SUPPLEMENTAL

This supplemental document provides additional insight into the data and analysis shown in the appendix to inform the development of the North Central Pennsylvania CEDS.

CEDS 2026–2030 Update:
Survey Results Analysis

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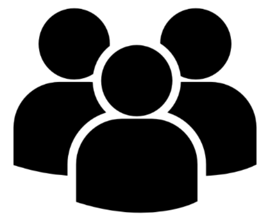
Introduction & Summary Stats

As part of North Central's update to the regional Comprehensive Economic Development Strategy (CEDS), residents of the region's six counties were invited to provide input on the plan's development through a public survey. This survey was distributed to regional partners and stakeholders through North Central listservs, and it was advertised to the public through social media and the local press.



349
Responses

Although this survey was only available for an abbreviated period of time (roughly three weeks), it received 349 responses from across the region. While responses were received from all six counties, responses were not evenly distributed. McKean County had the highest number of responses with 150 (43.0%), while Potter had the lowest at 16 (4.6%). Given the region's unequal population distribution, these raw numbers, however, only provide a partial picture. Providing a per capita measure of response rates helps to control for population disparities. Under this measure, Cameron County had the highest response rate with 7.0 per 1,000 residents; Clearfield had the lowest at 0.3 per 1,000. These results may indicate potential sampling biases that should be considered when examining regional applicability of findings. The table below showcases the full county-level response summaries (responses in green are higher than the overall rate, while red indicates a lower relative rate).

Table 1: Response Statistics By County

	Responses	Percent of Responses	Per Capita Rate*
Overall	***349***	***N/A***	***1.6 per 1,000 residents***
Cameron County	31	8.9%	7.0 per 1,000 residents
Clearfield County	26	7.4%	0.3 per 1,000 residents
Elk County	60	17.2%	2.0 per 1,000 residents
Jefferson County	43	12.3%	1.0 per 1,000 residents
McKean County	150	43.0%	3.8 per 1,000 residents
Potter County	16	4.6%	1.0 per 1,000 residents
Outside Region	20	5.7%	N/A
Blank	3	0.9%	N/A

**Per capita rates are based on American Community Survey (ACS) 2024, 5-year population estimates*

The survey asked two additional basic demographic questions: age and respondent category. For the purposes of this analysis, age was condensed into three primary ranges: 19–34, 35–54, and 55+. The youngest age range (19–34) was under-represented among respondents (1.3 per 1,000), while the middle range (35–54) was relatively over-represented (3.8 per 1,000); the oldest age range (55+) fell in-between (1.8 per 1,000). The full

Table 2: Response Statistics By Age Range

	Responses	Percent of Responses	Per Capita Rate*
Overall	***349***	***N/A***	***1.6 per 1,000 residents***
19–34	51	14.6%	1.3 per 1,000 residents
35–54	143	41.0%	3.6 per 1,000 residents
55+	146	41.8%	1.8 per 1,000 residents
Other**	9	2.6%	N/A

**Per capita rates are based on American Community Survey (ACS) 2024, 5-year population estimates*

***Includes Blank, Prefer Not to Answer, and Under 18*

response breakdown by age can be found in Table 2.

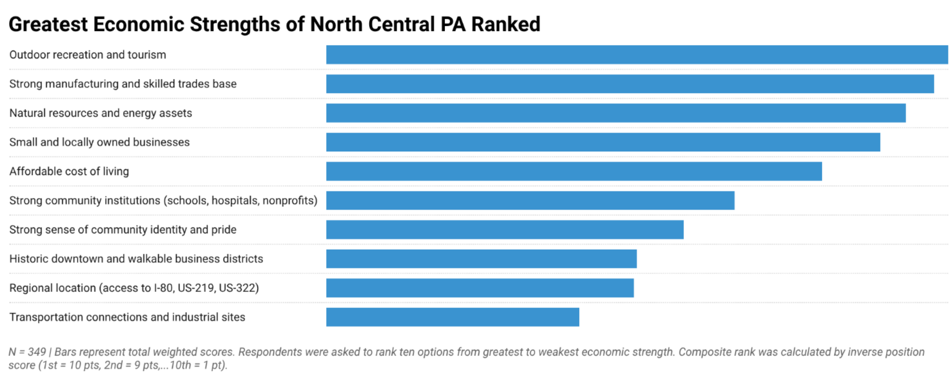
A majority of respondents categorized themselves as either a resident or employee of the region (50.7%). North Central stakeholders (self categorized as local government officials, economic development professionals, and nonprofits/community organizations) made up the second highest category at 19.8% of respondents. Retirees (11.5%), students (0.9%), and "other" (6.3%) made up somewhat smaller percentages.

