



**ECONOMIC &  
WORKFORCE  
DEVELOPMENT  
WORK GROUP**

**MARCELLUS SHALE  
ADVISORY  
COMMISSION**

**Frank Thompson  
NTRPDC  
NT WIB**



# NT Quick Facts

There are 166 municipalities in the 5 counties that we serve, with a total population of 181,008. Municipal populations range from a high of 5,813 (Sayre Borough) to 51 (Elk Township).

Our population density is 46 people/sq. mile, compared to the state's 274 people/sq. mile.

The region has approximately 4,700 businesses.

Establishments range in size from the single entrepreneur to the 2,300 employees at Procter and Gamble.



# Traditional Industry Clusters

Building and construction

Health care and social assistance

Diversified manufacturing

Lumber and wood products

## Past Market Conditions

Historically, the region is:

- Slow to change, lagging behind state and national trends
- Steady economy
- Focus on agriculture and manufacturing



# Population

## Census Annual Population Data in Multiple Counties(s) for 2006

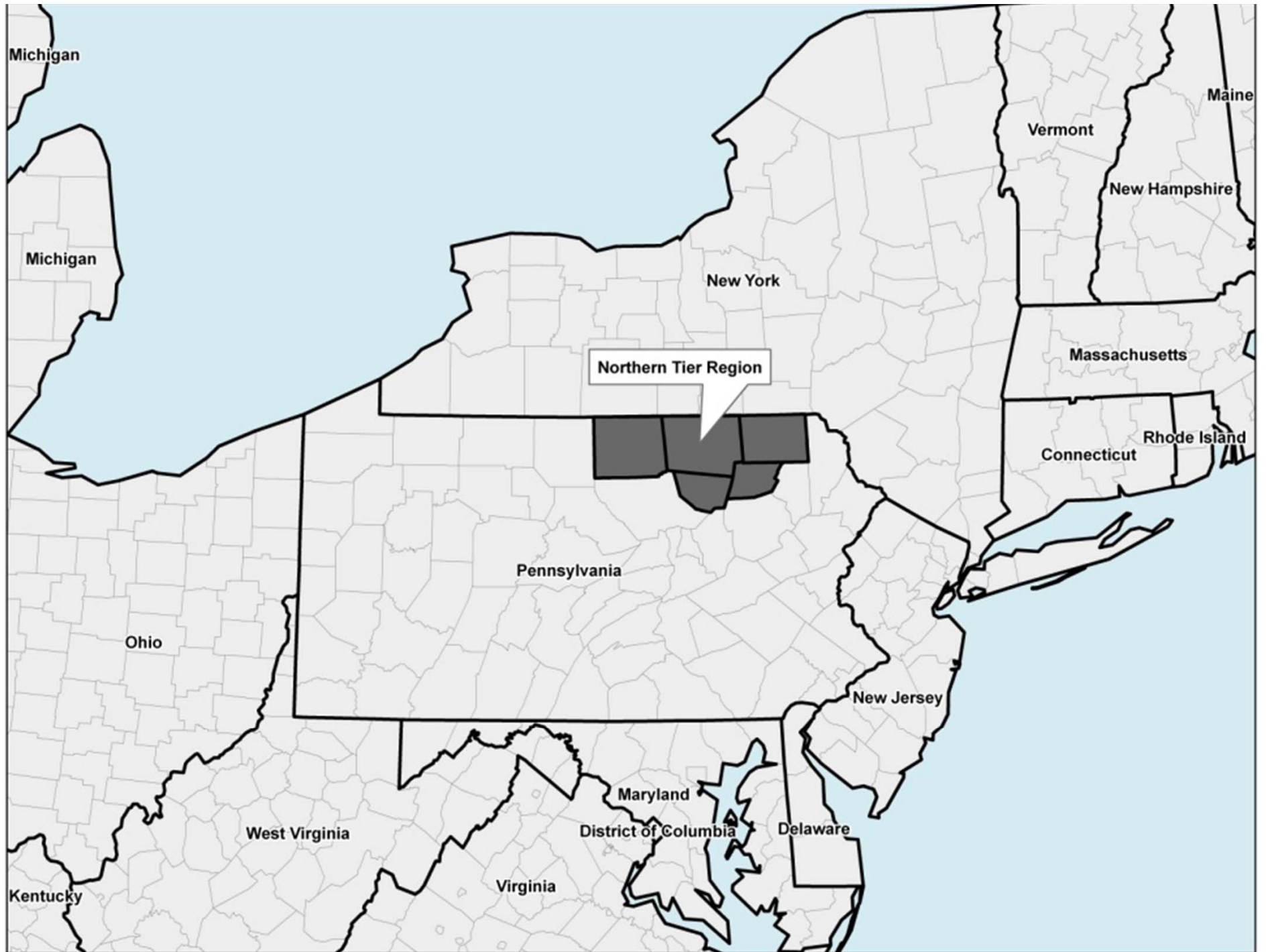
Bradford County	62,471
Sullivan County	6,277
Susquehanna County	41,889
Tioga County	41,137
Wyoming County	28,093
<b>Northern Tier Region</b>	<b>179,867</b>

## Census Annual Population Data in Multiple Counties(s) for 1986

Area Name	Year	Population
Northern Tier Region	1986	174,799
	1996	181,091
	2006	179,867

