

CLARION COUNTY, PENNSYLVANIA

December 2021



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EXECUTIVE SUMMARY

The *Clarion County 2030 Economic Development Strategy* will provide an achievable path to strengthen Clarion County's economy over the next decade. Through rigorous quantitative data analysis and qualitative stakeholder interviews, the Clarion County EDC and its consulting partners have developed the following goals to guide its vision for a prosperous Clarion County over the next decade.

- 1. Goal 1 Building Modern Infrastructure for the Next Decade: By enhancing Clarion County's infrastructure, it can take advantage of its location to major markets, proximity to I-80, and growing industry clusters. Broadband internet connectivity is becoming an increasingly important piece of infrastructure in our progressively more connected age. Clarion County also has the ability to enhance its physical infrastructure (water, sewer, stormwater, natural gas, etc.) to unlock the full potential of its six highway exits. Given the current emphasis on infrastructure funding, the time is right for Clarion County to capture all resources possible to enhance its infrastructure for the next decade.
- 2. Goal 2 Raising Awareness of Clarion County Through Dynamic Promotion and Branding: With strong existing industry clusters (including wood product manufacturing) and potential for new industry clusters (including plastic manufacturing), Clarion County's economic development brand becomes increasingly important in attracting new businesses. Clarion County should work to build this brand and enhance its marketing efforts, including robust promotion of its existing industry strengths and local resources for economic development. In addition, Clarion County can be promoted as a close-to-home tourist destination with abundant natural resources and recreational opportunities.
- 3. Goal 3 Establishing a 21st Century Workforce: To grow Clarion County's economy, the local workforce must be trained to work in in-demand fields and employment areas. Clarion County should embrace Clarion University's forthcoming transition by encouraging students to take advantage of new program offerings and relaunching the town-gown relationship in Clarion Borough. Given its robust manufacturing sector, Clarion County has the potential to strengthen its workforce training culture through workforce training/internship programs and new skills training offerings at the Clarion County Career Center. Clarion County's secondary students would be well-served through synergies by school districts serving the County.
- 4. Goal 4 Capitalize Upon Clarion County's Recreational and Cultural Assets: Clarion County's healthy tourism industry provides immense potential for future growth as more people become familiar with the area. Clarion County should take great strides to promote what makes it unique. Although it already has an excellent pedestrian and bike trail network, future improvements will only strengthen Clarion County's position with recreation-based tourists. Two of Clarion County's strongest recreational assets, the Allegheny and Clarion Scenic Rivers, keep people coming back year-after-year for recreational enjoyment. Therefore, any investment in the Scenic Rivers and river-based facilities will result in a strong economic impact.



- 5. GOAL 5 REVITALIZATION AND SUPPORT OF CORE COMMUNITIES: The abundance of available buildings and storefronts provides Clarion County the opportunity to reuse these underutilized structures for new and diverse experiences that keep people coming back to Clarion County. Improving the appearance of functionality of Clarion County's downtowns will not only benefit tourists, but it will also entice new residents to make Clarion County their home. Everyone enjoys vibrant and charming downtowns; tourists and residents alike. To continue converting tourists to residents, Clarion County must also focus on diversifying Clarion County's housing stock to meet the needs and demands of the current generation of buyers. By focusing on these goals, Clarion County can reverse the trend of population loss through new in-migration.
- 6. GOAL 6 STREAMLINE ECONOMIC DEVELOPMENT EFFORTS: Clarion County has multiple entities engaged in the field of economic development. Although these entities cover a wide breadth of economic development resources and initiatives, streamlining these resources and initiatives can make them more effective in tourism promotion, business recruitment, and business assistance. In addition, it is important to publicly promote Clarion County's economic development successes and stay connected with community members, businesses, and elected officials.



	ODERN INFRASTRUCTURE FOR				
	EGIES, ACTION ITEMS, AND ST				
STRATEGY #1: BRIDGING THE DIGITAL D					
	LEAD PARTNER	KEY STAKEHOLDERS	FUNDING OPPORTUNITIES	TIME FRAME	PERFORMANCE MEASURES
ACTION ITEM 1.A: UNDERTAKE A COUNTY-SPECIFIC BROADBAND STUDY Step 1: Establish a "Clarion County Connected" broadband steering committee Step 2: Raise matching funds for a county-specific broadband study Step 3: Pursue competitive grand funding for a broadband study. Step 4: Select consultant and undertake broadband feasibility study	Clarion County EDC	County Commissioners; Northwest Commission; North Central Commission; RIU#6;	ARC Area Development Funding; ARC POWER; American Rescue Plan	Years 1-2	Number of communities improved
ACTION ITEM 1.B: LOCATE FEASIBLE BROADBAND IMPLEMENTATION PROJECTS Step 1: Begin discussions with neighboring counties, LDDs, and stakeholders on regional broadband projects Step 2: Identify potential areas of geographic emphasis Step 3: Identify pertinent stakeholders in project area (schools, medical facilities, government facility, private businesses, etc.) Step 4: Seek opportunities to expand broadband connectivity with planned infrastructure Step 5: Establish a public-private partnership to secure funds for preliminary design/engineering and ROW acquisition	Clarion County Connected Broadband Steering Committee	Clarion County EDC; Northwest Commission; North Central Commission; Clarion County IDA; RIU#6; Private-Sector Partners		Year 2	Number of projects identified
ACTION ITEM 1.C: DEVELOP AN IMPLEMENTATION PLAN Step 1: Designate roles and responsibilities Step 2: Determine right-of-way ownership Step 3: Pull applicable permits for implementation Step 4: Select desired network equipment, hardware, and hardware specifications Step 5: Secure funds for preliminary design, engineering, and right-of-way acquisition Step 6: Apply for competitive grant and loan funding for project implementation.	Clarion County Connected Broadband Steering Committee	Clarion County EDC; Northwest Commission; North Central Commission; Clarion County IDA; RIU#6; Private-Sector Partners	ARC Area Development Funding; ARC POWER; American Rescue Plan; Underserved High-Speed Broadband Funding Program (DCED)	Year 2	Amount of funding secured for pre-construction activities
ACTION ITEM 1.D: BEGIN IMPLEMENTATION Step 1: Conclude final design, engineering, and right-of-way acquisition Step 2: Designate a lead implementation entity Step 3: Designate a lead for public funding administration and compliance Step 4: Finalize infrastructure construction and close-out of public grant/loan funding Step 5: Replicate process in a different area of Clarion County	Clarion County Connected Broadband Steering Committee	Clarion County EDC; Northwest Commission; North Central Commission; Clarion County IDA; RIU#6; Private-Sector Partners		Years 2-5	Number of unserved residents and businesses served; number of underserved residents and businesses served; improved upload and download speeds
STRATEGY #2:	PREPARING HIGHWAY EXITS FO	OR SUCCESS			
ACTION ITEM 2.A: INVENTORY EXISTING INFRASTRUCTURE AND INFRASTRUCTURE NEEDS IN PROXIMITY OF HIGHWAY EXITS Step 1: Work with the Clarion County Planning Department to inventory existing water, sewer, and internet/phone infrastructure Step 2: Assess the zoning and land use policies at priority sites to determine changes that should be made to facilitate development (if applicable) Step 3: Assess transportation improvements that should be considered to maximize access to prime properties Step 4: Contact and coordinate with utility providers to identify any expansion plans in the proximity of highway exits Step 5: Work with the Clarion County Planning Department to develop detailed infrastructure and transportation improvement maps	Clarion County EDC	Clarion County Planning Department; Clarion County IDA; utility providers		Year 2	Number of sites identified as suitable for further development
Step 1: Work with municipalities where the sites are located to advance required zoning, land use, and infrastructure improvements Step 2: Coordinate land assembly and master planning for priority sites Step 3: Work with local real estate agencies to market sites on nationwide real estate inventory sites (e.g. Loopnet) Step 4: Assist in developing and distributing RFPs as needed to engage interested developers for the sites Step 5. Coordinate with municipalities, school districts, and the county to evaluate LERTA districts at selected sites Step 6. At sites where infrastructure is needed, work with the same taxing bodies to implement TIF districts Step 7: Assist in ensuring efficient permitting processes to increase attractiveness to developers	Clarion County EDC	Local real estate agencies; municipal governments; school districts; county government	1	Years 2-5	Number of sites assembled; number of developers/investors contacted; number of developers/investors responding to RFPs; number of TIF/LERTA sites established
ACTION ITEM 2.C: UNLOCK THE POWER OF PUBLIC FUNDING FOR SITE REMEDIATION, DEVELOPMENT, AND INFRASTRUCTURE INSTALLATION Step 1: Hold annual summit meetings with real estate and development professionals to learn identify investor interest in highway sites Step 2: Arrange calls with state funding agencies (such as DCED and DEP) on a bi-annual basis to learn of forthcoming funding opportunities Step 3: Support the Clarion County IDA in its efforts to secure funding for improvements at sites it controls Step 4: Assist for-profit and non-profit entities in their pursuit of local, state, and federal public funding, including technical assistance	Clarion County EDC	Clarion County IDA; for-profit developers; non-profit development agencies	Appalachian Regional Commission (ARC); Economic Adjustment Assistance Program (EDA); Business in Our Sites (DCED); Multimodal Transportation Fund (DCED); PennDOT Multimodal Transportation Fund; H2O-PA (DCED); Redevelopment Assistance Capital Program (RACP)	Years 5-10	Amount secured in public funding for infrastructure installation and improvement
STRATEGY #3: LEVERAGING FUNDIN	IG STREAMS TO FUND FUTURE IN	 NFRASTRUCTURE IMPROVEMI	ENTS		
ACTION ITEM 3.A: DEVELOP A CLARION COUNTY INFRASTRUCTURE BANK (CCIB) L OAN PROGRAM Step 1: Explore feasibility of developing a CCIB Loan Program, including a preferred funding mechanism Step 2: Identify priority infrastructure projects throughout Clarion County that have not been awarded necessary funding Step 3: Develop a communications plan to convey the need for a CCIB Program Step 4: Work to develop roles, responsibilities, and guidelines for CCIB program Step 5: Launch CCIB program	Clarion County	Municipal governments	Stimulus funding; County Fee for Local Use; Act 13 Impact Fees	Year 3	Amount invested in infrastructure projects; number of infrastructure projects undertaken



GOAL II: RAISING THE PROFILE OF CLARION COU	NTY THROUGH DYNAM	IC PROMOTION AND B	RANDING				
	TION ITEMS, AND STEPS		ITAITE				
STRATEGY #1: DEVELOP CLARION COUNTY'S ECONOMIC DEVELOPMENT BRAND							
	LEAD PARTNER	KEY STAKEHOLDERS	FUNDING OPPORTUNITIES	TIME FRAME	PERFORMANCE MEASURES		
ACTION ITEM 1.A: DEVELOP CLARION COUNTY'S ECONOMIC DEVELOPMENT BRAND Step 1: Utilize Clarion County Connected summit meetings as a venue to obtain stakeholder input on branding Step 2: Assess Clarion County's greatest economic development assets via meetings and surveys Step 3: Work with a graphic design and/or marketing firm to develop branding alternatives Step 4: Publicily and privately test the brand items to determine which is mot impactful Step 5: Officially launch brand and promote it with local and regional real estate and economic development agencies	Clarion County EDC	Local business stakeholders	Engage! (DCED)	Year 3	Amount of stakeholder buy-in on new brand		
ACTION ITEM 1.B: IMPLEMENT ECONOMIC DEVELOPMENT MARKETING STRATEGY Step 1: Identify target audience(s) for brand Step 2: Develop consistent message and collateral materials based on audience(s) Step 3: Develop a "News" section on the Clarion County EDC's website to provide information on economic development successes and branding inititatives Step 4: Develop and implement a Marketing and Communications Plan	Clarion County EDC	Local business stakeholders	Engage! (DCED)	Years 3-10	Number of new businesses and site selection firms reached		
STRATEGY #2: PROMOTE CLARION COUNT	TY AS A CLOSE-TO-HOM	E TOURIST DESTINATION	l				
ACTION ITEM 2.A: DEVELOP A TOURISM BRAND THAT PROMOTES CLARION COUNTY AS A "CLOSE-TO-HOME VACATION DESTINATION Step 1: Use Clarion County Connected summit meetings to develop ideas for tourism brands Step 2: Request grant funding from the Hotel Tax Committee to develop logo, tagline, etc. Step 3: Identify target markets and advertising mediums Step 4: Collaborate with the PA Great Outdoors Visitors Bureau to launch campaign Step 5: Encourage use of the logo and tagline on travel-related websites (Cook Forest cabins rentals, dining establishments, trails, etc.)	Clarion County EDC	Hotel Tax Committee; PA Great Outdoors Visitors Bureau; business and tourism stakeholders	Marketing to attract tourists (DCED); Clarion County Hotel Tax	Year 1	Number of local tourism businesses that incorporate new brand		
ACTION ITEM 2.B: USE TOURISM MARKETING INITIATIVES TO ALSO ATTRACT NEW RESIDENTS Step 1: Survey local businesses to better understand their current hiring practices Step 2: Conduct focus groups with Clarion University students to gauge their perception of Clarion County Step 3: Integrate information about housing, schools, etc. in tourism marketing materials to emphasize Clarion County's quality of life Step 4: Deliver materials and post advertisements in strategic locations (Cook Forest, Clarion University, Route 322, etc.)	Clarion County EDC	Chamber of Commerce; business and tourism stakeholders	Marketing to attract tourists (DCED)	Years 1-3	Number of new residents attracted		
ACTION ITEM 2.C: CREATE A CONSISTENT FUNDING SOURCE FOR CLARION COUNTY MARKETING INITIATIVES Step 1: Work with the Commissioners to ensure a portion of the Hotel Tax is dedicated to marketing initiatives Step 2: When possible, utilize competitive grant funding from DCED for unique annual marketing initiatives	Clarion County EDC	Clarion County Commissioners; Hotel Tax Committee; DCED	Marketing to attract tourists (DCED)	Year 1	Amount of funding secured for tourism marketing		
STRATEGY #3: PROMOTE CLAR	ION COUNTY'S INDUSTR	Y STRENGTHS					
ACTION ITEM 3.A: ENHANCE THE CLARION COUNTY EDC'S WEBSITE WITH MORE INFORMATION ON INDUSTRY CLUSTERS Step 1: Use informatin from the Clarion County 2030 Economic Development Strategy to highlight key industry clusters Step 2: List the names of businesses in that industry cluster on the Clarion County EDC website Step 3: Draw a direct connection between the suppliers in the industry to the end-users Step 4: Map out the locations of key industry suppliers (even if they are outside of Clarion County)	Clarion County EDC	Website designer		Year 2	Number of additional leads generated		
ACTION ITEM 3.B: PROMOTE CLARION COUNTY'S ECONOMIC DEVELOPMENT BRAND AT INDUSTRY TRADE SHOWS Step 1: Develop materials that highlight Clarion County's brand and key industry clusters (Wood product manufacturing, plastic manufacturing, etc.) Step 2: Secure funding for marketing trips to industry trade shows Step 3: Attend industry trade shows where possible to generate interest in Clarion County as a place to do business	Clarion County EDC		Engage! (DCED)	Years 2-5	Number of industry trade shows attended		
ACTION ITEM 3.C: FORGE A STRONG RELATIONSHIP WITH THE GOVERNOR'S ACTION TEAM (GAT) Step 1: Hold an initial meeting with GAT to introduce Clarion County and its key industry clusters (Wood product manufacturing, plastic manufacturing, etc.) Step 2: Share with GAT a map key shovel-ready sites and sites with strong connectivity Step 3: Discuss any RFIs or conversations that GAT has undertaken with businesses in indentified industry clusters Step 4: Hold bi-annual discussions with GAT to update them on new opportunities	Clarion County EDC			Years 1-3	Number of new opportunities identified in discussions with GAT		
ACTION ITEM 3.D: INFORM BUSINESSES IN KEY INDUSTRY CLUSTERS OF THE CLARION COUNTY EDC'S SERVICES Step 1: Meet with Clarion County's ;businesses in key industry clusters on a frequent basis to learn about their needs and any opportunities they may have for supplier location/relocation Step 2: Maintain these relationships to position the Clarion County EDC as a go-to-resource for location/relocation opportunities Step 3: As needed, host manufacturer summit meetings to further foster key relationships	Clarion County EDC			Years 1-10	Number of additional leads generated		



GOAL III: ESTABLISHING A 21ST CENTURY WORKFORCE						
STRATEGIES, ACTION ITEMS, AND STEPS						
STRATEGY #1: TAKE ADVANTAGE OF CLARION UNIVERSITY'S ACADEMIC TRANSITION TO ESTABLISH LOCAL DEMAND						
	LEAD PARTNER	KEY STAKEHOLDERS	FUNDING OPPORTUNITIES	TIME FRAME	PERFORMANCE MEASURES	
ACTION ITEM 1.A: PROMOTE THE BREADTH OF THE PENNSYLVANIA WESTERN UNIVERSITY PROGRAM OFFERINGS TO LOCAL STUDENTS Step 1: Work with Pennsylvania Western University staff to develop marketing materials about new and existing program offerings Step 2: Work with Pennsylvania Western University staff to hold informational sessions in Clarion County's school districts to introduce the new brand and course offerings Step 3: Partner with economic development partners in neighboring counties to hold similar informational sessions in their school districts Step 4: More frequently utilize Pennsylvania Western University's Venango Campus as a resource for workforce development.	Clarion County EDC	Pennsylvania Western University staff; Venango Campus; regional school districts; regional economic development agencies		Years 2-5	Number of informational sessions held; number of new regional students enrolled	
ACTION ITEM 1.B: IMPROVE CLARION BOROUGH'S TOWN-GOWN RELATIONSHIP WITH PENNSYLVANIA WESTERN UNIVERSITY RELAUNCH Step 1: Promote the Pennsylvania Western University's Clarion Campus as the system's "active lifestyle" campus Step 2: Work with the Pennsylvania Western University to devote a portion of Clarion Campus' website to promoting local recreational assets Step 3: Strategically place the new Clarion County tourism brand in and around Clarion Borough as a "scavenger hunt" to engage students and promote the Clarion County tourism brand	Clarion County EDC	Pennsylvania Western University staff; Clarion Borough		Year 2	Number of new students (regional and outside) students enrolled	
STRATEGY #2: ENHANCE CLARION COU	NTY'S WORKFORCE TRAIN	NING OFFERINGS				
ACTION ITEM 2.A: PARTNER WITH NEW AND EXISTING BUSINESSES ON WORKFORCE TRAINING/INTERSHIP PROGRAMS Step 1: Survey existing businesses and manufacturers to determine workforce needs Step 2: Hold a workforce summit meeting to determine the willingness of businesses to participate in new programs Step 3: Provide eligible businesses with information on PA DCED workforce training/apprenticeship programs Step 4: Provide technical assistance to assist businesses with submitting applications for training funding		Clarion County businesses	WEDnetPA (DCED); Manufacturing PA Training-to-Career Grant (DCED); Pre-Apprentice and Apprenticeship Program (DCED)	Year 3	Number of workforce training/internship programs started; number of students enrolled in programs; amount of funding secured for programs	
ACTION ITEM 2.B: BUILD THE CLARION COUNTY CAREER CENTER INTO A HUB OF SECONDARY AND POST-SECONDARY SKILLS TRAINING Step 1: Study the regional labor market to identify existing workforce gaps Step 2: Based on the results of the study, evaluate how labor needs align with existing CCCC course offerings Step 3: Modify secondary course offerings to align with current workforce needs Step 4: Begin accreditation process for post-secondary courses Step 5: Secure public funding for facility expansion and renovation needs	Clarion County Career Center	Sending school districts	Redevelopment Assistance Capital Program; Economic Adjustment Assistance Program (EDA)	Years 3-10	Number of new programs started; length of time from graduation to placement; amount of funding secured for expansion	
STRATEGY #3: EVALUATE OPPORTUNITIES FOR COLLABO	DRATION AMONG CLARIC	ON COUNTY'S SCHOOL	DISTRICTS			
ACTION ITEM 3.A: HOLD QUARTERLY MEETINGS BETWEEN SCHOOL DISTRICTS, CLARION COUNTY CAREER CENTER, AND RIU#6 Step 1: Designate the RIU#6 as the lead scheduling and coordinating entity for meetings Step 2: Organize quarterly meetings between schools districts, the CCCC, and RIU#6 to discuss ongoing events and challenges Step 3: Distribute meeting minutes among group to recap what was discussed	RIU#6	Clarion County Career Center; sending school districts		Years 1-10	Number of meeting attendees	
ACTION ITEM 3.B: DEVELOP A PLAN TO ESTABLISH SYNERGIES AND SHARED EVENTS/SERVICES AMONG SCHOOL DISTRICTS Step 1: Among quarterly meeting members, discuss opportunities for shared events and services Step 2: Develop plan and implementation timeline to implement changes Step 3: Use quarterly meetings as a form to discuss implementation progress	RIU#6	Clarion County Career Center; sending school districts		Years 3-10	Number of shared events and services established	



GOAL IV: CAPITALIZE UPON CLARION CO	OUNTY'S R ECREATIONA	L AND CULTURAL ASSI	ETS		
STRATEGIES, AC	TION ITEMS, AND STEPS	 S			
STRATEGY #1: PROMOTE WHA	AT IS UNIQUE ABOUT CLA	ARION COUNTY			
	LEAD PARTNER	KEY STAKEHOLDERS	FUNDING OPPORTUNITIES	TIME FRAME	PERFORMANCE MEASURES
ACTION ITEM 1.A: SURVEY TOURISTS AND VISITORS TO DETERMINE WHAT DREW THEM TO CLARION COUNTY AND WHAT THEY WOULD LIKE TO SEE Step 1: Work collaboratively via Clarion County Connected to develop a tourist/visitor survey Step 2: Contact local businesses, particularly those in the tourist trade, to promote and advertise survey Step 3: Aggregate results and develop findings	Clarion County EDC	Clarion County Connected attendees	Marketing to Attract Tourists (DCED)	Year 1	Number of surveys taken
ACTION ITEM 1.B: INVENTORY CLARION COUNTY'S UNIQUE ATTRACTIONS AND EXPERIENCES Step 1: Use Clarion County Connected as a forum to inventory Clarion County's unique attraction and experiences Step 2: Develop maps of the locations of identified attractions	Clarion County EDC	Clarion County Connected attendees	Marketing to Attract Tourists (DCED)	Year 1	Number of attractions identified
ACTION ITEM 1.C: INTEGRATE THE LOCATIONS OF THE UNIQUE ATTRACTIONS AND EXPERIENCES INTO MARKETING MATERIALS Step 1: In Clarion County-specific marketing materials, include a map of attractions Step 2: Create a "scavenger hunt" that takes visitors on a trip throughout Clarion County to key attractions	Clarion County EDC	Hotel Tax Committee; PA Great Outdoors	Marketing to Attract Tourists (DCED)	Years 1-3	Number of marketing materials produced
STRATEGY #2: CONTINUE BUILD-OUT OF CLARION	COUNTY'S ROBUST PEDE	STRIAN AND BIKE TRAI	L NETWORK		
ACTION ITEM 2.A: USE CLARION COUNTY CONNECTED AS A MEANS TO SYNCHRONIZE TRAIL CONSTRUCTION EFFORTS Step 1: Invite non-profit trails groups to Clarion County Connected Step 2: Discuss forthcoming trail expansion projects and prior successes Step 3: Identify opportunities to connect trails	Clarion County EDC	Non-profit recreational groups		Year 1	Number of non-profit recreational groups engaged in Clarion County Connected
ACTION ITEM 2.B: SYNCHRONIZED FUNDING REQUESTS TO MAXIMIZE RESOURCES Step 1: Discuss funding needs and proposed funding requests at Clarion County Connected Step 2: Discuss attributes of projects and how they align with local, state, and federal funding opportunities Step 3: Collaboratively decide which group will pursue which source based upon need and project timelines	Clarion County EDC	Non-profit recreational groups	Greenways, Trails, and Recreation Program (DCED); Community Conservation Partnerships Program (DCNR); CFA Multimodal Transportation Fund (DCED); TA Set-Aside (PennDOT)	Years 1-10	Amount of funding acquired annually for Clarion County trail projects
ACTION ITEM 2.C: IDENTIFY OPPORTUNITIES TO COLLABORATE AND REDUCE TRAIL MAINTENANCE COSTS	Clarion County EDC	Non-profit recreational		Years 1-10	Number of collaborative
Step 1: During Clarion County Connected meetings, discuss opportunities to collaborate on trail maintenance and operations		groups			maintenance partnerships established
STRATEGY #3: ENHANCEMENT OF TH	E SCENIC RIVERS AND RIV	VER-BASED FACILITIES			
ACTION ITEM 3.A: IMPLEMENT FINDINGS OF PRIOR RECREATIONAL PLANS Step 1: Review findings of recreational plans Step 2: Discuss forthcoming and recommended capital improvement projects at Clarion County Connected meetings Step 3: Use Clarion County Connected to prioritize public funding requests for recreational capital improvement projects	Clarion County EDC	Clarion County Connected stakeholders; non-profit recreational groups	Greenways, Trails, and Recreation Program (DCED); Community Conservation Partnerships Program (DCNR); CFA Multimodal Transportation Fund (DCED); TA Set-Aside (PennDOT); PA Boating Facility Frant Program (PFBC)	Years 1-10	Number of capital improvement projects undertaken
ACTION ITEM 3.B: ACTIVELY INVOLVE PENNSYLVANIA WESTERN UNIVERSITY IN RIVER MANAGEMENT ACTIVITIES Step 1: Work with Pennsylvania Western University to establish river management course or club that teaches the balance between conservation and recreation in Pennsylvania's waterways	Clarion County EDC	Pennsylvania Western University staff		Years 2-10	Number of students enrolled in course



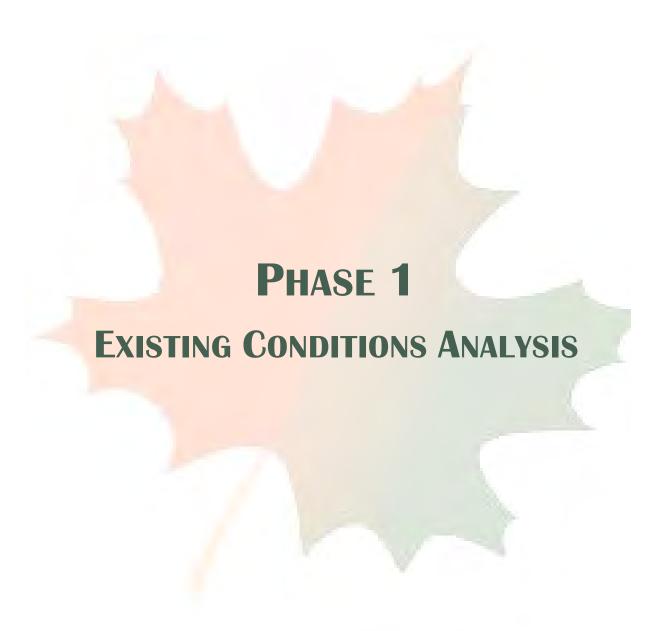
GOAL V: REVITALIZATION AND SUR	PPORT OF CORE COMMU	INITIES			
STRATEGIES, ACTION ITEMS, AND STEPS					
STRATEGY #1: PROMOTE THE DEVELOPMENT OF UNDERUTILIZED BUILDINGS AND PARCELS WITH NEW AND DIVERSE EXPERIENCES					
STRATEST WILL TROUBLE THE DEVELOT MENT OF ONDERO HELELD D	LEAD PARTNER	KEY STAKEHOLDERS	FUNDING OPPORTUNITIES	TIME FRAME	PERFORMANCE MEASURES
ACTION ITEM 1.A: IDENTIFY TOURIST WANTS/NEEDS AND UNDERUTILIZED BUILDINGS/PARCELS	Clarion County EDC	Municipal governments;	1 01121112	Years 2-3	Number of tourist
Step 1: Review the results of the tourism survey (See Goal IV - Action Item 1.A)		Clarion County			recommendations
Step 2: Determine where gaps exist in what facilities/experiences exist and what tourists would like to see		Redevelopment Authority			identified
Step 3: Work with municipalities and the Clarion County Redevelopment Authority to identify underutilized buildings/parcels					
ACTION ITEM 1.B: DEVELOP RFPS TO GAUGE DEVELOPER INTEREST	Clarion County EDC	Clarion County Connected		Years 3-4	Number of developer/investor
Step 1. Work with Clarion County Connected to identify most suitable end-uses		participants;			proposal responses
Step 2. Also identify most desirable buildings/parcels for end-uses		developers/investors			received
Step 3. Obtain permission of property owner(s) to develop RFPs					
Step 4. Draft RFPs for the reuse/rehabilitation of selected properties					
Step 5. Post/launch RFPs on reputable and significant websites					
Step 6. Evaluate RFPs and connect property owners with interested developers/investors					
ACTION ITEM 1.C: PROVIDE TECHNICAL ASSISTANCE TO DEVELOPERS/INVESTORS	Clarion County EDC	Developers/investors	Redevelopment Assistance Capital Program (RACP)	Years 4-10	Amount of technical assistance provided
Step 1. Provide development and public funding technical assistance to developers/investors that are building new and diverse experiences		_	Trogram (NACT)		provided
STRATEGY #2: IMPROVING THE APPEARANCE					
ACTION ITEM 2.A: Obtain Keystone Communities Designation in at Least One Clarion County Municipality Stan 1. Evaluate the people for Keystone Communities designation in a community without Diversity distribution.	Clarion County EDC	Selected municipality	Keystone Communities (DCED)	Years 2-5	Amount of new investment in
Step 1: Evaluate the need for Keystone Communities designation in a community without Blueprint eligibility					community generated after
Step 2: Reach out the the selected municipality to explain the opportunity					Keystone Communities
Step 3: Contact DCED's Northwest Regional Office to notify them of the intent to apply for Keystone Communities designation Step 4: Work with the municipality to apply for Keystone Communities designation					designation
Step 5: Assess the effectiveness of the Keystone Communities designation in yearly intervals; repeat if successful					
	Clarion County EDC	Municipal governments;	CFA Multimodal Transportation Fund	Voors 2 10	Number of streetscape projects
ACTION ITEM 2.B: PROMOTE STREETSCAPE IMPROVEMENTS IN CORE COMMUNITIES	Clarion County EDC	community contributors	(DCED); PennDOT Multimodal	Years 2-10	Number of streetscape projects undertaken
Step 1: Assess the condition of downtown streetscapes in municipalities and unincorporated villages		community contributors	Transportation Fund; TA Set-Aside		undertaken
Step 2: Contact municipality to discuss feasibility of streetscape improvements Step 3: Identify community champions to lead improvement and streetscape efforts			(PennDOT); Keystone Communities		
Step 4: Identify community contributors and public funding sources to assist with streetscaping costs			(DCED); WalkWorks (DOH)		
Step 5: Promote initial case study with other communities in Clarion County			, , , ,		
ACTION ITEM 2.C: ENHANCE WAYFINDING SIGNAGE IN CORE COMMUNITIES	Clarion County EDC	Clarion County Connected		Years 2-10	Number of communities with
Step 1: Assess the condition of current wayfinding signage in core commmunities		participants; municipal			improved wayfinding signage
Step 2: Discuss key destinations of interest at Clarion County Connected		governments; community			
Step 3: Forge public-private partnerships to fund and install new wayfinding signage to key destinations		contributors			
STRATEGY #3: DIVERSIFYING CLARI	ON COUNTY'S HOUSING S	ТОСК			
ACTION ITEM 3.A: PROMOTE AND ASSIST WITH THE DEVELOPMENT OF WORKFORCE HOUSING	Clarion County EDC	Clarion County Housing		Years 1-3	Number of new affordable
Step 1: Coordinate with the Clarion County Housing Authority to better understand housing needs		Authority; Clarion County			housing units created
Step 2: Facilitate collaboration between the Clarion County Housing Authority and potential investors		Redevelopment Authority; for			
Step 3: Work with the Clarion County Redevelopment Authority to identify sites for redevelopment		profit and non-profit			
Step 4: Assist the Clarion County Housing Authority and its partners on an as-needed basis with public funding applications		developers			
ACTION ITEM 3.B: ESTABLISH A LAND BANK PROGRAM TO REMEDIATE BLIGHT AND CREATE RESIDENTIAL DEVELOPMENT SITES	Clarion County Redevelopment	Clarion County	PHARE (PHFA), HOME (DCED), CDBG,	Year 2	Number of parcels and
Step 1: Consult with DCED's Local Government Services to obtain information on land bank programs	Authority	Commissioners	Keystone Communities (DCED)		properties admitted into land
Step 2: Review case studies and best practices to determine how a land bank can best benefit Clarion County					bank
Step 3: Develop communications strategy for creation of a land bank					
Step 4: Work with the Clarion County Commissioners to adopt a land bank ordinance					
Step 5: Develop program guidelines and internal administrative policy, including a pre-determination for what shall constitute blight					
Step 6: Secure public funding for initial land bank investments					
Step 7: Officially launch land bank program					
ACTION ITEM 3.C: PROMOTE THE DEVELOPMENT OF NEW HOUSING STYLES AND RESIDENTIAL DEVELOPMENT TYPES	Clarion County EDC	Residential homebuilders;		Years 3-10	Number (increase) of residential
Step 1: Coordinate meetings with local residential homebuilders to determine what they are building and their outlook		real estate agents; Clarion			housing starts
Step 2: Hold a summit meeting between residential homebuilders and realtors to create discussion of gaps and opportunities in the local residential housing market		County Redevelopment			
Step 3: Connect residential homebuilders with the Clarion County Redevelopment Authority to utilize land bank parcels for redevelopment		Authority			
Step 4: Provide technical assistance to any homebuilders seeking funding for off-site transportation or other infrastructure improvements					



GOAL VI: STREAMLINE E	GOAL VI: STREAMLINE ECONOMIC DEVELOPMENT EFFORTS									
Strategy, Ac	TION ITEMS, AND STE	PS								
STRATEGY #1: REVIEW ORGANIZATIONAL ROLES AND RESPONSIBILITIES IN ECONOMIC DEVELOPMENT										
	LEAD PARTNER	KEY STAKEHOLDERS	FUNDING OPPORTUNITIES	TIME FRAME	PERFORMANCE MEASURES					
ACTION ITEM 1.A: REVIEW ORGANIZATIONAL ROLES AND RESPONSIBILITIES Step 1: Facilitate initial meetings between Clarion County's economic development agencies Step 2: Assess the long-term financial and operational outlook of each organization Step 3: Discuss willingness to explore strategic partnerships between organizations	Clarion County EDC	Clarion County IDA; Clarion Chamber of Business and Industry; Redbank Valley Chamber of Commerce; East Brady Area Development Corporation; Clarion Blueprint Community; AC-Valley Region Blueprint		Year 1	Number of organizations involved in discussions					
ACTION ITEM 1.B: COMMISSION STUDY TO EXPLORE FEASIBILITY OF STRATEGIC PARTNERSHIPS AND OPERATIONAL/FINANCIAL SUSTAINABILITY OF THE CLARION COUNTY EDC Step 1: Obtain financial input from economic development agencies to fund study Step 2: Work with consultant to facilitate listening sessions regarding operational roles in economic development Step 3: Identify options for operational/financial sustainability of the Clarion County EDC Step 4: Work collaboratively to agree upon strategies and recommendations of the study Step 5: Work collaboratively to implement findings of study	Clarion County EDC	Clarion County IDA; Clarion Chamber of Business and Industry; Redbank Valley Chamber of Commerce; East Brady Area Development Corporation; Clarion Blueprint Community; AC-Valley Region Blueprint	Stakeholder contributions; Municipal Assistance Program (MAP)	Years 1-2	Number of recommendations developed					
STRATEGY #2: STAY CONNECTED WITH COMMUNITY MEMBERS, BUSIN	ESSES, AND ELECTED OF	FICIALS REGARDING ECO	NOMIC DEVELOPMENT	NITIATIVES						
ACTION ITEM 2.A: ORGANIZE QUARTERLY 'CLARION COUNTY CONNECTED' SUMMIT MEETINGS Step 1: Solicit contributions from participating organizations for quarterly summit meetings Step 2: Select rotating meeting locations across Clarion County Step 3: Discuss on-going economic development initiatives, opportunities, future plans, etc.	Clarion County EDC	*See Narrative	Private contributions	Years 1 - 10	Number of attendees at meetings					
ACTION ITEM 2.B: HOST SEPARATE QUARTERLY BUSINESS RETENTION AND ATTRACTION SUMMIT/ROUNDABLE MEETINGS Step 1: Identify key stakeholders involved in business retention and attraction in Clarion County Step 2: Schedule and host quarterly meetings to discuss business retention and attraction initiatives	Clarion County EDC	*See Narrative		Years 1-10	Number of attendees at meetings					
ACTION ITEM 2.C: MAINTAIN CLOSE CONTACT WITH ELECTED OFFICIALS ON ECONOMIC DEVELOPMENT INITIATIVES Step 1: Hold private legislative and elected official briefings on a bi-annual basis regarding the progress of existing economic initiatives and new economic development opportunities	Clarion County EDC	State Senator; State Representative; County Commissioners; Congressional Representative		Years 1-10	Frequency of briefings					



PHASE 1





SECTION 1.0: INTRODUCTION

SECTION 1.1 - OVERALL PURPOSE

The Clarion County 2030 Economic Development Strategy (Strategy) is a ten-year economic plan to guide the growth of jobs, development, and commerce in Clarion County. The process for developing the Strategy was built upon broadbased input and guidance, as well as the integration of economic development planning. The Strategy focuses on new strategies and action steps to enhance Clarion County's economic opportunities.

