A Resource for All Pennsylvania Libraries

2016 PaLA Conference
October 17, 2016

625 Forster Street, Room 902
Harrisburg, PA 17120
(717) 787-9555
www.rural.palegislature.us
The Center for Rural Pennsylvania

Legislative research agency of the Pennsylvania General Assembly (Act 16, 1987 & Act 12, 2009)

Mandates

• Administer grants to conduct research on rural conditions.
• Maintain a database on rural conditions and needs.
The Center for Rural Pennsylvania
Recently Published Research Reports

Topics

• Analysis of domestic violence services
• Analysis of rural hate crimes
• Economic impact of heritage areas
• Municipal pensions
• Status of rural nonprofits
• Pennsylvania State Police coverage of municipalities
• Rural charter/cyber-charter schools
• Rural homelessness
• Finances of volunteer fire companies

www.rural.palegislature.us/publications_reports.html
**Pennsylvania’s most comprehensive database on rural trends and conditions**

**Research grants program “feeds” the database**

**Data available on Center’s website or via email**
The Center for Rural Pennsylvania’s Definition of Rural/Urban Counties

Quick Facts about Rural Pennsylvania

- Rural Pennsylvanians (3.5 million) represent almost 27 percent of the state’s population.
- Rural Pennsylvania comprises 75 percent of the state’s land area.
- Pennsylvania has the third largest rural population in the nation: Texas is first, North Carolina is second.
- 48 of Pennsylvania’s 67 counties are classified as rural.
- Only Delaware and Philadelphia counties have no rural population.
Data Resources for Libraries

- Employment
- Businesses and Employers
- Income
- Housing
- Population
- Education
- Population Projections
- And more . . . .
Percent Change in Employment by County, 2010 to 2015

Data source: PA Department of Labor and Industry. Prepared by the Center for Rural Pennsylvania.
Percent Change in Pennsylvania Employment, 1980 to 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>971,266</td>
</tr>
<tr>
<td>1983</td>
<td>905,578</td>
</tr>
<tr>
<td>1985</td>
<td>944,087</td>
</tr>
<tr>
<td>1990</td>
<td>1,061,263</td>
</tr>
<tr>
<td>1995</td>
<td>1,109,417</td>
</tr>
<tr>
<td>2000</td>
<td>1,191,942</td>
</tr>
<tr>
<td>2005</td>
<td>1,235,126</td>
</tr>
<tr>
<td>2008</td>
<td>1,263,280</td>
</tr>
<tr>
<td>2010</td>
<td>1,223,905</td>
</tr>
<tr>
<td>2015</td>
<td>1,244,401</td>
</tr>
</tbody>
</table>

Data source: PA Department of Labor and Industry. Prepared by the Center for Rural Pennsylvania.
### Rural Employment by Industry, 2001 and 2015

**2001 Rural Employment**  
*(n=1,210,292)*

<table>
<thead>
<tr>
<th>Industry</th>
<th>Employment</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Mining &amp; Construction</td>
<td>76,632</td>
<td>6%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>234,251</td>
<td>20%</td>
</tr>
<tr>
<td>Retail, Wholesale, &amp; Transportation</td>
<td>251,745</td>
<td>21%</td>
</tr>
<tr>
<td>Education &amp; Health Care</td>
<td>265,585</td>
<td>22%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>111,459</td>
<td>9%</td>
</tr>
<tr>
<td>Finance, Professional Services &amp; Information</td>
<td>98,882</td>
<td>8%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>61,978</td>
<td>5%</td>
</tr>
<tr>
<td>Other*</td>
<td>109,760</td>
<td>9%</td>
</tr>
</tbody>
</table>

**2015 Rural Employment**  
*(n=1,244,401)*

<table>
<thead>
<tr>
<th>Industry</th>
<th>Employment</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Mining &amp; Construction</td>
<td>88,203</td>
<td>7%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>172,946</td>
<td>14%</td>
</tr>
<tr>
<td>Retail, Wholesale, &amp; Transportation</td>
<td>257,421</td>
<td>21%</td>
</tr>
<tr>
<td>Education &amp; Health Care</td>
<td>291,725</td>
<td>23%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>124,941</td>
<td>10%</td>
</tr>
<tr>
<td>Finance, Professional Services &amp; Information</td>
<td>257,421</td>
<td>21%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>60,792</td>
<td>5%</td>
</tr>
<tr>
<td>Other*</td>
<td>143,789</td>
<td>12%</td>
</tr>
</tbody>
</table>