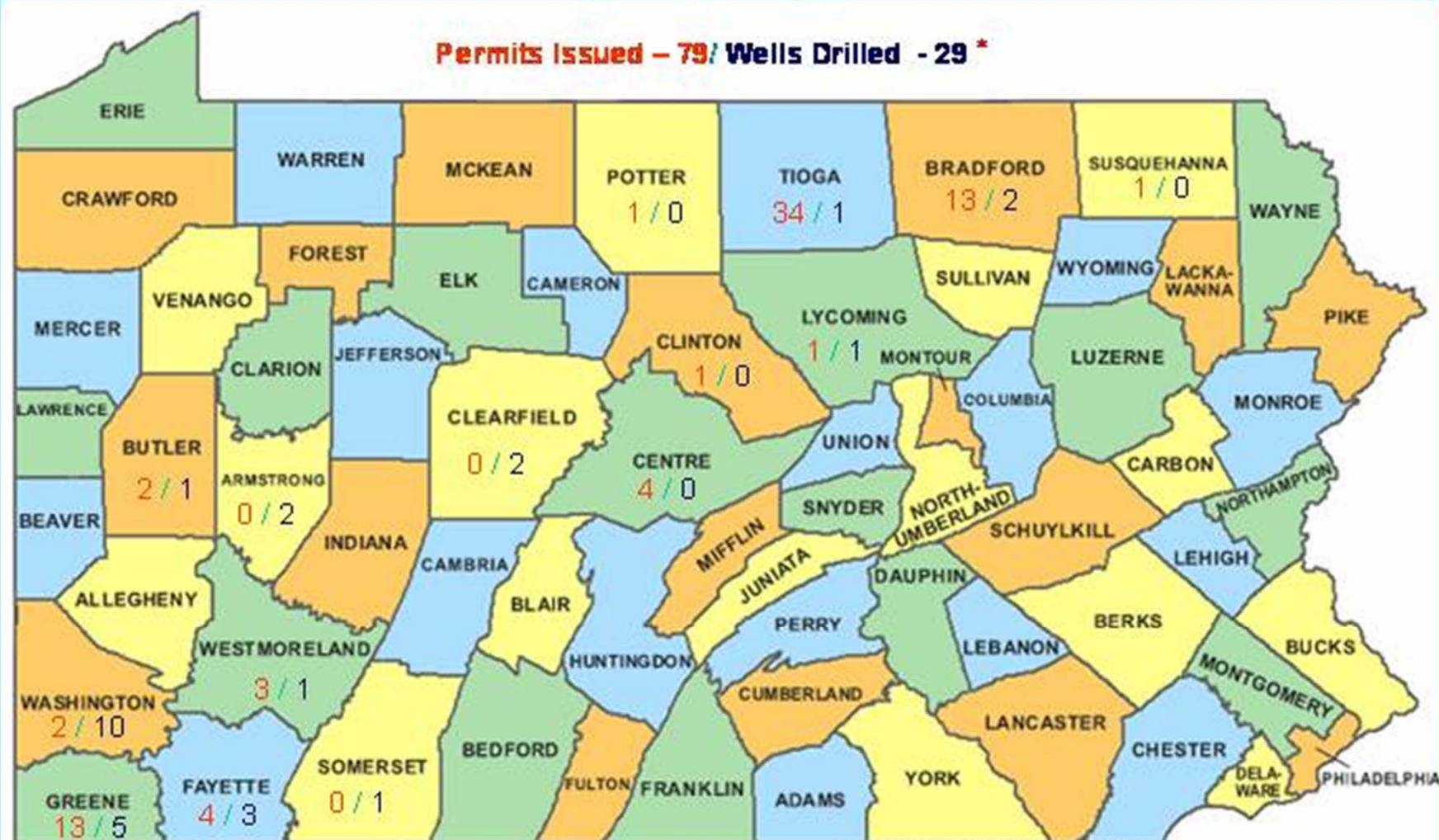
*Source: PA Dept of Labor and Industry*

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Department of Environmental Protection  
Bureau of Oil and Gas Management  
**Marcellus Shale Permits Issued & Wells Drilled**  
(January - 2009)