The Clarion County 2030 Economic Development Strategy is comprised of four parts:

- 1. Phase 1 Existing Conditions Analysis
- 2. Phase 2 Economic Recovery Strategy
- 3. PHASE 3 Economic Climate of Clarion County
- 4. Phase 4 Vision and Action Plan

This Strategy identifies the key findings of an indepth research process, a SWOT session with local businesses, non-profits, elected officials, educational institutions, municipal leaders, and public surveys. Each recommendation included in the Strategy is related to improving the economic competitiveness and quality of life opportunities for Clarion County residents and business owners. As background for the findings presented, Phase 1 of the Strategy includes:

 EXECUTIVE SUMMARY OF PHASE 1 FINDINGS: A summary of both quantitative and qualitative findings through primary and secondary data sources.

- EXISTING CONDITIONS REPORT: Employment and jobs trends; socioeconomic and demographic trends.
- SWOT ANALYSIS: An analysis of regional strengths, weaknesses, opportunities, and threats based upon quantitative data and qualitative insight.

Phase 1 provides a quantitative foundation for future Strategy phases. Phase 2 provides a pathway for Clarion County to recover from the COVID-19 Pandemic. Phase 3 examines Clarion County's economic and business profile through qualitative means, including interviews, surveys, and questionnaires. In Phase 4, the Strategy lays out a detailed Action Plan that outlines implementable steps to strengthen and broaden Clarion County's economy. Throughout Phases 3 and 4, consideration was given to examining the impacts of COVID-19 on the local economy. The Clarion County 2030 Economic Recovery Strategy (Phase 2), a document modeling the impacts of COVID-19 on Clarion County's economy and how Clarion County can proactively work to recover economically from the pandemic, has been developed concurrently with this Strategy. Together, both the Clarion County 2030 Economic Development Strategy and Clarion County 2030 Economic Recovery Strategy function as tools and guidance for Clarion County's decision makers and economic development agencies in the coming decade.



SECTION 1.2 - PHASE 1 PURPOSE

The vibrancy and sustainability of a local economy is contingent upon a number of interdependent factors. The foundation of a successful economic development plan is a clear understanding of the current environment within and around the area related to each of the questions outlined below, and how each impacts the local economy.

- 1. Who lives here?
- 2. Who works here?
- 3. Who's doing business here?
- 4. Who do we compete with in attracting new business development?
- 5. What are our competitive advantages and disadvantages?
- 6. What regional, national, and international trends can be leveraged to encourage local economic development?
- 7. What are our optimal economic development targets based on local and regional competitive factors? Based on national/international trends?
- 8. What critical factors will drive successful economic development?

Phase 1 of the Strategy presents a profile of key characteristics of Clarion County. To add meaning to the profile, local characteristics and trends in Clarion County are compared to characteristics and trends in peer counties and to the larger region to gain a better understanding of what sets the Clarion County area apart, its advantages and disadvantages, and the changes that need to take place to enhance the County's economic development efforts. Throughout the study, we have compared characteristics and trends for the following geographic areas:

- Clarion County
- Venango County
- Forest County
- Jefferson County

- Armstrong County
- Butler County
- Commonwealth of Pennsylvania

SECTION 1.3 - BACKGROUND

Recognizing the need for an economic development strategy that addresses current needs and desires of Clarion County, the Clarion County Economic Development Corporation (EDC) commissioned the *Clarion 2030 Economic Development Strategy* in January 2020. The EDC seeks an implementable strategy that outlines future goals, objectives, and action steps in

relation to strengthening and broadening Clarion County's economy. Although prior planning documents have indeed helped Clarion County achieve its economic development priorities, these documents are quickly aging. Clarion County's last Comprehensive Plan was adopted in 2004. The Northwest Commission, which serves an eight-county region in Northwestern



Pennsylvania that includes Clarion County, adopted their last Comprehensive Economic Development Strategy (CEDS) in 2016. The EDC seeks a modern and Clarion County-specific document that will outline an action plan and implementation strategy for key economic development objectives over the next ten years.

During development of Phase 1 of the Strategy, the COVID-19 Pandemic struck the United States, which has presented additional challenges pertaining to Clarion County's economy. Beginning in March 2020, numerous businesses and institutions were required to close or severely limit operations in an attempt to slow the spread of COVID-19. Notably, Clarion University of Pennsylvania suspended in-person instruction for the remainder of the Spring 2020 semester,

manufactured home manufacturers suspended sales and production, non-profit institutions (such as the Clarion County YMCA) temporarily closed their facilities, and restaurants throughout Clarion County were limited to offering take-out only. It is unknown whether reduced operations of these businesses and institutions, and others like it throughout Clarion County, will have a lasting impact. The emergence of the COVID-19 Pandemic guided future discussions are part of all Phases, including the SWOT Session in Phase 1, key stakeholder interviews and focus group sessions in Phase 2, and a public open house session in Phase 3. These discussions will help determine how COVID-19 has impacted businesses throughout Clarion County, and how Clarion County can best accommodate the needs of these businesses in the future.

SECTION 1.4 - HISTORY

Situated on the Allegheny Plateau in western Pennsylvania, Clarion County was established on March 11th, 1839, from pieces of Venango and Armstrong Counties¹. Even in 1839, residents realized the Clarion County was a place of great beauty and opportunity. Looking for a suitable place to build a county seat, Clarion County's founders selected a flat spot perched high atop a hall overlooking the Clarion River, which became the present-day Borough of Clarion. John Sloan Jr. surveyed the 200-acre site, and 275 in-lots and 50 out-lots were created. Lots for a county courthouse and public square were reserved from the sale. The public sale for the lots began October 30, 1839 and lasted for three days. The highest price for a lot was \$757.50 and the next in value

was sold for \$560.00. On April 6, 1841, the village of Clarion was incorporated into a borough¹.

Clarion County is home to three major waterways: The Clarion River, the Allegheny River, and Redbank Creek. The presence of these waterways helped to grow Clarion County's early industries, including iron, lumber, and oil². Clarion County's scenic waterways enabled the growth of the lumber industry, and the Clarion and Allegheny Rivers were used to float lumber from the area to market in Pittsburgh. During this period, agriculture was equally as important to Clarion County residents. From 1869 to 1879, Clarion County was home to an oil boom, which swiftly ended and gave way to bituminous coal mining in the late-1870's³. Some surface strip mining still continues into the present. In the 1800's, the pottery

¹ http://www.co.clarion.pa.us/Dept/History/Pages/default.aspx

² https://www.clarioncountyato.org/townships.html

 $^{^3} http://www.phmc.state.pa.us/bah/dam/rg/di/IncorporationDates For Municipalities/pdfs/clarion.pdf?catid=16$



and glass industry began to flourish in Clarion County due to near deposits of fire clay, sand, and abundant natural gas. Potteries and glassmakers, such as Purinton Pottery in Shippenville and Owens-Illinois in Clarion, continued to employ Clarion County residents well into the Twentieth and Twenty-First Centuries.

Today, Clarion County is comprised of 13 boroughs and 22 townships. Although Clarion County's waterways once proved to be vital transportation routes, today, they function as scenic recreation areas suitable for canoeing, kayaking, water skiing, fishing, etc. The lumber industry is still of vital importance, and timber harvested in Clarion County is used to manufacture flooring, modular homes, and other wood products. Interstate 80 provides transportation to major markets across the United States, including Pittsburgh, Chicago, New York City, and Washington D.C. Clarion County is within a one-day truck drive of more than 153 million consumers,

which represents nearly half of the population of the United States⁴. This superlative locational advantage has caused growth along some of Clarion County's six interstate exits. The economy of northern Clarion County is buoyed by Cook Forest State Park, an 8,500-acre wild recreation destination. Rural southern Clarion County has also been transformed into a recreation destination by the Red Bank Valley Trail, a 51-mile trail that educates users about Clarion County's rich lumber, mining, and industrial history⁵. With its main campus located in the Borough of Clarion, Clarion University of Pennsylvania provides post-secondary educational opportunities for students in Northwestern Pennsylvania and beyond. Although ways of doing business may have changed, the abundance of breathtaking scenery, natural resources, and hardworking residents has not changed since Clarion County's founding in 1839.



FIGURE 1 - CLARION BOROUGH 1896

Source: Pinterest

⁴ https://www.clarioncountyedc.com/transportation/

⁵ https://www.traillink.com/trail/redbank-valley-rail-trail/



SECTION 2.0: EXECUTIVE SUMMARY

In examining the demographic and economic data, it becomes apparent that Clarion County has immense opportunity to expand its economic growth and industry diversity. From an existing base of large, stable employers, to a skilled workforce, to locational and infrastructure advantages, Clarion County has a proper mix of assets to succeed in a global economy. When compared to its neighbors, Clarion County fares well in the following areas:

- WORKFORCE: Clarion County has a skilled workforce, with the Clarion County Career Center and Clarion University of Pennsylvania serving as catalysts for skill-building and educational opportunities.
- > SMALL BUSINESS SUPPORT: Clarion County has a number of economic development agencies ready and willing to assist businesses small and large in their business pursuits.
- > STABLE EMPLOYERS: Clarion County has a number of large, stable employers in the manufacturing, healthcare and social assistance, and education industries that offer employment opportunities to both blue-collar and white-collar residents.
- ECONOMIC SPECIALIZATION/INDUSTRY CLUSTERS: Clarion County is a well-known processor and manufacturer of wood products. Because wood is a renewable resource, this provides Clarion County an opportunity to build upon this industry cluster for continued economic security, including recruiting and expanding upstream and downstream industries.
- TRANSPORTATION: Clarion County's location between major East Coast and Midwestern markets positions it for quick distribution of products warehoused and manufactured in Clarion County. Interstate 80 functions as a major transportation network between these markets, and Clarion County benefits from its six highway exits.
- NATURAL ASSETS: Clarion County's burgeoning travel and tourism industry is propelled by its scenic rivers, world-renowned old growth forests, and ever-expanding trail network.

There are, however, areas where Clarion County may find itself falling behind. These disadvantages present room for mitigation and improvement as Clarion County looks toward 2030.

- POPULATION: Like most counties in the region, Clarion County has a declining and aging population. To ensure long-term economic health, Clarion County must develop ways to retain its resident youth and Clarion University of Pennsylvania students.
- **HOUSING STOCK:** Clarion County has an aging housing stock. Although these aging homes have potential to be rehabilitated, newer homes must be available to satisfy demand for such units.
- > INFRASTRUCTURE: In terms of broadband infrastructure, Clarion County has some large service gaps and a comparatively high cost for adoption. In terms of transportation infrastructure, Clarion County does not have active rail lines, which may limit its attractiveness for some manufacturers



and logistics companies. Water and sewer infrastructure are also inadequate for industry growth in some areas of Clarion County, including along PA Route 66 and along Interstate 80 exits.

- COMMODITY PRICE VOLATILITY: Although Clarion County's natural resources (natural gas, coal, mineral deposits, etc.) are a definite advantage, ever-changing commodity prices have the potential to negatively impact employment prospects in some industry sectors.
- MARKETING OF BUSINESS SITES: Clarion County has a number of pad-ready business sites, but many of them are not advertised on national commercial real estate listing databases. This puts Clarion County at a distinct disadvantage in terms of national visibility. More exposure on national commercial real estate listing databases will help to sell and lease these business sites more quickly and at higher transaction prices.

As Clarion County looks to 2030, the Strategy provides a variety of demographic and economic data to establish a baseline for future improvement. As Clarion County undertakes economic development projects, the indicators shown in this Strategy will begin to improve, and Clarion County will achieve the goals and objectives set in Phase 4 of the Strategy.



FIGURE 2 - PICTURES OF RURAL CLARION COUNTY

Source: Delta Development Group, Inc.



SECTION 3.0: ECONOMIC PROFILE

This Section will review the current economic conditions in Clarion County with respect to trends in population, income, employment, and housing. Clarion County's residents are the life blood of the regional economy, so understanding how Clarion County's residents live and work is essential to understanding the intricacies of its economy.

Clarion County's resident population represents the primary workforce that supports business operations and new business development. They are consumers of local goods and services, and therefore support local businesses. Collectively, they represent a distinct character that can serve as the context for place-making and branding.

SECTION 3.1 - DEMOGRAPHICS

POPULATION

For decades, Clarion County's population has hovered around the 40,000 mark. Clarion County's population peaked in 1980, when 43,414 people called Clarion County home. In 2018, Clarion County's population stood at 38,837, or a 2.88% decrease from 2010.

TABLE 1 - POPULATION COUNTY

POPULATION: COUNTY											
COUNTY	2010	2018	CHANGE 2010-2018	PERCENT CHANGE							
Clarion	39,988	38,837	-1,151	-2.9%							
Venango	54,984	52,376	-2,608	-4.7%							
Forest	7,716	7,351	-365	-4.7%							
Jefferson	45,200	44,084	-1,116	-2.5%							
Armstrong	68,941	66,331	-2,610	-3.8%							
Butler	183,862	186,566	2,704	1.5%							
Pennsylvania	12,702,379	12,791,181	88,802	0.7%							

SOURCES: 2010 U.S. Decennial Census; 2013-2018 ACS Five-Year Average

Although losing population is not ideal, population loss is not uncommon in counties surrounding Clarion. Neighboring counties, such as Venango, Forest, and Armstrong, experienced greater percentage population loses between 2010 and 2018. Butler County, spurred by growth concentrated in the southern end of the county, was the only neighboring county to experience a population increase.

An in-depth look at the data by municipality shows which areas of Clarion County are gaining population, and which areas are losing population.

The municipalities that experienced the largest percentage growth between 2010 and 2018 included Licking Township (30.2%), Shippenville Borough (21.9%), Strattanville Borough (12.9%), Washington Township (12.6%), and Highland Township (12.0%). Clarion County's portion of the Borough of Emlenton grew by 25.0%. Municipalities that experienced the largest loss in population between 2010 and 2018 included Brady Township (-50.9%), Callensburg Borough (-47.3%), Sligo Borough (-31.5%), St. Petersburg Borough (-26.5%), and Piney Township (-24.1%).

TABLE 2 - HISTORIC POPULATION

CLARION COUNTY HISTORIC POPULATION: 1930 to 2018									
YEAR	POPULATION	CHANGE							
1920	36,683	-4.50%							
1930	34,531	-4.50%							
1940	38,410	11.20%							
1950	38,344	-0.20%							
1960	37,408	-2.20%							
1970	38,414	2.50%							
1980	43,362	12.90%							
1990	41,699	-3.80%							
2000	41,765	0.20%							
2010	39,988	-4.30%							
2018	38,837	-2.88%							

SOURCE: U.S. Decennial Census; American Community Survey



TABLE 3 - MEDIAN AGE BY COUNTY

MEDIAN AGE: COUNTY										
COUNTY	2010	2018	CHANGE 2010-2018	PERCENT CHANGE						
Clarion	39.4	41.2	1.8	4.6%						
Venango	44.3	46.5	2.2	5.0%						
Forest	43.0	40.4	-2.6	-6.0%						
Jefferson	43.0	43.9	0.9	2.1%						
Armstrong	44.5	46.3	1.8	4.0%						
Butler	41.5	43.2	1.7	4.1%						
Pennsylvania	38.7	40.7	2.0	5.2%						

SOURCES: 2010 U.S. Decennial Census; 2014-2018 ACS Five-Year Average

Population growth and decline was inconsistent across Clarion County municipalities, with no discernible concentration in any particular geographic area. Consistent with its neighboring counties and the Commonwealth of Pennsylvania, Clarion County is aging. Between 2010 and 2018, the median age of Clarion County residents rose

from 39.4 to 41.2, or an increase of 4.6%. At 41.2 years, the median age of Clarion County residents is lower than that of all neighboring counties except Forest. The presence of Clarion University of Pennsylvania may lower Clarion County's median age, just as SCI Forest does in Forest County.

As shown in the Age Distribution table below, 9.2% of Clarion County residents are between the ages of 20 and 24 years, and 7.5% are between the ages of 15 to 19 years. These are university-age residents. Clarion County also has a large showing of residents between the ages of 45 to 69 years, or approximately 33.3% of Clarion County's population as a whole. This age distribution is somewhat unique compared to Clarion County compared to its neighbors.

TABLE 4 - AGE DISTRIBUTION BY COUNTY

	AGE DISTRIBUTION: COUNTY											
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER	PENNSYLVANIA					
TOTAL POPULATION:	38,827	52,376	7,351	44,084	66,331	186,566	12,791,181					
Under 5 Years	5.0%	5.1%	2.2%	5.6%	4.9%	5.1%	5.5%					
5 to 9 Years	5.5%	5.4%	1.7%	5.9%	5.6%	5.3%	5.7%					
10 to 14 Years	5.0%	5.6%	3.0%	6.0%	5.4%	6.2%	6.0%					
15 to 19 Years	7.5%	5.8%	4.2%	5.8%	5.4%	6.8%	6.5%					
20 to 24 Years	9.2%	5.2%	6.8%	5.5%	5.2%	5.8%	6.6%					
25 to 29 Years	6.5%	5.1%	11.5%	5.9%	5.2%	5.6%	6.7%					
30 to 34 Years	4.9%	5.2%	10.7%	5.5%	5.3%	5.6%	6.3%					
35 to 39 Years	5.4%	5.4%	9.1%	5.2%	5.4%	5.5%	5.9%					
40 to 44 Years	5.0%	5.4%	7.8%	5.7%	5.8%	6.4%	5.8%					
45 to 49 Years	6.2%	6.2%	4.1%	6.4%	6.9%	7.1%	6.5%					
50 to 54 Years	6.7%	7.4%	5.5%	7.0%	7.5%	7.7%	7.1%					
55 to 59 Years	7.0%	8.5%	5.6%	8.0%	8.3%	8.0%	7.3%					
60 to 64 Years	7.4%	8.7%	5.7%	7.3%	7.9%	7.3%	6.7%					
65 to 69 Years	6.0%	6.9%	7.0%	5.9%	6.8%	6.0%	5.6%					
70 to 74 Years	4.2%	5.0%	6.1%	5.0%	4.8%	4.0%	4.1%					
75 to 79 Years	3.4%	4.2%	5.1%	3.8%	3.9%	2.9%	3.0%					
80 to 84 Years	2.7%	2.7%	2.0%	2.5%	2.5%	2.1%	2.2%					
85 Years+	2.3%	2.3%	1.9%	3.0%	3.1%	2.7%	2.5%					

SOURCE: 2014-2018 ACS Five-Year Average



HOUSEHOLDS AND FAMILIES

According to the U.S. Census Bureau, a "household" is defined in the following manner: "A household consists of all the people who occupy a housing unit... A household includes the related

TABLE 5 - HOUSEHOLDS BY COUNTY

HOUSEHOLDS: COUNTY											
COUNTY	2010	2018	CHANGE 2010-2018	PERCENT CHANGE							
Clarion	15,742	15,824	82	0.5%							
Venango	22,457	21,915	-542	-2.4%							
Forest	1,996	1,631	-365	-18.3%							
Jefferson	18,236	18,465	229	1.3%							
Armstrong	28,814	27,990	-824	-2.9%							
Butler	71,911	76,240	4,329	6.0%							
Pennsylvania	4,940,581	5,025,132	84,551	1.7%							

SOURCES: 2005-2010 ACS Five-Year Average; 2013-2018 ACS Five-Year Average

family members and all the unrelated people... who share a housing unit"⁶.

By this definition, students living together in a student rental home would be classified as a household. Between 2010 and 2018, Clarion County experienced an 82-household increase, or a percentage change of 0.5%. Clarion was one of only three counties, along with Jefferson and Butler, to experience an increase in the number of households.

Families are a key indicator of non-student living arrangements. According to the U.S. Census Bureau, a "family" is defined as "A group of two people or more (one of whom is a householder) related by birth, marriage, or adoption and residing together; all such people (including related subfamily members) are considered as members of one family"7. Changes in student enrollment at Clarion University of Pennsylvania may result in swings in Clarion County's population totals. Family counts, however, are more stable and indicative of a resident population. In this measure, between 2010 and 2018, Clarion County saw a decrease of 3.3%, or a decrease of 339 families. Of Clarion County's neighboring counties, only Butler County experienced an increase in the number of families. This data point is indicative of an aging population, with children leaving their parents' homes and not returning to have families.

TABLE 6 - FAMILIES BY COUNTY

	FAMILIES: COUNTY										
COUNTY	2010	2018	CHANGE 2010-2018	PERCENT CHANGE							
Clarion	10,361	10,022	-339	-3.3%							
Venango	15,120	14,579	-541	-3.6%							
Forest	1,286	951	-335	-26.0%							
Jefferson	12,408	12,269	-139	-1.1%							
Armstrong	19,818	18,990	-828	-4.2%							
Butler	49,979	51,529	1,550	3.1%							
Pennsylvania	3,231,021	3,232,070	1,049	0.0%							

SOURCES: 2005-2010 ACS Five-Year Average; 2013-2018 ACS Five-Year Average

 $^{^{6}} https://www.census.gov/programs-surveys/cps/technical-documentation/subject-definitions.html \\$

 $^{^{7}} https://www.census.gov/programs-surveys/cps/technical-documentation/subject-definitions.html$



RACE

When examining the racial distribution of the County's population, Clarion County is similar to its neighbors, with a large majority of white residents (96.5%), with two or more races (1.4%) and Black/African-American (1.1%) being the predominant minority groups. Of note, Forest County's data is skewed by the presence of SCI Forest.

TABLE 7 - RACE BY COUNTY

	RACE: COUNTY													
	CLAI	RION	VENA	ANGO	FO	REST	JEFFE	RSON	ARMS	TRONG	BUT	LER	PENNSYLVANIA	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
TOTAL:	38,827		52,	376	7,	351	44,	084	66,	331	186,	566	12,791,2	181
White Alone	37,487	96.5%	50,691	96.8%	4,753	64.7%	43,169	97.9%	64,771	97.6%	178,940	95.9%	10,341,442	80.8%
Black/African-American	426	1.1%	434	0.8%	2,205	30.0%	235	0.5%	591	0.9%	1,754	0.9%	1,423,319	11.1%
Amer. Indian/Alaskan	83	0.2%	12	0.0%	23	0.3%	78	0.2%	19	0.0%	80	0.0%	24,847	0.2%
Asian	207	0.5%	191	0.4%	23	0.3%	127	0.3%	193	0.3%	2,353	1.3%	427,892	3.3%
Native Hawaiian/Pacific Islander	24	0.1%	0	0.0%	0	0.0%	21	0.0%	0	0.0%	46	0.0%	4,107	0.0%
Some Other Race	66	0.2%	131	0.3%	135	1.8%	47	0.1%	53	0.1%	399	0.2%	258,694	2.0%
Two or More Races	534	1.4%	917	1.8%	212	2.9%	407	0.9%	704	1.1%	2,994	1.6%	310,880	2.4%
Hispanic	334	0.9%	567	1.1%	466	6.3%	383	0.9%	492	0.7%	2,685	1.4%	905,156	7.1%

SOURCE: 2014-2018 ACS Five-Year Average

INCOME

In 2018, Clarion County had a median household income of \$45,625. With the exception of Forest County, this figure was lower than that of all neighboring counties and the Commonwealth of Pennsylvania. It should be noted, however, that Clarion County's university-age population tends to depress median household income figures. The plurality of Clarion County residents, 18.6%, earn between \$50,000 and \$74,999 annually. With the exception of Forest County, this was the trend among Clarion County's neighbors.

TABLE 8 - INCOME 2018

	HOUSEHOLD INCOME IN THE PAST 12 MONTHS										
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER	PENNSYLVANIA				
TOTAL:	15,824	21,915	1,631	18,465	27,990	76,240	5,025,132				
Less than \$10,000	7.8%	6.0%	5.2%	6.6%	6.1%	4.4%	6.3%				
\$10,000 to \$14,999	5.5%	5.1%	6.7%	6.1%	5.1%	3.7%	4.5%				
\$15,000 to \$24,999	14.1%	12.7%	15.9%	12.4%	12.4%	8.1%	9.6%				
\$25,000 to \$34,999	11.4%	12.8%	15.8%	12.0%	12.1%	8.1%	9.5%				
\$35,000 to \$49,999	15.4%	15.6%	23.2%	16.0%	15.1%	11.5%	12.7%				
\$50,000 to \$74,999	18.6%	20.2%	18.1%	19.3%	18.8%	18.6%	17.9%				
\$75,000 to \$99,999	12.2%	12.2%	8.5%	13.0%	12.6%	13.8%	12.9%				
\$100,000 to \$149,999	10.9%	10.9%	5.1%	10.6%	12.8%	17.9%	14.7%				
\$150,000 to \$199,999	2.6%	2.5%	0.8%	2.2%	2.9%	7.0%	5.9%				
\$200,000 or more	1.6%	2.1%	0.7%	1.7%	2.2%	7.0%	6.0%				
MEDIAN INCOME (dollars)	\$ 45,625	\$ 47,982	\$ 38,383	\$ 46,818	\$ 49,032	\$ 68,472	\$ 59,445				

SOURCE: 2014-2018 ACS Five-Year Average



LIFESTYLE ELEMENTS

Community Tapestry Segmentation, provided by ESRI, is a market segmentation system which classifies U.S. neighborhoods into 67 unique segments based on socioeconomic and demographic variables, including age, income, home value, occupation, household type, education, and other consumer behavior characteristics.

Segmentation systems operate on the theory that people with similar tastes, lifestyles, and behaviors seek others with the same tastes – hence the adage "like seeks like." These behaviors can be measured, predicted, and targeted. Community Tapestry combines the "who" of lifestyle demography with the "where" of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses – distinct behavioral market segments. Below are the dominant Tapestry Segments found within Clarion County:

TABLE 9 - ESRI TAPESTRY

DOMINANT TAPESTRY SEGMENTATION: CLARION							
COUNTY							
TAPESTRY SEGMENT	PERCENTAGE						
Salt of the Earth (6B)	29.6%						
Heartland Communties (6F)	18.9%						
College Towns (14B)	16.2%						
Rooted Rural (10B)	10.8%						
Small Town Simplicity (12C)	5.6%						
Other	19.0%						

SOURCE: ESRI Business Analyst

With the exception of the College Towns Tapestry Segment, Clarion County Tapestry Segments show that the population is a mix of both blue-collar and white-collar workers, many of whom have median household incomes in the \$30,000 – \$60,000 range.

Below are brief descriptions of each Tapestry Segment⁸:

SALT OF THE EARTH:

- Steady employment in construction, manufacturing, and related service industries.
- Nearly two in three households are composed of married couples; less than half have children at home.
- Due to their rural setting, households own two vehicles to cover their long commutes, often across county boundaries.
- These residents cherish family time and embrace the outdoors.
- Median household income: \$56,300

HEARTLAND COMMUNITIES:

- The rural economy of this market provides employment in the manufacturing, construction, utilities, healthcare, and agricultural industries.
- Residents are primarily (but not the majority)
 married couples, more with no children, and
 a slightly higher proportion of singles that
 reflects the aging of the population.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of the goods they purchase.
- Retirees in this market depress the average labor force participation rate to less than 60%, but the unemployment rate is comparable to the U.S.
- Median household income: \$42,400

COLLEGE TOWNS:

 About half of the residents of College Towns are enrolled in college, while the rest work for a college or the services that support it.

⁸https://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm



- This Tapestry Segment is comprised of a mix of densely developed student housing and dorms with local residences. Off-campus, low rent apartments compromise half of the housing stock.
- Residents tend to make thrifty purchases, do not eat the healthiest foods, but tend to dress to impress with the latest fashions.
- This market is bike and pedestrian friendly.
- Median household income: \$32,200

ROOTED RURAL:

- Employment in the forestry industry is common for this Tapestry group.
- This market is dominated by married couples, few with children at home.
- Nearly one in five housing units are vacant, with a high proportion for seasonal use.
 Home values are also low, with half of owned home valued under \$100,000.

- This market enjoys time spent outdoors hunting, fishing, or working in their gardens.
- Median household income: \$42,300

SMALL TOWN SIMPLICITY:

- Unemployment is higher in this market (7.7%), and labor force participation is lower (52%), which could be from the lack of jobs or retirement.
- This is an older market, with half of the householders aged 55 years or older, and predominantly single-person households.
- These are price-conscious consumers that shop accordingly, with coupons at discount stores.
- Their lifestyle is down-to-earth and semirural.
- Median household income: \$31,500

SECTION 3.2 - WORKFORCE CHARACTERISTICS

EDUCATIONAL ATTAINMENT

Overall, the presence of Clarion University of Pennsylvania has a positive effect on the continued education of Clarion County residents. According to the U.S. Census Bureau, among residents ages 25 or older, 13.0% of Clarion County residents have earned a Bachelor's degree, and 9.7% have earned a graduate/professional degree. In total, 31.7% of Clarion County residents 25-years or older have earned a college degree. Among its neighboring counties, only Butler County has a higher level of educational attainment.

TABLE 10 - EDUCATIONAL ATTAINMENT BY COUNTY - POPULATION 25+

E	EDUCATIONAL ATTAINMENT: POPULATION 25 YEARS AND OLDER											
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER	PENNSYLVANIA					
Less than 9th Grade	3.4%	3.3%	2.9%	3.5%	2.7%	1.4%	3.3%					
9th to 12th Grade, No Diploma	7.1%	6.9%	14.6%	6.9%	7.9%	4.0%	6.5%					
High School Graduate/GED	45.0%	48.4%	55.6%	50.1%	48.0%	33.2%	35.1%					
Some College, No Degree	12.9%	15.5%	15.9%	13.4%	15.2%	16.0%	16.0%					
Associate's Degree	9.0%	8.2%	3.5%	9.8%	9.9%	10.0%	8.3%					
Bachelor's Degree	13.0%	11.8%	4.9%	10.6%	10.8%	22.8%	18.6%					
Graduate/Professional Degree	9.7%	5.9%	2.5%	5.8%	5.4%	12.6%	12.1%					
Percent W/College Degree	31.7%	25.9%	10.9%	26.2%	26.1%	45.4%	39.0%					

SOURCE: 2014-2018 ACS Five-Year Average



Among residents ages 18 to 24 (post-secondary education age), Clarion County also has sizeable percentages of residents that have some college or an Associate's degree (43.1%) and a Bachelor's degree or higher (8.5%). These figures are only surpassed by Butler County (both categories) and Armstrong County (Bachelor's degree or higher). Clarion County has substantial opportunity to capitalize upon this knowledge base in the expansion and diversification of its economy.

TABLE 11 - EDUCATIONAL ATTAINMENT BY COUNTY - POPULATION 18 TO 24

EDUCATIONAL ATTAINMENT: POPULATION 18 TO 24 YEARS OLD										
CLARION VENANGO FOREST JEFFERSON ARMSTRONG BUTLER PENNSYLVANIA										
Less than High School	12.8%	17.9%	35.2%	22.0%	15.5%	8.9%	11.9%			
High School Graduate/GED	35.6%	47.6%	56.8%	46.3%	40.3%	33.0%	33.5%			
Some College or Assoc. Degree	43.1%	28.6%	7.7%	25.9%	32.9%	46.4%	42.0%			
Bachelor's Degree or Higher	8.5%	5.9%	0.4%	5.9%	11.3%	11.7%	12.6%			
Percent W/College Degree	51.6%	34.5%	8.1%	31.8%	44.2%	58.1%	54.6%			

SOURCE: 2014-2018 ACS Five-Year Average

In-line with Clarion University's program offerings, the plurality of residents age 25+ with a Bachelor's degree or higher earned it in the field of Education (26.4%). This would include Clarion County residents such as professors, primary school teachers, and secondary school teachers. At 25.6%, a large proportion also earned degrees in the field of Science and Engineering. With the exception of Butler County, these figures are fairly consistent among Clarion County's neighbors.

TABLE 12 - DEGREE EARNED BY COUNTY

FIELD OF BACHELOR'S DEGREES REPORTED: POPULATION 25+ WITH A BACHELOR'S DEGREE OR HIGHER								
CLARION VENANGO FOREST JEFFERSON ARMSTRONG BUTLER PENNSYL								
TOTAL Population 25+ w/Bachelor's Degree:	5,970	6,742	448	5,316	7,916	46,776	2,745,317	
Science and Engineering	25.6%	26.7%	27.9%	23.6%	28.0%	32.2%	33.3%	
Science and Engineering Related Fields	13.1%	13.9%	10.0%	15.1%	15.3%	11.0%	10.60%	
Business	16.4%	17.1%	17.6%	14.1%	14.8%	23.8%	19.70%	
Education	26.4%	26.4%	26.3%	30.5%	25.7%	15.6%	14.90%	
Arts, Humanities, and Others	18.6%	16.0%	18.1%	16.7%	16.2%	17.4%	21.50%	

SOURCE: 2014-2018 ACS Five-Year Average

OCCUPATION

According to 2017 American Community Survey (ACS) 5-Year Averages, among Clarion County's civilian population age 16+, the plurality (29.7%) work in the Educational Services, Health Care, and Social Assistance field. The next highest industry percentages were found in Manufacturing (13.0%) and Retail Trade (11.0%). Few Clarion County residents work in the Information (0.7%), Wholesale Trade (2.1%), and Agriculture, Forestry, Fishing, Hunting, and Mining (2.8%) industry sectors.