*Other includes: administration and waste services (NAICS 56); utilities (NAICS 22); other services (NAICS 81); and all other data that are suppressed for confidentiality reasons. Data source: PA Department of Labor and Industry. Prepared by the Center for Rural Pennsylvania.
Urban Employment by Industry, 2001 and 2015

2001 Urban Employment  
(n=4,244,424)

- Agriculture, Mining & Construction: 213,039 (5%)
- Manufacturing: 585,118 (14%)
- Retail, Wholesale, & Transportation: 868,228 (20%)
- Finance, Professional Services & Information: 692,084 (16%)
- Hospitality: 341,792 (8%)
- Education & Health Care: 941,320 (22%)
- Other*: 405,504 (10%)
- Public Administration: 197,339 (5%)

2015 Urban Employment  
(n=4,299,897)

- Agriculture, Mining & Construction: 194,551 (4%)
- Manufacturing: 392,551 (9%)
- Retail, Wholesale, & Transportation: 848,184 (20%)
- Finance, Professional Services & Information: 719,856 (17%)
- Hospitality: 420,753 (10%)
- Education & Health Care: 1,132,274 (26%)
- Other*: 418,103 (10%)
- Public Administration: 173,625 (4%)
- Agriculture, Mining & Construction: 194,551 (4%)

*Other includes: administration and waste services (NAICS 56); utilities (NAICS 22); other services (NAICS 81); and all other data that are suppressed for confidentiality reasons. Data source: PA Department of Labor and Industry. Prepared by the Center for Rural Pennsylvania.
Unemployment: Pennsylvania Rural and Urban Unemployment Rate, 1970 to 2015
(Annual Average, Not Seasonally Adjusted)

Data source: Pennsylvania Department of Labor and Industry. Prepared by the Center for Rural Pennsylvania.
Business Establishments: Rural Business Establishments
By Number of Employees, 2014 (n=75,089)

1 to 4 Employees 51%
5 to 9 Employees 22%
10 to 19 Employees 13%
20+ Employees 14%

Change in the Number Small Rural Pennsylvania Business Establishments, (1 to 5 Employees), 1990 to 2014

Top Employer By County, 4th Quarter 2015

Data Source: Pennsylvania Department of Labor and Industry.
Map by the Center for Rural Pennsylvania.
Income: Per Capita Income in Rural and Urban Pennsylvania (Inflation Adjusted), 1970 to 2014

Dollar figures adjusted for inflation using the CPI-U with 2014 = 100  Data source: U.S. Bureau of Economic Analysis. Graph by the Center for Rural Pennsylvania.
Income: Sources of Rural Pennsylvania Income, 1970 and 2014 (Inflation Adjusted)

1970 ($64.83 Billion)
- Earnings (Wages and Salary): $48.92 Billion, 75%
- Dividends, Interest, & Rent: $7.79 Billion, 12%
- Transfer Payments: $8.12 Billion, 13%

2014 ($134.15 Billion)
- Earnings (Wages and Salary): $81.53 Billion, 61%
- Dividends, Interest, & Rent: $20.52 Billion, 15%
- Transfer Payments: $32.11 Billion, 24%

Dollar figures adjusted for inflation using the CPI-U with 2014 = 100. Data source: U.S. Bureau of Economic Analysis. Graph by the Center for Rural Pennsylvania.
Average Weekly Wage by County, 2015

Statewide Average Weekly Wage = $1,003

Data Source: Pennsylvania Department of Labor and Industry.
Map by the Center for Rural Pennsylvania.
Percent Change in Average Weekly Wage, 2010 to 2015 (Inflation Adjusted)