**Permits Issued - 79 / Wells Drilled - 29 \***



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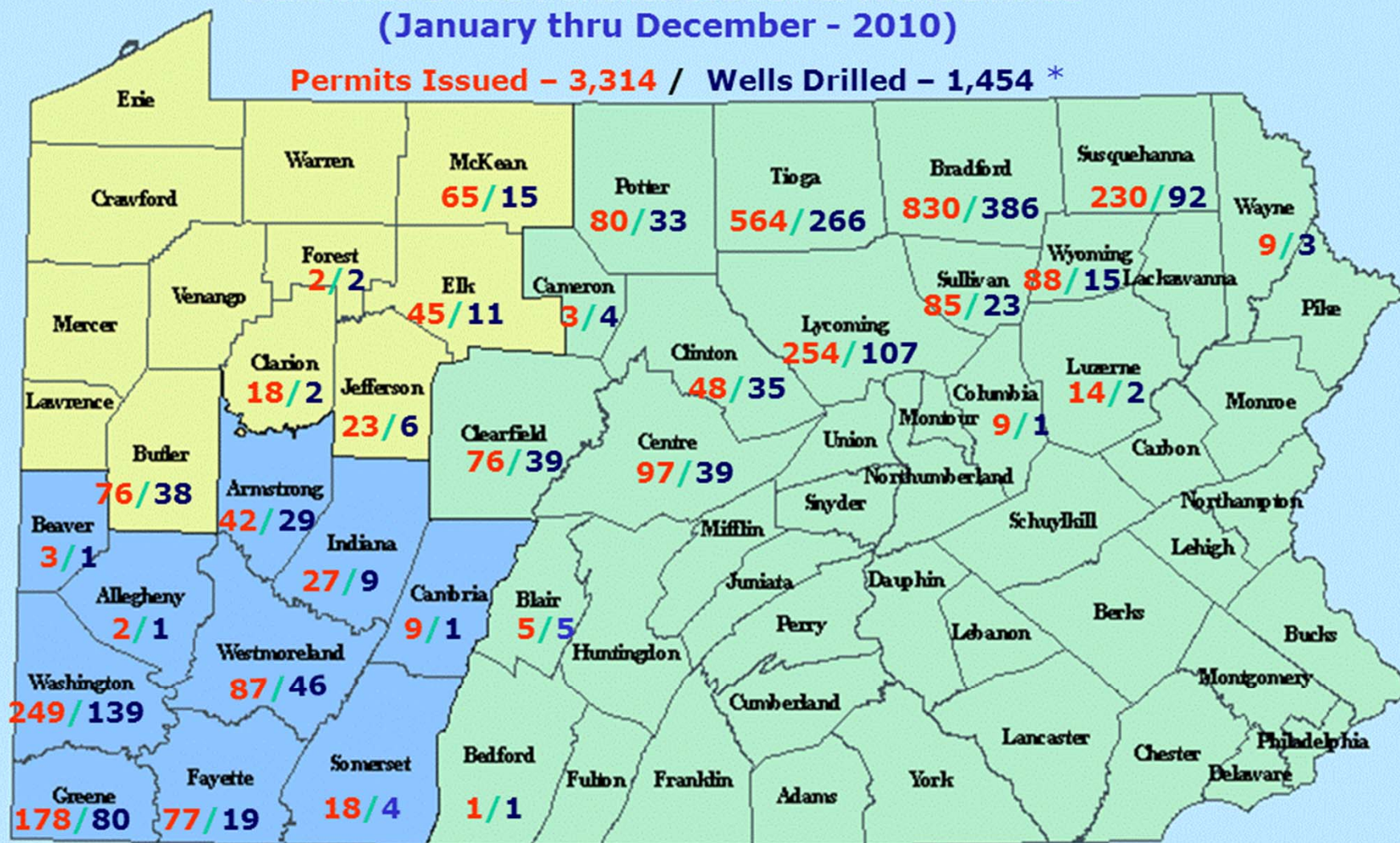
Updated 02/27/2009

\* As reported by Operators

Map Courtesy of Digital-Topo-Maps.com

Department of Environmental Protection  
 Bureau of Oil and Gas Management  
 Marcellus Shale Permits Issued & Wells Drilled  
 (January thru December - 2010)