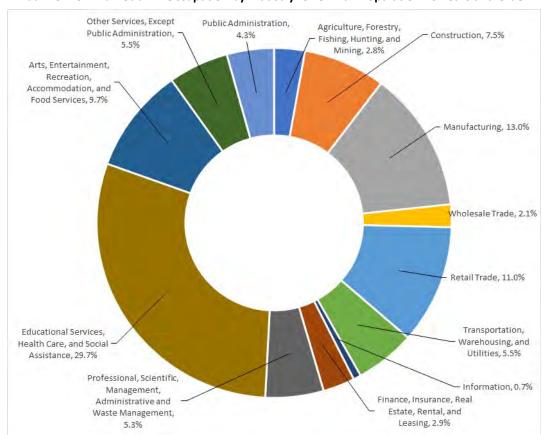


TABLE 13 - OCCUPATION BY INDUSTRY

OCCUPATION BY INDUSTRY FOR CIVILIAN POPULATION 16 YEARS AND OLDER							
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER	PENNSYLVANIA
CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER:	17,280	22,971	751	19,833	29,713	93,194	6,096,977
Agriculture, Forestry, Fishing, Hunting, and Mining	2.8%	2.3%	5.3%	5.6%	3.6%	1.3%	1.4%
Construction	7.5%	6.3%	6.9%	7.5%	8.9%	6.5%	5.8%
Manufacturing	13.0%	18.3%	10.9%	16.8%	15.1%	13.2%	11.9%
Wholesale Trade	2.1%	1.6%	3.2%	2.4%	2.1%	3.2%	2.8%
Retail Trade	11.0%	12.2%	11.6%	11.2%	12.5%	12.5%	11.5%
Transportation, Warehousing, and Utilities	5.5%	5.7%	7.9%	6.9%	5.7%	5.7%	5.4%
Information	0.7%	1.1%	0.8%	1.0%	1.3%	1.7%	1.7%
Finance, Insurance, Real Estate, Rental, and Leasing	2.9%	3.5%	6.4%	2.9%	3.7%	6.2%	6.5%
Professional, Scientific, Management, Administrative and Waste	5.3%	5.5%	2.5%	4.6%	7.1%	10.3%	10.2%
Educational Services, Health Care, and Social Assistance	29.7%	24.9%	19.3%	25.3%	25.9%	22.6%	25.8%
Arts, Entertainment, Recreation, Accommodation, and Food Services	9.7%	7.4%	6.3%	6.0%	5.7%	8.7%	8.4%
Other Services, Except Public Administration	5.5%	4.8%	6.9%	5.9%	5.4%	4.4%	4.6%
Public Administration	4.3%	6.4%	12.0%	3.9%	3.0%	3.4%	4.0%

SOURCE: 2013-2017 ACS Five-Year Average

FIGURE 3 – CLARION COUNTY Occupation by Industry for Civilian Population 16 Years and Older



Source: 2013-2017 ACS Five-Year Average



INFLOW-OUTFLOW

The U.S. Census Bureau's OnTheMap provides detailed commute pattern data. By analyzing this data, communities obtain a better understanding of the connections between employment and choice

FIGURE 4 – CLARION COUNTY EMPLOYMENT INFLOW-OUTFLOW (2017)

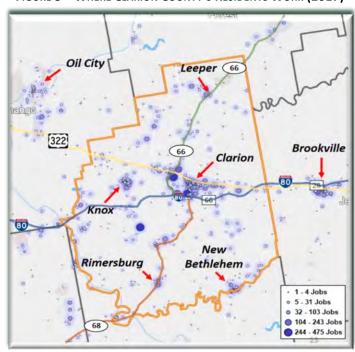


Source: U.S. Census Bureau OnTheMap

of residence. In 2017, approximately 6,042 (28.2%) were employed in Clarion County but live outside. Approximately 8,368 (39.1%) live inside the County but work outside. Approximately 7,018 (32.8%) both live and work inside Clarion County. These numbers indicate a healthy, balanced employment inflow-outflow.

The heat map below visualizes where Clarion County's *residents* are employed. As shown by the dark blue dots, there are major clusters of employment along US Route 322 and PA Route 66. A significant number of Clarion County residents also travel to Venango and Jefferson Counties for employment.

FIGURE 5 - WHERE CLARION COUNTY'S RESIDENTS WORK (2017)



Source: U.S. Census Bureau OnTheMap



The table below gives an in-depth look at where Clarion County's working residents work. As shown, the highest proportion (8.2%) live in the Borough of Clarion, followed by the Borough of Brookville (3.5%), and the City of Pittsburgh (2.2%). It is important to note that these statistics include workers that work remotely (telecommute), hence some seemingly distant municipalities being included in the data.

TABLE 14 - WHERE CLARION COUNTY'S WORKING RESIDENTS WORK

WHERE CLARION COUNTY'S WORKING RESIDENTS WORK							
		COUNT	SHARE				
TOTAL ALL JOBS:		15,386	100.0%				
PLACE	COUNTY			PLACE	COUNTY		
Clarion Borough, PA	Clarion	1,267	8.2%	Karns City Borough, PA	Butler	51	0.3%
Brookville Borough, PA	Jefferson	538	3.5%	Parker City, PA	Armstrong	51	0.3%
Pittsburgh City, PA	Allegheny	333	2.2%	Foxburg Borough, PA	Clarion	48	0.3%
Knox Borough, PA	Clarion	300	1.9%	Kittanning Borough, PA	Armstrong	48	0.3%
Marianne CDP, PA	Clarion	284	1.8%	Grove City Borough, PA	Mercer	45	0.3%
New Bethlehem Borough, PA	Clarion	260	1.7%	Shippenville Borough, PA	Clarion	44	0.3%
Rimersburg Borough, PA	Clarion	184	1.2%	Indiana Borough, PA	Indiana	43	0.3%
Oil City City, PA	Venango	166	1.1%	Punxsutawney Borough, PA	Jefferson	43	0.3%
Erie City, PA	Erie	135	0.9%	DuBois City, PA	Clearfield	41	0.3%
Strattanville Borough, PA	Clarion	134	0.9%	Lawrence Park CDP, PA	Erie	38	0.2%
Butler City, PA	Butler	129	0.8%	East Brady Borough, PA	Clarion	37	0.2%
Sugarcreek Borough, PA	Venango	129	0.8%	North Warren CDP, PA	Warren	36	0.2%
Seneca CDP, PA	Venango	115	0.7%	Emlenton Borough, PA	Venango	33	0.2%
Leeper CDP, PA	Clarion	91	0.6%	West Hills CDP, PA	Armstrong	29	0.2%
Franklin City, PA	Venango	84	0.5%	Altoona City, PA	Blair	28	0.2%
Petrolia Borough, PA	Butler	84	0.5%	Monroeville municipality, PA	Allegheny	28	0.2%
Marienville CDP, PA	Forest	79	0.5%	Philadelphia City, PA	Philadelphia	28	0.2%
Slippery Rock University CDP, PA	Butler	73	0.5%	Harrisburg City, PA	Dauphin	27	0.2%
Homeacre-Lyndora CDP, PA	Butler	72	0.5%	Reynoldsville Borough, PA	Jefferson	27	0.2%
St. Petersburg Borough, PA	Clarion	64	0.4%	New Castle City, PA	Lawrence	26	0.2%
Sligo Borough, PA	Clarion	64	0.4%	Tionesta Borough, PA	Forest	26	0.2%
Meadville City, PA	Crawford	59	0.4%	Edinboro Borough, PA	Erie	25	0.2%
Hermitage City, PA	Mercer	56	0.4%	Titusville City, PA	Crawford	25	0.2%
Warren City, PA	Warren	55	0.4%	West Mifflin Borough, PA	Allegheny	25	0.2%
South Bethlehem Borough, PA	Armstrong	53	0.3%	Crenshaw CDP, PA	Jefferson	24	0.2%
				ALL OTHER LOCATIONS:		9,702	63.1%

SOURCE: U.S. Census Bureau OnTheMap 2017



Table 15 shows the same information arranged by county. The largest proportion of Clarion County's working residents work in Clarion County (45.6%), Butler County (7.3%), and Jefferson County (6.5%).

Conversely, it is also important to understand where Clarion County's workers live. The six largest proportional areas of residence are all in Clarion County: Borough of Clarion (4.9%), Borough of Knox (1.8%), Marianne CDP (1.6%), Borough of New Bethlehem (1.3%), Borough of East Brady (1.2%), and Rimersburg Borough (1.1%).

TABLE 15 - WORK INFLOW OUTFLOW BY COUNTY

WHERE CLARION COUNTY'S							
Working Residents Work							
COUNTY	COUNT	SHARE					
Clarion County, PA	7,018	45.6%					
Butler County, PA	1,125	7.3%					
Jefferson County, PA	995	6.5%					
Allegheny County, PA	926	6.0%					
Venango County, PA	814	5.3%					
Armstrong County, PA	509	3.3%					
Erie County, PA	472	3.1%					
Mercer County, PA	334	2.2%					
Westmoreland County, PA	247	1.6%					
Forest County, PA	244	1.6%					
ALL OTHER COUNTIES:	2,702	17.6%					

SOURCE: U.S. Census Bureau OnTheMap 2017

TABLE 16 - WHERE CLARION COUNTY'S WORKERS LIVE

WHERE CLARION COUNTY'S WORKERS LIVE							
		COUNT	SHARE				
TOTAL ALL JOBS:		13,060	100.0%				
PLACE	COUNTY			PLACE	COUNTY		
Clarion Borough, PA	Clarion	646	4.9%	Woodland Heights CDP, PA	Venango	33	0.3%
Knox Borough, PA	Clarion	233	1.8%	Sugarcreek Borough, PA	Venango	32	0.2%
Marianne CDP, PA	Clarion	215	1.6%	Crown CDP, PA	Clarion	31	0.2%
New Bethlehem Borough, PA	Clarion	171	1.3%	Emlenton Borough, PA	Venango	31	0.2%
East Brady Borough, PA	Clarion	156	1.2%	Warren City, PA	Warren	31	0.2%
Rimersburg Borough, PA	Clarion	148	1.1%	Butler City, PA	Butler	30	0.2%
Oil City City, PA	Venango	147	1.1%	South Bethlehem Borough, PA	Armstrong	30	0.2%
Brookville Borough, PA	Jefferson	125	1.0%	Summerville Borough, PA	Jefferson	29	0.2%
Sligo Borough, PA	Clarion	115	0.9%	Tionesta Borough, PA	Forest	29	0.2%
Shippenville Borough, PA	Clarion	95	0.7%	Vowinckel CDP, PA	Clarion	28	0.2%
Hawthorn Borough, PA	Clarion	94	0.7%	Leeper CDP, PA	Clarion	27	0.2%
Strattanville Borough, PA	Clarion	87	0.7%	Reynoldsville Borough, PA	Jefferson	26	0.2%
Pittsburgh City, PA	Allegheny	84	0.6%	Seneca CDP, PA	Venango	26	0.2%
St. Petersburg Borough, PA	Clarion	60	0.5%	Foxburg Borough, PA	Clarion	24	0.2%
Marienville CDP, PA	Forest	56	0.4%	Corsica Borough, PA	Jefferson	23	0.2%
Franklin City, PA	Venango	53	0.4%	Meadville City, PA	Crawford	23	0.2%
Punxsutawney Borough, PA	Jefferson	53	0.4%	Hermitage City, PA	Mercer	22	0.2%
Tylersburg CDP, PA	Clarion	48	0.4%	Homeacre-Lyndora CDP, PA	Butler	22	0.2%
Indiana Borough, PA	Indiana	45	0.3%	Kennerdell CDP, PA	Venango	22	0.2%
Erie City, PA	Erie	41	0.3%	Altoona City, PA	Blair	21	0.2%
DuBois City, PA	Clearfield	40	0.3%	Treasure Lake CDP, PA	Clearfield	20	0.2%
Hasson Heights CDP, PA	Venango	37	0.3%	Clearfield Borough, PA	Clearfield	19	0.1%
Dayton Borough, PA	Armstrong	34	0.3%	St. Marys City, PA	Elk	19	0.1%
Titusville City, PA	Crawford	34	0.3%	State College Borough, PA	Centre	19	0.1%
Callensburg Borough, PA	Clarion	33	0.3%	Parker City, PA	Armstrong	17	0.1%
				ALL OTHER LOCATIONS:		9,576	73.3%

SOURCE: U.S. Census Bureau OnTheMap 2017



When this same information is viewed by county, the largest proportion of Clarion County's workers live in Clarion County (53.7%), Venango County (6.7%), and Jefferson County (6.1%).

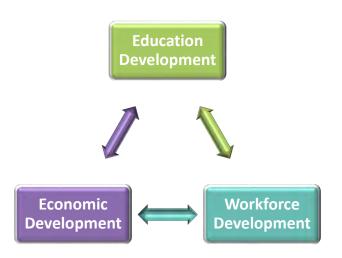
TABLE 17 - HOME INFLOW OUTFLOW BY COUNTY

WHERE CLARION COUNTY'S							
WORKERS LIVE							
COUNTY	COUNT	SHARE					
Clarion County, PA	7,018	53.7%					
Venango County, PA	869	6.7%					
Jefferson County, PA	796	6.1%					
Armstrong County, PA	729	5.6%					
Butler County, PA	413	3.2%					
Allegheny County, PA	298	2.3%					
Clearfield County, PA	286	2.2%					
Indiana County, PA	251	1.9%					
Crawford County, PA	249	1.9%					
Forest County, PA	182	1.4%					
ALL OTHER COUNTIES:	1,969	15.1%					

SOURCE: U.S. Census Bureau OnTheMap 2017

EDUCATIONAL OPPORTUNITIES

Education plays a large role in the County's effort to remain competitive in the local, national, and international economy. Skills required for today's industries are changing; the County's workforce will need to be trained to meet the industries' requirements. Companies will be attracted to communities that provide an ample supply of educated and trained workers. Training the workforce does not begin after high school, it starts with early childhood education, and continues through a child's primary and second education. Creating and sustaining an economic base to allow school districts to provide quality education should be a high priority for local government officials.



K-12 EDUCATION

Although companies will not be visiting elementary, middle, and high schools to recruit their talent, these schools serve a critical role in Clarion County. Quality education will develop workers who are trainable and will prepare students to attain higher educational degrees. The schools will also prepare students to adapt to the demands of our changing economic environment and will prepare them to enter fields that will support new technology, allowing Clarion County to compete on a global basis. In addition, quality education will be necessary to recruit professionals who may have children in primary and secondary schools. Many professionals will rely on student assessment scores to determine where they will reside. Although the County will have no control on the education system and how each school district will manage its programs, it is important to understand changes that may be occurring within individual school districts.



Clarion County has an array of primary, secondary, and post-secondary educational opportunities. Clarion County is home to seven public school districts:

1. ALLEGHENY-CLARION VALLEY SCHOOL DISTRICT

- Allegheny-Clarion Valley Elementary School
- Allegheny-Clarion Valley Junior-Senior High School

2. CLARION AREA SCHOOL DISTRICT

- Clarion Area Elementary School
- Clarion Area High School

3. CLARION-LIMESTONE AREA SCHOOL DISTRICT

- Clarion-Limestone Elementary School
- Clarion-Limestone High School

4. KEYSTONE SCHOOL DISTRICT

- Keystone Elementary
- Keystone Junior-Senior High School

5. North Clarion County School District

- North Clarion County Elementary School
- North Clarion County Junior-Senior High School

FIGURE 6 - CLARION-LIMESTONE HIGH SCHOOL



Source: exploreclarion.com

6. REDBANK VALLEY SCHOOL DISTRICT

- Redbank Valley Primary School
- Redbank Valley Intermediate School
- Redbank Valley High School

7. UNION SCHOOL DISTRICT

- Sligo Elementary School
- Union High School

East Brady Borough and Brady Township are served by the Karns City Area School District in Butler and Armstrong Counties.

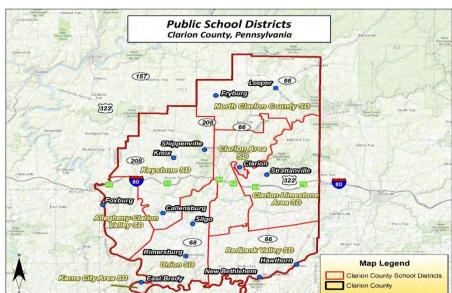


FIGURE 7 — CLARION COUNTY SCHOOL DISTRICTS

Source: Delta Development Group, Inc.



Among Clarion County's public-school districts, in the 2017-2018 school year, Redbank Valley School District had the largest enrollment (Karns City Area School District has a larger enrollment number, but only covers a small piece of Clarion County), and Union School District had the lowest enrollment. All school districts have experienced declining enrollment since the 2007-2008 school year, with some all but one school district experiencing double-digit enrollment declines between the 2007-2008 and 2017-2018 school years. These steep enrollment declines will present substantial challenges for Clarion County's school districts in the coming years.

TABLE 18 - SCHOOL DISTRICT ENROLLMENT AND SPENDING

	CLARION COUNTY SCHOOL DISTRICT ENROLLMENT AND SPENDING									
		Enrol	LMENT			TOTAL SPENDING	;	SPENDING PER STUDENT		
	2007-2008	2012-2013	2017-2018	% DECADE CHANGE	2007-2008	2012-2013	2017-2018	2007-2008	2012-2013	2017-2018
Allegheny-Clarion Valley School District*	934	740	723	-22.6%	\$12,894,326	\$13,646,102	\$15,068,821	\$13,805	\$18,429	\$20,831
Clarion Area School District	890	830	763	-14.3%	\$10,982,120	\$11,797,670	\$13,610,651	\$12,333	\$14,218	\$17,848
Clarion County Career Center	386	292	323	-16.3%	\$3,203,591	\$3,306,700	\$3,130,359	\$8,299	\$11,324	\$9,692
Clarion-Limestone Area School District*	1,078	918	875	-18.8%	\$11,559,516	\$15,546,033	\$14,361,992	\$10,722	\$16,940	\$16,416
Karns City Area School District*	1,799	1,646	1,463	-18.7%	\$19,448,949	\$20,257,460	\$21,963,017	\$10,813	\$12,311	\$15,011
Keystone School District	1,235	1,087	1,012	-18.0%	\$14,056,604	\$14,400,205	\$16,021,121	\$11,388	\$13,246	\$15,836
North Clarion County School District	676	598	596	-11.8%	\$7,642,625	\$7,471,438	\$8,714,324	\$11,303	\$12,486	\$14,629
Redbank Valley School District	1,255	1,169	1,151	-8.3%	\$14,978,156	\$16,873,160	\$28,008,049	\$11,932	\$14,429	\$20,857
Union School District	726	648	568	-21.8%	\$9,597,172	\$9,756,066	\$11,221,984	\$13,222	\$15,051	\$19,757
Clarion County*	8,979	7,928	7,474		\$104,363,059	\$113,054,834	\$132,100,318	\$11,535	\$14,270	\$16,764

SOURCE: OpenPAGov.org

*School District Boundaries Extend Beyond Clarion County

In terms of Spending per Student, a measure of overall school district spending per enrolled student, Redbank Valley School District, Allegheny-Clarion Valley School District, and Union School District each spend around \$20,000 per enrolled student. The Clarion County Career Center, North Clarion School District, and Karns City Area School District spend the least.

Among Clarion County's school districts, Real Estate Taxes are by far the most significant source of revenue. 511 Taxes and Delinquent Taxes vary considerably by school district.

TABLE 19 - SCHOOL DISTRICT TAX REVENUE

	SCHOOL DISTRICT TAX REVENUE: 2017-2018 SCHOOL YEAR						
	511 TAXES	DELIQUENT TAXES	PAYMENT IN LIEU OF TAXES	PER CAPITA TAXES	PUBLIC UTILITY REALTY TAXES	REAL ESTATE TAXES	TOTAL TAX REVENUE
Allegheny-Clarion Valley School District*	14.6%	9.2%	0.0%	0.4%	0.1%	75.7%	\$3,749,001
Clarion Area School District	11.5%	8.8%	0.1%	0.2%	0.1%	79.3%	\$7,915,654
Clarion-Limestone Area School District*	14.2%	5.4%	1.5%	0.3%	0.1%	78.5%	\$5,093,091
Karns City Area School District*	15.9%	6.6%	0.0%	0.3%	0.0%	77.2%	\$7,023,328
Keystone School District	19.5%	8.5%	0.1%	0.4%	0.1%	71.5%	\$4,488,727
North Clarion County School District	18.9%	5.5%	0.5%	0.4%	0.1%	74.6%	\$2,854,567
Redbank Valley School District	25.3%	3.6%	0.0%	0.9%	0.0%	70.3%	\$3,128,698
Union School District	21.6%	7.7%	0.2%	0.4%	0.1%	69.9%	\$2,054,557
Clarion County	16.5%	7.3%	0.4%	0.4%	0.1%	75.4%	\$29,284,295

SOURCE: OpenPAGov.org

*School District Boundaries Extend Beyond Clarion County



School performance by standardized testing area tends to vary considerably by school district. The below table shows standardized testing proficiency levels by grade and subject area. The scores for grades 3-8 are gathered from the PSSA test, while information for grade 11 is collected from the Keystone test. Proficiency level is typically placed into four categories: Advanced, Proficient, Basic, and Below Basic. For the purposes of this table, Advanced and Proficient are combined into Advanced/Proficient, while Basic and Below Basic are combined into Not Proficient.

TABLE 20 - SCHOOL PERFORMANCE

		•			Schoo	DL PERFOR	MANCE BY S	TANDAF	RDIZED T	ESTING A	AREA (20:	17-2018)					
	GRADE		HENY- VALLEY SD	CLAF ARE			LIMESTONE EA SD	KARN ARE	S CITY A SD	KEYSTO	ONE SD	NO CLARI	RTH ON SD	REDE VALLE		UNIC	N SD
		A/P	NP	A/P	NP	A/P	NP	A/P	NP	A/P	NP	A/P	NP	A/P	NP	A/P	NP
	3	54%	46%	76%	24%	85%	15%	57%	43%	79%	21%	72%	28%	46%	54%	53%	47%
	4	24%	76%	38%	62%	39%	61%	45%	55%	45%	55%	30%	70%	42%	58%	24%	76%
I	5	16%	84%	40%	60%	67%	33%	36%	64%	52%	48%	58%	42%	44%	56%	48%	52%
МАТН	6	16%	84%	42%	59%	61%	39%	47%	53%	41%	59%	49%	51%	35%	65%	44%	56%
2	7	21%	79%	21%	79%	46%	54%	51%	50%	34%	66%	44%	56%	26%	74%	23%	77%
	8	8%	92%	23%	77%	37%	63%	36%	64%	18%	82%	40%	60%	23%	77%	23%	77%
	11	76%	24%	67%	33%	83%	17%	85%	15%	60%	40%	87%	13%	48%	52%	68%	32%
	3	63%	37%	84%	16%	94%	6%	74%	26%	78%	22%	74%	26%	51%	49%	51%	49%
	4	48%	52%	60%	40%	73%	27%	72%	28%	66%	34%	63%	38%	62%	38%	45%	55%
SH	5	33%	67%	60%	40%	78%	22%	65%	35%	81%	19%	67%	33%	55%	45%	58%	42%
ENGLI	6	51%	49%	55%	45%	77%	23%	70%	30%	75%	25%	72%	28%	72%	28%	61%	39%
E	7	42%	58%	56%	44%	79%	21%	77%	23%	64%	36%	72%	28%	58%	42%	47%	53%
	8	54%	46%	70%	30%	83%	17%	67%	33%	58%	42%	70%	30%	62%	38%	53%	47%
	11	83%	17%	72%	28%	94%	6%	76%	24%	74%	26%	77%	23%	76%	24%	71%	29%

SOURCE: OpenPAGov.org

A/P = Advanced/Proficient; NP = Not Proficient

In addition to traditional public schools, Clarion County has a variety of K-12 private schools, including:

- 1. Immaculate Conception School (Catholic Affiliation) Grades K-6
- 2. Saint Joseph School (Catholic Affiliation) Grades K-6
- 3. Clarion Center School (Special Education) Grades 6-12
- 4. Keystone Smiles Alternative Education (Alternative Education) Grades 7-12
- 5. New Bethlehem Mennonite School (Mennonite Affiliation) Grades 1-9
- 6. New Bethlehem Wesleyan Methodist School (Methodist Affiliation) Grades K-12
- 7. Zacheral Amish School (Amish Affiliation) Grades 1-8
- 8. McCauley School (Amish Affiliation) Grades 1-8



VOCATIONAL AND TECHNICAL EDUCATION

Together, Clarion County's publicschool districts provide students a firm footing in primary and secondary education. These school districts are also "sending school districts" to the Clarion County Career Center (CCCC), a career and technical school promoting



Source: https://www.clarioncte.org/

technical education, academics, teamwork, and communication. CCCC provides the following program offerings⁹:

- 1. Allied Health
- 2. Automotive Technology
- 3. Computer Networking
- 4. Construction Technology
- 5. Cooperative Education

- 6. Cosmetology
- 7. Culinary Arts
- 8. Diesel Technology
- 9. Police Science
- 10. Welding and Fabrication

These offerings correspond with a wide range of employment/industry sectors found throughout Clarion County. Some of these programs, such as Allied Health, Construction Technology, Culinary Arts, and Diesel Technology, are geared toward student placement at some of Clarion County's largest employers. For example, the CCCC is currently partnered with Commodore Factory Crafted Homes for a skills-based internship program. In addition to providing educational opportunities for public school students, the CCCC also offers adult learners career and professional instructor lead training via Ed2Go, an online learning application. Classroom training is also available for adult learners in the following areas:

- 1. Medical Administrative Assistant
- 2. PA Inspection
- 3. Food Handler Safety
- 4. Welding
- 5. AWS D.1.1 Welding Certification
- 6. Emergency Medical Technician
- 7. Phlebotomy
- 8. Pharmacy Technician
- 9. CPR/AED First Aid
- 10. Commercial Driver's License (CDL)

HIGHER EDUCATION

Located in the Borough of Clarion, **Clarion University of Pennsylvania** (CUP) is a PA State System of Higher Education (PASSHE) institution offering range of undergraduate and graduate study programs. According to the National Center for Education Statistics' Integrated Postsecondary Education Data Systems (IPEDS)¹⁰, during the 2018-2019 school year, tuition was approximately \$11,125 for in-state undergraduate students, and \$16,214 for in-state graduate students. In Fall 2018, CUP had an enrollment of 4,864 students, with 3,937 (80.9%) enrolled in undergraduate programs, and 927 (19.1%) enrolled in

⁹ https://www.clarioncte.org/

¹⁰ https://nces.ed.gov/ipeds/use-the-data



graduate programs. First year retention rates for full-time students are high, with 74% of full-time undergraduate Bachelor's degree-earning students returning for a second year during the Fall 2018 semester.

In recent years, CUP has undertaken steps to improve its facilities and overall presence within the region. Beginning in 2014, CUP undertook construction of two new residence halls with capacity for 728 students¹¹. These new suitestyle mixed-use residence halls (Suites on Main Street North and Suites on Main Street South) provide students with modern living, retail, and dining space. In 2019, a \$42.7 million renovation

FIGURE 9 - CLARION UNIVERSITY OF PENNSYLVANIA CAMPUS

Source: clarion.edu

to the Tippin Gym and Natatorium was completed¹². The renovated facility provides a renovated pool, new two-story weight room, new locker rooms, and a new auxiliary gymnasium. CUP hopes to further implement capital improvement projects and programmatic changes through its True North initiative¹³. Focus areas of the initiative include:

- 1. STUDENT SUCCESS: Better defining, structuring, and coordinating student success
- 2. ACADEMIC PROGRAMMING: Support academic program development in promising new areas and adaptation/modification of existing academic programs to maintain and enhance CUP's mission as a regional comprehensive University
- **3. AFFORDABILITY:** Identify affordability as a university priority and examine student fee rates, scholarship models, and associated budget decisions
- **4. Student Engagement** and **CITIZENSHIP:** Develop mechanisms to increase engagement of students, enhance citizenship, and promote a culture where students' basic needs and higher-level needs are met
- **5. VENANGO CAMPUS:** Develop a Business Plan to encompass all relevant aspects of building/rebuilding the Venango Campus as a viable academic and economic venture for the University and the region

CUP is currently in the implementation stages of the True North initiative, and changes have been implemented to position CUP as an interactive learning institution that teaches skills relevant for success in the modern workforce. CUP is an asset for Clarion County, and it will be instrumental in developing a workforce that powers Clarion County's economy.

¹¹ https://www.clarion.edu/news/2014/may/Clarion-breaks-ground.html

¹³ https://www.clarion.edu/about-clarion/leadership/office-of-the-president/initiatives/true-north/index.html



SECTION 3.3 - ECONOMIC ENVIRONMENT

A critical key to uncovering the assets in Clarion County that can drive future economic development is an analysis of the current economic environment in the County, the regional economic environment, and Clarion County's role in the regional economy. This section of the Strategy is designed to uncover economic characteristics and trends that are indicators of the County's economic well-being and economic assets that can be leveraged to catalyze future economic development. The following pages provide an overview of key economic indicators:

- Industry Mix
- Economic Diversity
- Economic Inequality
- Industry Competitiveness
- Wages by Industry

- Top Employers
- Regional Production
- Unemployment
- Innovation
- Taxation

INDUSTRY MIX

A healthy economy is comprised of a diverse mix of industry sectors and is not disproportionately dependent upon a single (or very few) industries for its sustainability. As shown below, the top five sectors by employment in Clarion County include the following:

- 1. Health Care and Social Assistance (21.3%)
- 2. Educational Services (13.2%)
- 3. Retail Trade (12.3%)
- 4. Manufacturing (11.8%)
- 5. Accommodation and Food Services (9.9%)

TABLE 21 - INDUSTRY EMPLOYMENT IN CLARION COUNTY

INDU	INDUSTRY EMPLOYMENT BREAKDOWN (ALL WORKERS): CLARION COUNTY					
		2018	PERCENT OF			
NAICS	Industry	ANNUAL	TOTAL			
		AVERAGE	EMPLOYMENT			
11	Agriculture, Forestry, Fishing and Hunting	68	0.5%			
21	Mining, Quarrying, and Oil and Gas Extraction	131	1.0%			
22	Utilities	117	0.9%			
23	Construction	699	5.5%			
31	Manufacturing	1515	11.8%			
42	Wholesale Trade	348	2.7%			
44	Retail Trade	1574	12.3%			
48	Transportation and Warehousing	418	3.3%			
51	Information	90	0.7%			
52	Finance and Insurance	314	2.4%			
53	Real Estate and Rental and Leasing	69	0.5%			
54	Professional, Scientific, and Technical Services	436	3.4%			
55	Management of Companies and Enterprises	58	0.5%			
56	Administration & Support, Waste Management	239	1.9%			
	and Remediation					
61	Educational Services	1691	13.2%			
62	Health Care and Social Assistance	2728	21.3%			
71	Arts, Entertainment, and Recreation	37	0.3%			
72	Accommodation and Food Services	1274	9.9%			
81	Other Services (excluding Public Administration)	572	4.5%			
90	Public Administration	443	3.5%			
	TOTAL:	12,821				

SOURCE: U.S. Census Bureau Quarterly Workforce Indicators (QWI) 2018 Annual Average



The table below show Clarion County's mix of industries compared to its neighboring counties. Proportionally, Clarion County has large Health Care and Social Assistance (13.2%) and Accommodation and Food Services (9.9%) industries as compared to its neighbors. This is likely due to the presence of Clarion University of Pennsylvania and businesses (such as contracted food services, nearby restaurants, and lodging) that support its operations. Compared to its similarly sized neighbors, Clarion County has a slightly lower concentration of Manufacturing (11.8%). A lower concentration of employment is based solely on the total number of individuals employed in the industry, not the relative competitiveness of businesses within that industry.

TABLE 22 - INDUSTRY EMPLOYMENT BY COUNTY

	INDUSTRY EMPLOYMENT BREAKD	OWN (ALI	WORKERS): COUNT	Y COMPARIS	SON	
NAICS	INDUSTRY	CLARION COUNTY	VENANGO COUNTY	FOREST COUNTY*	JEFFERSON COUNTY	ARMSTRONG COUNTY	BUTLER COUNTY
11	Agriculture, Forestry, Fishing and Hunting	0.5%	0.2%	1.7%	0.6%	0.7%	0.2%
21	Mining, Quarrying, and Oil and Gas Extraction	1.0%	0.6%	0.0%	3.7%	5.2%	0.8%
22	Utilities	0.9%	0.7%	0.0%	0.3%	1.3%	0.4%
23	Construction	5.5%	2.6%	4.1%	4.3%	5.7%	5.3%
31	Manufacturing	11.8%	21.8%	14.5%	24.2%	10.3%	14.3%
42	Wholesale Trade	2.7%	2.3%	1.7%	2.3%	3.0%	5.8%
44	Retail Trade	12.3%	12.5%	5.2%	9.9%	13.1%	12.1%
48	Transportation and Warehousing	3.3%	4.8%	3.8%	3.3%	5.8%	3.7%
51	Information	0.7%	0.8%	0.4%	0.6%	0.6%	1.2%
52	Finance and Insurance	2.4%	1.8%	1.0%	1.5%	2.7%	2.4%
53	Real Estate and Rental and Leasing	0.5%	0.7%	0.0%	0.6%	1.1%	0.8%
54	Professional, Scientific, and Technical Services	3.4%	3.1%	0.0%	3.1%	2.1%	5.4%
55	Management of Companies and Enterprises	0.5%	0.5%	0.0%	0.5%	0.6%	5.0%
56	Administration & Support, Waste Management and Remediation	1.9%	3.8%	0.0%	5.4%	1.6%	5.0%
61	Educational Services	13.2%	6.1%	5.3%	6.0%	8.1%	6.1%
62	Health Care and Social Assistance	21.3%	22.6%	26.6%	21.0%	19.9%	15.6%
71	Arts, Entertainment, and Recreation	0.3%	0.3%	0.0%	0.5%	1.2%	1.1%
72	Accommodation and Food Services	9.9%	6.4%	1.0%	5.8%	7.7%	9.1%
81	Other Services (excluding Public Administration)	4.5%	3.9%	0.7%	2.9%	4.8%	3.6%
90	Public Administration	3.5%	4.4%	33.9%	3.4%	4.5%	2.0%

SOURCE: U.S. Census Bureau Quarterly Workforce Indicators 2018 Annual Average

ECONOMIC DIVERSITY

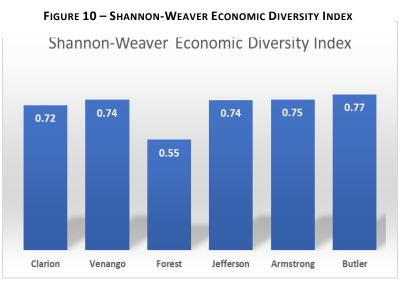
The Shannon-Weaver (S-W) Index is a method of measuring economic diversity in a region. The S-W Index examines the employment of a region and its distribution among a region's industries. It ranges from zero to one, with zero indicating minimum diversity and a value of one indicating maximum diversity. A value of zero (complete specialization) occurs when the economic activity of a region is concentrated in only

^{*}Zero indicates that data is withheld due to insufficient sample size



one industry. A value of one (perfect diversity) occurs when all industries are present in the region, with employment spread equally among them¹⁴.