Data Source: Pennsylvania Department of Labor and Industry. Data adjusted for inflation using the CPI-U with 2015 = 100.
Map by the Center for Rural Pennsylvania.
Internet Connectivity, 2014

Percent of Pennsylvania Rural and Urban Households Without Home Internet Access, 2014

<table>
<thead>
<tr>
<th>Type of Connectivity</th>
<th>Rural Households</th>
<th>Urban Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dial-up and Other Methods</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>Mobile Broadband Only (Smart Phone)</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Internet Access through Other Means (free Wi-Fi)</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>DSL Only</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>Other Broadband (Satellites, Fiber Optics, etc.)</td>
<td>30%</td>
<td>9%</td>
</tr>
<tr>
<td>Cable Modem Only</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Multiple Methods of Connectivity (Smart Phone, DSL, Cable etc.)</td>
<td>36%</td>
<td>44%</td>
</tr>
</tbody>
</table>

Gas and Oil Wells Drilled in Pennsylvania, January 2010 to August 2016

Data source: SPUD Reports, Pennsylvania Department of Environmental Protection. Prepared by the Center for Rural Pennsylvania.
Rural Adult (25+) Educational Attainment Rising

% Rural Adults with Bachelor's Degree or Higher

1990: 12.0%
2000: 15.0%
2010-14: 20.0%

Highest Level of Adult Educational Attainment, 2010-14

- No High School Diploma: 12%
- Bachelor's degree or higher: 20%
- High School Diploma or GED: 45%
- Associate’s Degree: 8%
- Some College, No Degree: 15%

Postsecondary Institutions in Pennsylvania, 2014

Non-Degree Granting Postsecondary Institutions (Trade & Technical Schools)

- Rural = 48
- Urban = 83
- Total = 131

Degree Granting Postsecondary Institutions (Colleges & Universities)

- Rural = 56
- Urban = 212
- Total = 268

Agriculture and the Rural Economy, 2014

Rural Persons Employed in Agriculture, 2014

| Nonfarm, 1,724,570 | 98% |
| Fam, 34,000       | 2%  |

Counties With Ag Sales of $100 Million or More, 2014

Data source: U.S. Bureau Economic Analysis. Graph and map by the Center for Rural Pennsylvania.
Pennsylvania’s Rural and Urban Population, 1950 to 2040 (projected)

Data sources: U.S. Census Bureau and Pennsylvania State Data Center. Graph by the Center for Rural Pennsylvania.
Change in Population, 1980 to 2010 and 2010 to 2040 (projected)

Number of Pennsylvania Youth and Senior Citizens, 1950 to 2040 (projected)

Projected Domestic and International Migration in Rural Pennsylvania, 2010 to 2040

Data sources: U.S. Census Bureau and Pennsylvania State Data Center. Graph by the Center for Rural Pennsylvania.
Research Resources for Libraries
Wealth Transfer in Pennsylvania
In 2008, the Center for Rural Pennsylvania conducted a wealth transfer study because of:

- Growing pressure on existing government finances
- Growing need for community investment
- Research from Nebraska that linked the transfer of wealth to community philanthropy and community development

Since 2008, Pennsylvania communities have since experienced significant economic changes requiring an update.
Impact of the Great Recession and Shale Drilling

Monthly Unemployment Rates in Rural and Urban Pennsylvania and Recession periods

Number of Unconventional Wells Drilled, 2008 to 2015

Data source: SPUD Data, PA Dept. of Environmental Protection.
Aging Population
Pennsylvania
Age Cohorts
Blue = % Pop. Males, Yellow = % Pop. Females, Red = Baby Boomers, Born 1946-64

Transfer of Wealth Opportunity

- Can increase private investment in our communities
- May open new avenues of philanthropic giving
- Can help support local non-profits and civic organizations in meeting community needs
- Can help start a community-wide conversation on what is important and worth preserving
Methodology

- Estimate Current Net Worth
- Discount Assets
- Build Demographic Model
- Review and Verification
- Estimate Timing of Transfer
Statewide Transfers, 2016 to 2065

- Purpose of the model was to understand the magnitude of future wealth transfers.
- Model is a scenario, not a prediction or forecast.
- 50 year time frame was selected to provide a full generational picture of transfer dynamics.
- All figures were held constant in 2015 dollars.