SWOT Analysis

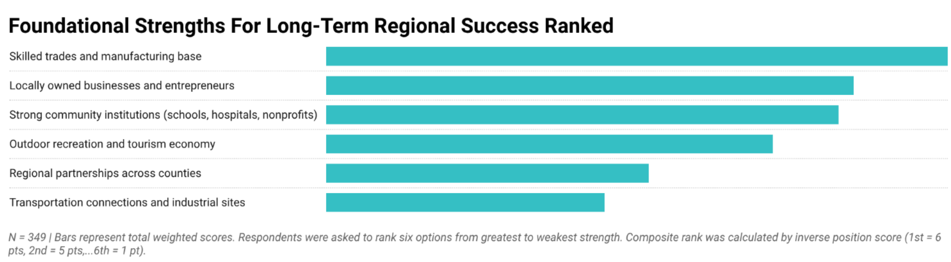
One of the primary aims of the public input survey was to help inform an updated SWOT analysis for the region (strengths, weaknesses, opportunities, and threats), a CEDS requirement from the Economic Development Administration. Several questions, therefore, were directly aligned with this framework.

Strengths

Respondents were asked to rank a pre-constructed list of strengths for the region. Using these individual results, a composite rank was calculated through inverse position score (also referred to as the Borda count), whereby options were given points relevant to their rank. For example, ranking an option as choice number one gave that option 10 points, two was given nine points, etc. Individual scores were then summed to create the final composite rank.



This methodology was repeated for a shorter list of "foundational strengths."



The top three regional strengths identified by the survey were "outdoor recreation and tourism," "strong manufacturing and skilled trades base," and "natural resources and energy assets." The two lowest ranked strengths were "regional location" and "transportation connections and industrial sites."

When respondents were asked to consider long-term success, however, the results shifted in notable ways. For example, while outdoor recreation was ranked as the top overall strength for the region, it only ranked fourth as providing for long-term success. This may suggest latent concerns with the long-term reliability of outdoor recreation for economic sustainability, though any conclusions are outside the scope of this brief. Locally owned businesses, on the other hand, saw a reverse trend: while only ranked fourth as an overall strength, respondents ranked "locally owned businesses and entrepreneurs" as the second highest foundational strength. Manufacturing and skilled trades remained a top contender, ranking second overall and first among foundational strengths. Importantly, not all options were included in both questions.

Outdoor Recreation

Ranking As A Strength

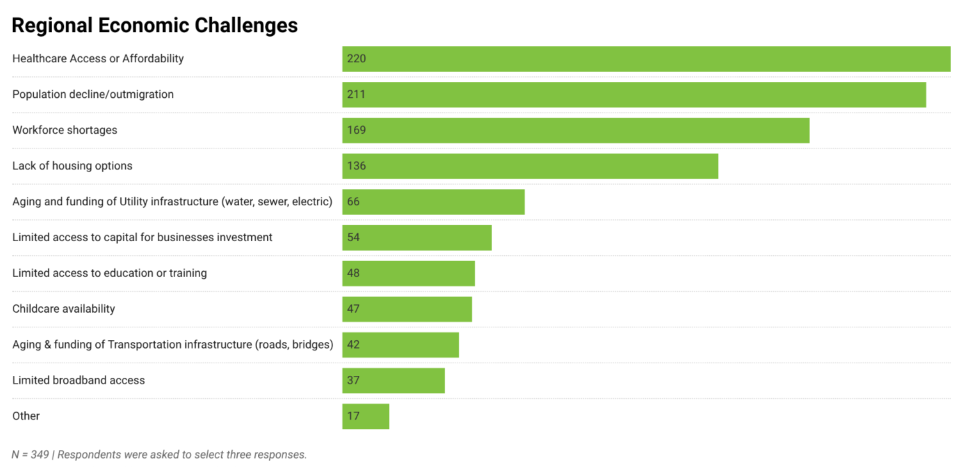
1	**4**
Overall	**Foundational**

This analysis was extended to the three age cohorts to see if there were any observable differences in ranking between different ages. After repeating the methodology for the three age ranges described above, no choice was placed more than one above or below their ranking among the overall sample (the only exception being "natural resources and energy assets" which was ranked two places lower among 19–34 year olds).