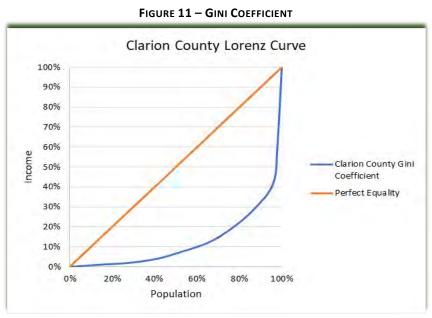
According to IMPLAN 2018 data, Clarion County's S-W Index stood at 0.72, or trending toward the side of economic diversity. Other than Forest County, which has a low S-W Index of 0.55 due to concentration of employment at SCI Forest, all other neighboring counties had an S-W Index score in the 0.70 to 0.80 range. To avoid concentrating too much employment in too few sectors, Clarion County should seek to maintain or incrementally increase its S-W Index.



Source: IMPLAN

ECONOMIC INEQUALITY

The Gini Coefficient (Gini Index) is a statistical measure of the distributing of wealth and income. The coefficient ranges from 0 (or 0%) to 1 (or 100%), with 0 representing perfect equality and 1 representing perfect inequality. A higher Gini Coefficient indicates that higher income earning individuals receive much



Sources: U.S. Census Bureau 2010 Decennial Census; Dr. Robert Pehrsson

larger percentages of the total income of the population.

Using 2010 U.S. Decennial Census data of households falling into specific income brackets, Clarion County's Gini Coefficient is **0.748**. As shown by the Lorenz Curve below (which visualizes the proportion distribution of income), Clarion County falls well short of perfect income equality and distribution. According to the St. Louis Federal Reserve, the U.S. and Canada have a Gini

¹⁴https://implanhelp.zendesk.com/hc/en-us/articles/115009505687-The-Shannon-Weaver-Index-of-Economic-Diversity-An-Overview-and-Descriptive-Analysis



Coefficient of 0.3707¹⁵. Therefore, income inequality in Clarion County is greater than in the United States and Canada as a whole. As Clarion County looks toward 2030, it must consider how to develop an economy that results in a distribution of income that benefits all potential earners. If not, Clarion County will continue to struggle with ensuring people of all income brackets have ample earning opportunities.

INDUSTRY COMPETITIVENESS (CLARION COUNTY LOCATION QUOTIENT)

The location quotient (LQ) is a measure used to quantify how concentrated an industry is in a region compared to a reference economy (typically the state or nation). The LQ mathematically quantifies which industries make an economy unique. A LQ below 1.0 indicates that industry employment is LESS concentrated in the area than in the reference economy. A LQ above 1.0 indicates that the industry is MORE concentrated in the area than in the reference economy. According to the Economic Base Theory, industries with employment share that exceeds reference economy's employment share (LQ of 1.0+) have excess production that serves export markets. Because export activity injects new money into the local economy, these

TABLE 23 - CLARION COUNTY LOCATION QUOTIENT

	CLARION COUNTY LOCATION QUOTIENT 2018: ALL SECTORS					
NAICS	INDUSTRY	2018 Annual Average	PERCENT OF TOTAL EMPLOYMENT	2018 LOCATION QUOTIENT		
11	Agriculture, Forestry, Fishing and Hunting	68	0.5%	1.3		
21	Mining, Quarrying, and Oil and Gas Extraction	131	1.0%	2.1		
22	Utilities	117	0.9%	1.5		
23	Construction	699	5.5%	1.2		
31	Manufacturing	1,515	11.8%	1.2		
42	Wholesale Trade	348	2.7%	0.7		
44	Retail Trade	1,574	12.3%	1.1		
48	Transportation and Warehousing	418	3.3%	0.7		
51	Information	90	0.7%	0.4		
52	Finance and Insurance	314	2.4%	0.5		
53	Real Estate and Rental and Leasing	69	0.5%	0.5		
54	Professional, Scientific, and Technical Services	436	3.4%	0.5		
55	Management of Companies and Enterprises	58	0.5%	0.2		
56	Administration & Support, Waste Management and Remediation	239	1.9%	0.3		
61	Educational Services	1,691	13.2%	1.6		
62	Health Care and Social Assistance	2,728	21.3%	1.2		
71	Arts, Entertainment, and Recreation	37	0.3%	0.2		
72	Accommodation and Food Services	1,274	9.9%	1.2		
81	Other Services (excluding Public Administration)	572	4.5%	1.3		
90	Public Administration	443	3.5%	1.1		
	TOTAL:	12,821				

basic industries are considered Source: U.S. Census Bureau Quarterly Workforce Indicators 2018 Annual Average

key drivers of economic growth. As shown in the table, when examining **all** Clarion County employment sectors (comprised of private sector businesses and public sector institutions), the sectors with the highest location quotients are:

Mining, Quarrying, and Oil and Gas Extraction: 2.1

Educational Services: 1.6

Utilities: 1.5

¹⁵ https://www.stlouisfed.org/on-the-economy/2017/october/how-us-income-inequality-compare-worldwide



Over time, industry employment figures in the county economy and reference economy may change. These shifts alter the location quotient. As shown in the table below, the employment sectors that experienced the largest positive shift between 2013 and 2018 were:

- Professional, Scientific, and Technical Services (+0.25)
- Manufacturing (+0.22)
- > Transportation and Warehousing (+0.11)

The employment sectors that experienced the largest negative shift were:

- Mining, Quarrying, and Oil and Gas Extraction (-4.09)
- Utilities (-0.36)
- Agriculture, Forestry, Fishing, and Hunting (-0.15)

Among most industry sectors, the change in LQ was negligible. The most profound change was in the Mining, Quarrying, and Oil and Gas Extraction industry, where changes in commodity prices have resulted in changes in employment figures. Meanwhile, the relative competitiveness of Clarion County's Professional, Scientific and Technical Services and Manufacturing sectors continue to grow.

Table 24 – Clarion County Location Quotient Change

	CHANGE IN CLARION COUNTY LOCATION QUOTIENT: 2013 to 2018					
		2013 LOCATION QUOTIENT	2018 LOCATION QUOTIENT	CHANGE		
11	Agriculture, Forestry, Fishing and Hunting	1.4	1.3	-0.15		
21	Mining, Quarrying, and Oil and Gas Extraction	6.2	2.1	-4.09		
22	Utilities	1.8	1.5	-0.36		
23	Construction	1.3	1.2	-0.05		
31	Manufacturing	1.0	1.2	0.22		
42	Wholes ale Trade	0.7	0.7	0.07		
44	Retail Trade	1.1	1.1	0.01		
48	Transportation and Warehousing	0.6	0.7	0.11		
51	Information	0.5	0.4	-0.04		
52	Finance and Insurance	0.5	0.5	0.04		
53	Real Estate and Rental and Leasing	0.5	0.5	-0.01		
54	Professional, Scientific, and Technical Services	0.3	0.5	0.25		
55	Management of Companies and Enterprises	0.2	0.2	0.00		
56	Administration & Support, Waste Management and Remediation	0.3	0.3	0.08		
61	Educational Services	1.7	1.6	-0.12		
62	Health Care and Social Assistance	1.2	1.2	-0.03		
71	Arts, Entertainment, and Recreation	0.1	0.2	0.03		
72	Accommodation and Food Services	1.3	1.2	-0.06		
81	Other Services (excluding Public Administration)	1.3	1.3	-0.03		
90	Public Administration	1.0	1.1	0.10		

SOURCE: U.S. Census Bureau Quarterly Workforce Indicators 2013 and 2018 Annual Averages; Delta Analysis



INDUSTRY COMPETITIVENESS (COMPARATIVE LOCATION QUOTIENT)

When comparing the location quotients of *private* sector businesses among Clarion County and its neighbors, some conclusions emerge. For instance, Clarion county has a comparatively higher LQ within the Accommodation and Food Services sector. Compared to four of its five neighboring counties, Clarion County has a comparatively lower LQ in the Transportation and Warehousing sector. For most sectors, LQ figures in Clarion County are generally consistent with its neighbors.

Table 25 - Comparative Private Sector Location Quotients

COMPARATIVE PRIVATE SECTOR LOCATION	N QUOTIE	NTS: 2018	ANNUAL	EMPLOYMI	ENT AVERAGE	S
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER
NAICS 11 Agriculture, Forestry, Fishing, and Hunting	0.70	0.27	*	0.77	0.78	0.27
NAICS 21 Mining, Quarrying, and Oil and Gas Extraction	2.35	1.20	*	7.46	10.72	1.67
NAICS 22 Utilities	2.67	2.01	*	*	1.83	0.76
NAICS 23 Construction	0.89	0.49	*	0.73	0.92	1.00
NAICS 31-33 Manufacturing	1.33	2.36	*	2.88	1.30	1.60
NAICS 42 Wholesale Trade	0.55	0.54	0.28	*	0.60	1.18
NAICS 44-45 Retail Trade	1.15	1.20	0.36	0.95	1.11	1.14
NAICS 48-49 Transportation and Warehousing	0.85	1.29	0.69	0.88	1.60	1.03
NAICS 51 Information	0.31	0.39	*	0.42	0.70	0.61
NAICS 52 Finance and Insurance	0.63	0.49	*	0.38	0.62	0.53
NAICS 53 Real Estate and Rental and Leasing	0.36	0.46	*	0.34	0.60	0.53
NAICS 54 Professional and Technical Services	0.25	0.22	*	*	0.31	0.73
NAICS 55 Management of Companies and Enterprises	0.24	0.26	*	*	0.35	2.91
NAICS 56 Administrative and Waste Services	0.34	0.58	0.03	0.57	0.23	0.75
NAICS 61 Educational Services	0.32	0.25	*	0.21	0.19	0.42
NAICS 62 Health Care and Social Assistance	1.59	1.31	1.47	1.52	1.48	1.11
NAICS 71 Arts, Entertainment, and Recreation	0.19	0.22	*	0.31	0.58	0.69
NAICS 72 Accommodation and Food Services	1.13	0.77	0.82	0.67	0.85	0.95
NAICS 81 Other Services, Except Public Administration	1.45	1.23	0.18	0.95	1.51	1.13

SOURCE: U.S. Bureau of Labor Statistics 2018 Annual Average

EMPLOYEE WAGES BY INDUSTRY

Among *private* sector industries, there is a vast difference in the average annual wage paid to employees. In Clarion County, the Utilities sector has, by far, the highest annual employee wage (\$86,857), followed by the Construction sector (\$52,574), and the Mining, Quarrying, and Oil and Gas Extraction sector (\$51,276). The lowest annual employee wages are found in the Accommodation and Food Services sector (\$12,914), the Arts, Entertainment, and Recreation sector (\$16,035), and the Agriculture, Forestry, Fishing, and Hunting sector (\$23,950). When compared to its neighboring counties, Clarion County has a slightly lower annual employee compensation for the Mining, Quarrying, and Oil and Gas sector, but comparatively higher compensation in the Other Services, Except Public Administration sector.

^{*}Data withheld because of U.S. Bureau of Labor Statistics reporting standards



TABLE 26 - ANNUAL EMPLOYEE WAGE AVERAGES

2018 ANNUAL E	MPLOYEE WA	GE AVERAGE	S: PRIVATE S	ECTOR		
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER
NAICS 11 Agriculture, Forestry, Fishing, and Hunting	\$23,950	\$36,454	*	\$51,169	\$32,111	\$26,469
NAICS 21 Mining, Quarrying, and Oil and Gas Extraction	\$51,276	\$58,119	*	\$81,440	\$76,786	\$111,604
NAICS 22 Utilities	\$86,857	\$83,048	*	*	\$96,512	\$95,022
NAICS 23 Construction	\$52,574	\$41,265	*	\$41,895	\$46,319	\$58,500
NAICS 31-33 Manufacturing	\$43,196	\$52,956	*	\$48,853	\$52,220	\$68,601
NAICS 42 Wholesale Trade	\$39,856	\$49,881	\$43,541	*	\$49,352	\$65,636
NAICS 44-45 Retail Trade	\$25,911	\$25,031	\$15,607	\$25,166	\$26,240	\$28,447
NAICS 48-49 Transportation and Warehousing	\$34,057	\$46,868	\$12,377	\$38,400	\$34,659	\$43,269
NAICS 51 Information	\$30,224	\$35,784	*	\$52 <i>,</i> 546	\$67,172	\$93,324
NAICS 52 Finance and Insurance	\$49,278	\$58,715	*	\$43,345	\$48,292	\$71,191
NAICS 53 Real Estate and Rental and Leasing	\$35,784	\$25,056	*	\$35,303	\$33,843	\$42,478
NAICS 54 Professional and Technical Services	\$41,033	\$41,415	*	*	\$46,009	\$69,161
NAICS 55 Management of Companies and Enterprises	\$35,213	\$53,860	*	*	\$147,505	\$103,145
NAICS 56 Administrative and Waste Services	\$35,706	\$19,982	\$28,670	\$37,595	\$26,586	\$38,734
NAICS 61 Educational Services	\$24,455	\$28,997	*	\$19,788	\$25,369	\$26,210
NAICS 62 Health Care and Social Assistance	\$33,440	\$40,612	\$37,007	\$31,971	\$38,629	\$47,280
NAICS 71 Arts, Entertainment, and Recreation	\$16,035	\$11,430	*	\$13,978	\$16,774	\$16,632
NAICS 72 Accommodation and Food Services	\$12,914	\$12,710	\$12,775	\$13,018	\$11,638	\$16,688
NAICS 81 Other Services, Except Public Administration	\$31,319	\$19,469	\$12,038	\$27,743	\$27,656	\$28,040

SOURCE: U.S. Bureau of Labor Statistics

INDUSTRY COMPETITIVENESS (IN-DEPTH INDUSTRY PROFILE)

North American Industry Classification System (NAICS) codes can be further refined to give more specific examples of Clarion County's strongest industries. According to the U.S. Bureau of Labor Statistics' 2018 annual employment averages of *private* sector industries, Clarion County's most competitive industry is the Wood Product Manufacturing industry (LQ 28.79). This industry subsector includes the manufacturing of wood products such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, manufactured homes, and prefabricated wood buildings¹⁶. The local competitive strength of this industry manifests itself through the numerous modular home manufacturers (*Commodore Homes, Colony Homes, New Era Homes, etc.*) and other wood product manufacturers (*Allegheny Wood Products, Kronospan, etc.*) found throughout Clarion County. Between 2015 and 2018, this industry sector became even more regionally competitive, with the LQ growing by 2.15.

Among the Top 20 regionally competitive employment sectors within Clarion County, the Utilities industry had the highest annual wages per employee (\$86,857). Businesses classified under this sector would include power generation, power transmission, power distribution, natural gas distribution, sewer and water treatment, and sewer and water treatment distribution¹⁷. With an average annual wage per

^{*}Data withheld by U.S. Bureau of Labor Statistics

https://www.naics.com/naics-code-description/?code=321

¹⁷https://www.google.com/search?q=naics+221&rlz=1C1CHBF_enUS819US819&oq=naics+221&aqs=chrome..69i57j0l6j69i60.1743j0j4&sourceid=chrome&ie=UTF-8



employee of \$68,114, the Heavy and Civil Engineering Construction also had a comparatively high rate of compensation.

TABLE 27 - TOP PRIVATE SECTOR LOCATION QUOTIENTS

TOP PRIVATE SECTOR LOCATION QU	OTIENTS: 2018 A	ANNUAL EMP	LOYMENT AVERAGI	ES
NAICS SUB-SECTOR	ANNUAL AVERAGE EMPLOYMENT	ANNUAL WAGES PER EMPLOYEE	ANNUAL AVERAGE EMPLOYMENT LOCATION QUOTIENT	LQ CHANGE: 2015 - 2018
NAICS 321 Wood Product Manufacturing	1,055	\$45,937	28.79	2.15
NAICS 211 Oil and Gas Extraction	57	53,753	4.43	-1.25
NAICS 212 Mining, Except Oil and Gas	64	49,398	3.72	-1.76
NAICS 485 Transit and Ground Passenger Transportation	152	15,354	3.5	0.61
NAICS 811 Repair and Maintenance	330	41,347	2.76	-0.32
NAICS 221 Utilities	133	86,857	2.67	0.27
NAICS 623 Nursing and Residential Care Facilities	797	28,557	2.64	0.18
NAICS 624 Social Assistance	910	24,131	2.61	-0.26
NAICS 447 Gasoline Stations	198	16,574	2.35	0.1
NAICS 237 Heavy and Civil Engineering Construction	217	68,114	2.33	0.5
NAICS 562 Waste Management and Remediation Services	73	49,306	1.87	1.09
NAICS 452 General Merchandise Stores	488	23,283	1.74	-0.06
NAICS 337 Furniture and Related Product Manufacturing	55	42,725	1.55	0.02
NAICS 441 Motor Vehicle and Parts Dealers	251	39,541	1.38	0.03
NAICS 484 Truck Transportation	163	46,806	1.21	-0.07
NAICS 722 Food Services and Drinking Places	1,230	12,450	1.15	0.03
NAICS 453 Miscellaneous Store Retailers	86	26,604	1.14	0.06
NAICS 813 Membership Associations and Organizations	139	18,762	1.11	0.11
NAICS 446 Health and Personal Care Stores	101	33,795	1.06	0.01
NAICS 721 Accommodation	183	16,033	1	0.19

SOURCE: U.S. Bureau of Labor Statistics 2018 Annual Average

TOP EMPLOYERS

As shown in the table, many of Clarion County's most competitive industry sectors correspond with its top employers by employee count. For instance, the Wood Product Manufacturing sector encompasses six of Clarion County's top 30 employers:

- ➤ Kronospan USA 225 Employees
- ➤ Colony Homes 190 Employees
- ➤ Commodore Homes 162 Employees

FIGURE 12 – COLONY HOMES MANUFACTURING YARD



Source: Delta Development Group, Inc.



- ➤ New Era/Champion Homes 70 Employees
- ➤ Allegheny Wood Products, Inc. 70 Employees
- Structural Modulars, Inc. 67 Employees

Nursing/Home Health Care/Social Assistance organizations also have a strong showing, with eleven of Clarion County's top 30 employers. These organizations include:

- ➤ Training Towards Self Reliance, Inc. – 300 Employees
- WRC Senior Services 200 Employees
- ➤ New Light, Inc. 200 Employees
- ➤ Clarview Rest Home, Inc. 125 Employees
- Clarion Psychiatric Center 110 Employees
- ➤ Point of Caring, Inc. 83 Employees
- United Community for Independence Programs – 80 Employees
- ➤ Shippenville Healthcare & Rehab Center 75 Employees
- Clarion-Forest Visiting Nurses
 Association 75 Employees
- Clarion Healthcare & Rehab Center – 75 Employees
- ➤ Health Services of Clarion, Inc. – 30 Employees

Other regionally competitive industries, such as General Merchandise Retail, Utilities, Food Services, and Heavy Construction also make a showing on the list of top employers.

TABLE 28 - TOP EMPLOYERS

CLARION COU	NTY'S 30 TOP EMPLOYERS	
EMPLOYER	SECTOR	# OF EMPLOYEES
Clarion University	Higher Education	700
Clarion Hospital	Healthcare -Medical Hospital	490
Wal-Mart Associates Inc	Retail	300
Training Towards Self Reliance Inc	Healthcare and Social Assistance	300
Riverview Intermediate Unit 6	Educational Services	248
Kronospan USA	Manufacturing -Wood Products	225
WRC Senior Services	Healthcare and Social Assistance	200
New Light Inc	Healthcare and Social Assistance	200
Colony Homes	Manufacturing -Housing	190
Commodore Homes	Manufacturing -Housing	162
Clarion Bathware	Manufacturing	160
Clarview Rest Home Inc	Healthcare and Social Assistance	125
Clarion Psychiatric Center	Healthcare -Psychiatric Hospital	110
Point of Caring Inc	Healthcare and Social Assistance	83
United Community for Independence Programs	Healthcare and Social Assistance	80
Car Mate Trailers Inc	Motor Vehicle Body and Trailer Manufacturing	80
Shippenville Healthcare & Rehab Center	Healthcare and Social Assistance	75
Clarion-Forest Visiting Nurses Assn	Home Healthcare Services	75
Clarion Healthcare & Rehab Center	Healthcare and Social Assistance	75
Swartfager Welding Inc	Manufacturing	73
New Era/Champion Homes	Manufacturing -Housing	70
Allegheny Wood Products Inc	Sawmills	70
Central Electric Cooperative Inc	Utilities	69
Structural Modulars Inc	Manufacturing -Housing	67
J.M. Smucker LLC	Manufacturing -Food	50
Ibake Foods LLC	Manufacturing -Food	50
Francis J Palo Inc	Heavy Construction	50
Charles Machine Inc	Manufacturing	50
Chartwells Dining & Catering	Special Food Services	35
Health Services of Clarion Inc	Healthcare -Offices of Physicians	30

SOURCE: ClarionCountyEDC.com

LEGEND
Nursing/Home Health Care/Social Assistance
Wood Product Manufacturing
General Merchandise Retail
Utilities
Food Services
Heavy Construction



REGIONAL PRODUCTION

According to the U.S. Bureau of Economic Analysis, Gross Domestic Product (GDP) is a measure of the total monetary market value of all goods and services produced within a specified area. The GDP essentially represents "value added", or its gross output (sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (consumption of goods and services purchased from other U.S. industries or imported)¹⁸. It can be used to compare the size and growth of county economies across the nation¹⁹.

Compared to its neighboring counties (other than Forest), Clarion County has a smaller, albeit growing, GDP. In 2018, Clarion County's GDP stood at approximately \$1.2 billion. This represented a 1.9% increase from the year prior. Although this GDP figure is smaller than most of its neighbors, the GDP growth rate of nearly 2.0% is consistent with most of its neighbors (Forest County experienced a decrease of 0.9%, and Armstrong County experienced a smaller increase of 0.6%). In 2018, Clarion County's GDP ranked 60th among Pennsylvania's 67 counties, and its growth rate ranked 42nd out of 67.

TABLE 29 - GROSS DOMESTIC PRODUCT

	LOCAL AREA GROSS DOMESTIC PRODUCT											
		PERCENT CHANGE FROM PRECEDING PERIOD										
	1	<u>Thousands</u> of Chai	ned (2012) Dollar	S	2018 Rank	Po	ercent Chan	ge	2018 Rank			
	2015	2016	2017	2018	in State	2016	2017	2018	in State			
Clarion	\$1,222,337	\$1,189,419	\$1,180,605	\$1,203,238	60	-2.7%	-0.7%	1.9%	42			
Venango	\$1,759,210	\$1,715,875	\$1,708,831	\$1,744,639	48	-2.5%	-0.4%	2.1%	37			
Forest	\$287,912	\$283,843	\$276,930	\$274,369	66	-1.4%	-2.4%	-0.9%	60			
Jefferson	\$1,563,729	\$1,512,253	\$1,538,225	\$1,569,079	52	-3.3%	1.7%	2.0%	41			
Armstrong	\$2,276,494	\$2,228,905	\$2,330,667	\$2,344,977	41	-2.1%	4.6%	0.6%	52			
Butler	\$9,624,865	\$9,723,458	\$9,854,888	\$10,060,376	18	1.0%	1.4%	2.1%	38			
Pennsylvania	\$681,234,571	\$689,844,386	\$693,675,632	\$711,822,173		1.3%	0.6%	2.6%				

SOURCE: U.S. Bureau of Economic Analysis

UNEMPLOYMENT

When compared to its neighbors, Clarion County has a fairly comparable unemployment rate. In 2019, Clarion County's average unemployment rate stood at 4.9%. This was generally comparable with Venango, Jefferson, and Armstrong Counties, but was higher than Butler County's unemployment rate (3.9%), and lower than Forest County's (6.8%). Between 2015 and 2019, Clarion County's unemployment rate decreased by 1.1%. This decrease was fairly close among all counties, with Armstrong County experiencing the largest decrease (-1.5%). In light of recent unemployment increases resulting from the COVID-19 Pandemic, the Clarion County EDC will continue to track and monitor fluctations and movement in the unemployment rate.

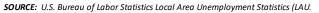
¹⁸ https://apps.bea.gov/regional/definitions/

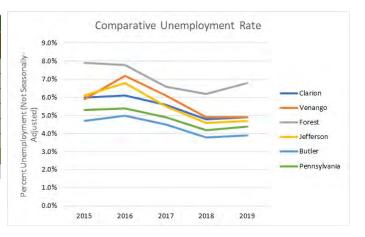
¹⁹ https://www.bea.gov/data/gdp/gdp-county-metro-and-other-areas



TABLE 30 - COMPARATIVE UNEMPLOYMENT RATE

	COMPARATIVE UNEMPLOYMENT RATE											
	2015	CHANGE (2015-2019)										
Clarion	6.0%	6.1%	5.6%	4.8%	4.9%	-1.1%						
Venango	5.9%	7.2%	6.1%	4.9%	4.9%	-1.0%						
Forest	7.9%	7.8%	6.6%	6.2%	6.8%	-1.1%						
Jefferson	6.1%	6.8%	5.5%	4.6%	4.7%	-1.4%						
Armstrong	6.6%	7.5%	6.1%	5.0%	5.1%	-1.5%						
Butler	4.7%	5.0%	4.5%	3.8%	3.9%	-0.8%						
Pennsylvania	5.3%	5.4%	4.9%	4.2%	4.4%	-0.9%						







TAXATION

In general, taxation among Clarion County's municipalities tends to be higher in the Boroughs due to the increased amount of services offered. The below table gives 2019 taxation rates for each of Clarion County's 34 municipalities.

TABLE 31 - TAX COMPARISON

	CLA	ARION COUN	ITY MUNICIP	AL TAX COMI	PARISON (2	019)			
MALIAUCIDALITY	Cou	INTY		MUNICIPAL		SCHOOL DISTRICT			
MUNICIPALITY	REAL ESTATE	PER CAPITA	REAL ESTATE	OCCUPATION PER CAPITA		REAL ESTATE	OCCUPATION	PER CAPITA	
Ashland Township	0.022	\$ 5.00	0.0052169	-	\$ 5.00	0.0515870	30%	\$ 10.00	
Beaver Township	0.022	\$ 5.00	0.0007500	-	\$ 5.00	0.0515870	30%	\$ 10.00	
Brady Township	0.022	\$ 5.00	0.0030250	0.005	-	0.0468800	-	\$ 10.00	
Callensburg Borough	0.022	\$ 5.00	0.0048000	-	-	0.0515870	30%	\$ 10.00	
Clarion Borough	0.022	\$ 5.00	0.0220000	-	-	0.0657300	25%	\$ 10.00	
Clarion Township	0.022	\$ 5.00	0.0003496	-	\$ 5.00	0.0605500	-	\$ 10.00	
East Brady Township	0.022	\$ 5.00	0.0240000	-	\$ 10.00	0.0468800	-	\$ 10.00	
Elk Township	0.022	\$ 5.00	0.0006700	-	\$ 2.50	0.0515870	30%	\$ 10.00	
Foxburg Borough	0.022	\$ 5.00	0.0048329	-	\$ 5.00	0.0581600	-	\$ 10.00	
Farmington Township	0.022	\$ 5.00	0.0052500	-	-	0.0442282	18%	\$ 10.00	
Hawthorn Borough	0.022	\$ 5.00	0.0080100	-	\$ 5.00	0.0337497	\$ 10.00	\$ 10.00	
Highland Township	0.022	\$ 5.00	0.0033300	-	\$ 5.00	0.0657300	25%	\$ 10.00	
Knox Borough	0.022	\$ 5.00	0.0100000	0.0085	\$ 5.00	0.0515870	30%	\$ 10.00	
Knox Township	0.022	\$ 5.00	0.0068000	-	\$ 5.00	0.0442282	18%	\$ 10.00	
Licking Township	0.022	\$ 5.00	0.0012000	-	\$ 5.00	0.0515870	30%	\$ 10.00	
Limestone Township	0.022	\$ 5.00	0.0029190	-	\$ 5.00	0.0605500	0%	\$ 10.00	
Madison Township	0.022	\$ 5.00	0.0064100	-	\$ 5.00	0.0505080	30%	\$ 10.00	
Millcreek Township	0.022	\$ 5.00	0.0078350	-	-	0.0605500	-	\$ 10.00	
Monroe Township	0.022	\$ 5.00	0.0026600	-	\$ 5.00	0.0657300	25%	\$ 10.00	
New Bethlehem Borough	0.022	\$ 5.00	0.0211150	-	\$ 5.00	0.0337497	\$ 10.00	\$ 10.00	
Paint Township	0.022	\$ 5.00	0.0048000	-	-	0.0657300	25%	\$ 10.00	
Perry Township	0.022	\$ 5.00	0.0028263	-	-	0.0581600	-	\$ 10.00	
Piney Township	0.022	\$ 5.00	0.0022500	-	\$ 5.00	0.0505080	30%	\$ 10.00	
Porter Township	0.022	\$ 5.00	0.0020900	-	\$ 5.00	0.0337497	\$ 10.00	\$ 10.00	
Redbank Township	0.022	\$ 5.00	0.0030000	-	\$ 5.00	0.0337497	\$ 10.00	\$ 10.00	
Richland Township	0.022	\$ 5.00	0.0043340	-	-	0.0581600	-	\$ 10.00	
Rimersburg Borough	0.022	\$ 5.00	0.0132000	-	\$ 5.00	0.0505080	30%	\$ 10.00	
Salem Township	0.022	\$ 5.00	0.0016640	-	\$ 5.00	0.0515870	30%	\$ 10.00	
Shippenville Borough	0.022	\$ 5.00	0.0063260	-	\$ 5.00	0.0515870	30%	\$ 10.00	
Sligo Borough	0.022	\$ 5.00	0.0147500	0.022	\$ 5.00	0.0505080	30%	\$ 10.00	
St. Petersburg Borough	0.022	\$ 5.00	0.0084900	-	-	0.0581600	-	\$ 10.00	
Strattanville Borough	0.022	\$ 5.00	0.0097500	-	\$ 5.00	0.0605500	-	\$ 10.00	
Toby Township	0.022	\$ 5.00	0.0030000	-	\$ 5.00	0.0505080	30%	\$ 10.00	
Washington Township	0.022	\$ 5.00	0.0059130	-	\$ 5.00	0.0442282	18%	\$ 10.00	

SOURCE: Clarion County Tax Assessor's Office



Property taxes within Clarion County are determined by the actual market value of a property in 1975. Occupation taxes are either a flat-rate or evaluated based upon an employed person's income. To put into perspective the tax burden upon residents by various municipalities, below is a sample tax bill based upon Clarion County's 2018 median household income, median home value, and median household size.

TABLE 32 - SAMPLE TOTAL TAX BILL

SAMPLE TOTAL TAX BILL (201	9)	
MUNICIPALITY	то	TAL TAX BILL
Median Home Value 2018	\$	114,300.00
Median Home Value 1975 (Inflation Adjusted)	\$	23,084.11
Median Salary	\$	45,625.00
Average Household Size		2
Ashland Township	\$	1,995.99
Beaver Township	\$	1,892.88
Brady Township	\$	1,917.99
Callensburg Borough	\$	1,976.37
Clarion Borough	\$	2,677.08
Clarion Township	\$	1,953.66
East Brady Township	\$	2,194.05
Elk Township	\$	1,886.03
Foxburg Borough	\$	2,001.99
Farmington Township	\$	1,762.14
Hawthorn Borough	\$	1,521.84
Highland Township	\$	2,256.10
Knox Borough	\$	2,494.22
Knox Township	\$	1,807.92
Licking Township	\$	1,903.27
Limestone Township	\$	2,012.98
Madison Township	\$	1,998.63
Millcreek Township	\$	2,116.46
Monroe Township	\$	2,240.64
New Bethlehem Borough	\$	1,824.35
Paint Township	\$	2,280.04
Perry Township	\$	1,945.66
Piney Township	\$	1,902.60
Porter Township	\$	1,385.18
Redbank Township	\$	1,406.18
Richland Township	\$	1,980.47
Rimersburg Borough	\$	2,155.37
Salem Township	\$	1,913.98
Shippenville Borough	\$	2,021.60
Sligo Borough	\$	3,194.90
St. Petersburg Borough	\$	2,076.41
Strattanville Borough	\$	2,170.66
Toby Township	\$	1,783.03
Washington Township	\$	1,787.44
COLUBERS Classics County Town Assessed Office I	- /4 -	

SOURCES: Clarion County Tax Assessor's Office; Delta Dev. Group Calculations



SECTION 3.4 - ECONOMIC OUTLOOK

SHIFT-SHARE ANALYSIS

Shift-share analysis is a method of analyzing differences between the growth or decline in a county's economy compared to a state's economy. Shift-share analysis is conducted by comparison the county economy to the state economy (as opposed to the national economy), so the LQ may be slightly different than U.S. Bureau of Labor Statistics national comparisons.

Shift-share analysis is comprised of three parts:

- 1. THE STATE GROWTH EFFECT (SGE): Representation of how many jobs in the county would have been created (or lost) had the local economy changed at the rate of the overall state economy.
- 2. THE INDUSTRY MIX EFFECT (IME): Representation of the number of jobs that would have been created (or lost) had the local economy changed at the rate of the overall state economy and had the individual industry employment change mirrored that in the state.
- 3. THE LOCAL SHARE EFFECT (LSE): Comparison of the total expected change due to state trends and industry trends to the actual change in employment, which indicates the change that can be contributed to local factors. This indicates a local competitive advantage.

Of these components, the LSE provides the most local insight on industry competitiveness. A positive LSE indicates that local industry growth outpaced industry growth statewide — a sign of competitive advantage. A negative LSE indicates that local conditions do not support continued job growth because the local industry growth has not kept pace with the statewide industry growth.

As shown in the table below, Clarion County experienced a net gain of 190 jobs between 2013 and 2018. The largest total gains in employment were experienced by the following industries:

➤ Manufacturing: +248 jobs

Professional, Scientific, and Technical Services: +209 jobs

Health Care and Social Assistance: +124 jobs.