Amount Transferring Between 2016-2065
- $2.64 Trillion
- $517,032 per Household

Amount Transferring Between 2016-25
- $309.92 Billion
- $60,754 per Household

2015 Net Worth
- $3.11 Trillion
- $610,565 per Household

Estimate of Average Net Worth in Pennsylvania 2015

Transfer of Wealth, 2016 to 2025

- U.S.: $7.1 trillion, $59,586 per household
- Pennsylvania: $309.9 billion, $60,754 per household
- Urban Pennsylvania: $242.1 billion, $65,309 per household
- Rural Pennsylvania: $67.8 billion, $48,635 per household

Why is the Transfer of Wealth Important?

Total Transfer $309.9 Billion
$60,754 per households

5% Community Capture would generate $15.5 Billion
or $3,038 per household

Annual Payout of $774.8 Million

Foundation Assets in Pennsylvania, 2014-15

Data source: Internal Revenue Service.

<table>
<thead>
<tr>
<th></th>
<th>Rural</th>
<th>Urban</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1 to $499,999</td>
<td>512</td>
<td>3,682</td>
</tr>
<tr>
<td>$500,000 to $999,999</td>
<td>59</td>
<td>240</td>
</tr>
<tr>
<td>$1.0 to $9.9 Million</td>
<td>63</td>
<td>549</td>
</tr>
<tr>
<td>$10.0+ Million</td>
<td>9</td>
<td>127</td>
</tr>
<tr>
<td>Data Not Reported</td>
<td>42</td>
<td>179</td>
</tr>
<tr>
<td>Total</td>
<td>685</td>
<td>4,777</td>
</tr>
</tbody>
</table>
Rural Youth Study:
Where do you want to live when you are 30 years old?

- Live Outside PA:
  - 7th Grade = 25.0%
  - 11th Grade = 30.4%

- Live in Rural PA
  - 7th Grade = 37.8%
  - 11th Grade = 32.2%

- Don’t Know
  - 7th Grade = 27.3%
  - 11th Grade = 27.3%

- Live in Urban PA
  - 7th Grade = 9.9%
  - 11th Grade = 10.1%

The Bottom Line

- Pennsylvania counties have wealth ($3.1 trillion)
- This wealth varies by county
- Over the next 10 years approximately $310 billion of the wealth will be transferred from one generation to the next
- Setting aside just 5 percent of this wealth for community philanthropy could generate $774 million annually to meet community needs

Every community has a unique household wealth profile. Employing research procured from Esri, we have prepared the following Household Net Worth Profile. Documentation, definitions and interpretative analysis can be found on the back of this Profile.

**Total Household Current Net Worth (CNW)**

- Median CNW: $137,326
- Mean CNW: $604,000
- Median to Mean Ratio: 4.4x

### Percent of Households by CNW

- $500,000+: 19.3%
- $250,000-$500,000: 46.9%
- $150,000-$249,999: 16.6%
- $100,000-$149,999: 12.3%
- $75,000-$99,999: 6.2%
- $50,000-$74,999: 4.0%
- $35,000-$49,999: 6.6%
- $15,000-$34,999: 21.9%
- <$15,000:

### Percent of Households by Age Cohort

- <25: 2.3%
- 25-34: 11.0%
- 35-44: 15.3%
- 45-54: 12.4%
- 55-64: 14.3%
- 65-74: 14.8%
- 75+: 9.5%

### Average CNW by Age Cohort

- 75+: $736,365
- 65-74: $1,195,098
- 55-64: $819,748
- 45-54: $542,293
- 35-44: $266,689
- 25-34: $110,983
- <25: $55,397

**Scenario for Every Pennsylvania County**

www.rural.palegislature.us
Brown County (pop. 2,946) Residents developed unrestricted endowment to fund the local hospital, fire department and recreation program.

Valley County (pop. 4,154) established a $4.0 million permanent endowment to support entrepreneurship opportunities for middle and high school students.