Permits Issued - 3,314 / Wells Drilled - 1,454 \*



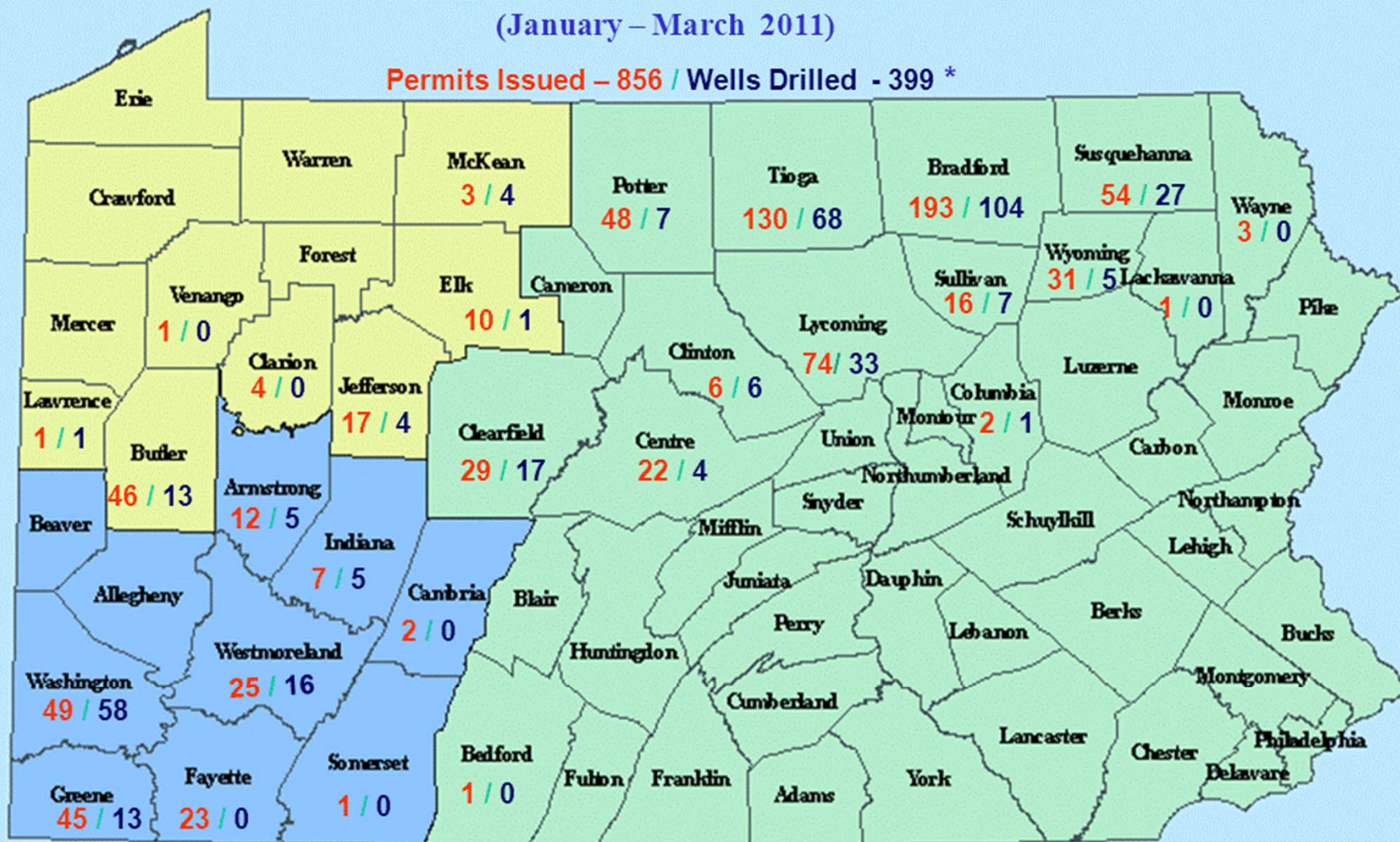
Updated 01/25/2011

\* As reported by Operators



Department of Environmental Protection  
 Bureau of Oil and Gas Management  
 Marcellus Shale Permits Issued & Wells Drilled  
 (January – March 2011)

