

Perspectives

First Quarter 2006

A State of the Workforce Report for the Northern Tier Workforce Investment Area

Bradford, Sullivan, Susquehanna, Tioga and Wyoming Counties

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Labor Market History

| | Civilian Labor Force | Employed |
|------|----------------------|----------|
| 1990 | 81,700 | 76,300 |
| 2000 | 87,400 | 83,800 |
| 2004 | 93,100 | 87,800 |
| 2005 | 92,900 | 88,000 |

| | Northern Tier WIA | Pennsylvania |
|------|-------------------|--------------|
| 1990 | 6.6% | 5.4% |
| 2000 | 4.1% | 4.2% |
| 2004 | 5.7% | 5.4% |
| 2005 | 5.3% | 5.0% |

Employment by Industry Cluster

| | Employment in the Cluster | Percentage |
|--------------------------------------|---------------------------|------------|
| Construction | 3,431 | 6.17% |
| Diversified Manufacturing | 8,051 | 14.47% |
| Health Care/Social Assistance | 8,616 | 15.48% |
| Lumber and Wood Products | 4,707 | 8.46% |
| Non Targeted Industries | 30,836 | 55.42% |

Source: Regional Data Analysis Tool

Employment by Occupation

| | May 2004 |
|--|----------|
| Office & administrative support occupations | 8,062 |
| Sales & related occupations | 7,068 |
| Management occupations | 6,984 |
| Production occupations | 6,587 |
| Transportation & material moving occupations | 5,355 |
| Food preparation & serving related occupations | 4,311 |
| Construction & extraction occupations | 3,564 |
| Healthcare practitioners & technical occupations | 3,309 |
| Installation, maintenance & repair occupations | 3,222 |
| Personal care & service occupations | 2,973 |
| Education, training & library occupations | 2,643 |
| Building/grounds cleaning & maintenance occ. | 2,498 |
| Healthcare support occupations | 2,068 |
| Business & financial operations occupations | 1,822 |
| Community & social services occupations | 1,462 |
| Farming, fishing & forestry occupations | 1,431 |
| Protective service occupations | 795 |
| Architecture & engineering occupations | 776 |
| Arts, design, entertainment, sports & media occ. | 735 |
| Computer & mathematical science occupations | 507 |
| Military occupations | 460 |
| Legal occupations | 366 |
| Life, physical & social science occupations | 350 |

Source: Center for Workforce Information and Analysis

Major Employers

| Company | Location |
|---------------------------------|---------------|
| Procter & Gamble Paper Products | Mehoopany |
| Osram Sylvania Inc, | Towanda |
| Ward Manufacturing Inc, | Blossburg |
| CraftMaster Manufacturing Inc, | Towanda |
| Guthrie Clinic Ltd, | Sayre |
| Mill's Pride LP | Sayre |
| Ingersoll-Rand Co, | Athens |
| Memorial Hospital Inc, | Towanda |
| Tunkhannock Area Sch District | Tunkhannock |
| Paper Magic Group Inc, | Troy |
| Soldiers & Sailors Memorial | Wellsboro |
| Northern Tioga School District | Elkland |
| Sayre Area School District | Sayre |
| Bradford County | Towanda |
| Shop Vac Corporation | Canton |
| Martha Lloyd Community Svcs. | Troy |
| Bradford County Manor | Troy |
| OSRAM SYLVANIA Inc. | Wellsboro |
| Wal-Mart Stores Inc. | Mansfield |
| Tyler Memorial Hospital | Tunkhannock |
| Wellsboro Area School District | Wellsboro |
| Paper Magic Group Inc . | Canton |
| Southern Tioga School District | Blossburg |
| Towanda Area School District | Towanda |
| Paxar Corporation | Sayre |
| Ronco Machine & Rigging Inc. | Lake Winola |
| Wal-Mart Stores Inc.. | Sayre |
| Metamora Products Corporation | Elkland |
| Acp Mfg Co LLC | Lawrenceville |
| Mansfield University | Mansfield |
| Truck-Lite Co Inc. | Wellsboro |
| County of Tioga | Wellsboro |
| Green Home | Wellsboro |
| County of Susquehanna | Montrose |
| Wyalusing Area School Dist | Wyalusing |
| Wal-Mart Stores Inc. | Tunkhannock |
| County of Wyoming | Tunkhannock |
| L T C Associates | Forest City |
| Electri-Cord Manufacturing Co. | Westfield |
| Beverly Enterprises - PA | Tunkhannock |