Holt County (pop. 10,313) community supported fund established an economic development office with full-time director which led to 11 start-up businesses and 9 expansions.

Butler County (pop. 8,115) community foundation provided scholarship for leadership training and provides support for the arts council.

McCook City (pop. 7,698) community foundation established a welding and machine shop at local community college.

Eustis City (pop. 401) community foundation supports a child care center.
Public Hearing/ Public Forum Resources for Libraries: Opioid Crisis in Pennsylvania
Public Hearings on Heroin/Opioid Epidemic

- 2014 to 2016, 11 public hearings on the heroin/opioid overdose epidemic
- Testimony from health care/treatment professionals, law enforcement personnel and judges, educators, local government officials, researchers, families, and those recovering from addiction
- Hearings summarized in two reports.
  - 2014 report findings highlighted support for two pieces of legislation that were under consideration in the General Assembly. Both became law.
    - Act 139, provided legal protection for witnesses, or Good Samaritans, seeking medical help at the scene of an overdose, and allowed Naloxone to be prescribed to third parties, such as a friend or family member, and administered by law enforcement and firefighters.
    - Act 191, expanded the types of drugs monitored under the state’s existing Prescription Drug Monitoring Program to include Schedule II through V controlled substances.
Public Hearings on Heroin/Opioid Epidemic

- 2015 report findings highlighted need to:
  - recognize addiction as a disease and those suffering from the disease afforded proper treatment;
  - require continuing medical education credits on pain management and prescribing practices of opioids for professionals licensed to prescribe in Pennsylvania;
  - expand pilot program of early intervention through warm hand-off services statewide;
  - establish a uniform manner to report overdose deaths, specifically heroin deaths; and
  - expand the use of naloxone among local Pennsylvania police departments.

- Center worked with PA Department of Drug and Alcohol Services (DDAP) in 2015 to conduct survey of local police departments on naloxone use.
Number of Opioid Deaths, 2014

Data source: U.S. Drug Enforcement Administration.
Map by the Center for Rural Pennsylvania.

Legend:
- 1 to 9 Opioid Deaths
- 10 to 24 Opioid Deaths
- 25 or More Opioid Deaths
- Data Not Reported
Opioid Deaths by Age Cohort in Rural and Urban Pennsylvania, 2014

Urban Opioid Deaths (n=1,169) Avg. Age = 40.2

Rural Opioid Deaths (n=427) Avg. Age = 39.9

Data source: U.S. Drug Enforcement Administration.
Graphs by the Center for Rural Pennsylvania.
Opioid Deaths by Gender in Rural and Urban Pennsylvania, 2014

Urban Opioid Deaths (n=1,619)
- Males: 66.5%
- Females: 33.5%

Rural Opioid Deaths (n=427)
- Males: 64.4%
- Females: 35.6%

Opioid Deaths by Race in Rural and Urban Pennsylvania, 2014

Location of Drug Takeback Boxes, March 2016 (Locations approximate)

Data source: Pennsylvania Department of Drug and Alcohol Programs.
Map by the Center for Rural Pennsylvania.

Pennsylvania Department of Drug and Alcohol Programs:
www.ddap.pa.gov/Prevention/Pages/Drug_Take_Back.aspx
Police Departments Carrying Naloxone, March 2016 (Location approximate)

Data source: Pennsylvania Department of Drug and Alcohol Programs. Map by the Center for Rural Pennsylvania.
Continuing to Address Heroin/Opioid Epidemic

- Center participating in statewide Teletown Hall Event as part of A Commonwealth Crisis initiative. [http://www.acommonwealthcrisis.com/](http://www.acommonwealthcrisis.com/)

- Joint session of legislature held Sept. 28, 2016.

- Legislation may be acted on before session ends. There are currently 38 bills and 5 resolutions addressing the crisis.

- Communities forming task forces and holding meetings to address epidemic locally.
How Libraries Can Use
The Center for Rural Pennsylvania as a Resource

Data and research findings for:
  - Community groups
  - Local governments
  - Students
  - Businesses

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Thank you!

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