Permits Issued – 856 / Wells Drilled - 399 \*



Updated 04/06/2011

\* As reported by Operators

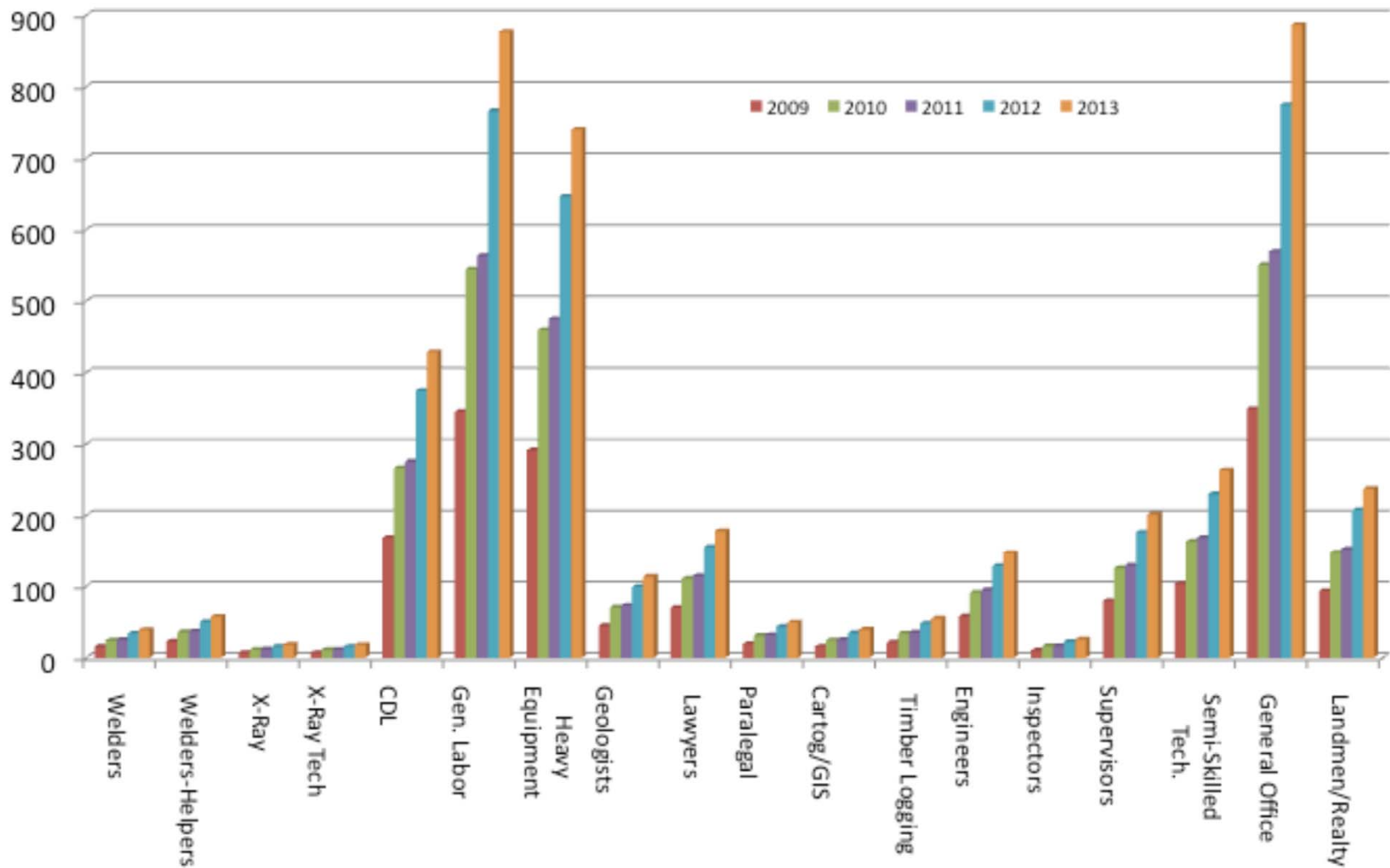
Northern Tier WIB Region

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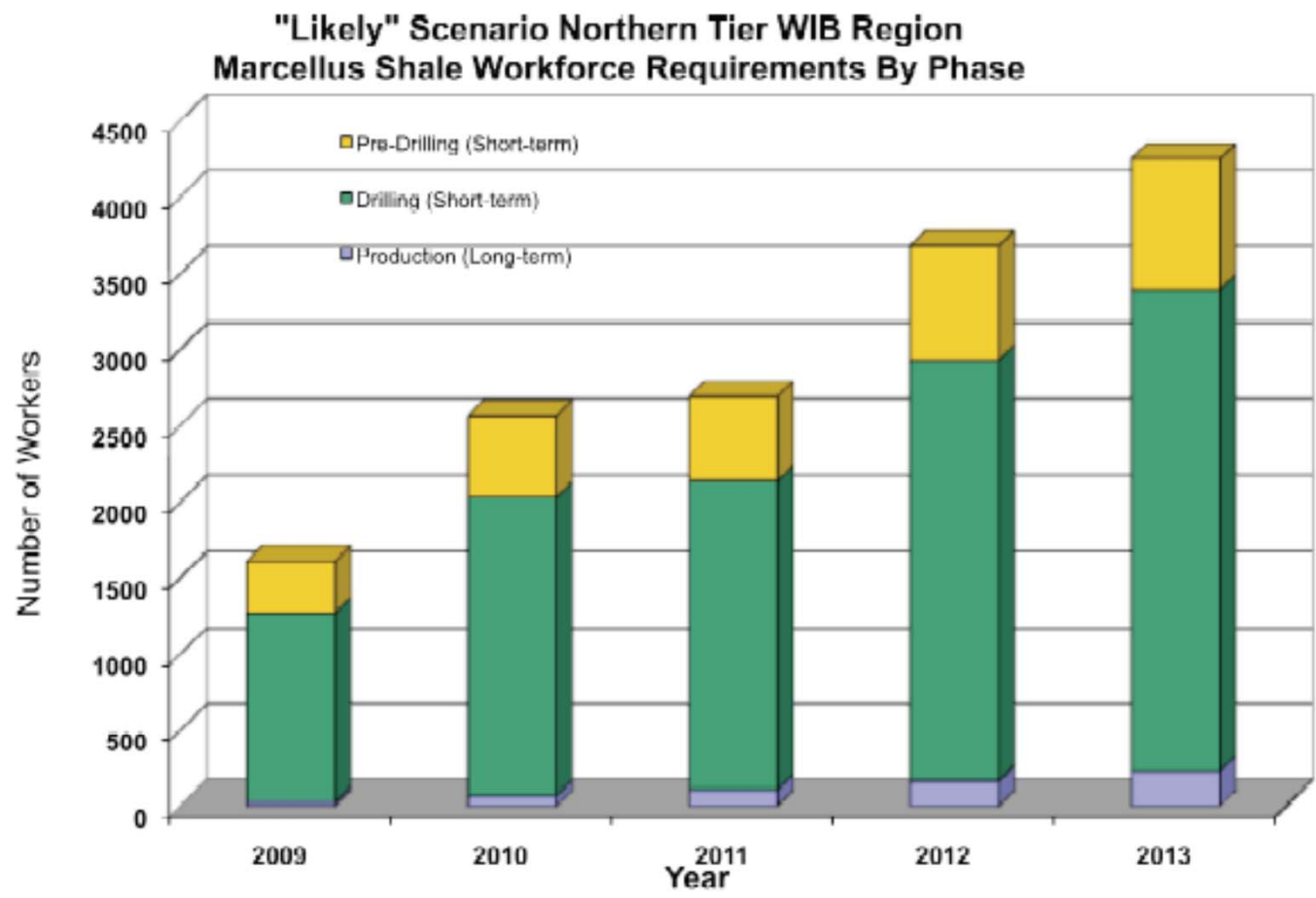
Year	2008 <sup>2</sup>	2009	2010	2011	2012	2013
Low Scenario	54	105	166	172	233	267
"Likely" Scenario	54	140	221	229	311	356
High Scenario	54	175	277	286	389	445