Source: Center for Workforce Information and Analysis, Second Quarter 2005



Occupations with the Most Projected Openings

| Projected annual openings through 2015 | |
|---|-----|
| Cashiers, except gaming | 125 |
| Retail salespersons | 95 |
| Waiters and waitresses | 80 |
| Child care workers | 71 |
| Farmers and ranchers | 66 |
| Carpenters | 62 |
| First-line supervisors/managers of retail sales workers | 52 |
| Truck drivers, heavy and tractor-trailer | 48 |
| Bus drivers, school | 47 |
| Janitors/cleaners, except maids & housekeeping | 46 |
| Maids and housekeeping cleaners | 43 |
| Laborers and freight, stock, and material movers, hand | 43 |
| <i>Registered nurses</i> | 385 |
| Office clerks, general | 348 |
| <i>Managers, all other</i> | 339 |
| Farmworkers & laborers, crop, nursery & greenhouse | 332 |
| Tellers | 306 |
| Team assemblers | 287 |
| <i>General and operations managers</i> | 277 |
| Bookkeeping, accounting, and auditing clerks | 275 |
| Automotive service technicians and mechanics | 268 |
| Combined food preparation and serving workers, includ- | 265 |
| <i>First-line supervisors/managers of construction trades and</i> | 253 |
| <i>Elementary school teachers, except special education</i> | 250 |
| Nursing aides, orderlies, and attendants | 25 |
| Farm, ranch, and other agricultural managers | 24 |
| Stock clerks and order fillers | 24 |
| Counter attendants, cafeteria, food concession, and cof- | 23 |
| Food preparation workers | 23 |
| <i>Secondary school teachers, except special and vocational</i> | 22 |
| Receptionists and information clerks | 22 |
| Door-to-door sales workers, news and street vendors, and | 21 |
| Landscaping and groundskeeping workers | 20 |
| Home health aides | 20 |
| Maintenance and repair workers, general | 19 |
| Dishwashers | 19 |
| <i>Chief executives</i> | 18 |
| Customer service representatives | 18 |
| Counter and rental clerks | 17 |
| Secretaries, except legal, medical, and executive | 17 |
| Construction laborers | 17 |

Occupations shown in italics meet the self-sustaining wage of \$21,684 for the Northern Tier WIA based on 2005 data. Projected annual openings = total job replacements plus jobs created by industry growth.

Source: Center for Workforce Information and Analysis

Occupations with the Most Projected Openings (continued)

| Projected annual openings through 2015 | |
|---|----|
| Personal and home care aides | 17 |
| Directors, religious activities and education | 16 |
| Police and sheriff's patrol officers | 16 |
| First-line supervisors/managers of food preparation and serving workers | 16 |
| Meat, poultry, and fish cutters and trimmers | 16 |
| Packers and packagers, hand | 16 |
| Construction managers | 16 |
| Production workers, all other | 16 |
| Sales representatives, wholesale and manufacturing, except technical and scientific products | 15 |
| Cooks, restaurant | 14 |
| Nonfarm animal caretakers | 14 |
| Truck drivers, light or delivery services | 14 |
| <i>First-line supervisors/managers of production and operating workers</i> | 14 |
| Woodworking machine setters, operators, and tenders, except sawing | 14 |
| First-line supervisors/managers of office and administrative support workers | 14 |
| <i>Operating engineers and other construction equipment operators</i> | 14 |
| Accountants and auditors | 13 |
| <i>Special education teachers, preschool, kindergarten, and elementary school</i> | 13 |
| <i>Industrial machinery mechanics</i> | 13 |
| Bartenders | 13 |
| <i>Licensed practical and licensed vocational nurses</i> | 12 |
| Business operation specialists, all other | 12 |
| Hairdressers, hairstylists, and cosmetologists | 12 |
| Food service managers | 12 |
| Insurance sales agents | 12 |
| Teacher assistants | 11 |
| Industrial truck and tractor operators | 10 |
| Bus and truck mechanics and diesel engine specialists | 10 |
| Executive secretaries and administrative assistants | 10 |
| Medical assistants | 10 |
| Social and human service assistants | 9 |
| Separating, filtering, clarifying, precipitating, and still machine setters, operators, and tenders | 9 |
| Cleaners of vehicles and equipment | 9 |
| <i>Lawyers</i> | 8 |
| Hotel, motel, and resort desk clerks | 8 |
| Bus drivers, transit and intercity | 8 |
| <i>Financial managers</i> | 8 |
| Refuse and recyclable material collectors | 8 |



Data reflected in this report is the most up-to-date available at the time of publication.

Commute Times

| County | Percentage of Population Traveling | | | |
|----------------------|------------------------------------|------------|------------|-----------|
| | < 30 Min. | 30-44 Min. | 45-49 Min. | > 60 Min. |
| Bradford | 70.50% | 18.32% | 5.88% | 5.30% |
| Sullivan | 62.10% | 17.47% | 11.87% | 8.56% |
| Susquehanna | 59.64% | 24.68% | 9.66% | 6.02% |
| Tioga | 70.45% | 16.55% | 6.80% | 6.21% |
| Wyoming | 63.74% | 21.21% | 7.87% | 7.18% |
| Northern Tier WIA | 66.55% | 19.86% | 7.50% | 6.08% |