Challenges (Weaknesses)

Respondents were also asked to consider their top three economic challenges for the North Central PA region. Overwhelmingly, "healthcare access or affordability" (220 responses or 63.0% of respondents) and "population decline/outmigration" (211 responses or 60.5% of respondents) were selected as top concerns. "Lack of housing options" rounded out the top three with 169 responses or 48.4% or respondents selecting it as one of their three choices.

Notably, there were significant differences across the region in terms of challenges selected. This is especially notable because of the disparity in the number of responses between counties described in the introduction.



For example, while healthcare was overwhelmingly selected as a top challenge overall, it was not a primary concern in every county. There was an especially stark difference observed between the northern and southern tiers of the region. Among McKean County respondents, 78.0% selected healthcare access or affordability as a challenge; similar results were found in Elk County at 75.0%. Clearfield (30.7%) and Jefferson County (25.6%) respondents, however, were much less likely to select healthcare as a challenge. These disparities may be explained by current levels of healthcare access in the region.

As just one example, according to the Center for Rural Pennsylvania, of the six counties composing North Central PA, Clearfield and Jefferson are the only two to maintain labor and delivery units. This difference should be noted because of potential implications for these results, especially given the higher number of respondents from McKean County. (In fact, of the 220 responses for healthcare access and affordability, 117 or 53.2% were from McKean County residents.) Population decline, on the other hand, did not see such disparities, ranking as a high concern for all counties.

Healthcare

Selection As A Challenge

Highest

78.0%

McKean County

Lowest

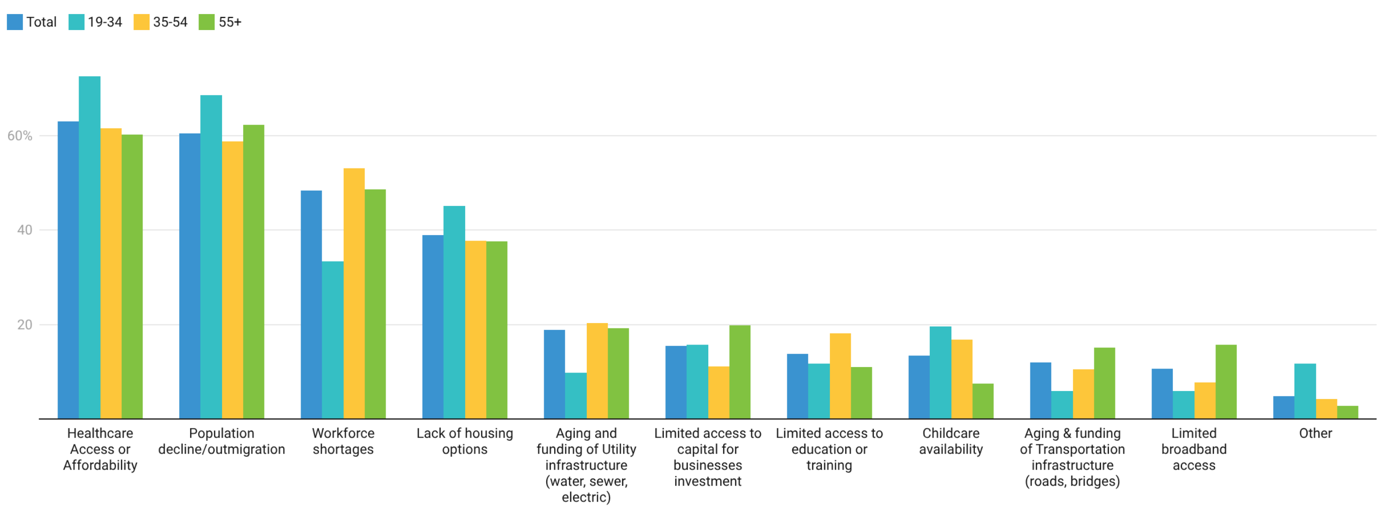
25.6%

Jefferson County

Results were also analyzed by examining the cross tabs for the different age cohorts, with particular attention paid to the responses of the youngest cohort, as relates to concerns about population loss. It is important to note, however, the small sample size among 19–34 year olds (n=51) which limits overly generalized conclusions from these results.