The industries that experienced the highest loss in employment are:

Mining, Quarrying, and Oil and Gas Extraction: -364 jobs

Educational Services: -189 jobs

> Retail Trade: -80 jobs

A review of LSE analysis determines how much of this growth or loss in employment can be accounted for by specific strengths or weaknesses in Clarion County's economy. For instance, the three industry sectors with the highest LSE are:

➤ Manufacturing: +237 jobs

Professional, Scientific, and Technical Services: +189 jobs

Transportation and Warehousing: +52 jobs



These LSE figures show that Clarion County's economy has unique attributes that spurred the creation of additional jobs. The SGE shows that Clarion County would have gained only 67.4 jobs had the Manufacturing industry grown at the same rate as the state economy as whole (5.32%). The SGE would have lost 56.3 Manufacturing jobs had it grown (or declined) at the same rate as the Manufacturing industry across the Commonwealth (-4.45%). Instead, the industry grew 18.7% due to the robust nature of Clarion County's Manufacturing environment. The LSE shows the greatest areas for potential growth in Clarion County's economy and seeking business types that fall into these industry sectors will help achieve the goal of additional economic and employment growth.

TABLE 33 - SHIFT-SHARE ANALYSIS

	Cı	LARION C	OUNTY SI	HIFT-SHAI	RE A NALY	SIS: 2013	- 2018			
	CL	CLARION COUNTY			CLARION COUNTY 2013-2018			COUNTY 2	TOTAL SHIFT =	
INDUSTRIES/ECONOMIC SECTORS BY NAICS CODE	2013	2018	CHANGE (2015 - 2018)	STATE GROWTH EFFECT	INDUSTRY MIX EFFECT	LOCAL SHARE EFFECT	LOCAL SHARE EFFECT	LOCAL SHARE EFFECT	LOCAL SHARE EFFECT	STATE SHARE + INDUSTRY MIX + LOCAL EFFECT
Agriculture, Forestry, Fishing and Hunting	74	68	-6	5.32%	1.49%	-14.90%	3.9	1.1	-11	-6
Mining, Quarrying, and Oil and Gas Extraction	495	131	-364	5.32%	-24.60%	-54.20%	26.3	-121.8	-268.5	-364
Utilities	142	117	-25	5.32%	0.88%	-23.80%	7.5	1.3	-33.8	-25
Construction	670	699	29	5.32%	7.43%	-8.40%	35.6	49.8	-56.4	29
Manufacturing	1,267	1,515	248	5.32%	-4.45%	18.70%	67.4	-56.3	237	248
Wholesale Trade	344	348	4	5.32%	-9.81%	5.70%	18.3	-33.7	19.4	4
Retail Trade	1,654	1,574	-80	5.32%	-7.37%	-2.80%	87.9	-121.9	-46	-80
Transportation and Warehousing	302	418	116	5.32%	15.87%	17.20%	16.1	47.9	52	116
Information	103	90	-13	5.32%	-6.24%	-11.70%	5.5	-6.4	-12.1	-13
Finance and Insurance	310	314	4	5.32%	-8.92%	4.90%	16.5	-27.7	15.2	4
Real Estate and Rental and Leasing	67	69	2	5.32%	4.63%	-7.00%	3.6	3.1	-4.7	2
Professional, Scientific, and Technical Services	227	436	209	5.32%	3.34%	83.40%	12.1	7.6	189.3	209
Management of Companies and Enterprises	59	58	-1	5.32%	-4.71%	-2.30%	3.1	-2.8	-1.4	-1
Administration & Support, Waste Management and Remediation	175	239	64	5.32%	4.07%	27.20%	9.3	7.1	47.6	64
Educational Services	1,880	1,691	-189	5.32%	-4.85%	-10.50%	99.9	-91.2	-197.7	-189
Health Care and Social Assistance	2,604	2,728	124	5.32%	6.38%	-6.90%	138.4	166.2	-180.6	124
Arts, Entertainment, and Recreation	30	37	7	5.32%	3.05%	15.00%	1.6	0.9	4.5	7
Accommodation and Food Services	1,276	1,274	-2	5.32%	3.09%	-8.60%	67.8	39.4	-109.3	-2
Other Services (excluding Public Administration)	566	572	6	5.32%	1.75%	-6.00%	30.1	9.9	-34	6
Public Administration	386	443	57	5.32%	2.53%	6.90%	20.5	9.8	26.7	57
TOTAL:	12,631	12,631 12,821 190					190			

SOURCE: U.S. Census Bureau Quarterly Workforce Indicators (QWI) 2013 and 2018 Annual Averages



SECTION 3.5 - REAL ESTATE

A county's residential real estate market is indicative of the county's economy. As median household incomes rise, the price and condition of a county's housing stock tends to rise accordingly. A county's housing stock is also an important factor in corporate relocation and recruiting. Corporate recruiters often hire local real estate agencies to assist potential employees in finding homes. If the housing stock is not up to par with the client's needs, it becomes more difficult to attract them as employees. Below is an overview of Clarion County's residential housing market.

OCCUPANCY AND VACANCY

Housing occupancy and vacancy rates are used to determine the relative health of a county's housing market. In most instances, higher vacancy rates equate to less desirable housing stock and lower demand. According to the U.S. Census Bureau, "vacancy" is defined as: "A housing unit is vacant if no one is living in it at the time of the interview, unless its occupants are only temporarily absent. In addition, a vacant unit may be one which is entirely occupied by persons who have a usual residence elsewhere" 20. By this definition, vacation homes, cabins, cottages, and hunting camps will be classified as vacant if they are not the primary residence of the owner. One stark example of this definition is Forest County, which has a vacancy rate of 80.6%. Forest County is home to many cottages and hunting camps. Although Clarion County's vacancy rate seems high, 22.6%, some of this can be accounted for by the number of cottages and hunting camps comprising the County's housing stock.

When examining the vacancy breakdown by owner-occupied and rental units, Clarion County has an owner-occupied vacancy rate of 2.1% and a rental vacancy rate of 12.3%. Compared to its neighbors, this seems relatively high. However, the number of student rental units in Clarion Borough may inflate this number compared to counties without a significant student population. It is generally recognized that a typical rental vacancy rate of 7.0% - 8.0% is healthy. For owner-occupied units, a 2.0% vacancy rate is considered healthy²¹.

TABLE 34 - HOUSING OCCUPANCY AND VACANCY

HOUSING OCCUPANCY AND VACANCY (2018)										
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER	PENNSYLVANIA			
Occupied Housing Units	77.4%	79.4%	19.4%	81.4%	85.5%	92.5%	88.6%			
Vacant Housing Units	22.6%	20.6%	80.6%	18.6%	14.5%	7.5%	11.4%			
Homeowner Vacancy Rate	2.1%	2.1%	2.2%	2.4%	2.4%	1.4%	1.6%			
Rental Vacancy Rate	12.3%	5.7%	26.2%	7.8%	4.9%	4.9%	5.8%			
TOTAL HOUSING UNITS:	20,447	27,592	8,421	22,673	32,736	82,455	5,673,599			

SOURCE: ACS 2014-2018 Five-Year Average

²⁰ https://www.census.gov/housing/hvs/definitions.pdf

²¹ https://www.citylab.com/equity/2018/07/vacancy-americas-other-housing-crisis/565901/



Like its neighboring counties, with the exception of Butler County, Clarion County tends to have an older housing stock. A plurality of its housing units, 25.7%, were built in 1939 or earlier, followed by homes built between 1970 and 1979 (17.0%), and 1990 to 1999 (11.6%). This age breakdown was fairly consistent between Clarion, Venango, Jefferson, and Armstrong Counties. Still, the data indicates that Clarion County has fairly few homes constructed after 2010 (2.6%). Buyers that prefer newer homes will have fewer options.

TABLE 35 - AGE OF HOUSING STOCK

	YEAR RESIDENTIAL STRUCTURES WERE BUILT (2018)										
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER	PENNSYLVANIA				
Built 2014 or Later	0.9%	0.7%	0.6%	0.9%	0.4%	2.2%	0.8%				
Built 2010 to 2013	1.7%	1.0%	0.9%	1.0%	1.1%	2.7%	1.6%				
Built 2000 to 2009	8.7%	7.8%	8.0%	7.7%	8.3%	13.8%	8.4%				
Built 1990 to 1999	11.6%	6.6%	7.9%	8.1%	7.4%	17.4%	9.6%				
Built 1980 to 1989	9.5%	8.3%	9.9%	9.4%	8.3%	11.2%	9.6%				
Built 1970 to 1979	17.0%	13.3%	31.6%	15.4%	13.5%	14.2%	12.4%				
Built 1960 to 1969	9.8%	9.6%	15.3%	7.5%	8.4%	8.5%	10.2%				
Built 1950 to 1959	9.4%	11.7%	12.2%	9.2%	13.7%	10.0%	13.7%				
Built 1940 to 1949	5.7%	6.2%	3.8%	7.6%	8.4%	5.0%	7.5%				
Built 1939 or Earlier	25.7%	34.8%	9.8%	33.2%	30.4%	15.0%	26.3%				
TOTAL HOUSING UNITS:	20,447	27,592	8,421	22,673	32,736	82,455	5,673,599				

SOURCE: ACS 2014-2018 Five-Year Average

Although it tends to have an older housing stock, that has not suppressed the value of Clarion County's housing stock. With a median owner-occupied home value of \$114,300, Clarion County's median home value is higher than that of all neighboring counties except Butler. A plurality of Clarion County's owner-occupied housing units is valued between \$50,000 - \$99,999 (29.2%), followed by \$100,000 - \$149,999 (20.8%), and \$150,000 - \$199,999 (16.1%). This is one housing market indicator that is fairly strong for Clarion County.

TABLE 36 - VALUE OF HOUSING STOCK

	OWNER-OCCUPIED HOUSING RESIDENTIAL VALUE (2018)										
	CLARION	VENANGO	FOREST	JEFFERSON	ARMSTRONG	BUTLER	PENNSYLVANIA				
OWNER-OCCUPIED HOUSING UNITS	10,914	16,557	1,401	13,937	21,344	57,655	3,467,467				
Less than \$50,000	13.2%	23.6%	20.0%	15.4%	15.7%	7.4%	7.8%				
\$50,000 - \$99,999	29.2%	35.0%	35.4%	34.7%	32.7%	9.6%	15.6%				
\$100,000 - \$149,999	20.8%	19.0%	17.9%	19.2%	17.3%	15.2%	16.7%				
\$150,000 - \$199,999	16.1%	10.9%	10.3%	13.8%	15.0%	18.6%	17.5%				
\$200,000 - \$299,999	12.3%	7.8%	9.4%	10.2%	11.4%	23.1%	20.9%				
\$300,000 - \$499,999	6.5%	2.6%	5.1%	5.0%	6.1%	19.8%	15.2%				
\$500,000 - \$999,999	1.5%	0.8%	1.1%	1.2%	1.3%	5.4%	5.3%				
\$1,000,000 or More	0.4%	0.3%	0.7%	0.4%	0.5%	1.0%	1.0%				
MEDIAN VALUE:	\$114,300	\$85,700	\$89,500	\$99,800	\$103,600	\$197,600	\$174,100				

SOURCE: ACS 2014-2018 Five-Year Average



SECTION 4.0: ASSET INVENTORY

With a mix of urban, suburban, and rural assets, Clarion County contains a diverse range of assets that appeal to all lifestyles. The following pages inventory the following asset types:

- Transportation Network
- Natural Resources
- Healthcare
- Major Business and Industry

Section 4.1 - Transportation Network

Clarion County's transportation network puts it within a one-day drive of nearly half of the population of the United States. With six convenient exits, Interstate 80 runs east-west across the County. Interstate 80 is the primary transportation route for Clarion County's manufacturers and other businesses. U.S. Route 322, which runs from Cleveland, OH to Atlantic City, NJ, runs in a southeast-northwest direction. Interstate 80 and U.S. Route 322 intersect at Exit 70 (US 322: Strattanville). PA Route 66 and PA Route 68 function as Clarion County's main north-south routes, with PA Route 66 converging with Interstate 80 at Exits 60 (PA 66 North: Shippenville) and 64 (PA 66 South: Clarion/New Bethlehem), and PA Route 68 converging with Interstate 80 at Exit 62 (PA 68: Clarion).

INTERSTATE 80 EXITS:

➤ EXIT 45: PA Route 478 – St. Petersburg/Emlenton

EXIT 53: To PA Route 338 – Knox

EXIT 60: PA Route 66 North – Shippenville

EXIT 62: PA Route 68 – Clarion

Exit 64: PA Route 66 South – New

Bethlehem/Clarion

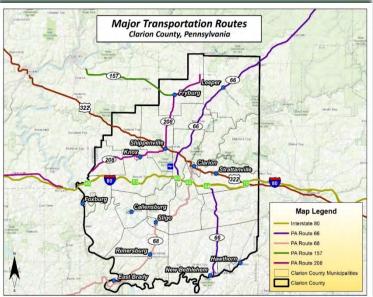
EXIT 70: U.S. Route 322 – Strattanville

FIGURE 14 - INTERSTATE 80 EXIT 62: CLARION



Source: Delta Development Group, Inc.

FIGURE 13 – CLARION COUNTY MAJOR TRANSPORTATION ROUTES



Source: Delta Development Group, Inc.



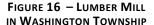
Although Clarion County no longer has active rail service, it does provide prospective residents and businesses an alternative form of transportation through air service. Located off the PA Route 66 Corridor, the Clarion County Airport is a General Aviation, Business Class airport serving Clarion County as its current site since 1974. The Clarion County Airport features a 5,003' asphalt runway that can serve most general aviation aircraft, including corporate jets, in a variety of weather conditions. The Airport also consists of a parallel runway, a terminal, three hangars, a maintenance building, and a generator building.

Clarion County has limited public transportation options. Clarion County currently contracts with Ride-Right to provide paratransit services to seniors, disabled residents, and veterans²². Access to this service is dependent upon eligibility. Area Transit Authority (ATA) provides two fixed-out bus service routes in and around Clarion Borough and Monroe Township²³. Although this service is available to users of all ages, the routes are designed for Clarion University Students (who are able to use the services free of charge with valid University ID). This service provides much needed mobility to key retail, medical, and residential facilities for residents without vehicles.

FIGURE 15 – CLARION COUNTY AIRPORT

Source: Delta Development Group, Inc.

SECTION 4.2 - NATURAL RESOURCES





Source: Delta Development Group, Inc.

Since its founding in the 19th Century, people have recognized Clarion County for its natural and scenic beauty. From majestic rivers to mature forests, Clarion County has built its economy around its natural resources. Northern Pennsylvania is known worldwide for its high-quality hardwoods. These hardwoods have a multitude of end-uses, including finished lumber for manufacturing of furniture, flooring, pallets, modular home framing, and many other uses. Clarion County's logging companies are responsible stewards of the environment, with trees being replanted to replace those that have been harvested.

Clarion County is also home to underground natural resources, particularly natural gas. In the Marcellus shale natural gas boom of the 2010s, Clarion County experienced a drastic increase in employment in the mining industry as new natural gas and oil wells were drilled. Lower gas prices have caused the gas drilling activity to taper, but natural gas extraction still plays a crucial role in Clarion County's economy. Between 2015 and 2020, Clarion County saw permits issued for 48 gas wells, 2 oil wells, and 1 combined oil/gas

²² http://www.co.clarion.pa.us/Dept/Transportation/Pages/default.aspx

²³ http://rideata.net/all-routes/fixed-routes/clarion



well. Low natural gas prices and COVID-19-related shutdowns have taken their toll on drilling activity in Clarion County, with only 1 gas drilling permit issued in Clarion County in 2020.

When compared to its neighboring counties, Clarion County has seen relatively few new wells drilled between 2015 and 2020. In the five-year span, 7 conventional and 15 unconventional wells were drilled. Only Jefferson County

TABLE 37 – WELLS PERMITTED

DRILLING PERMITS ISSUED IN CLARION COUNTY										
PERMITS ISSUED FROM 2015 2016 2017 2018 2019 2020 TOTAL										
Combined Oil & Gas	1	0	0	0	0	0	1			
Gas	12	5	10	7	13	1	48			
Oil	0	0	2	0	0	0	2			
TOTAL:	13	5	12	7	13	1	51			

SOURCE: Pennsylvania Department of Environmental Protection Oil and Gas Reports

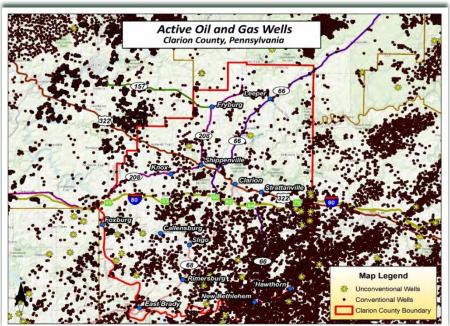
experienced less drilling activity. Even though there has not been abundance of wells drilled in Clarion County, natural gas and extraction companies based in Clarion County have operations throughout Western Pennsylvania.

TABLE 38 - WELLS DRILLED

OIL AND GAS WELLS DRILLED BY COUNTY										
WELLS DRILLED BETWEEN 1/1/2015 to 5/11/2020 CLARION VENANGO FOREST JEFFERSON ARMSTRONG BUTLER PENNSYLVANI.										
Conventional	7	104	73	0	1	3	810			
Unconventional	15	0	0	2	76	259	3,703			
GRAND TOTAL:	22	104	73	2	77	262	4,513			

SOURCE: Pennsylvania Department of Environmental Protection Oil and Gas Reports

FIGURE 17 - ACTIVE OIL AND GAS WELLS



Source: PA Department of Environmental Protection (DEP)



SECTION 4.3 - HEALTHCARE

Clarion County is served by a multitude of healthcare providers that offer both inpatient and outpatient care. As Clarion County's population ages, healthcare will become an increasingly important need. Healthcare networks have been undertaking physical expansions in Clarion County that help to increase healthcare service offerings, which empowers Clarion County residents to select a healthcare provider that meets their needs.

CLARION HOSPITAL/BUTLER HEALTH SYSTEM

Located in Monroe Township, the Clarion Hospital is a 67-bed facility that offers inpatient, outpatient, and emergency services. Inpatient units include an ICU, Medical Surgical, Inpatient Rehabilitation Center, and the Women's Health and Birthing Center. Outpatient services include same day surgery, diagnostic imaging (radiology), clinical laboratory services, medical and radiation oncology (The Cancer Center at Clarion Hospital), pain management, and an array of therapeutic

- Canon Horma

FIGURE 18 - CLARION HOSPITAL

Source: Delta Development Group, Inc.

support services. Because Clarion Hospital offers Clarion County's only 24-hour emergency services, it is a vital resource in the event of accident or emergency. In November 2019, regulatory authorities approved the merger of the Clarion Healthcare System (CHS) and Butler Health System (BHS)²⁴. This strategic merger will create investments in new programs, services, and technology to better serve Clarion County residents. A recent step toward this goal was Butler Health System's purchase of the former Barnes Center at Clarion University. Located at Trinity Point in Monroe Township, the building will be expanded to house space for Lifestyle Medicine, Women's Care, and Cardiovascular Care. The facility will also include space for telemedicine services.²⁵

 $^{^{24}\} https://www.clarionhospital.org/regulatory-authorities-approve-merger-of-clarion-healthcare-system-inc-and-butler-health-system/$

²⁵https://www.thecourierexpress.com/the leader vindicator/news/local/bhs-clarion-begins-construction/article 9bb77c7c-8dea-5476-a03c-182657c907b4.html



THE PRIMARY HEALTH NETWORK

Opened in July 2014 at Trinity Point at Monroe, Clarion Community Health Center provides a variety of family medicine services. The Primary Health Network is a Federally Qualified Health Center (FQHC), also

FIGURE 19 - CLARION COMMUNITY HEALTH CENTER



Source: Delta Development Group, Inc.

known as a Community Health Center (CHC). CHCs provide preventative care to low-income individuals, the uninsured, and the underinsured. Without a CHC, these populations may not otherwise have access to adequate preventative care²⁶. With a central location along Interstate 80 in Clarion County, the Clarion County Health Center provides critical preventative care to Clarion County's vulnerable populations.

UPMC

UPMC Northwest, based in nearby Seneca (Venango

County), offers a variety of services at their affiliate office in Monroe Township. Services include urgent care, general surgery, colorectal surgery, orthopedic surgery, pain management, physical medicine and rehabilitation, and urology²⁷. UPMC Northwest also operates Magee-Women's Specialty Services at its office in Clarion Township.

PENN HIGHLANDS HEALTHCARE

Although Penn Highlands Healthcare, based in DuBois, currently has limited operations in Clarion County, it has considerable expansion plans. Penn Highlands' existing services include Penn Highlands Ophthalmology in Monroe Township and the Penn Highlands Lung Center in Clarion Township. Penn Highlands is currently constructing the

FIGURE 20 - PENN HIGHLANDS HEALTHCARE CLARION OUTPATIENT FACILITY



Source: Penn Highlands Healthcare System

Clarion Outpatient Facility, a 16,000 SF along PA Route 68 in Monroe Township. The facility is anticipated to house a QCare walk-in clinic, imaging and lab services, and telemedicine suites²⁸.

²⁶ https://primary-health.net/FQHC.aspx

²⁷ https://www.upmc.com/locations/hospitals/northwest/services/specialty-locations

²⁸ http://www.exploreclarion.com/2019/11/08/1another-outpatient-hospital-within-two-years-as-penn-highlands-eyes-clarion/



GEISINGER

Based in Danville, PA, Geisinger Health System operates Pediatric Specialty Services Clarion, a branch of the Janet Weis Children's Hospital. Services include These specialty services include Pediatric Cardiology, heart surgery, diagnostic testing, and heart rhythm disorders. These specialty services are available on a limited basis a few days a month²⁹.

BUTLER VA HEALTH CARE SYSTEM

The U.S. Veteran's Administration (VA) operations the Clarion County VA Outpatient Clinic. The facility strives to provide a similar level of service as its main facility in Butler, albeit closer to home for many veterans.

FIGURE 21 – CLARION COUNTY HEALTHCARE FACILITIES



Source: Delta Development Group, Inc.

Services include registration, primary care, physical exams, lab work, telemedicine, women's services, social work services, palliative care, and outpatient behavioral services³⁰.

Section 4.4 - Major Business and Industry

As noted in **Section 3.3**, Clarion County has some easily identifiable concentrations of business and industry. Most notably, Clarion County's Wood Products Manufacturing sector is fueled by the area's superior hardwoods. Not only are these hardwoods processed in Clarion County, but they are transformed

into products such as furniture, flooring, manufactured homes, etc. Spurred inpart by the local availability of hardwoods, Clarion County is home to four modular home manufacturers (Colony Homes, Commodore Homes, New Era Homes, and Structural Modulars, Inc.), with PennWest Homes maintaining a production facility in nearby Emlenton. Clarion Bathware, a manufacturer of fiberglass and acrylic bathware products



Source: notifix.info

with two facilities in Clarion County, serves as a supplier to these modular home manufacturers. With a large plant in Paint Township, Kronospan, a manufacturer of wood and laminate flooring products, also supplies modular home manufacturers. This intricate connectivity of the Wood Product Manufacturing industry and supporting industries shows a healthy synergetic relationship between Clarion County businesses.

²⁹ https://locations.geisinger.org/details.cfm?id=99

³⁰ https://www.butler.va.gov/locations/Clarion_County_VA_Outpatient_Clinic.asp



Manufacturers of other products also have notable operations in Clarion County. Care Mate Trailers, Inc. of Leeper manufactures cargo and utility trailers that are sold at dealerships across the Northeastern and Midwestern United States and Canada. Swartfager Welding, Inc. of Knox is the site of carbon steel welding and other metal fabrication. J.M. Smucker, Inc. roasts and grinds peanuts for peanut butter production at its New Bethlehem facility. These are but a few of the numerous manufacturing facilities that call Clarion

FIGURE 23 - J.M. SMUCKER NEW BETHLEHEM PLANT



Source: Google Maps

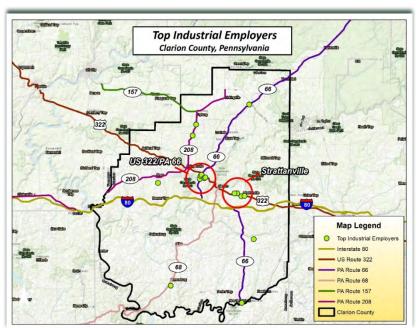
County home. Unsurprisingly, a majority of Clarion County's larger manufacturers are located along major roadways. The U.S. Route 322/PA Route 66 junction in Paint Township, in particular, is the largest concentration of industrial activity in Clarion County. A smaller concentration of industrial activity exists in Strattanville, which also front U.S. Route 322. Both Paint Township and Strattanville have quick access to Interstate 80.

Beyond manufacturing, Clarion County has a

FIGURE 24 - TOP INDUSTRIAL EMPLOYERS

multitude of healthcare and social assistance employers scattered throughout the county. The largest healthcare employer in the county, Clarion Hospital, provides employment to nearly 490 people.

Other healthcare and social assistance employers, such as Training Toward Self Reliance, Inc., WRC Senior Services, New Light, Inc., Clarview Rest Home, Inc., and Clarion Psychiatric Center, provide care for Clarion County's youth, elderly, and vulnerable populations. Clarion University of Pennsylvania, which directly employs a staff of nearly 700 people, is the economic engine



Source: Delta Development Group, Inc.

driving the Borough of Clarion. Spending from students and parent visitors also indirectly benefits other dining, hospitality, and retail establishments in the Clarion area.



FIGURE 25 - MAIN STREET CLARION



Source: co.clarion.pa.us

SECTION 4.5 – CONNECTIVITY

In December 2017, the Northwest Commission adopted a Community Technology Action Plan³¹ that examined connectivity in eight Northwestern Pennsylvania counties. The results showed significant deficiencies in broadband connectivity for Clarion County residents. Approximately 17.3% of Clarion County residents have internet access only through dial-up internet, satellite internet, or mobile data. These sources of internet do not have adequate bandwidth and are unreliable compared to modern technologies. Clarion County had the highest reported cost of broadband service, and 33.3% of residents cite cost as a barrier to adoption. For the 93.8% of Clarion County residents that use the internet, 31.7% of which telework, these statistics pose an issue. As shown by the maps below, the greatest broadband service gaps exist in northeastern and southwestern Clarion County. Businesses in portions of Clarion County without adequate broadband connectivity are at a significant disadvantage. As the COVID-19 Crisis has demonstrated, businesses must be accessible digitally to weather times of uncertainty.

³¹ http://connectmycommunity.org/northwest-pennsylvania/



25 Mbps
Download
and
3 Mbps
Upload

**CONNECTED*

— Interstate
— US Road
— Local Road
— Local Road
— City Limits
— Water

FIGURE 26 - FIXED BROADBAND AVAILABILITY

Source: Connected Nation, Northwest Pennsylvania Community Technology Action Plan

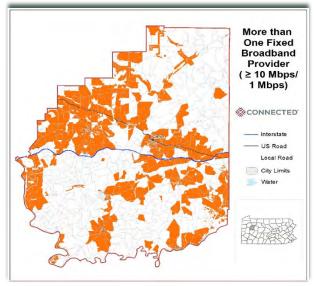


FIGURE 27 – MORE THAN ONE FIXED BROADBAND PROVIDER

Source: Connected Nation, Northwest Pennsylvania Community Technology Action Plan



SECTION 5.0: ECONOMIC DEVELOPMENT SITES AND INCENTIVES

Business attraction and retention is a vital component of any county's economic development strategy. To facilitate location, relocation, or expansion options for prospective companies, it is important to consider key selection criteria such as proximity to major markets, availability of infrastructure and amenities, and financial incentives to entice new businesses to locate in Clarion County and retain those already present. Business and industrial parks can contribute significant competitive advantages in this process by offering shovel ready sites strategically located near amenities and access to major transportation routes. Clarion County is home to a number of business/industrial parks ranging in size, available space, location, and amenities to accommodate a variety of business interests and needs. One

potential deficiency is the lack of a centralized database and inventory of available business sites. Although the Clarion County EDC's website contains a site selection tool that displays available properties, many of Clarion County's available commercial land and properties are listed with local brokers, many of which do not utilize recognized nationally commercial databases. This makes it more difficult for relocating or expanding businesses to find a site that fits their needs. Moving forward, local economic development and business assistance agencies should work with local real estate agents and developers to utilize larger listing databases. If a commercial property has more exposure, both the landowner and broker/agent will benefit from faster, higher-priced transactions.

SECTION 5.1 – EXISTING BUSINESS SITES

Whether a business is small or large, Clarion County has development-ready sites to fit an employer's needs. Some of these sites have the added benefit of state and federal tax incentive status, which help a prospective business offset the cost of relocation or expansion. Below is an inventory of Clarion County's master planned business sites.

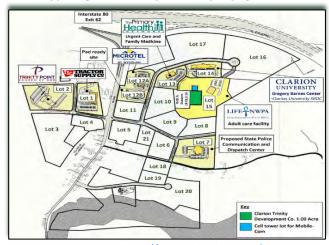
TRINITY POINT AT MONROE (MONROE TOWNSHIP).

LOCATION: Junction of Interstate 80 and PA Route 68; Exit 62

DESCRIPTION: Opened in 2006, Trinity Point at Monroe is a mixed-use business park with access to both PA Route 68 and Interstate 80. Perched atop a hill overlooking Interstate 80, Trinity Point at Monroe has excellent visibility from Interstate 80. Trinity Point at Monroe anchors the southern side of Exit 62, which serves as Clarion County's primary retail, dining, medical, and hospitality hub.

<u>TENANTS</u>: Existing tenants include the Butler Health System, Primary Health Network, Tractor Supply Company, Trinity Point Church of God, Life-NWPA, and Microtel Inn & Suites by Wyndham.

FIGURE 28 - TRINITY POINT AT MONROE SITE PLAN



Source: https://www.clarionbiz.com/



AVAILABLE ACREAGE: Available lots range from 1.5 to 12 acres and can be subdivided or combined as desired.

EXISTING INFRASTRUCTURE: Trinity Point at Monroe has existing utilities, signalization, and storm water infrastructure. The site has 100/100Gbps internet service with multiple providers. Natural gas service (4" main) is provided by National Fuel, and water service (12" main) is provided by Pennsylvania American Water Company.

<u>TAX INCENTIVES</u>: Trinity Point at Monroe is a designated Keystone Enterprise Zone through 2024.

WEBSITE: https://www.clarionbiz.com/

GLASSWORKS BUSINESS PARK (CLARION BOROUGH)

LOCATION: Grand Avenue – Clarion, PA 16214

<u>DESCRIPTION</u>: Currently under development, the Glassworks Business Park is a brownfield redevelopment of the former Owens-Illinois glass manufacturing plant.

<u>TENANTS</u>: All sites are currently available for purchase or lease.

<u>AVAILABLE ACREAGE</u>: Of the site's 28.5 acres of land, 24 acres are available for building. The average lot size is 3.4 acres.

EXISTING INFRASTRUCTURE: Full utilities will be installed

at every building pad. Stormwater management has been pre-designed, and a permitted E&S Plan has been developed for each building pad.

TAX INCENTIVES: Tax Increment Financing (TIF)

WEBSITE: http://milesbrothersllc.com/portfolio/

CLARION COUNTY COMMERCE CENTER (BEAVER TOWNSHIP)

LOCATION: PA Route 338/Kribbs Lane – Knox, PA 16232

DESCRIPTION: The Clarion County Commerce Center, a development of the Clarion County Industrial Development Authority (IDA), is a 67.0-acre industrial greenfield site located in Beaver Township. The site is approximately 1.5 miles north of Interstate 80 Exit 53.

TENANTS: The site currently has no existing tenants.

<u>AVAILABLE ACREAGE</u>: The site is 67.0 acres and can be subdivided as desired.

reystone Enterprise Zone through 2024.



FIGURE 29 - ENTRANCE SIGN AT GLASSWORKS BUSINESS PARK

Source: Delta Development Group, Inc.

FIGURE 30 – ENTRANCE TO THE CLARION COUNTY

COMMERCE CENTER



Source: Google Maps



EXISTING INFRASTRUCTURE: Existing infrastructure on-site includes electric, natural gas, water laterals, and sewer laterals. Stormwater management is designed for 50% coverage of the lot.

TAX INCENTIVES: None Available

WEBSITE:

https://www.burfordandhenry.com/default.asp?content=expanded&search_content=results&this_form_at=3&mls_number=147292&page=1&query_id=0&sortby=2&sort_dir=desc_

OTHER SITES

In addition to the actively marketed sites listed above, Clarion County has available commercial land in established industrial corridors.

- ➤ <u>U.S. Route 322/PA Route 66 Corridor (Paint Township)</u>: This corridor, located in Paint Township near Shippenville/Marianne, has multiple established industrial and retail tenants, including Clarion Bathware, Commodore Homes, Colony Homes, Kronospan USA, etc. The concentration of industrial and commercial activity at this junction makes it ideal for upstream or downstream suppliers of existing businesses. This area is approximately 3.2 miles north of Interstate 80 Exit 60 (Shippenville).
- "STRATTANVILLE" INDUSTRIAL PARK (STRATTANVILLE BOROUGH):
 Although not master planned as one industrial development, Strattanville is the site of both New Era Modulars and Structural Modulars, Inc, manufacturers of modular housing. This industrial center, located along U.S. Route 322, is approximately 3.3 miles away from Interstate 80 Exit 64 (Clarion/New Bethlehem), and 4.1 miles away from Interstate 80 Exit 70 (Strattanville). This area is also part of Clarion County's two federal Opportunity Zones.
- NEW BETHLEHEM/HAWTHORN
 INDUSTRIAL SITES (NEW BETHLEHEM
 BOROUGH, HAWTHORN BOROUGH,
 AND REDBANK TOWNSHIP):

A mix of small and large industrial sites are located along PA Route 28 in New Bethlehem Borough, Hawthorn Borough, and Redbank Township. Some notable industrial employers, such as J.M. Smucker Company and Max Distribution, provide employment opportunities to residents of southern Clarion County. These sites are the furthest from Interstate 80, approximately 10-12 miles, with highway access coming primarily from PA Route 66 and PA Route 28.

Existing Industrial Parks/Corridors
Clarion County, Pennsylvania

Gentlin

FIGURE 31 - EXISTING INDUSTRIAL PARKS/CORRIDORS

Source: Delta Development Group, Inc.



SECTION 5.2 – ENTREPRENEURSHIP

With the presence of Clarion of University of Pennsylvania, opportunities abound for entrepreneurs in Clarion County. Clarion County has the following entrepreneurship programs and organizations that seek to spur innovative economic growth.

CLARION UNIVERSITY ENTREPRENEURIAL LEADERSHIP CENTER

Clarion University's Entrepreneurial Leadership Center supports innovation, entrepreneurial activity, entrepreneurial approaches to problem solving, and provides a value-added contribution to the economic development of Northwestern Pennsylvania. Dedicated staff members provide students with the resources necessary to move an idea to enterprise development, such as business plan development and student incubator opportunities³².

CLARION UNIVERSITY SMALL BUSINESS DEVELOPMENT CENTER (SBDC)

The Clarion University Small Business Development Center (SBDC) provides entrepreneurs with the education, information, and tools necessary to begin their businesses and sustain profitable operations. Clarion University SBDC consultants work with entrepreneurs in confidential, one-to-one engagements to help them with a range of business issues including testing a new business proposition, shaping a business plan, investigating funding opportunities, and much more³³.