**Figure 4: Projected Marcellus Shale Wells, Drilled Per Year 2009-2013**

## Estimated Northern Tier WIB Region Occupational Requirements 2009-2013

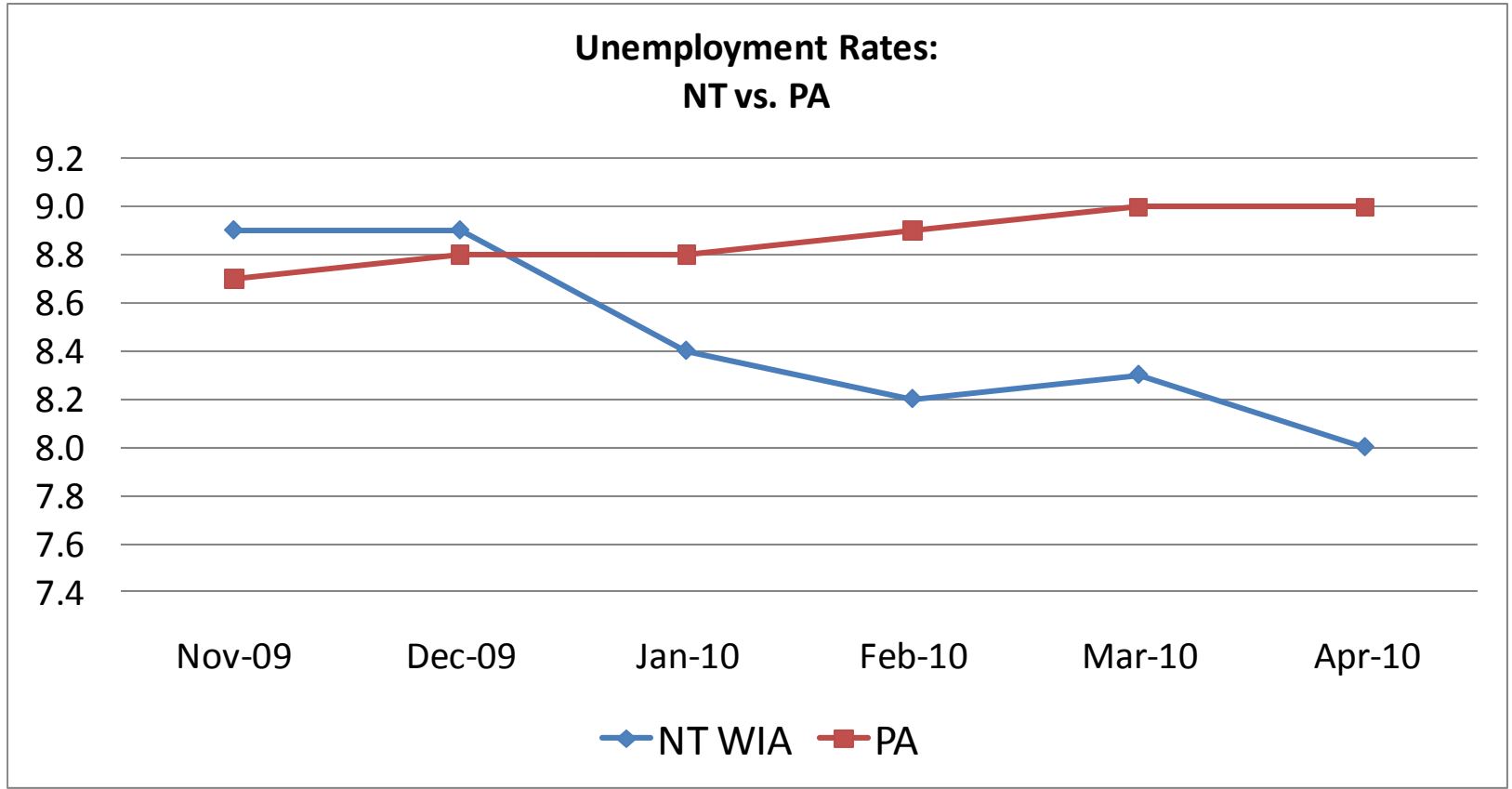


- Penn College Workforce Needs Assessment



**Figure 13: Workforce Requirements by Industry Phase, Northern Tier WIB Region**

# Unemployment Impact



# Projected Job Growth? Old Prediction

100 wells drilled per year = 1153 jobs per  
year over 10 years

Employment between April 2009 and 2010 increased by 2,500 for Bradford County and 900 for Tioga County  
4,100 employment openings region wide

*Largest growth in the Commonwealth*



# January 2008

**Monthly Seasonally Adjusted Labor Force, Employment and Unemployment data in Multiple Counties(s) for January, 2008. To see the most recent profile data click on the area name.**

<b>Area Name</b>	<b>Civilian Labor Force</b>	<b>Employment</b>	<b>Unemployment</b>	<b>Unemployment Rate (%)</b>
<a href="#"><u>Bradford County</u></a>	30,600	29,200	1,400	4.7
<a href="#"><u>Sullivan County</u></a>	3,000	2,800	200	5
<a href="#"><u>Susquehanna County</u></a>	21,700	20,700	1,000	4.7
<a href="#"><u>Tioga County</u></a>	20,400	19,300	1,100	5.5
<a href="#"><u>Wyoming County</u></a>	14,500	13,700	800	5.4

*Source: PA Dept of Labor and Industry*





# January 2009

**Monthly Seasonally Adjusted Labor Force, Employment and Unemployment data in Multiple Counties for January, 2009. To see the most recent profile data click on the area name.**

<b>Area Name</b>	<b>Civilian Labor Force</b>	<b>Employment</b>	<b>Unemployment</b>	<b>Unemployment Rate (%)</b>
<a href="#"><u>Bradford County</u></a>	31,400	29,000	2,300	7.5
<a href="#"><u>Sullivan County</u></a>	3,000	2,800	200	7.9
<a href="#"><u>Susquehanna County</u></a>	22,000	20,300	1,700	7.7
<a href="#"><u>Tioga County</u></a>	20,700	18,900	1,900	8.9
<a href="#"><u>Wyoming County</u></a>	14,500	13,500	1,100	7.4