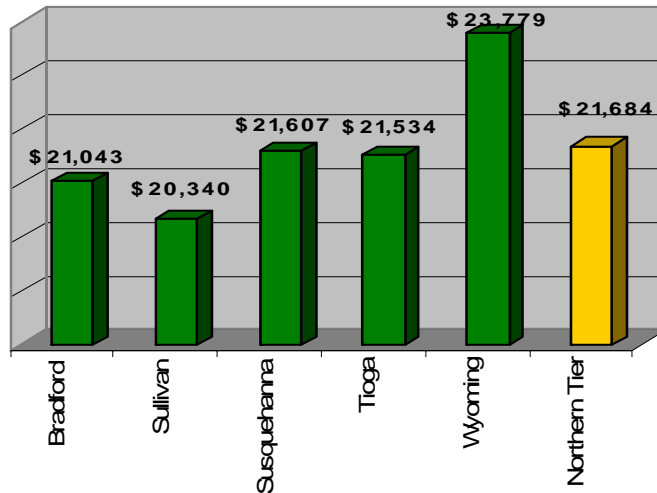
Source: U.S. Census Bureau

Educational Attainment

| | Percentage of Population 25+ |
|---------------------------------|------------------------------|
| Less than 9th Grade | 14.81% |
| 9th to 12th Grade No Diploma | 6.71% |
| High School Graduate | 9.76% |
| College, No Diploma | 14.32% |
| Associate Degree | 6.18% |
| Bachelor's Degree | 42.62% |
| Graduate or Professional Degree | 5.61% |

Source: DemographicsNow

Self Sufficiency Wages



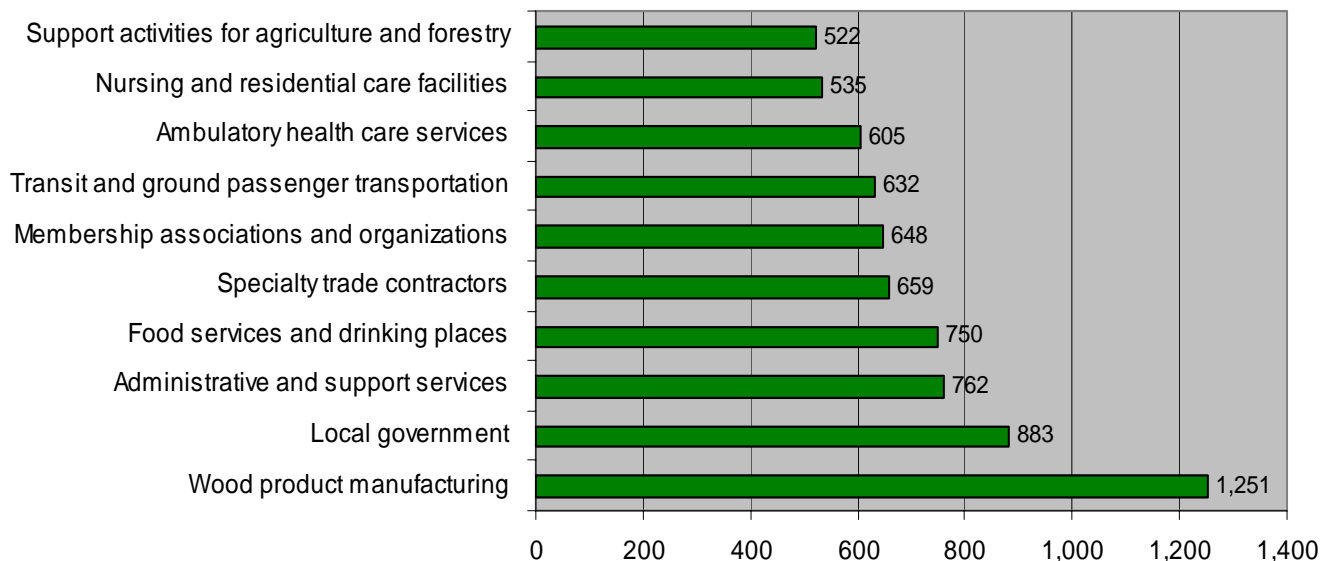
Based on the self-sufficiency standard for a family comprised of one parent and one school aged child. The self-sufficiency wage for the Northern Tier WIA is a weighted average of the self-sufficiency wages for all five counties. Self Sufficiency Standard for Pennsylvania (Path Ways PA, 2004).

Quarterly Workforce Indicators

| Indicators | Definitions | Northern Tier (Q3 2004) | Pennsylvania (Q3 2004) |
|----------------------------------|--|----------------------------|---------------------------|
| Total Employment | Number employed by the same employer as in previous quarter | 54,307 | 5,372,442 |
| Net Job Flows | The difference between current and previous employment | -797 | 24,092 |
| Job Creation | New jobs created by expansion or new businesses | 2,357 | 332,265 |
| New Hires | Number employed by a different business than in previous quarter | 7,661 | 888,890 |
| Separations | Number who left employment in subsequent quarter | 10,059 | 1,108,237 |
| Turnover | New hires and separations compared to total employment | 9.20% | 10.30% |
| Average Monthly Earnings | Average earnings of individuals employed for a full quarter | \$2,580.00 | \$3,128.00 |
| Average New Hire Earnings | Average earnings of new hires | \$1,594.00 | \$2,113.00 |

Source: U.S. Census Bureau

Top Ten Industries by Projected Volume Growth* 2012 Projected Volume Change



*North American Industrial Classification System (NAICS) 3-digit subsectors.

Source: Center for Workforce Information and Analysis