CLARION AREA YOUNG PROFESSIONALS (CAYP)

A subsidiary of the Clarion Area Chamber of Business & Industry, Clarion Area Young Professionals provides a networking opportunity for young professionals and entrepreneurs. CAYP holds seminars, events, and other opportunities for young professionals to share ideas and become involved in the community³⁴.

SECTION 5.3 - ECONOMIC DEVELOPMENT/BUSINESS ASSISTANCE AGENCIES

Whether a business is small or large, Clarion County has numerous economic development and business assistance agencies ready and willing to assist. These agencies are essential in ensuring that businesses have the financial and human capital needed to expand operations or relocate to Clarion County. Below is an inventory of such agencies:

CLARION COUNTY ECONOMIC DEVELOPMENT CORPORATION (EDC)

The Clarion County Economic Corporation (EDC) provides existing and relocating businesses assistance in site selection, corporate incentives, small business support, and workforce training and recruiting. As part of the Clarion County 2030 initiative, the EDC will lead efforts relating to the development of the *Clarion*

³² https://www.clarion.edu/about-clarion/offices-and-administration/centers-and-outreach/elc/

³³ https://clarion.edu/sbdc/contact-us/staff-information/index.aspx

³⁴ https://www.clarionpa.com/about-cayp/



County 2030 Economic Development Strategy and the Clarion County Economic Recovery Strategy. The EDC is supported by Clarion County government and supporting member institutions.

CONTACT: JARRED HEUER — EXECUTIVE DIRECTOR

840 Wood Street | 103 Carrier Administrative Building | Clarion, PA 16214 | (814) 226-9045

<u>Jarred@ClarionCountyEDC.com</u> https://www.clarioncountyedc.com/

CLARION UNIVERSITY SMALL BUSINESS DEVELOPMENT CENTER (SBDC)

Clarion University's Small Business Development Center (SBDC) provides entrepreneurs and small business owners with the education, information, and tools necessary to build successful businesses throughout a 10-county region. The SBDC's consultants, who work closely with clients in a specified geographic area, provide clients with multiple services, including testing new business propositions, shaping businesses plans, investigating funding opportunities. The SBDC will frequently hold traveling seminars and skills workshops to effectively assist entrepreneurs and small business owners throughout the 10-county region.

CONTACT: CINDY NELLIS - DIRECTOR

840 Wood Street | 122 Carrier Hall | Clarion, PA 16214 | (814) 393-2060

sbdc@clarion.edu

https://clarion.edu/sbdc/index.html

NORTHWEST PENNSYLVANIA REGIONAL PLANNING AND DEVELOPMENT COMMISSION (NORTHWEST COMMISSION)

With an emphasis on community development, business development, and corporate retention and expansion, the Northwest Commission is a Local Development District (LDD) serving an eight-county region. The Northwest Commission offers a wide range of services, including municipal grant and loan assistance, government contracting, international marketing, business financing, business attraction, and transportation planning. In addition to being a designated LDD, the Northwest Commission is Northwestern Pennsylvania's Rural Planning Organization (RPO), which helps to develop and maintain the region's Long Range Transportation Plan (LRTP) and Transportation Improvement Program (TIP).

CONTACT: JILL FOYS — EXECUTIVE DIRECTOR

395 Seneca Street | Oil City, PA 16301 | (814) 677-4800

jillf@northwestpa.org

http://www.northwestpa.org/

CLARION AREA CHAMBER OF BUSINESS & INDUSTRY

The Clarion Area Chamber of Business & Industry provides promotional assistance to new and existing business throughout Clarion and Venango Counties. This promotional assistance comes in the form of flyers, web advertisements, and programmatic events, such as Clarion's Autumn Leaf Festival. The Clarion



Area Chamber of Business & Industry also provides key business and quality of life information to prospective residents and businesses.

CONTACT: TRACY BECKER - EXECUTIVE DIRECTOR

650 Main Street | Clarion, PA 16214 | (814) 226-9161

tracy@clarionpa.com

https://www.clarionpa.com/

REDBANK VALLEY CHAMBER OF COMMERCE

Serving businesses in southern Clarion County, the Redbank Valley Chamber of Commerce seeks to be the leading force for economic vitality in the New Bethlehem Area and surrounding communities. Its mission to represent the interests of its members and the New Bethlehem Area business community by facilitating strategic partnerships for the benefit of the community, educating the community on the benefits of economic development, advocating for local and regional competitive economic vitality, and promoting civic leadership and community engagement. The Redbank Valley Chamber of Commerce's signature event, the New Bethlehem Peanut Butter Festival, celebrates New Bethlehem's rich history of peanut butter manufacturing.

CONTACT: RYAN WELLS - BOARD PRESIDENT

309 Broad Street | Suite 2 | New Bethlehem, PA 16242 | (814) 275-3929

info@redbankchamber.com
https://redbankchamber.com/

CLARION COUNTY INDUSTRIAL DEVELOPMENT AUTHORITY (IDA)

The Clarion County Industrial Development Authority (IDA) is comprised of a group of volunteers that seek to enable to growth and expansion of industrial and commercial businesses in Clarion County. The IDA led the development of the Clarion County Commerce Center in Beaver Township, which is currently for sale. The IDA also supported the development of a feasibility study for a PA Route 28 access road to the J.M. Smucker Company peanut butter factory in New Bethlehem. Currently, the IDA is working with Kronospan USA in Paint Township to increase access to their site. Positions at the IDA are currently appointed by other IDA Board members. The IDA maintains no formal website.

CONTACT: ERIC FUNK - BOARD VICE PRESIDENT

840 Wood Street | 103 Carrier Administration Building | Clarion, PA 16214

efunk@farmersnb.com

SECTION 5.4 - BUSINESS INCENTIVE ZONES

Business incentive zones, both at the state and federal levels, provide tax breaks and other incentives for businesses that choose to location within a zone's boundaries. For many businesses, this becomes an attractive incentive to locate within a designated site. Clarion County is the site of a Keystone Opportunity Zone (KOZ) and Qualified Opportunity Zones (QOZs).



KEYSTONE OPPORTUNITY ZONE (KOZ)

The KOZ program, created by the Pennsylvania Department of Community and Economic Development (DCED), eliminates specific state and local taxes within specific business sites in underutilized areas. According to DCED, depending on the situation, the state and local tax burden at designated sites may be reduced to zero through exemptions, deductions, abatements, and credits for the following³⁵:

- State Taxes: Corporate Net Income Taxes, Capital Stock Foreign Purchase Tax, Personal Income Tax, Sales Use Tax, Bank Shares and Trust Company Shares Tax, Alternative Bank and Trust Company Share Tax, Mutual Thrift Institutions Tax, and Insurance Premium Tax
- Local Taxes: Earned Income/Net Profits Tax, Business Gross Receipts, Business Occupancy, Business Privilege and Mercantile Taxes, Local Real Property Tax, and Sales and Use Tax

Although DCED provides the framework for the program, at the local level, this program is administered by the Northwest Commission. The Northwest Commission is the



Source: Delta Development Group, Inc.

point of contact for all information related to KOZ benefits and designation. Trinity Point at Monroe is the only KOZ-designated area of Clarion County. These KOZ benefits are set to expire at this location by 2024.

QUALIFIED OPPORTUNITY ZONE (QQZ)

Established through the Tax Cuts and Jobs Act (TCJA) of 2017, Qualified Opportunity Zones are a tool for supporting long-term investment in low-income communities. QOZ areas are census tracts with poverty rates of at least 20% or median family incomes of no more than 80% of statewide or metropolitan area family income³⁶. By investing in these zones through special funds, investors and developers can defer or eliminate federal taxes on capital gains. For many investors, this becomes an attractive long-term investment prospect. Clarion County has two census tracts that are designated QOZ's. These QOZ's cover the areas of Clarion Borough, Strattanville Borough, Clarion Township, and Millcreek Township.

³⁵ https://dced.pa.gov/business-assistance/keystone-opportunity-zones/

³⁶ https://dced.pa.gov/programs-funding/federal-funding-opportunities/qualified-opportunity-zones/



Federal Opportunity Zones
Clarion County, Pennsylvania

Grand State

Grand State

Fighland Typ

1601.02

State

No Contact

No Contact

State

FIGURE 33 - CLARION COUNTY FEDERAL OPPORTUNITY ZONES

Source: Delta Development Group, Inc.



Section 6.0: Recreation and Tourism

Since its founding in 1839, Pennsylvanians have long-recognized Clarion County for its scenic beauty. Today, as part of the *Clarion County 2030 Economic Development Strategy*, Clarion County seeks to develop ways to promote and enhance existing recreational opportunities. Through a combination of public and private funding sources, there is also potential to grow the number of recreational opportunities and tourism assets.

Section 6.1 - Existing Recreation and Tourism Assets

LOCAL PARKS/RECREATION

BEAVER CREEK NATURE AREA (BEAVER TOWNSHIP): Located west of Knox borough, the Beaver Creek Nature Area offers nearly 850 acres of lakes, wetlands, and meadows. Given its rural nature, the Beaver Creek Nature Area is ideal for photography, bird watching, hiking, fishing, and picnicking.

BRYNERS MILL ROAD COMMUNITY PARK (SHIPPENVILLE BOROUGH): This municipal park, located in Shippenville Borough, offers a softball field, pavilion, playground, and basketball court.

CLARION COUNTY PARK (PAINT TOWNSHIP): Located in Paint Township, the Clarion County Park offers a wide range of active and passive recreation options. Active recreation facilities include three ball fields, two soccer fields, one tennis court, one basketball court, one horseshoe pit, and one archery range. The Clarion County Park also has ample picnic accommodations, including seven small pavilions, one medium pavilion, one large pavilion, and a community recreation center. Picnic tables and charcoal grills are available on site. A playground and children's garden are available for use by Clarion County's younger residents. An arena and barn are also available for those interested in providing activities for animals and livestock.

FIGURE 34 - CLARION COUNTY PARK CHILDREN'S GARDEN



Source: www.exploreclarion.com

CLARION COUNTY MEMORIAL VETERANS PARK (CLARION BOROUGH): Located across from the historic Clarion County Courthouse, Clarion County Memorial Veterans Park hosts many events throughout year. This legacy park, which has been present in Clarion since the town was originally plotted, offers benches, a pavilion, picnic tables, shade from mature trees, and magnificent views of the Clarion County Courthouse and the 124-year-old Civil War Monument.

FARMINGTON TOWNSHIP PARK (FARMINGTON TOWNSHIP): Farmington Township Park, located northwest of Leeper, provides a variety of recreational opportunities to Farmington Township residents. Facilities include a playground, softball field, loop trail, and ample space for other community events.



HELEN FURNACE PARK (HIGHLAND TOWNSHIP): The centerpiece of the Helen Furnace Park is a 32-foot high cold-blast charcoal stone furnace and iron works that was constructed in 1845. The surrounding park offers pastoral open land suitable for a variety of activities.

FIGURE 35 - HELEN FURNACE



Source: http://r2parks.net/Helen.html

KNOX COMMUNITY PARK (KNOX BOROUGH): The Knox Community Park, located in the Borough of Knox, offers three softball fields, a basketball court, a playground, a covered pavilion, and ample parking for community events.

MUNICIPAL POOL (CLARION BOROUGH): Located adjacent to the Clarion Area High School, the Clarion Borough Municipal Pool offers an open-air swimming pool at a convenient downtown location. The pool is managed by the Clarion County YMCA.

PAUL A. WEAVER COMMUNITY PARK (CLARION BOROUGH): Owned by the Borough of Clarion, the Paul A. Weaver Community Park is comprised of approximately 15.0 acres and offers several ball

fields, a picnic pavilion, and a playground. The Paul A. Weaver Community Park is used extensively by local sports teams, including the Clarion Little League and the Clarion Area School District Varsity and JV baseball and softball teams.

REDBANK VALLEY MUNICIPAL PARK (REDBANK TOWNSHIP): The Redbank Valley Municipal Park, located in Redbank Township east of the Borough of New Bethlehem, offers facilities and events for all ages. The Park features a playground, tennis court, multipurpose court, and 2,000 seat grandstand. For events, the park has several pavilions with water and electric service. The Park also has tent and RV camping areas with electric and water/sewage hookups.

UNION COG POOL PARK (SLIGO BOROUGH): Located in the Borough of Sligo, the Union COG Pool Park offers swimming and recreational facilities for residents of southern Clarion County. The Park features a swimming pool, concession stand, five pavilions and picnic areas, a volleyball court, and a playground.

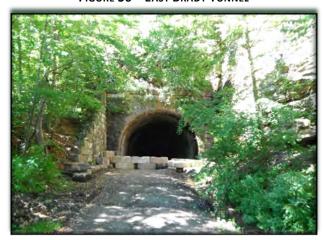


TRAILS

ARMSTRONG TRAIL: With a trailhead located near the Allegheny River in East Brady, the Armstrong Trail offers 30 miles of crushed gravel trail along the former Allegheny Valley Railroad line. The trail extends from East Brady in Clarion County to Rosston in Armstrong County. Efforts are currently underway to rehabilitate the Brady Tunnel, a 2,468-foot-long tunnel built completed in 1916. Once rehabilitated, the Brady Tunnel will be the centerpiece of the Armstrong Trail.

BAKER **T**RAIL: The Baker Trail is a 140-mile mile hiking trail traversing six counties, including

FIGURE 36 - EAST BRADY TUNNEL



Source: https://www.traillink.com/trail-photo/armstrong-trail 88855/

Clarion, Jefferson, and Forest. The Baker Trail passes many of the region's greatest recreational assets, including Cook Forest State Park and the Allegheny National Forest. For adventurers seeking the most rugged, wild experience possible, the Baker Trail delivers.

CLARION LOOP TRAIL: Completed in 2018, the Clarion Loop Trail, a designated spur of the North Country Trail, is a 3.0-mile loop extending from Clarion University's campus to the Clarion River. The Clarion Loop Trail traverses rugged, hilly terrain on the east end of Clarion Borough. This trail was developed as a partnership between the Clarion County Trails Association, Clarion County Chapter of the North Country Trail Association, and Clarion University of Pennsylvania.

FIGURE 37 - CLARION LOOP TRAIL TRAILHEAD



Source: Delta Development Group, Inc.

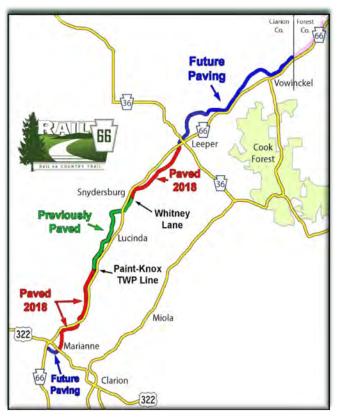


NORTH COUNTRY TRAIL: One of only 11 dedicated National Scenic Trails in the United States, the North Country Trail is a 4,600 mile on-road and off-road trail extending from Vermont to North Dakota. Clarion County contains 96 miles of this trail, which runs through the Allegheny National Forest, Cook Forest State Park, Clear Creek State Forest, and runs parallel to the Clarion River in some areas. Hikers from around the world pass through Clarion County on their mission to hike the North Country Trail's entire length.

RAIL 66 COUNTRY TRAIL: Spanning Paint, Knox, and Farmington Townships, the Rail 66 Country Trail is a 15-mile paved four-season non-motorized trail following PA Route 66. The trail is built upon the historic Knox-Kane Railroad bed. The Headwaters Charitable Trust and Rail 66 Country Trail, Inc., which own and operate pieces of the trail, have received funding from the Pennsylvania Department of Conservation and Natural Resources (DCNR) to extend the trail from Leeper to the Forest County line, with hopes of extending the trail to Marienville in Forest County.

REDBANK VALLEY TRAIL: The Redbank Valley Trail traverses southern Clarion County along the scenic Redbank Creek. The 51.0-mile four-season non-motorized trail extends from Brookville in Jefferson County to East Brady in Clarion County. Completed in 2019, the 9.0-mile Sligo Spur extends from the main trail north to the Borough of Sligo. The centerpiece of Redbank Valley Trail is the Climax Tunnel, a 608-foot-long rail tunnel built in the 1870's. The tunnel has been rehabilitated and reopened in August 2018 as part of the Redbank Valley Trail.

FIGURE 38 - RAIL 66 COUNTRY TRAIL PROGRESS MAP



Source: https://visitpago.com/listings/rail-66-country-trail/

FIGURE 39 – REDBANK VALLEY TRAIL



Source: https://visitpago.com/listings/climax-tunnel

WATERWAYS

ALLEGHENY RIVER: Known locally as the "Mighty Allegheny", the Allegheny River forms Clarion County's southwestern border. The Allegheny passes Foxburg Borough and East Brady Borough, both of which have splendid river views and recreational amenities. With water views abounding its numerous shops and restaurants, quaint Foxburg offers tourists a leisurely outdoor experience. Opened in 1887 on a plateau



overlooking the Allegheny River, the Foxburg Golf Course and Country Club is the oldest continually operating golf course in the United States. Foxburg is also home to the American Golf Hall of Fame. In nearby East Brady, the Allegheny River offers nine miles of deepwater unlimited horsepower boating. This deep channel is ideal for fishing, boating, kayaking, canoeing, and water skiing.



FIGURE 40 - FOXBURG, PENNSYLVANIA IN AUTUMN

Source: https://visitpago.com/treat-yourself-at-the-foxburg-art-wine-and-food-festival/

CLARION RIVER: The Clarion River, Clarion County's namesake, spans the county from its northeastern to southwestern ends. The Clarion River converges with the Allegheny River between Foxburg and East Brady. The southernmost stretch of the Clarion River, from Piney Dam to Foxburg, offers visitors a scenic

twisting shallow-water waterway ideal for kayaking and canoeing. Centrally located in Clarion County, the Piney Dam has created a 14.0-mile reservoir extending from Piney Township to Millcreek Township. This reservoir, which borders Clarion Borough, is ideal for unlimited horsepower boating and water sports. Visitors can access this portion of the Clarion River via the Toby Boat Launch in Clarion Borough, or Mill Creek Boat Launch in Clarion Township. The northernmost segment of the Clarion River in Clarion County begins in Cooksburg. This segment of the river twists through the wild, untouched lands of Clear Creek State Forest and Cook

FIGURE 41 – CLARION RIVER AT TOBY BOAT



Source: exploreclarion.com

Forest State Park. Cooksburg offers a plethora of rental cabins, family activities, and shops and restaurants that make for a suitable family getaway.



OUTDOOR RECREATION

COOK FOREST STATE PARK: Cook Forest State Park is an 8,500-acre scenic forest located in Clarion, Forest, and Jefferson Counties. Cook Forest State Park is most well-known for its old growth forest. The park's Forest Cathedral of soaring hemlocks and white pines is a designated National Natural Landmark. Numerous trails, including the North Country Trail, wind through the park's 8,500-acres. Cook Forest State

FIGURE 42 - COOK FOREST STATE PARK



Source: Delta Development Group, Inc.

Park also contains 13 miles of the Clarion River. Unparalleled views of the Clarion River Valley at Fire Tower #9, a decommissioned 80-foot fire tower that is available for parkgoers to climb. The Verna Leith Sawmill Theater offers visitors the opportunity to shop, learn crafting techniques, and watch plays and musicals throughout the summer. The Log Cabin Environmental Learning Center hosts a variety of historical exhibits, artifacts, and educational programs. Outside of the park's boundaries, local proprietors operate of variety of rental cabins, small shops, restaurants, and other entertainment facilities.

CLEAR CREEK STATE FOREST: Comprised of 16,299 acres spanning five northwestern Pennsylvania counties, the Clear Creek State Forest highlights the rural, forested nature of northwestern Pennsylvania. In Clarion County, the Clear Creek State Forest is intermingled with Cook Forest State Park and parallels the Clarion River from Cookburg to Mill Creek. A variety of trails, including the North Country Trail, meander through the heavily wooded Clear Creek State Forest. The Clear Creek State Forest offers visitors a rugged outdoor experience.

INDOOR RECREATION

CLARION COUNTY YMCA: Opened in January 2019, the Clarion County YMCA is a new 40,000 SF facility offering expansive, modern recreational facilities and a variety of programmatic offerings. The building

features a full-service wellness center, full gymnasium with indoor track, an indoor pool, full-day childcare, an outdoor athletic field, and a variety of other support spaces for programmatic offerings. Members exercise overlooking the pastoral Clarion Oaks Golf Course. Since constructing the facility, YMCA membership has grown considerably. The Clarion County YMCA has become a hub of health and well-being.

FIGURE 43 - CLARION COUNTY YMCA



Source: Delta Development Group, Inc.



Cook Forest State Park **Recreational Amenities** Clarion County, Pennsylvania Map Legend Local Parks Fishing and Boating Access Point Allegheny River Clarion River Redbank Creek Armstrong Trail Clarion Highlands Trail Erie to Pittsburgh Trail North Country Trail Rail 66 Country Trail Redbank Valley Trail Clarion Area Sandy Creek Trail Sligo Branch Line Trail Interstate 80 State Gameland Cook Forest State Park Clear Creek State Forest Clarion County

FIGURE 44 - RECREATIONAL AMENITIES

Source: Delta Development Group, Inc.

SECTION 6.2 - TOURISM PROFILE

Clarion County's status as a nationally recognized tourism destination has grown considerably in recent years. In 2019, the Clarion River was awarded 2019 River of the Year by the Pennsylvania Department of Conservation and Natural Resources (DCNR) and the Pennsylvania Organization for Waterways and River (POWR). This award highlighted the decades-long efforts to rid the Clarion River of pollution stemming heavy mining and logging ³⁷. In May 2019, the United States Postal Service released its collection of America's Wild and Scenic Rivers stamps, of which the Clarion River was a part ³⁸. As shown below, these awards and accolades build

FIGURE 45 - THE PENNSYLVANIA WILDS



Source: pawilds.com

upon an increase in tourist travel and spending in Clarion County in recent years.

³⁷ http://pariveroftheyear.org/2019-river-of-the-year-2/

 $[\]frac{38}{\text{https://about.usps.com/newsroom/local-releases/pa/2019/0515ma-clarion-po-site-for-clarion-river-stamp-unveiling.htm}$



ECONOMIC IMPACT OF TRAVEL AND TOURISM

On an annual basis, the Pennsylvania Department of Community and Economic Development (DCED) commissions an *Economic Impact of Travel and Tourism* report. These reports give in-depth insight on the economic impacts of travel in tourism in Pennsylvania's tourism regions and counties, including employment and earnings, contribution to the gross state product, and tax receipts received. As Clarion County invests in improving and promoting its tourism and recreational assets, these reports provide baseline data to monitor the economic impact of tourism and travel in Clarion County's economy.

Clarion County is part of the Pennsylvania Wilds tourism region, a group of 13 rural counties in northcentral Pennsylvania. Other counties included in this region include Forest, Warren, Jefferson, Elk, McKean, Potter, Cameron, Clinton, Centre, Lycoming, and Tioga. As the westernmost county of the Pennsylvania Wilds, Clarion County serves as a gateway for travelers and tourists entering the area from Interstate 80 and U.S. Route 322. As shown on the next page, Clarion County's gateway status has helped grow the economic impact of travel and tourism in the region.

Between 2008 and 2018, the total amount of traveler spending in Clarion County has grown from \$112.0 million to \$123.3 million, or an increase of \$11.3 million (10.1%). Although this increase is lower than the increase in most neighboring counties, it still represents a steady, continually growing interest in Clarion County's recreational amenities. The greatest overall increases in traveler spending were experienced by Elk County (36.8%), Lycoming County (33.8%), and Potter County (32.8%).

TABLE 39 - PA WILDS TRAVELER SPENDING

PENNSYLVANIA WILDS TRAVELER SPENDING (2008-2018)									
COUNTY	2008	2013	2018	PERCENT CHANGE (2008-2013)	PERCENT CHANGE (2013-2018)	PERCENT CHANGE (2008-2018)			
Cameron	\$9.3	\$9.6	\$10.0	3.2%	4.2%	7.5%			
Clarion	\$112.0	\$121.5	\$123.3	8.5%	1.5%	10.1%			
Clearfield	\$250.3	\$265.5	\$292.7	6.1%	10.2%	16.9%			
Clinton	\$123.2	\$150.6	\$152.4	22.2%	1.2%	23.7%			
Elk	\$57.9	\$66.0	\$79.2	14.0%	20.0%	36.8%			
Forest	\$21.2	\$23.4	\$27.1	10.4%	15.8%	27.8%			
Jefferson	\$97.8	\$115.1	\$121.9	17.7%	5.9%	24.6%			
Lycoming	\$293.1	\$405.9	\$392.1	38.5%	-3.4%	33.8%			
McKean	\$138.9	\$174.5	\$183.4	25.6%	5.1%	32.0%			
Potter	\$29.3	\$34.5	\$38.9	17.7%	12.8%	32.8%			
Tioga	\$159.1	\$187.6	\$201.4	17.9%	7.4%	26.6%			
Warren	\$157.8	\$169.3	\$190.2	7.3%	12.3%	20.5%			
REGION TOTAL:	\$1,450.1	\$1,723.4	\$1,812.7	18.8%	5.2%	25.0%			

SOURCE: Economic Impact of Travel and Tourism in Pennsylvania (2018)

^{*}Dollar amounts in millions



Economic Impact of Travel and Tourism in Clarion County (2008-2018) \$130.0 \$125.0 Traveler Spending in Millions \$120.0 \$115.0 \$110.0 \$105.0 \$100.0 - Clarion County \$95.0 \$90.0 \$85.0 \$80.0 2008 2009 2010 2012 2015 2016 2017 2018 Year

CHART 1 - CLARION COUNTY TRAVELER SPENDING

Source: Economic Impact of Travel and Tourism in Pennsylvania (2018)

The *Economic Impact of Travel and Tourism Reports* also provide data on where travelers spend their money. In Clarion County, a plurality of the spending (\$34.8 million) is on transportation (gasoline, rental vehicles, etc.). Food & beverage accounted for \$29.2 million in spending, recreation accounted for \$22.2 million, shopping accounted for \$21.6 million, and lodging accounted for \$15.5 million.

TABLE 40 - TRAVELER SPENDING BY CATEGORY

	PENNSYLVANIA WILDS TRAVELER SPENDING BY CATEGORY (2018)									
COUNTY	LODGING	FOOD & BEVERAGE	SHOPPING	RECREATION	TRANSPORTATION	TOTAL				
Cameron	\$0.6	\$2.0	\$1.7	\$2.6	\$3.0	\$10.0				
Clarion	\$15.5	\$29.2	\$21.6	\$22.2	\$34.8	\$123.3				
Clearfield	\$30.2	\$65.5	\$54.3	\$48.7	\$94.0	\$292.7				
Clinton	\$13.9	\$35.4	\$24.1	\$26.6	\$52.5	\$152.4				
Elk	\$10.1	\$20.3	\$14.7	\$13.2	\$21.0	\$79.2				
Forest	\$4.2	\$5.8	\$5.2	\$4.9	\$7.0	\$27.1				
Jefferson	\$9.0	\$23.0	\$17.3	\$21.1	\$51.4	\$121.9				
Lycoming	\$52.1	\$96.6	\$65.2	\$58.5	\$119.8	\$392.1				
McKean	\$19.1	\$38.8	\$27.7	\$30.0	\$67.8	\$183.4				
Potter	\$5.5	\$8.5	\$6.8	\$6.7	\$11.5	\$38.9				
Tioga	\$23.1	\$46.6	\$34.0	\$36.1	\$61.6	\$201.4				
Warren	\$8.8	\$39.3	\$31.6	\$31.4	\$79.1	\$190.2				
REGION TOTAL:	\$192.1	\$410.9	\$304.3	\$302.0	\$603.4	\$1,812.7				

SOURCE: Economic Impact of Travel and Tourism in Pennsylvania (2018)

^{*}Dollar amounts in millions



Traveler Spending by Category in Clarion County (2018)

Lodging 13%

Food & Beverage 24%

Recreation 18%

Shopping 17%

CHART 2 - CLARION COUNTY TRAVELER SPENDING BY CATEGORY

Source: Economic Impact of Travel and Tourism in Pennsylvania (2018)

As traveler spending in Clarion County grows, so do the number of jobs supported by the travel and tourism industry. In 2018, approximately 1,127 jobs in Clarion County are supported by the travel and tourism industry. That represents a net increase of 164 jobs since 2008, or an increase of 17.0%. Among other PA Wilds counties, this increase in travel industry employment was mid-pack. The greatest increase in travel industry employment were found in Tioga County (30.9%), Clinton County (30.5%), and Potter County (30.5%).

TABLE 41 - PA WILDS TRAVEL INDUSTRY EMPLOYMENT

	PENNSYLVANIA WILDS TRAVEL INDUSTRY EMPLOYMENT (2008-2018)									
COUNTY	2008	2013	2018	PERCENT CHANGE (2008-2013)	PERCENT CHANGE (2013-2018)	PERCENT CHANGE (2008-2018)				
Cameron	79	76	78	-3.8%	2.6%	-1.3%				
Clarion	963	1,046	1,127	8.6%	7.7%	17.0%				
Clearfield	1,623	1,778	1,869	9.6%	5.1%	15.2%				
Clinton	835	1,040	1,090	24.6%	4.8%	30.5%				
Elk	496	554	601	11.7%	8.5%	21.2%				
Forest	131	137	140	4.6%	2.2%	6.9%				
Jefferson	732	804	839	9.8%	4.4%	14.6%				
Lycoming	2,573	2,973	2,989	15.5%	0.5%	16.2%				
McKean	997	1,138	1,203	14.1%	5.7%	20.7%				
Potter	197	241	257	22.3%	6.6%	30.5%				
Tioga	1,253	1,530	1,640	22.1%	7.2%	30.9%				
Warren	1,154	1,141	1,189	-1.1%	4.2%	3.0%				
REGION TOTAL:	11,032	12,456	13,021	12.9%	4.5%	18.0%				

SOURCE: Economic Impact of Travel and Tourism in Pennsylvania (2018)



Travel Industry Employment in Clarion County (2008-2018) 1,150 1,100 Travel Industry Employment 1,050 1,000 950 Clarion County 900 850 800 2008 2009 2015 2016 2017 2018 2010 2011 2012 2013 2014 Year

TABLE 42 - TRAVEL INDUSTRY EMPLOYMENT

Source: Economic Impact of Travel and Tourism in Pennsylvania (2018)

Just as it belongs to the PA Wilds, tourism in Clarion County is also promoted by the Pennsylvania Great

Outdoors Visitors Bureau. This smaller five-county region is comprised of Clarion County, Forest County, Jefferson County, Elk County, and Cameron County. Because the region is smaller, the Pennsylvania Great Outdoors Visitors Bureau is able to promote more place-specific attractions and events, and also obtain more detailed tourism data. According to IT data gathered by the Pennsylvania Great Outdoors Visitors Bureau, the top 10 states for visitpago.com webpage hits are:

TOP 10 STATES:

- 1. Pennsylvania
- 2. New York
- 3. Ohio
- 4. Illinois
- 5. New Jersey
- 6. District of Columbia
- 7. Virginia
- 8. Michigan
- 9. Maryland
- 10. California

FIGURE 46 – AMISH BUGGY IN WASHINGTON TOWNSHIP



Source: Delta Development Group, Inc.



In addition, visitpago.com tracks webpage visitors by city. Below are the top 10 webpage city-specific tags by number of hits:

TOP 10 CITIES:

- 1. Unidentified (Not Set/Hidden)
- 2. Pittsburgh, PA
- 3. New York City, NY
- 4. Chicago, IL
- 5. St. Marys, PA
- 6. Philadelphia, PA
- 7. Washington D.C.
- 8. State College, PA
- 9. Greensburg, PA
- 10. Altoona, PA

FIGURE 47 - PHOTOS OF RURAL CLARION COUNTY



Source: Delta Development Group, Inc.

According to the Pennsylvania Great Outdoors

Visitors Bureau, Cook Forest State Park is the top searched attraction on the visitpago.com website. Promotion of this asset has been successful, with nearly 500,000 travelers visiting Cook Forest State Park on an annual basis. Clarion County contains portions of Cook Forest State Park, as well as the numerous rental cabins, restaurants, shops, and outfitters that support traveler needs.

FIGURE 49 - TOBY BOAT LAUNCH



Source: Delta Development Group, Inc.

FIGURE 48 – FOREST CATHEDRAL AT COOK FOREST STATE PARK



Source: Delta Development Group, Inc.



SECTION 7.0: BASELINE DATA FOR 2030

As Clarion County achieves its economic development goals in the 2020s, maintaining a baseline for improvement is essential. Using these baseline data figures, Clarion County can measure its progress when it reaches the year 2030. Below is a compilation of baseline data that will be used to measure economic development progress. There should be one or more interim benchmark to determine interim progress in anticipation of 2030.

TABLE 43 - BASELINE DATA

CLARION COUNTY BASELINE DATA FOR MEASURING ECONOMIC DEVELOPMENT PROGRESS									
	YEAR		2018 - 2025		2025 - 2030		2018 - 2030		
	2018	2025	2030	CHANGE	PERCENT CHANGE	CHANGE	PERCENT CHANGE	CHANGE	PERCENT CHANGE
Population	38,837								
Median Age	41.2								
Median Household Income	\$45,625								
Residents Age 25+ w/College Degree	31.7%								
Employed Population Age 16+	17,280								
Gini Coefficient	0.748								
GDP	\$1,203,238,000								
Unemployment	4.8%								
Shift-Share	190								
Owner-Occupied Housing	77.4%								
Median Owner-Occupied Home Value	\$114,300								
Traveler Spending	\$123,300,000								
Travel Industry Employment	1,127	·							

Source: Delta Development Group, Inc.



SECTION 8.0: KEY TAKEAWAYS AND FUTURE IMPLICATIONS

When viewed together, the quantitative data points outlined in this Phase 1 document help to develop a clear picture of Clarion County's existing economy and where economic trends may take it in the future. Below is a list of key takeaways and future implications based on the quantitative data presented above:

Wood Product Manufacturing Sector: Clarion County has an extremely robust and growing Wood Product Manufacturing sector. As such, Clarion County should seek opportunities to grow or expand industries "upstream" or "downstream" from this sector. "Upstream" sectors are those that supply the target industry with good or services needed to operate the business. "Downstream" sectors are those that service the business to keep it operational. In the case of the Wood Product Manufacturing Sector, upstream businesses may include logging and timbering companies, hardwood distributors, etc., and downstream industries may include trucking companies, warehousing and logistics firms, wholesalers, etc. Due to the presence of such a robust Wood Products Manufacturing sector, Clarion County should consider focusing economic development efforts on hardwood products that Clarion County does not currently produce.

ESTABLISHING INDUSTRY SYNERGIES: By focusing on growing businesses upstream and downstream from Clarion County's largest sectors, Clarion County can establish cost-effective synergies between various businesses and industries. For example, Clarion Bathware and Kronospan provide modular home manufacturers with materials used to construct modular homes. Clarion Bathware and Kronospan benefit from having a reliable, local consumer of their product, and the modular home manufacturer benefits from reduced shipping and transportation fees for the product. Moving forward, Clarion County must determine what else Clarion County *COULD* manufacture to supply its largest employers & industries and adjust economic development and site relocation initiatives accordingly.