Regional Economic Challenges (% of Respondents)

Listed by Select Age Groups



Percentages sum to 300% as respondents were asked to select three responses. N = 349 (N, 19-34 = 51; N, 35-54 = 143; N, 55+ = 146)

Chart: Aidan Bobik • Source: CEDS Update Public Survey • Created with Datawrapper

Younger respondents were more likely to select "healthcare access or affordability" (72.6% vs. 63.0%), "population decline/outmigration" (68.6% vs. 60.5%), and "lack of housing options" (45.1% vs. 39.0%) as challenges than the overall sample. These differences, however, were not statistically significant when conducting a chi-square analysis using Jamovi.

One result, however, was found to be statistically significant at the p <0.05 level: younger respondents were significantly more likely to view "childcare availability" as an economic challenge (p=0.02). On of the one hand this seems to make intuitive sense; younger respondents are more likely to be caretakers of children. It also, however, may suggest a need for increased attention toward childcare for regional economic and community development efforts, especially when considering population retention implications.

Childcare
Selection As A Challenge

13.5% Overall

19.6% 19–34

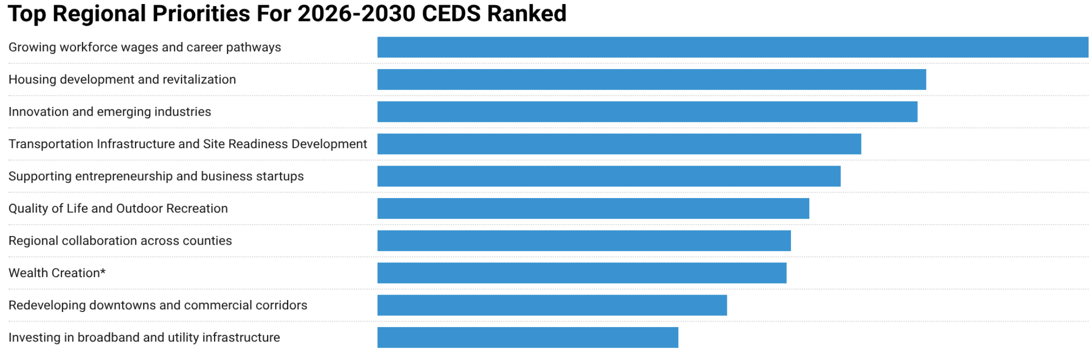
Two other differences were close to the significance threshold, but were nevertheless rejected, especially when utilizing a Fisher's exact test, a statistical test which helps to account for small sample sizes (such as in this survey). Under this test, "workforce shortages" had a p value of exactly 0.05 and "limited broadband access" had a value of 0.053. (Note that, somewhat interestingly, *older* respondents were more likely to select limited broadband access as a challenge than younger.)

Priorities and Success (Opportunities)

The survey did not include an exact measure for opportunities. Instead two questions—one regarding priorities, the other success—serve as useful proxies for this section.

Respondents overwhelmingly ranked "growing workforce wages and career pathways" as the top priority for the region. (Note, this analysis utilized the same methodology described in the strengths section.) "Housing development and revitalization" and "innovation and emerging industries" were ranked second and third respectively. The lowest ranked priority was "investing in broadband and utility infrastructure." These results closely align with the findings above, especially identified challenges. (Workforce was the third most commonly cited challenge while housing was the second. Healthcare, which was the first most cited challenge was not included as an option for this question.)

Top Regional Priorities For 2026-2030 CEDS Ranked



**Wealth creation allows communities to focus on what they have, instead of what they lack, to generate new and sustainable economic opportunities that are rooted in local people, places and businesses. N = 349 | Bars represent total weighted scores. Respondents were asked to rank ten options from highest to lowest priority. Composite rank was calculated by inverse position score (1st = 10 pts, 2nd = 9 pts,...10th = 1 pt).*

Source: CEDS Update Public Survey • Created with Datawrapper

This analysis was also repeated for the different age cohorts. While most observed differences were small (i.e., ranked only one place above or below the ranking for the overall sample), there were two notable distinctions among the youngest cohort.