*Source: PA Dept of Labor and Industry*



# February 2011

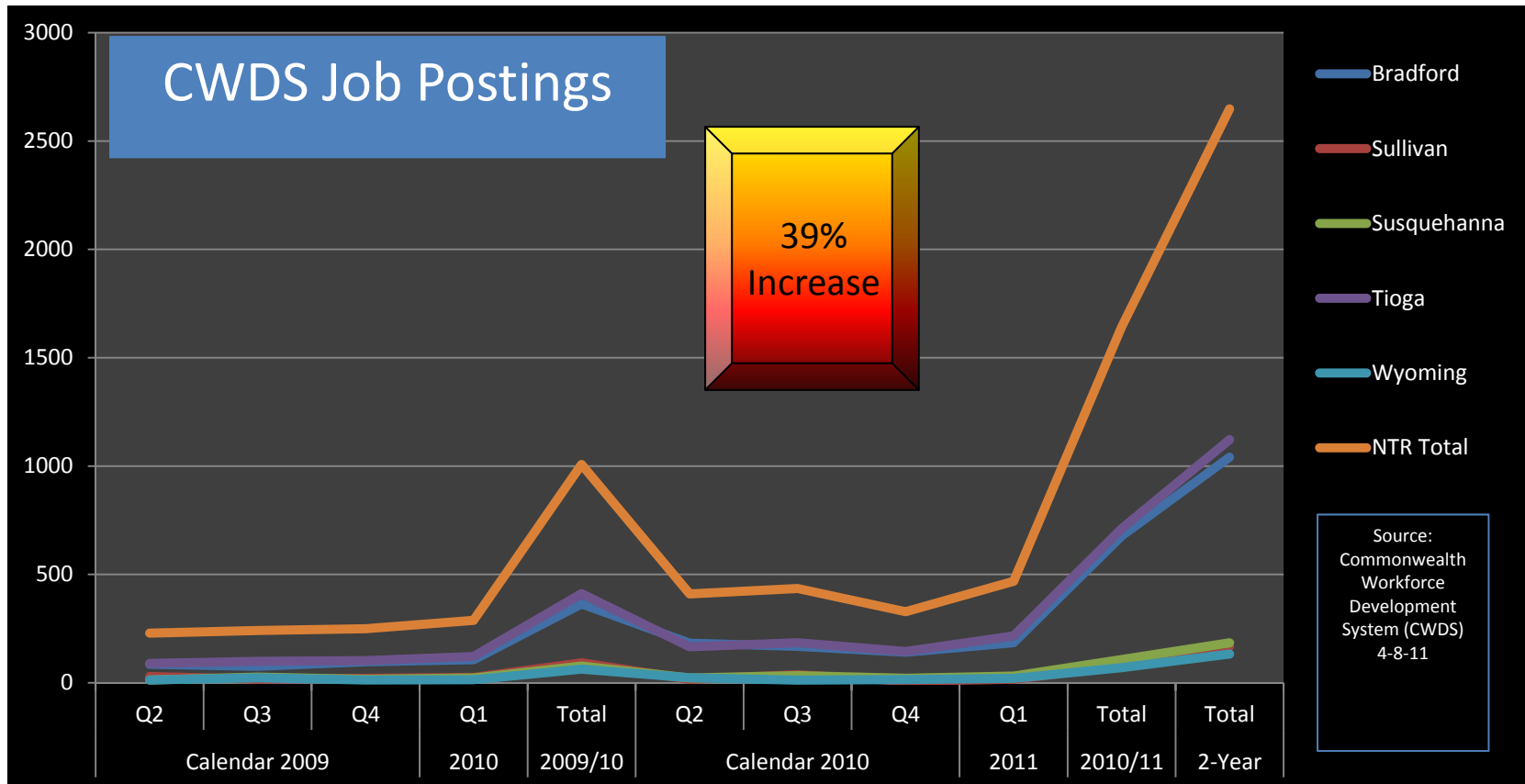
**Monthly Seasonally Adjusted Labor Force, Employment and Unemployment data in Multiple Counties(s) for February, 2011. To see the most recent profile data click on the area name.**

<b>Area Name</b>	<b>Civilian Labor Force</b>	<b>Employment</b>	<b>Unemployment</b>	<b>Unemployment Rate (%)</b>
<a href="#"><u>Bradford County</u></a>	33,400	31,700	1,700	5.1
<a href="#"><u>Sullivan County</u></a>	3,300	3,000	200	6.8
<a href="#"><u>Susquehanna County</u></a>	22,500	21,000	1,600	6.9
<a href="#"><u>Tioga County</u></a>	20,800	19,500	1,300	6.1
<a href="#"><u>Wyoming County</u></a>	14,500	13,100	1,400	9.4