TRANSPORTATION: Although it lacks rail, Clarion County's transportation system can be utilized for further economic growth and development. Existing industry in Clarion County is generally concentrated along major transportation routes, including U.S. Route 322, PA Route 66, and PA Route 68. This speaks to the crucial nature of transportation access to many industries. Clarion County is fortunate to have six exits along Interstate 80. Only one of them, however, has developed in a significant way (Exit 62). With the proper infrastructure in place, the remaining five exits could become attractive for new development for industry, retail, dining, hospitality, etc. Likewise, Interstate 80's connectivity to Clarion County's other major transportation routes, such as U.S. Route 322, PA Route 66, and PA Route 68, has strengthened the development opportunities of areas that are not adjacent to the interstate (such as the US 322/PA 66 junction in Paint Township). Absent rail service, Clarion County must strategically plan for infrastructure that takes advantage of Interstate 80's connectivity to major Midwestern and East Coast markets.

EXPANDED EDUCATIONAL OPPORTUNITIES: The Clarion County Career Center (CCCC) has strategically developed program offerings that are tailored to Clarion County's top industry sectors. Through its True North initiative, Clarion University of Pennsylvania seeks to similarly develop program offerings that provide a skills-based learning approach in fields relevant to life in Northwestern Pennsylvania. If Clarion



University of Pennsylvania's program offerings are tailored in such a way, it increased the likelihood that Clarion University of Pennsylvania graduates can stay in or relocate to northwestern Pennsylvania as their career develops. Clarion University of Pennsylvania will be a vital partner in helping to stem the braindrain and population loss that Northwestern Pennsylvania has struggled with in recent decades.

STRENGTHENING THE TOURISM AND HOSPITALITY SECTOR: Clarion County's abundant natural resources and idyllic scenery leave it well-positioned to benefit economically from recreation-based tourism. Projects and initiatives are already underway by various groups to promote the Clarion River as a recreational asset. Improving access to the Clarion River and other assets, developing unique county-wide branding, and effective promotion and advertising of Clarion County will be essential to strengthening the tourism and hospitality sector. The COVID-19 Pandemic has presented distinct challenges for airlines, cruise companies, and larger destinations that require distant travel. For many people in the Midwest and East Coast, Clarion County is a close-to-home scenic destination that can be accessed by car or RV, where it is easier to social distance. In the coming years, Clarion County should try and capitalize upon the changing travel and tourism societal shifts stemming from the COVID-19 Pandemic.



Phase 2





SECTION 1.0: PURPOSE

The COVID-19 Pandemic (Pandemic) has resulted in unprecedented challenges for households, organizations, and businesses across the nation. For many organizations and businesses, COVID-19-related shutdowns have resulted in reduced patronage and revenue. Unemployment claims across the Commonwealth of Pennsylvania have skyrocketed since the beginning of the Pandemic, and Clarion County is not immune. Recognizing the need for proactive economic recovery planning, the following entities advanced the *Clarion County Economic Recovery Strategy* (Strategy):

- Clarion County Economic Development Corporation (EDC)
- Clarion University Small Business Development Center (SBDC)
- Clarion Area Chamber of Business & Industry (Chamber)
- Clarion County Industrial Development Authority (IDA)
- Riverview Intermediate Unit #6 (RIU6)

The Strategy, a piece of the larger *Clarion County 2030 Economic Development Strategy*, seeks to address the short and medium-term needs of Clarion County's economy following the Pandemic.

SECTION 2.0: METHODOLOGY

In an era of economic uncertainty, the Strategy seeks to do the following:

- ➤ Identify the adverse economic impacts of the Pandemic in Clarion County to plan for continuing recovery.
- Gather baseline data of Clarion County's economy prior to the Pandemic as a baseline to measure adverse impacts.
- Quantify these impacts through IMPLAN economic impact analysis.
- Conduct qualitative analysis through SWOT Session findings and interviews with Clarion County business and industry leaders.
- Identify opportunities for growth.
- Develop a detailed Action & Implementation Strategy.

The Action & Implementation Strategy will outline the roles of responsibilities of economic development agencies in the economic recovery process, funding sources needed to achieve end goals, and progress measures needed to ensure the Strategy's success.



SECTION 3.0: ECONOMIC OVERVIEW

Section 3.1: Pre-Pandemic Economic Overview

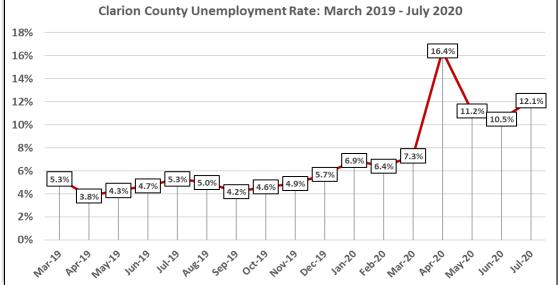
- February 2020 Unemployment: 6.4%
- Clarion's GDP in 2018 \$1,203,238,000 (\$1.2 billion) ranked 60th of Pennsylvania's 67 counties.
- > Of Clarion County's 939 businesses, nearly half of businesses had 5 or fewer employees.
- > The Manufacturing industry had the largest disparity between number of firms, number of employees, and the amount of overall payroll.
- Clarion County had 594 farms totaling 100,344 acres. Sales of agricultural products produced in Clarion County totaled \$27.67 million in 2017.

SECTION 3.2: UNEMPLOYMENT RATE

- Like the rest of the nation, Clarion County has experienced a sharp increase in unemployment.
- In July 2019, Clarion County's unemployment rate stood at 5.3%.
- In July 2020, Clarion County's unemployment rate stood at 12.1%.
- In July 2020, Pennsylvania had an unemployment rate of 14.1%, and the U.S. had an unemployment rate of 10.5%.
- Clarion County should continue to monitor this important measure to gauge the relative health of Clarion County's economy.

CHART 3 - CLARION COUNTY UNEMPLOYMENT RATE: MARCH 2019 - JULY 2020

Clarion County Unemployment Rate: March 2019 - July 2020 18%



Source: Bureau of Labor Statistics LAUS; *Not seasonally adjusted



SECTION 3.3: COMPARATIVE UNEMPLOYMENT RATE

- Among its neighboring counties, Clarion County tracks closely in unemployment to Venango, Jefferson, and Butler Counties.
- Forest County generally has a high unemployment rate, and Butler County a lower unemployment rate.
- All counties have experienced a drastic increase in unemployment from the COVID-19 Pandemic, but unemployment rates are now stabilizing.

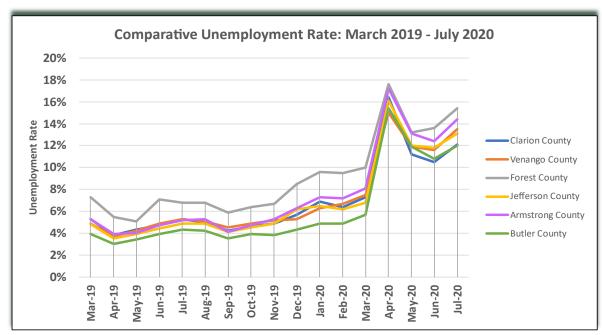


CHART 4 - COMPARATIVE UNEMPLOYMENT RATE: MARCH 2019 - JULY 2020

Source: Bureau of Labor Statistics LAUS; *Not seasonally adjusted



SECTION 3.4: SIZE OF BUSINESSES (ESTABLISHMENTS)

- Approximately half of businesses operating within Clarion County have five (5) or fewer employees.
- > The number of businesses/establishments decrease as the employment counts rise.
- As shown by these statistics, assisting Clarion County's small businesses through the pandemic is a crucial component of economic recovery.

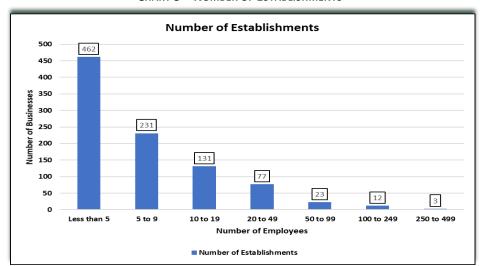


CHART 5 - NUMBER OF ESTABLISHMENTS

Source: U.S. Census Bureau County Business Patterns (2017)

SECTION 3.5: GROSS DOMESTIC PRODUCT (GDP)

- Gross Domestic Product (GDP) is the value of all goods and services produced within an economy.
- > GDP serves a measure of an economy's overall size and health.
- Compared to its neighbors, other than Forest County, Clarion County has a slightly smaller economy.
- In 2018, Clarion County's GDP ranked 60 out of 67 PA counties.

LOCAL AREA GROSS DOMESTIC PRODUCT (BILLIONS)									
	PERCENT CHANGE FROM PRECEDING PERIOD								
		Billions Chaine	2018 Rank in	Percent Change			2018 Rank		
	2015	2016	2017	2018	State	2016	2017	2018	in State
Clarion	\$1.22	\$1.19	\$1.18	\$1.20	60	-2.7%	-0.7%	1.9%	42
Venango	\$1.76	\$1.72	\$1.71	\$1.74	48	-2.5%	-0.4%	2.1%	37
Forest	\$0.29	\$0.28	\$0.28	\$0.27	66	-1.4%	-2.4%	-0.9%	60
Jefferson	\$1.56	\$1.51	\$1.54	\$1.57	52	-3.3%	1.7%	2.0%	41
Armstrong	\$2.28	\$2.23	\$2.33	\$2.34	41	-2.1%	4.6%	0.6%	52
Butler	\$9.62	\$9.72	\$9.85	\$10.10	18	1.0%	1.4%	2.1%	38
Pennsylvania	\$681.23	\$689.94	\$693.68	\$711.82		1.3%	0.6%	2.6%	

Table 44 – Local Area Gross Domestic Product (Billions)

SOURCE: U.S. Bureau of Economic Analysis



SECTION 3.6: SECTOR SIGNIFICANCE

- Clarion County's economy is comprised of 18 industry sectors.
- In some sectors, such as Manufacturing, a smaller number of establishments employ a large number of people.
- In other sectors, such as Arts, Entertainment, and Recreation, a proportionally higher number of establishments employ fewer people.
- > Below is a percentage comparison of a sector's employees, payroll, and establishments.

TABLE 45 - SECTOR SIGNIFICANCE: ESTABLISHMENTS, EMPLOYEES, AND ANNUAL PAYROLL

SECTOR SIGNIFICANCE: ESTABLISHMENTS, EMPLOYEES, AND ANNUAL PAYROLL								
	Number of Establishments	Number of Employees	Annual Payroll (\$1,000)					
Agriculture, Forestry, Fishing and Hunting	0.5%	0.1%	0.1%					
Mining, Quarrying, and Oil and Gas Extraction	2.1%	1.1%	1.6%					
Utilities	1.3%	1.3%	3.1%					
Construction	7.7%	4.3%	7.6%					
Manufacturing	3.9%	15.0%	20.7%					
Wholesale Trade	2.7%	3.1%	4.4%					
Retail Trade	17.6%	15.6%	12.0%					
Transportation and Warehousing	4.8%	3.3%	3.0%					
Information	1.8%	0.8%	0.9%					
Finance and Insurance	4.6%	2.8%	4.4%					
Real Estate, Rental, and Leasing	2.7%	1.1%	0.9%					
Professional, Scientific, and Technical Services	3.9%	2.3%	2.4%					
Administrative and Support and Waste Management and Remediation Servies	3.3%	2.6%	2.8%					
Educational Services	0.7%	1.5%	0.7%					
Health Care and Social Assistance	17.4%	25.0%	25.5%					
Arts, Entertainment, and Recreation	1.3%	0.5%	0.3%					
Accommodation and Food Services	10.1%	12.5%	4.6%					
Other Services (Except Public Administration)	13.3%	6.6%	4.8%					

Source: U.S. Census Bureau County Business



SECTION 3.7: U.S. CENSUS OF AGRICULTURE

- In 2017, the year of the most recent U.S. Census of Agriculture, Clarion County had 594 farms totaling 100,344 acres.
- ➤ The average size of a farm in Clarion County was 169 acres.
- The total value of sales from these farms totaled \$27,670,000. Only Butler County (\$49.5 million) and Armstrong County (\$39.8) had higher gross sales.

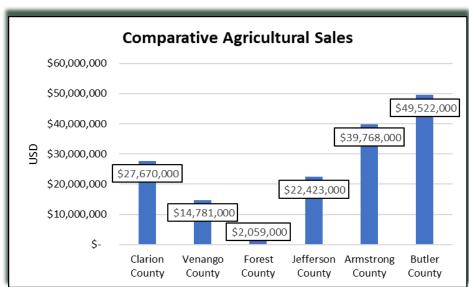


CHART 6 - COMPARATIVE AGRICULTURAL SALES

Source: U.S. Census of Agriculture (2017)



SECTION 3.8: TOURISM

- According to DCED, annual traveler spending in Clarion County totaled \$123.3 million and supported 1,127 jobs in 2018.
- For Clarion County, this traveler spending results in an average Hotel Tax revenue of between \$200,000 \$300,000 annually.
- ➤ Due to the COVID-19 Pandemic, Hotel Tax revenue in the 2nd Quarter of 2020 was nearly half of its usual level.

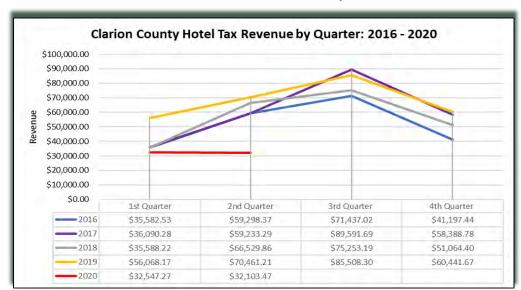


CHART 7 - CLARION COUNTY HOTEL TAX REVENUE BY QUARTER: 2016-2020

SOURCE: DCED Economic Impact of Travel in Pennsylvania (2018); Clarion County Treasurer's Office



SECTION 4.0: OUTREACH

SECTION 4.1: INTERVIEW FINDINGS

- 1. <u>NEGATIVE IMPACTS OF COVID-19</u>: Small businesses and healthcare organizations are very concerned about COVID-19's impact on their financial well-being. The added expenses of sanitization, PPE, etc. impact their bottom-line. A reduction in student population and organized events associated with Clarion University has also adversely impacted businesses.
- 2. <u>NEUTRAL/POSITIVE IMPACTS OF COVID-19:</u> In some sectors, such as wood product manufacturing and food product manufacturing, the pandemic has had little to no impact.
- 3. CLARION COUNTY'S PEOPLE ARE A STRENGTH: Interviewees noted that Clarion County's residents have a strong work ethic and have fostered a hospitable environment for new residents and businesses.
- **4.** <u>TRAINING NEEDS</u>: Interviewees noted that there is employer demand for training opportunities, including Computer-Aided Design (CAD), Microsoft Excel, LPN certification, finance/accounting, etc.
- 5. <u>OPENNESS TO NEW EMPLOYERS</u>: Interviewees welcome the addition of new employers and industries to Clarion County.
- 6. <u>BROADBAND/CONNECTIVITY NEEDS</u>: Although internet and cell service seemed to be sufficient at the locations of interviewed businesses, interviewees identified connectivity needs at the homes of their employees, customers, and patients.
- 7. <u>DESIRE FOR SOMETHING "DIFFERENT"</u>: Interviewees identified a need to develop unique attractions, events, spaces, etc. to set Clarion County apart from its neighbors.

INTERVIEW INDUSTRY COMPOSITION - NUMBER OF INTERVIEWEES BY INDUSTRY

- 1. Healthcare Industry (2)
- 2. Food Manufacturing (1)
- 3. Wood Product Manufacturing (1)
- 4. Finance/Banking (1)
- 5. Professional Services (1)
- 6. Retail (1)



SECTION 4.2: SWOT SESSION ATTENDEES

On July 1, 2020, Delta Development Group hosted a SWOT Session with representatives from economic development organizations, business groups, local government agencies, educational institutions, and Clarion County's elected officials. During the session, participants were tasked with identifying Clarion County's economic strengths, weaknesses, opportunities, and threats. Below are the groups represented during the SWOT Session who are "all-in for Clarion County!".

"ALL-IN FOR CLARION COUNTY!"

Clarion Area Chamber of Business & Industry

Clarion County

Clarion County Economic Development

Clarion County Hotel Tax Committee

Clarion County IDA

Clarion County School Districts

Clarion Hospital - Butler Health System

Clarion University

Congressman Glenn Thompson

East Brady Area Development Corporation

Redbank Valley Chamber of Commerce

Representative Donna Oberlander

Riverview Intermediate Unit

Senator Scott E. Hutchinson

Small Business Development Center - Clarion University

The Rural Lab



SECTION 4.3: SWOT SESSION FINDINGS

Below is a listing of Clarion County's greatest economic opportunities as ranked by SWOT Session participants. The SWOT Session, which involved a group discussion and subsequent ranking exercise, helped to foster a shared vision for economic development activities and initiatives in the coming decade.

- 1. Digital Connectivity
- 2. Skilled Trades/Vocational Training of Existing Workforce
- 3. Eco-Tourism and Recreation
- 4. Cooperative Opportunities Between Public Education and Vocational Careers
- 5. "Build It and They Will Come" (i.e., Be willing to take risks on new project types)
- 6. Leveraging of Public-Private Partnerships
- 7. Working with Surrounding Counties on Regional Projects
- 8. Influx of Human Capital/Diversification
- 9. Stronger Collaboration Between the CCCC and Existing Employers
- 10. Marketing of "Hometown Feel" of Smaller Communities and Downtowns



SECTION 5.0: IMPACT ANALYSIS (MARCH TO AUGUST 2020)

- From March 23rd May 8th, Clarion County was Pennsylvania's "Red Phase", during which "non-life sustaining businesses" were closed or open for only limited activity.
- During this period, Clarion County experienced increased unemployment, which has a negative effect on employee compensation and tax revenue.
- ➤ Beginning in April 2020, Americans began to receive CARES Act stimulus checks that increased consumer spending power.
- Below is an estimate of the economic impacts of the increased unemployment and current distribution of stimulus checks.

FIGURE 50 - ECONOMIC IMPACTS OF THE INCREASED UNEMPLOYMENT AND CURRENT DISTRIBUTION OF STIMULUS CHECKS

MID-MARCH - MID-MAY

- Jobs Impacted in <u>Top 25</u> Industries: (4,345)
- Jobs Impacted in Supporting Industries: (1,389)
- Total Impacted Jobs: (5,735)
- Total Loss of Employee
 Wages in <u>Top 25</u> Industries: (\$35,353,474.33)
- Loss of Earned Income Tax: (\$571,241.73)
- Loss of Sales Tax: (\$1,755,720.28)
- Stimulus Payments to Households (<u>All</u> County Households):
 \$30,878,404.30
- Jobs Supported by Stimulus Payments: 162

MID-MAY - MID-JULY

- Jobs Impacted in <u>Top 25</u>
 Industries: (2,912)
- Jobs Impacted in Supporting Industries: (971)
- Total Impacted Jobs: (3,883)
- Total Loss of Employee
 Wages in <u>Top 25</u> Industries:
 (\$24,238,077)
- Loss of Earned Income Tax: (\$359,884)
- Loss of Sales Tax: (\$1,034,920)

MID-JULY – MID-AUGUST

- Jobs Impacted in <u>Top 25</u> Industries: (2,258)
- Jobs Impacted in Supporting Industries: (582)
- Total Impacted Jobs: (2,840)
- Total Loss of Employee
 Wages in <u>Top 25</u> Industries: (\$7,487,910)
- Loss of Earned Income Tax: (\$112,574)
- Loss of Sales Tax: (\$523,256)

TOTAL MID-MARCH MID-AUGUST

- Total Loss of Employee
 Wages in <u>Top 25</u> Industries: (\$67,079,461)
- Loss of Earned Income Tax: (\$1,043,700)
- Loss of Sales Tax: (\$3,313,896)
- Stimulus Payments to Households (<u>All</u> County Households): \$30,878,404.30
- Jobs Supported by Stimulus Payments: 162

Source: IMPLAN, 2020



SECTION 6.0: KEY TAKEAWAYS AND IMPLICATIONS

- Broadband connectivity is a top priority of residents, business, organizations, and elected officials. The need for reliable internet and phone connectivity has been exacerbated by the COVID-19 Pandemic.
- Clarion County's small businesses are very concerned about their long-term financial well-being, and support and technical assistance from Clarion County's economic development agencies would be greatly appreciated.
- > Shifts in the travel/tourism and post-secondary education industries present both opportunities and threats to small businesses throughout Clarion County.
- > Training needs still persist, and local educational institutions are positioned to fulfill those needs.
- ➤ Clarion County's residents, businesses, and elected officials are open to bold proposals and development opportunities that help Clarion County differentiate itself among neighboring counties and grow its economy.



SECTION 7.0: "CLARION COUNTY CONNECTED" INITIATIVE

- A component of the larger "Clarion County 2030 Economic Development Strategy"
- > The Initiative seeks to coordinate various groups in advancing programmatic and capital improvement projects across Clarion County.
- > The Initiative also seeks to prioritize broadband planning, design, engineering, and implementation projects to facilitate telecommuting, telehealth, and distance education capability.
- A part of the Initiative, competitive funding requests will be prioritized to reduce competition among Clarion County's various stakeholders and entities.

PARTICIPANTS IN THE "CLARION COUNTY CONNECTED" INITIATIVE:







CLARION COUNTY IDA







CLARION COUNTY SCHOOL DISTRICTS

EAST BRADY AREA DEV. CORP.









CONGRESSMAN GLENN THOMPSON

SENATOR SCOTT E. HUTCHINSON PENNSYLVANIA'S 21ST DISTRICT **BUTLER, CLARION, FOREST, VENANGO AND WARREN COUNTIES**





PHASE 3

PHASE 3 ECONOMIC CLIMATE OF CLARION COUNTY



SECTION 1.0: BUSINESS OWNER SURVEY

In July and August 2021, the Clarion County EDC and Delta collaboratively launched an online survey to better understand perceptions of Clarion County as a place to do business. The Clarion County EDC contacted businesses via email to distribute the survey. In total, 18 local businesses participated in the survey. Below is a summary of survey data.

What would you consider your business/organization to be? (Please select all that apply) Agriculture, Forestry, Fishing, and Hunting 0.00% Mining, Quarrying, and Oil and Gas Extraction 5.56% Utilities 11.11% Manufacturing 11.11% Wholesale Trade 5.56% Retail Trade 22.22% Transportation and Warehousing 0.00% Information, Publishing, and Communications 0.00% Finance and Insurance 5.56% Real Estate and Rental and Leasing 16.67% Professional, Scientific, and Technical Services 11.11% Management of Companies and Enterprises 5.56% Administrative, Support, Waste Management, and... 0.00% Educational Services (Public and Private) 11.11% Health Care and Social Assistance 5.56% Arts, Entertainment, and Recreation 0.00% Accommodation and Food Services 22.22% 0.00% Public Administration (e.g., Government) Construction 11.11% 0.00% 5.00% 10.00% 15.00% 20.00% 25.00%

CHART 8 - SUMMARY SURVEY DATA

Source: Delta Development Group, Inc.

In total, 18 local businesses participated in the survey. With four (4) responses a piece, the Retail Trade and Accommodation and Food Services sectors had the greatest representation in the sample (22.22%), followed closely by Real Estate and Rental and Leasing with three (3) responses (16.67%).



Approximately how many people does your business/organization employ? 1 person 16.67% 2-5 people 16.67% 6-10 people 5.56% 27.78% 11-50 people 50 to 100 people 5.56% More than 100 people 11.11% 0% 10% 20% 40% 15% 25% 30% 35%

CHART 9 - EMPLOYEES BY BUSINESS

SOURCE: Delta Development Group, Inc.

The plurality of businesses (27.78%) employs 11-50 people. This category contained five (5) responses. At three (3) responses a piece, the 1 person and 2-5 people categories each garnered 16.67% of survey responses.

Q: Which Of Its <u>Strengths</u> Can Clarion County Leverage To Further Attract And Retain Business Growth?

Although this question was open-ended, themes emerged among the respondents' answers.

- Proximity to major markets and transportation routes; presence of Interstate 80
- Natural assets and abundant outdoor recreational opportunities
- Clarion University of Pennsylvania

Q: WHAT DO YOU BELIEVE CLARION COUNTY'S GREATEST WEAKNESSES ARE AS A PLACE TO DO BUSINESS?

Although this question was open-ended, themes emerged among the respondents' answers.

- Availability of skilled workforce
- Town-and-gown relationship between the community and Clarion University
- Inadequate broadband internet and cellular coverage

Q: WHAT OPPORTUNITIES EXIST IN CLARION COUNTY?

Although this question was open-ended, themes emerged among the respondents' answers.

- Availability of developable land
- Location along Interstate 80
- Presence of Clarion University of Pennsylvania



Q: ARE THERE ANY THREATS PRESENT IN CLARION COUNTY AS A PLACE TO DO BUSINESS?

Although this question was open-ended, themes emerged among the respondents' answers.

- Workforce is not being sufficiently trained
- Inadequate broadband connectivity
- Local tax rates: tax assessment needs to be updated

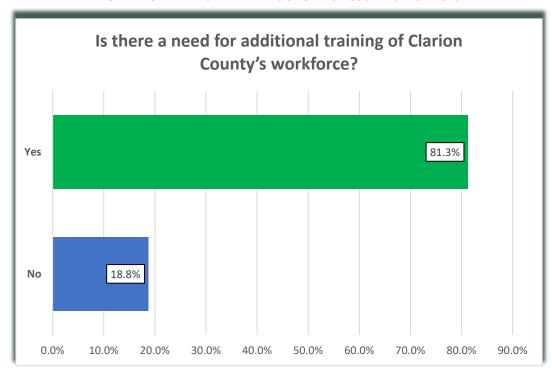


CHART 10 - ADDITIONAL TRAINING OF CLARION COUNTY'S WORKFORCE

Source: Delta Development Group, Inc.

According to 81.3% of survey respondents (13 responses in total), there is a need for additional workforce training in Clarion County. This is consistent with identified weaknesses and threats to Clarion County's economy. Respondents were given the opportunity to identify what kinds of workforce training is needed. Key themes that emerged from the open-ended responses included the following:

- Skilled labor (*tradesman/journeyman*), including plumbing, electrical, roofing, general manufacturing, etc.
- ➤ General communication, customer service skills, and work ethic
- Clarion County Career Center could be a stronger asset with proper promotion and evaluation of its program offerings



Q: What Are The Top Three (3) Things Needed In Clarion County To Support Existing Businesses? Although this question was open-ended, themes emerged among the respondents' answers.

- Funding resources for small businesses to expand operations, improve their buildings, and tax forgiveness
- > Technical assistance to obtain funding, improve bookkeeping practices, answer tax questions, etc.
- Adequate broadband internet connectivity

Q: WHAT IS THE TOP THREE (3) THINGS NEEDED IN CLARION COUNTY TO ATTRACT NEW BUSINESSES AND INDUSTRIES?

Although this question was open-ended, themes emerged among the respondents' answers.

- > Infrastructure to facilitate development, particularly along Interstate 80
- Funding resources, including tax incentives, grants, rent assistance, LERTA, etc.
- Adequate broadband internet connectivity

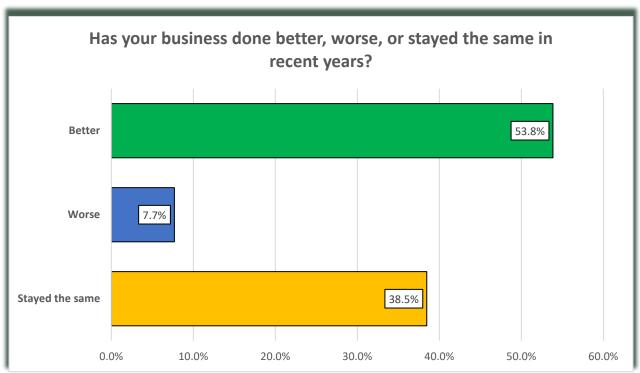


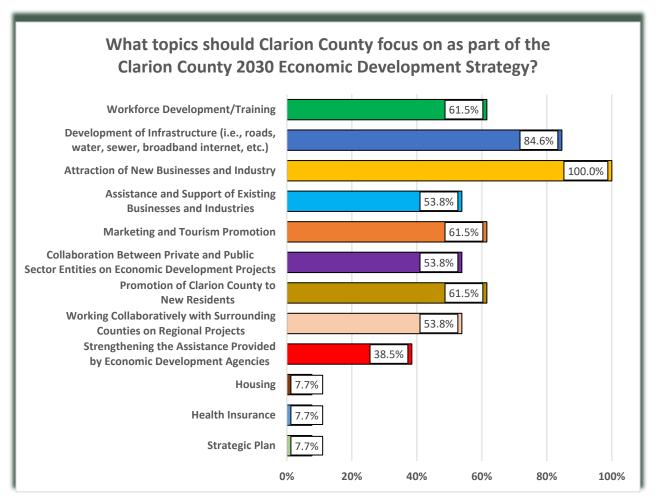
CHART 11 - BUSINESS PERFORMANCE IN RECENT YEARS

Source: Delta Development Group, Inc.

A majority of businesses, 53.8% (seven respondents), indicated that their businesses has done better in recent years. This is a particularly notable result given the COVID-19 Pandemic. A smaller percentage, 38.5% (five respondents) indicated that their business has stayed the same. Only one respondent (7.7%) indicated that their business has done worse in recent years.



CHART 12 - FOCUS OF THE CLARION COUNTY 2030 ECONOMIC DEVELOPMENT STRATEGY



Source: Delta Development Group, Inc.

Attraction of New Business and Industry was, by-far, the most preferred focus topic of the *Clarion County 2030 Economic Development Strategy (100% of respondents selected it as a priority)*. The second highest preferred priority was Development of Infrastructure, which 84.6% of respondents selected as a priority. A three-way tie emerged for the third highest priority; 61.5% of respondents selected Workforce Development/Training, Marketing and Tourism, and Promotion of Clarion County to new residents as a preferred focus of the *Clarion County 2030 Economic Development Strategy*.



SECTION 2.0: COMMUNITY PUBLIC SURVEY

In July and August 2021, the Clarion County EDC and Delta collaboratively launched an online survey to better understand perceptions of Clarion County as a place to live and work. The Clarion County EDC contacted undertook an advertising campaign that consisted of a link on clarioncountyedc.com, advertisements in print and online (including The Derrick, The Clarion News, and ExploreClarion.com), and a radio advertisement. In total, 167 individuals participated in the survey. Below is a summary of survey data.

TABLE 46 - WHERE IN CLARION COUNTY DO YOU LIVE?

WHERE IN CLARION COUNTY DO YOU LIVE? PLEASE LIST YOUR HOME MUNICIPALITY (i.e., Clarion Borough, Highland Township, Sligo Borough, etc.)					
LISTED MUNICIPALITIES	RESPO	ONSES			
Clarion Borough	27.6%	45			
Clarion Township	15.3%	25			
Paint Township	8.6%	14			
Monroe Township	7.4%	12			
Farmington Township	3.7%	6			
Strattanville Borough	3.1%	5			
Beaver Township	2.5%	4			
Elk Township	2.5%	4			
Highland Township	2.5%	4			
Limestone Township	2.5%	4			
Shippenville Borough	2.5%	4			
Sligo Borough	2.5%	4			
Washington Township	2.5%	4			
Ashland Township	1.8%	3			
Salem Township	1.8%	3			
Knox Borough	1.2%	2			
Knox Township	1.2%	2			
Marianne Estates CDP	1.2%	2			
Millcreek Township	1.2%	2			
Perry Township	1.2%	2			
Redbank Township	1.2%	2			
Richland Township	1.2%	2			
Emlenton Borough	0.6%	1			
Lamartine (Unincorporated)	0.6%	1			
Monroe Borough	0.6%	1			
N/A	0.6%	1			
New Bethlehem	0.6%	1			
Porter Township	0.6%	1			
St. Petersburg	0.6%	1			
Toby Township	0.6%	1			



The plurality of survey participants, 27.6%, lived in Clarion Borough, followed closely by Clarion Township (15.3%), and Paint Township (8.6%). Although these municipalities reside in the center of the County, survey responses were obtained from throughout Clarion County.

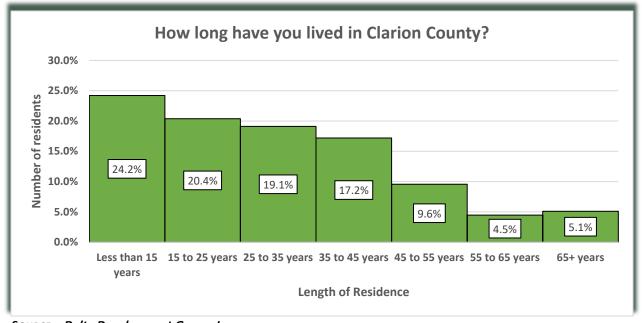


CHART 13 - HOW LONG HAVE YOU LIVED IN CLARION COUNTY?

SOURCE: Delta Development Group, Inc.

Among all respondents, nearly a fourth (24.2%) have lived in Clarion County less than 15 years. This was followed closely by residents that have lived in the County 15 to 25 years (20.4%) and 25 to 35 years (19.1%).

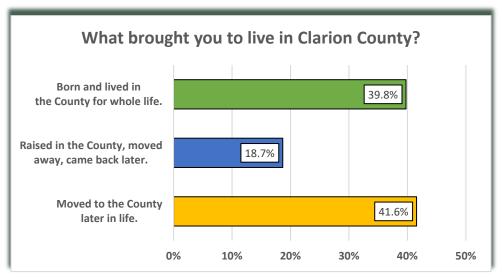


CHART 14 - WHAT BROUGHT YOU TO LIVE IN CLARION COUNTY?



Approximately 41.6% of survey respondents indicated that they were not raised in Clarion County but moved to Clarion County later in life. Residents who were born and lived in Clarion County their whole lives comprised 39.8% of survey responses. Approximately 18.7% of survey respondents were raised in the County, moved away, and then came back.

Occupation by NAICS Sector Accommodation and Food Services 6.1% Administrative, Support, Waste Management, and... 1.5% Agriculture, Forestry, Fishing, and Hunting 2.0% Arts, Entertainment, and Recreation 2.0% 15.2% **Educational Services (Public and Private) Finance and Insurance** 9.1% 12.6% **Health Care and Social Assistance** I do not work (retired) or am unable to work 12.1% Information, Publishing, and Communications 5.6% 3.5% **Management of Companies and Enterprises** Manufacturing 2.5% Mining, Quarrying, and Oil and Gas Extraction 1.5% Parent/homemaker 1.5% Professional, Scientific, and Technical Services 5.6% Public Administration (i.e., government) 6.1% **Real Estate and Rental and Leasing** 3.5% **Retail Trade** 5.1% Student 1.5% **Transportation and Warehousing** 1.5% Utilities 1.5% Wholesale Trade 0.0% 0.0% 2.0% 4.0% 6.0% 8.0% 10.0% 12.0% 14.0% 16.0%

CHART 15 - OCCUPATION BY NAICS SECTOR



A plurality of respondents, 15.2%, worked in the Educational Services (*Public and Private*) industry. The second and third highest occupation categories were in the Health Care and Social Assistance industry (12.6%) and individuals who are retired or unable to work (12.1%).

TABLE 47 - WHAT WOULD YOU IDENTIFY AS CLARION COUNTY'S STRENGTHS?

WHAT WOULD YOU IDENTIFY AS CLARION COUNTY'S STRENGTHS (Things that you like)?				
TOPIC/CATEGORY	MENTIONS			
Environment/Natural Beauty	56	40.6%		
Small Town, Rural Feel	52	37.7%		
Friendly People	30	21.7%		
Sense of Community	30	21.7%		
Outdoor/Recreational Activities	26	18.8%		
Affordability/Quality of Life	18	13.0%		
Low Traffic/Accessibility (Including Access to I-80)	17	12.3%		
Low Crime/Safe	14	10.1%		
Schools/Great for Raising Kids	12	8.7%		
Quality and Quantity of Small Local Businesses	10	7.2%		
Clarion University	8	5.8%		
Autumn Leaf Festival	6	4.3%		
Good Government/Social Services	4	2.9%		
History	3	2.2%		



Survey respondents were asked to identify Clarion County's strengths in an open-ended prompt. Delta's team reviewed responses for certain key words and themes that were present in multiple responses. Some responses contained more than one theme. In total, 40.6% of respondents noted that the Environmental/Natural Beauty is a strength of Clarion County. This was followed by Small Town, Rural Feel (37.7%), Friendly People (21.7%), and Sense of Community (21.7%).

TABLE 48 - WHAT WOULD YOU IDENTIFY AS CLARION COUNTY'S WEAKNESSES?

WHAT WOULD YOU IDENTIFY AS CLARION COUNTY'S WEAKNESSES (Things that you don't like)?					
TOPIC/CATEGORY	MENTIONS				
Lack of Dining/Retail	50	36.5%			
Lack of Grocery Stores	29	21.2%			
Lack of Economic Development/Business Growth	28	20.4%			
No Jobs/Lack of Good Opportunities	24	17.5%			
Lack of Entertainment	22	16.1%			
Blighted Properties/Abandoned Buildings	22	16.1%			
Lack of Indoor Recreation	21	15.3%			
Lack of High-Paying Jobs	20	14.6%			
Stagnation	20	14.6%			
Little Investment in Young Adults/Families	17	12.4%			
Poor Government/Social Services	16	11.7%			
Lack of Diversity (Racial/Political/Opinion)	13	9.5%			
High Drug Use/Drug Crime	9	6.6%			
Towns are Not Visibly Appealing	9	6.6%			
University is Reducing Tax Base	9	6.6%			
Poor Internet/Broadband	8	5.8%			
Poor Housing/Unaffordable Housing	8	5.8%			
High Cost of Living	7	5.1%			
Businesses Close Early	3	2.2%			
Far from Medical Facilities	3	2.2%			

Source: Delta Development Group, Inc.

Survey respondents were asked to identify Clarion County's weaknesses in an open-ended prompt. Delta's team reviewed responses for certain key words and themes that were present in multiple responses. Some responses contained more than one theme. In total, 36.5% of survey respondents did perceive there to be a Lack of Dining/Retail. Similarly, 21.2% of survey respondents said that there was a Lack of Grocery Stores. The third most common response was a Lack of Economic Development/Business Growth, which appeared in 20.4% of survey responses.



Table 49 – What Do You See as Opportunities to Strengthen Clarion County's Economy in the Future?

What Do You See As Opportunities To Strengthen					
CLARION COUNTY'S ECONOMY IN THE FUTURE?					
TOPIC/CATEGORY	MENTIONS				
More Stores, Additional Restaurants	22	16.4%			
Business Incentivization	22	16.4%			
Add Job and Career Opportunities	18	13.4%			
Tourism, Vacation Destinations	17	12.7%			
Small Business Development	16	11.9%			
Industrial/Manufacturing Development	16	11.9%			
Proximity to I-80	15	11.2%			
Broadband Improvement and Expansion	14	10.4%			
Improve Curb Appeal, Repair Blighted/Neglected Property	13	9.7%			
Additional Workforce Development Besides the University	13	9.7%			
Destination Recreation	11	8.2%			
Further Incorporate Natural Resources into County's Offerings	10	7.5%			
Revitalize/Reuse/Redevelop the Clarion Mall	9	6.7%			
New Grocery Store	8	6.0%			
Continue Improving/Adding Natural Sites	8	6.0%			
Logistics and Supply Chain	8	6.0%			
Attracting Teleworkers	6	4.5%			
Improve Schools	6	4.5%			
Lower Taxes	6	4.5%			
Additional Entertainment Options	5	3.7%			
Encourage Cooperation Between the County's Strong Non-Profit Organizations	5	3.7%			
Political Reform	4	3.0%			
Improve/Expand Medical Offerings in the County	4	3.0%			
Better Gather and Incorporate Feedback and Suggestions from Residents	3	2.2%			
Energy Development	3	2.2%			
Trails, Pedestrian, Biking Resources, Connectivity	2	1.5%			
Expand Business Hours	2	1.5%			

Source: Delta Development Group, Inc.

Survey respondents were asked to identify opportunities to strengthen Clarion County's economy in an open-ended prompt. Delta's team reviewed responses for certain key words and themes that were present in multiple responses. Some responses contained more than one theme. In total, 16.4% of survey respondents noted that More Stores, Additional Restaurants can strengthen Clarion County's economy. The same percentage of survey respondents also noted that Business Incentivization (tax abatement, grants, rental assistance) is also an opportunity. The third most common response was to Add Job and Career Opportunities, which was noted in 13.4% of survey responses.



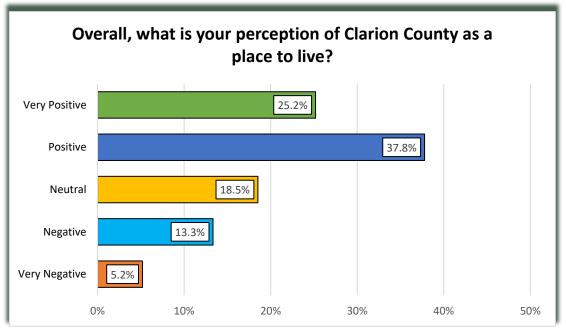
TABLE 50 - WHAT DO YOU SEE AS THREATS TO CLARION COUNTY'S ECONOMY?

WHAT DO YOU SEE AS THREATS TO CLARION COUNTY'S ECONOMY?					
TOPIC/CATEGORY	MENTIONS				
People Moving Away	22	16.2%			
Loss/Lack of Retail/Restaurants	21	15.4%			
Attitudes About Business	20	14.7%			
Changes to Clarion University	18	13.2%			
Loss/Lack of Manufacturing	16	11.8%			
Unwillingness to Embrace Change	14	10.3%			
Loss/Lack of Jobs	13	9.6%			
Low Number of High-Paying Jobs	11	8.1%			
Low-Income Housing	11	8.1%			
Economic Climate Stifling Innovation/Growth	9	6.6%			
Abandoned/Blighted Properties	8	5.9%			
Lack of Essential Businesses (Retail, Grocery)	8	5.9%			
Lack of/Poor Cellular/Internet Infrastrucutre	6	4.4%			
Taxes	6	4.4%			
Aging Population	5	3.7%			
Drug Abuse	5	3.7%			
Local/State Regulations	4	2.9%			
Inadequate School Funding	3	2.2%			
I-80 Bridge Tolling Plan	3	2.2%			

Source: Delta Development Group, Inc.

Survey respondents were asked to identify threats to Clarion County's economy in an open-ended prompt. Delta's team reviewed responses for certain key words and themes that were present in multiple responses. Some responses contained more than one theme. The most frequent response was People Moving Away, which was noted in 16.2% of responses. The second highest response was Loss/Lack of Retail/Restaurants, which was noted in 15.4% of responses. The third highest responses were Attitudes About Business, which was noted in 14.7% of responses.

CHART 16 - OVERALL, WHAT IS YOUR PERCEPTION OF CLARION COUNTY AS A PLACE TO LIVE?



Source: Delta Development Group, Inc.

When asked their perception of Clarion County as a place to live, survey respondents were generally positive. The plurality of respondents (37.8%) said that they have a positive perception. The second highest response, very positive, was selected by 25.2% of survey respondents. The third highest response, neutral, was selected by 18.5% of survey respondents. Only 18.5% of survey respondents had a negative or very negative view of Clarion County as a place to live.

TABLE 51 - HOW WOULD YOU RATE THE FOLLOWING ATTRIBUTES OF CLARION COUNTY?

HOW WOULD YOU RATE THE FOLLOWING ATTRIBUTES OF CLARION COUNTY?						
	VERY POSITIVE	POSITIVE	NEUTRAL	NEGATIVE	VERY NEGATIVE	WEIGHTED SCORE (Out of 5.0)
Availability of Outdoor Recreation	47.7%	29.6%	10.6%	6.8%	5.3%	4.1
Ease of Finding Outdoor Recreational Spaces (i.e. signage, maps, etc.)	24.2%	35.6%	22.0%	12.1%	6.1%	3.6
Quality of Public Education	8.3%	46.2%	24.2%	15.2%	6.1%	3.4
Access to Post-secondary Education and Technical Training	9.9%	37.1%	30.3%	15.2%	7.6%	3.3
Affordability of Housing Stock	11.4%	36.4%	25.8%	17.4%	9.1%	3.2
Availability of Healthcare Services	12.1%	33.3%	25.8%	21.2%	7.6%	3.2
Condition of Infrastructure (Roads, Bridges, Water/Sewer, etc.)	3.8%	19.7%	28.0%	31.8%	16.7%	2.6
Availability of Public Transportation	3.8%	16.0%	42.0%	14.5%	23.7%	2.6
Condition and Attractiveness of Housing Stock	1.5%	17.4%	33.3%	34.9%	12.9%	2.6
Availability of Jobs	8.4%	19.9%	17.6%	26.0%	28.2%	2.5
Promotion and Marketing of Clarion County	1.5%	11.4%	39.4%	28.8%	18.9%	2.5
Digital Connectivity (Phone and Internet)	2.3%	16.7%	19.7%	31.1%	30.3%	2.3
Quality of Available Jobs	3.1%	7.7%	15.4%	40.0%	33.9%	2.1
Choice of Shops and Restaurants	0.8%	10.6%	15.2%	35.6%	37.9%	2.0



Survey respondents were asked to rate the following attributes of Clarion County on a scale from "Very Positive" to "Very Negative". As can be seen, survey responses varied drastically by attribute. Using the response percentages, an overall score was calculated (out of 5). A higher score represents a more overall positive response, and a lower score represents a more overall negative response. The three most positive responses were found in the categories of Availability of Outdoor Recreation (4.1/5.0), Ease of Finding Outdoor Recreational Spaces (3.6/5.0), and Quality of Public Education (3.4/5.0). The three most negative responses were found in the categories of Choice of Shops and Restaurants (2.0/5.0), Quality of Available Jobs (2.1/5.0), and Digital Connectivity (2.3/5.0).

TABLE 52 – HOW WOULD YOU RANK THE FOLLOWING ATTRIBUTES OF CLARION COUNTY IN TERMS OF THEIR IMPORTANCE TO YOU?

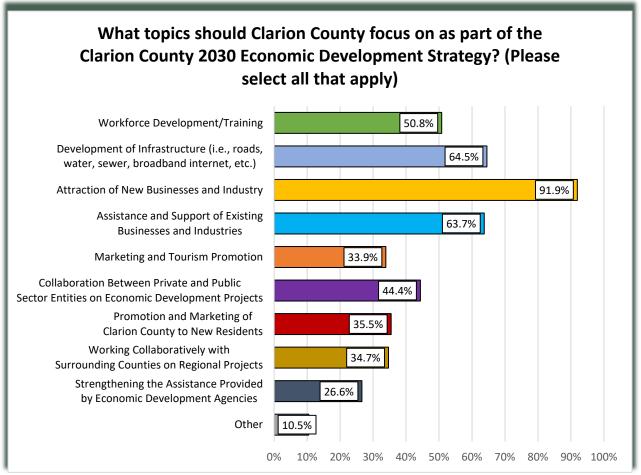
HOW WOULD YOU RANK THE FOLLOWING ATTRIBUTES OF CLARION COUNTY IN TERMS OF THEIR IMPORTANCE TO YOU?							
	MOST IMPORTANT	IMPORTANT	NEUTRAL	UNIMPORTANT	NOT IMPORTANT	WEIGHTED SCORE (Out of 5.0)	
Quality of Available Jobs	84.38%	13.28%	0.78%	1.56%	0.00%	4.8	
Digital Connectivity (Phone and Internet)	69.53%	24.22%	4.69%	1.56%	0.00%	4.6	
Availability of Jobs	68.50%	25.20%	3.94%	2.36%	0.00%	4.6	
Availability of Healthcare Services	64.06%	26.57%	7.81%	0.78%	0.78%	4.5	
Quality of Public Education	59.06%	33.06%	6.30%	0.79%	0.79%	4.5	
Condition of Infrastructure (Roads, Bridges, Water/Sewer, etc.)	47.66%	39.84%	10.94%	1.56%	0.00%	4.3	
Choice of Shops and Restaurants	50.00%	38.28%	7.81%	3.13%	0.78%	4.3	
Affordability of Housing Stock	28.91%	55.47%	14.06%	0.78%	0.78%	4.1	
Condition and Attractiveness of Housing Stock	22.66%	58.59%	17.19%	1.56%	0.00%	4.0	
Availability of Outdoor Recreation	24.22%	53.91%	14.06%	7.03%	0.78%	3.9	
Ease of Finding Outdoor Recreational Spaces (i.e. signage, maps, etc.)	17.19%	42.19%	23.44%	10.93%	6.25%	3.5	
Promotion and Marketing of Clarion County	22.66%	33.59%	24.22%	11.72%	7.81%	3.5	
Availability of Public Transportation	15.63%	32.81%	27.34%	10.16%	14.06%	3.3	

SOURCE: Delta Development Group, Inc.

Survey respondents were asked to rate the following attributes of Clarion County on a scale from "Most Important" to "Least Important". Using the response percentages, an overall score was calculated (out of 5). A higher score represents a more overall positive response, and a lower score represents a more overall negative response. The three highest scoring responses were found in the categories of Quality of Available Jobs (4.8/5.0), Digital Connectivity (4.6/5.0), and Availability of Jobs (4.6/5.0). The three lowest scoring responses were found in the categories of Availability of Public Transportation (3.3/5.0), Promotion and Marketing of Clarion County (3.5/5.0), and Ease of Funding Outdoor Recreational Spaces (3.5/5.0).



CHART 17 — WHAT TOPICS SHOULD CLARION COUNTY FOCUS ON AS PART OF THE CLARION COUNTY 2030 ECONOMIC DEVELOPMENT STRATEGY?



SOURCE: Delta Development Group, Inc.

Survey respondents were asked to select all topics/categories that should be a focus area of the *Clarion County 2030 Economic Development Strategy*. By far, the most frequent response was Attraction of New Businesses and Industry, which was selected by 91.9% of survey respondents. The second and third most selected responses were Development of Infrastructure (64.5%) and Assistance and Support of Existing Businesses and Industries (63.7%).



SECTION 3.0: REAL ESTATE/DEVELOPER INTERVIEWS

In early-mid 2021, Delta undertook interviews with five (5) real estate and development firms to obtain insight on the local real estate and development market and how opportunities can be leveraged for success. Although all interviewees had somewhat unique insights, key themes emerged among interviewees:

- 1. Interviewees see I-80 as one of Clarion County's greatest assets. However, the lack of infrastructure along Clarion County's six (6) highway exits (except Exit 62) limits I-80's potential benefits. One interviewee noted that only 2% of Clarion County's land area is developed, and much of that is around I-80.
- 2. Tax Rates: For residential homeowners and landowners, Clarion County generally has a low tax burden, which is attractive for potential new residents. This is partially due to older assessment values, which are compensated for by a higher county millage rate. However, interviewees note that Clarion County's high millage rate can sometimes be misleading for new businesses looking to locate to the area; it gives the false impression of a higher tax burden. Pennsylvania's high gas taxes also put Clarion County at a relative disadvantage to counties in Ohio and West Virginia.
- 3. <u>Outdoor Recreation</u>: Although Clarion County has abundant outdoor recreational resources, there is still room to improve in terms of promotion and further build-out of recreational attractions. Because Clarion County has seen a surge in buyers seeking recreational and seasonal properties, it becomes increasingly important to bring them into communities to dine, shop, etc.
- 4. <u>Housing</u>: Residential real estate agents have seen a huge demand in the past year for recreational and seasonal properties. The COVID-19 Pandemic seems to have spurred much of this demand, particularly among buyers from the Pittsburgh area, Cleveland area, and the State of New York. Among permanent resident buyers, buyers seek properties with abundant land/acreage. A lack of adequate broadband infrastructure is perhaps the greatest challenge for Clarion County in attracting new buyers.
- 5. <u>AMENITIES FOR NEW RESIDENTS</u>: To attract new residents, there need to be more amenities in terms of dining, retail, and entertainment. For instance, the Clarion area does not have a traditional full-service grocer (Walmart, Aldi, and smaller meat markets are the only options for groceries). There has also been a concerning trend in smaller businesses closing in downtowns, but smaller businesses like these are essential in attracting new residents.
- **6. BROADBAND:** Among both businesses and residents, broadband internet connectivity is a massive infrastructure hurdle.



- 7. Take Advantage of Clarion County's Economic Strengths: In addition to I-80, Clarion County has the strongest hardwoods industry cluster in the Commonwealth of Pennsylvania. Clarion County's abundant supply of natural gas makes it attractive to new manufacturers, including the potential for plastic manufacturing. According to the 2019 Petrochemicals Supply Chain Opportunity Study³⁹, a publication commissioned by the Northwest Commission, Northwestern Pennsylvania is uniquely positioned to take advantage of the polyethylene products produced at the future Beaver County Shell Cracker Plant. Clarion County, in particular, benefits from an abundant natural gas supply and availability of local hardwoods. Some manufacturers, such as wood and laminate flooring manufacturer Kronospan USA, successfully use these inputs to produce export items in Clarion County. More pad-ready business sites will facilitate future manufacturers that can utilize similar production inputs.
- 8. EDUCATION AND WORKFORCE TRAINING: Clarion County is served by seven (7) school districts, which may be difficult to maintain given current enrollment trends. There is also a need to integrate in-demand skills and training opportunities into the curriculums of high schools, career and technical schools, and Clarion University. For instance, there are needs for advanced manufacturing training, GIS skills, and nursing that are currently going unfulfilled in the region. For existing local employers, this makes it difficult to expand.

https://northwestpa.org/wp-content/uploads/2019/09/Report-NW-PA-Regional-Petrochemicals-Economic-Opportunity-Study-NWC-5.pdf



PHASE 4





SECTION 1.0: VISION AND ACTION PLAN

It is the Clarion County EDC's mission to ensure that the following items take place in Clarion County by 2030:

> INFRASTRUCTURE:

- A. Broadband internet coverage is more widespread, and existing service gaps are filled by at least one service provider.
- B. Clarion County's highway exits have adequate infrastructure (i.e., water, sewer, stormwater, natural gas, etc.) to develop more pad-ready commercial and industrial sites.
- C. Recent stimulus funding, or other funding, is used to begin the Clarion County Infrastructure Bank (CCIB) and build-out necessary infrastructure to promote commercial and industrial development.

PROMOTION AND BRANDING:

- A. Clarion County has a strong and recognizable economic development brand that has effectively been promoted through successful marketing.
- B. Clarion County has successfully been marketed as a close-to-home vacation destination, which has grown the tourism industry and has resulted in tourists purchasing both seasonal recreational and permanent homes in Clarion County.
- C. Industry clusters have been successfully marketed and have resulted in new manufacturers and upstream/downstream industries locating in Clarion County.

▶ Workforce:

- A. Clarion University's rebrand and relaunch has not only provided new opportunities for local students but has improved Clarion Borough's town-gown relationship with the University.
- B. The strength of existing manufacturers and the Clarion County Career Center have been leveraged to build skills in in-demand industry sectors.
- C. Clarion County's school districts have developed synergies and shared services as a result of quarterly meetings between school districts, the Clarion County Career Center, and RIU#6.

RECREATIONAL AND CULTURAL ASSETS:

- A. Clarion County's recreational and cultural assets are more recognizable and easily accessible due to targeted promotion.
- B. Bike and pedestrian trails have been built-out and interconnected to allow for continuous non-motorized passage between Clarion County's core communities.



C. The Allegheny and Clarion Scenic Rivers have become centerpieces of Clarion County, both physically and in programming promoted by "Western University".

CORE COMMUNITIES:

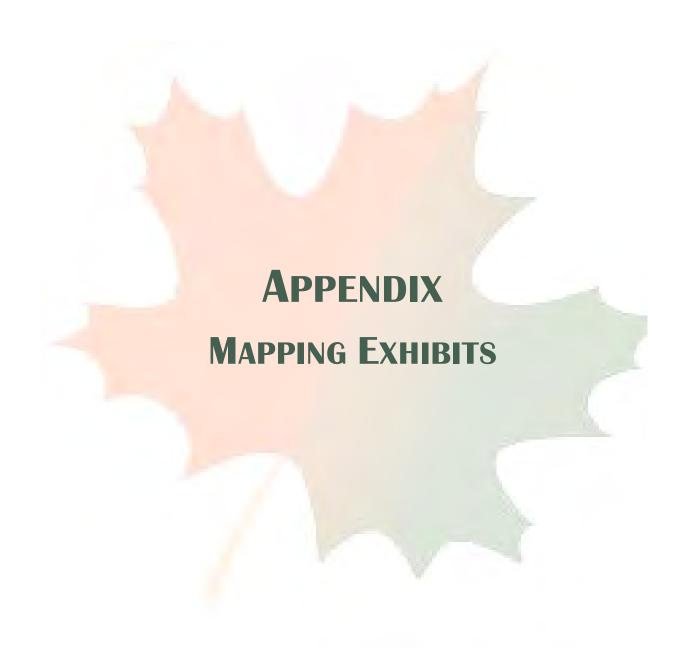
- A. Empty buildings in Clarion County's core communities have been filled with new and diverse experiences with the help of new outside investment.
- B. Core communities have been improved with streetscaping and new wayfinding signage.
- C. Clarion County's housing stock has been diversified through the building of new housing styles and residential development types, including on land secured through a new land bank program.

ECONOMIC DEVELOPMENT AGENCIES:

- A. The roles and responsibilities of Clarion County's economic development agencies have been more defined, and synergies take place where possible to reduce costs and increase level of services.
- B. Economic development agencies are more in-touch with economic development efforts through 'Clarion County Connected' summit meeting, business attraction/retention summit and roundtable meetings, and close contact with elected officials.

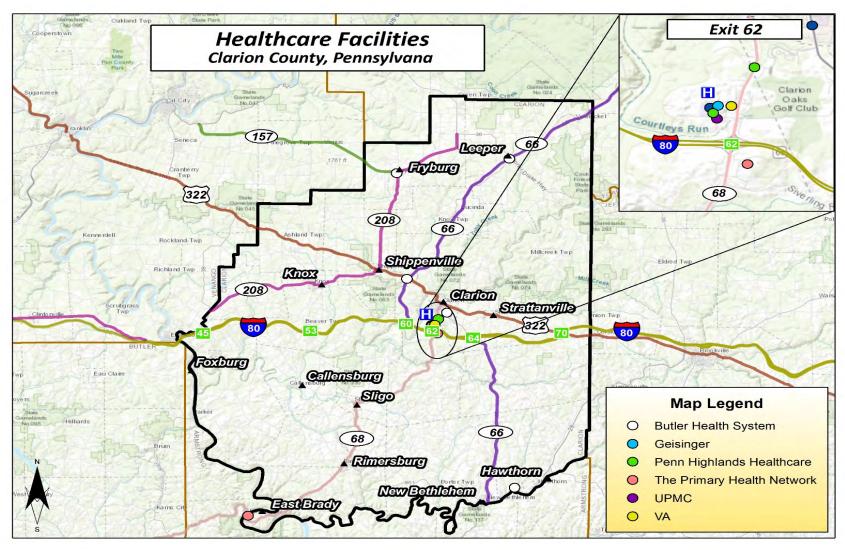


APPENDIX



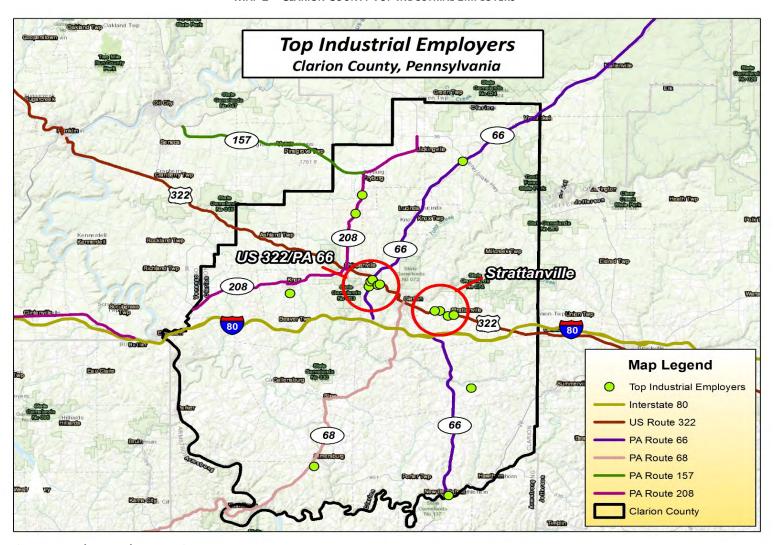


Map 1 – Clarion County Healthcare Facilities



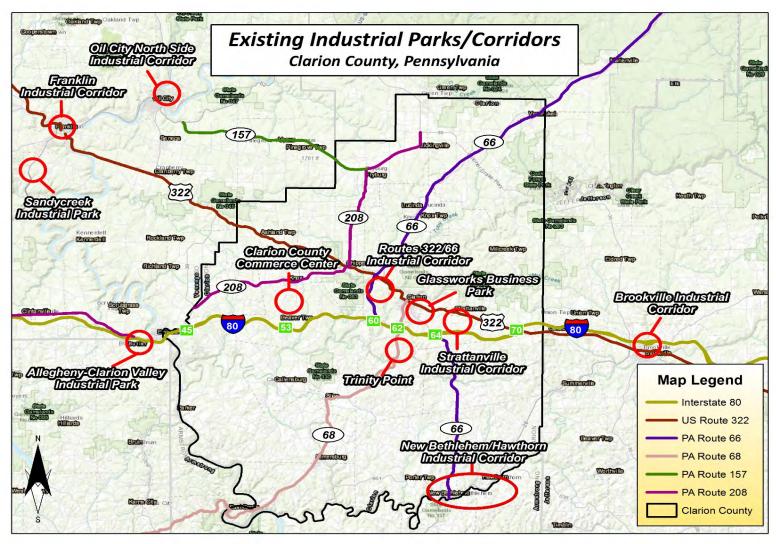


Map 2 - Clarion County Top Industrial Employers



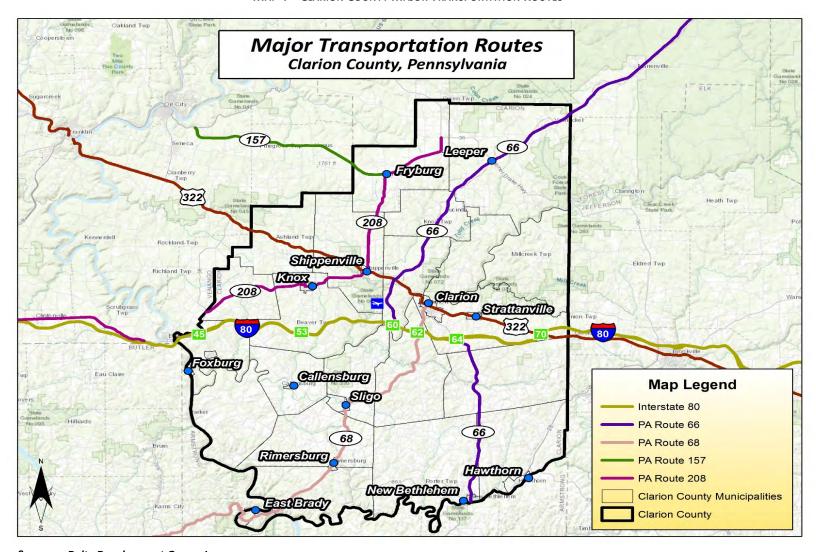


Map 3 – Clarion County Industrial Parks/Corridors



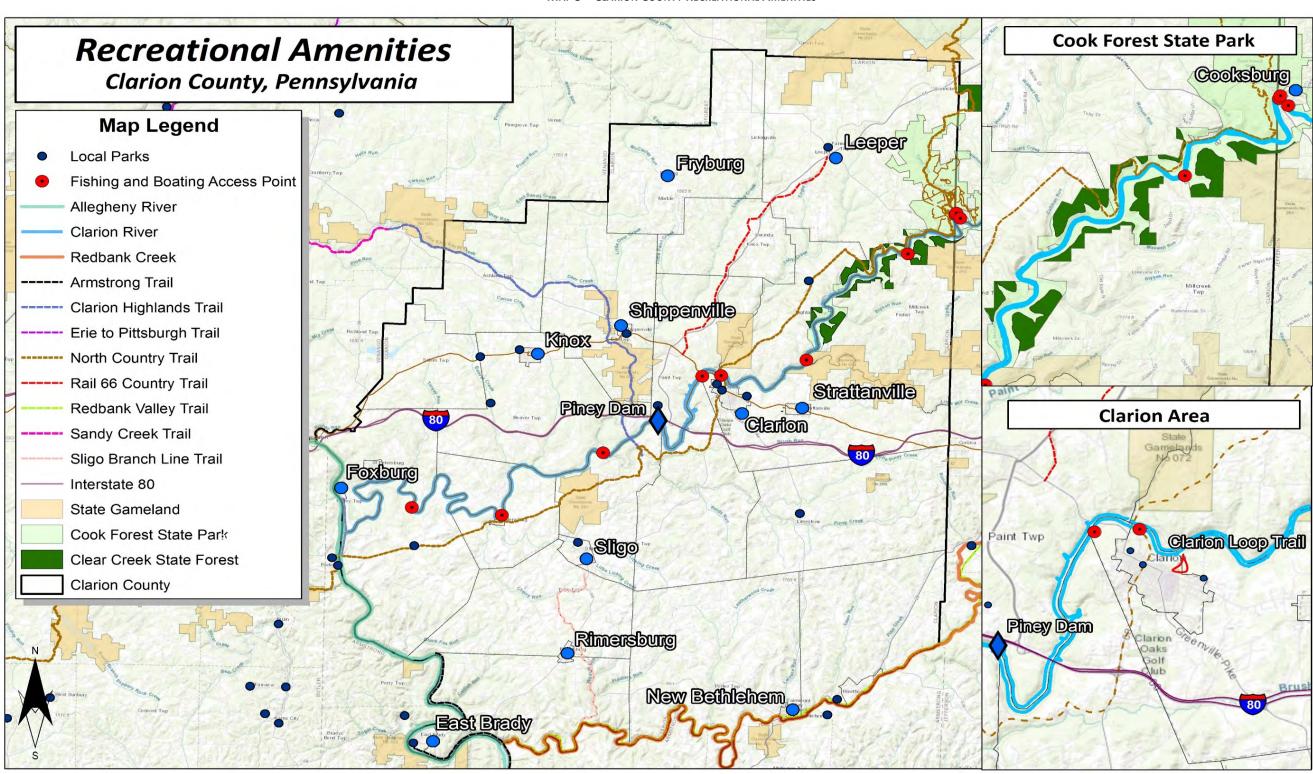


Map 4 - Clarion County Major Transportation Routes



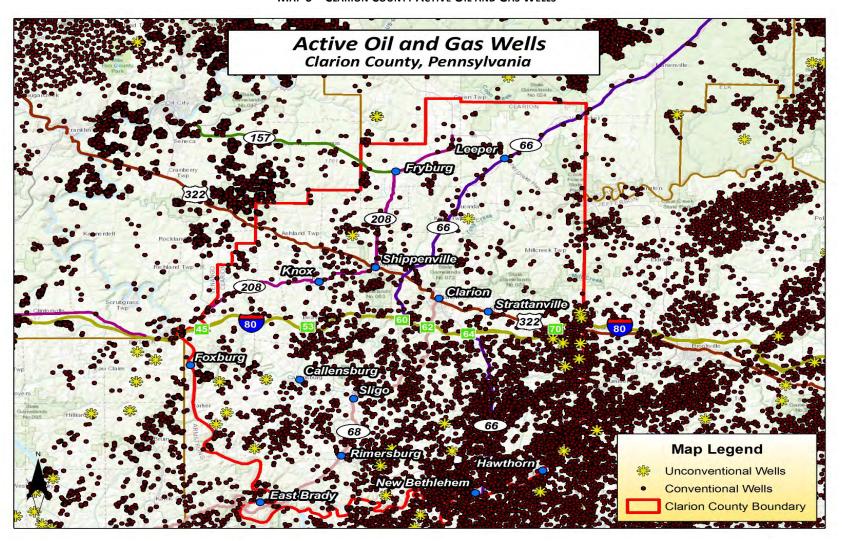


Map 5 - Clarion County Recreational Amenities



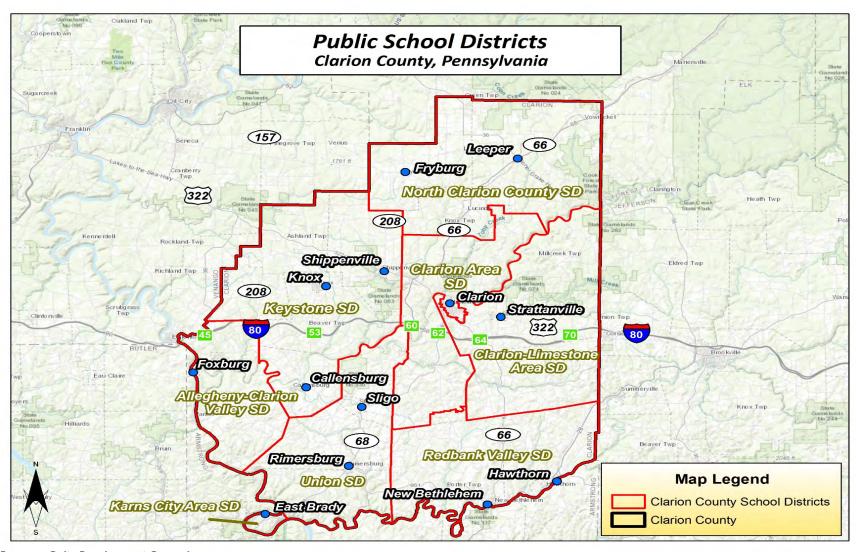


Map 6 – Clarion County Active Oil and Gas Wells





Map 7 - Clarion County Public School Districts





Map 8 - Clinton County Federal Opportunity Zones