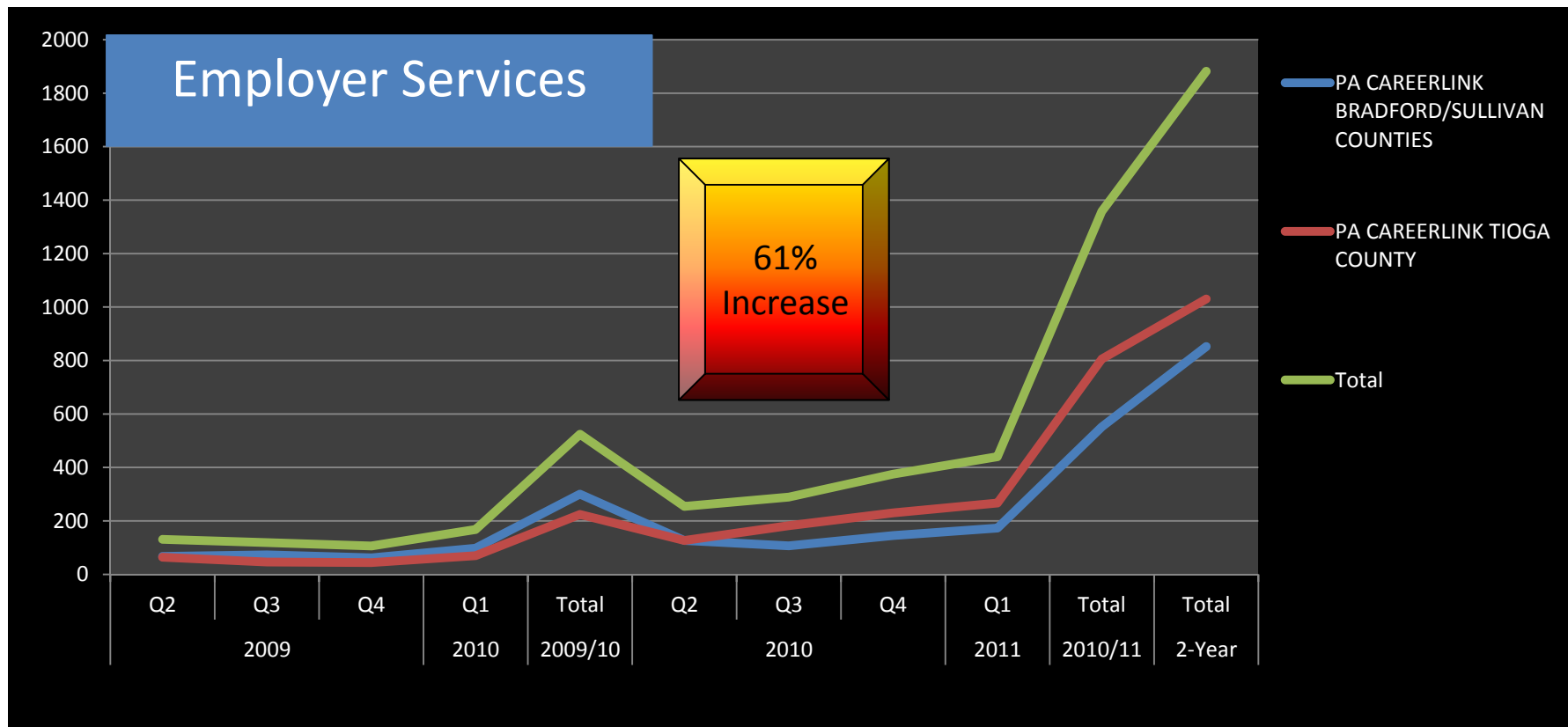
*Source: PA Dept of Labor and Industry*



# PA CareerLink – Northern Tier



# PA CareerLink – Northern Tier





# PA CareerLink – Northern Tier

- 79 companies related to the natural gas industry posting jobs on CWDS in the Northern Tier
- 216 postings
- 2305 job openings
- Job Fairs are being held onsite almost weekly



# Bradford County

- Bradford County, at 5.1%, had the lowest unemployment rate in the Commonwealth in February.

# Impact on local businesses

Services

Restaurants

Retail

Lodging

Fuel Suppliers



# “Fit 4 Natural Gas”



# Natural Gas Summit for Municipal Officials



# Business to Business Natural Gas Expo





# Land Use Control

Fewer than half of local Northern Tier governments have a municipal planning commission or a comprehensive plan.

Subdivision and land development ordinances are even less common.

This general lack of planning at a municipal level contributes to uncoordinated development, undesirable uses of land, and sprawl.

# Local Municipality Challenges

- No uniform inventory of posted roads
- No inventory of posted bridges
- Traffic volume impacts unknown
- Oversized loads and coordination of permits when using local system

# Impacts to Housing & Real Estate

- Supply vs. demand has doubled or even tripled rental prices and local residents cannot afford the increase
- Real estate property available for sale is at an all time low (subsurface rights are not included for those that are for sale)
- Appraisals of property have become difficult due to varying lease values



# Transportation Impact

- Congestion
- Safety Concerns
- Heavy Hauling Permit Enforcement
- Uniform local Posting and Bonding/Permit Issuances
- Increases in traffic volume and truck traffic

“Traffic has increased on secondary roads from 150 vehicles a day to an additional 700 *trucks* per day”





# Other Regional Impacts

- Municipalities challenged to manage more complex issues with less resources and expertise
- How to factor gas drilling in with long-term transportation plans?
  - Dynamics of operation
  - Changes in method of hauling water
  - Gathering lines and major pipelines
- Shale fracturing operations will continue long after drilling
- Other shale plays below Marcellus show promising opportunities