Firstly, among the 19–34 year olds, "wealth creation" (defined in the question as a model that "allows communities to focus on what they have, instead of what they lack, to generate new and sustainable economic opportunities that are rooted in local people, places, and businesses") was ranked much higher than the overall sample: 5 versus 8. Possible reasons for this are outside the scope of this report but are worth further evaluation.

Secondly, in the reverse direction, "transportation infrastructure and site readiness development" was ranked lower among the 19–34 cohort than the overall sample: 7 versus 4. This may suggest lower saliency for this issue among this age range; this is especially notable considering the outsized attention paid to this issue among current economic and community development programming and funding. (It may also be possible that part of this distinction has to do with who the respondents were. That is, whether the respondents were residents or economic development staff. This analysis, however, was not conducted and provides a future direction for research.)

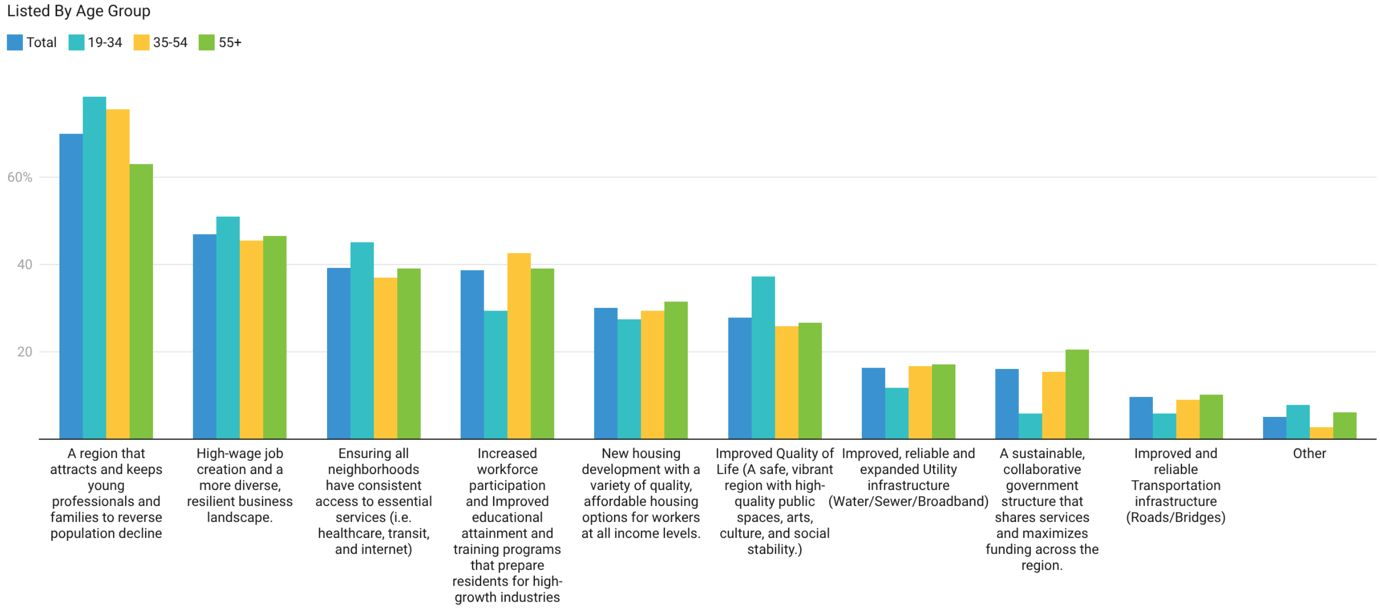
Wealth Creation
Ranking As A Priority

8	**5**
Overall	**19–34**

Respondents were also asked to select among a set of ten (with one being an "other" category) their top three measures of success for the region. Unsurprisingly, considering the previously described findings, "a region that attracts and keeps young professionals and families to reverse population decline (69.9%), "high-wage job creation and a more diverse, resilient business landscape" (47.0%), and "ensuring neighborhoods have consistent access to essential services (i.e., healthcare, transit, and internet)" (39.3%) were the top three most commonly identified success measures. The latter result most likely primarily motivated by healthcare concerns. Notably, infrastructure options, often an outsized focus of regional development efforts, were selected by a much small number of respondents (water and sewer at 16.3% and transportation at 9.7%).

Regional Success Measures (% of Respondents)

Listed By Age Group



Percentages sum to 300% as respondents were asked to select three responses. N = 349 (N, 19-34 = 51; N, 35-54 = 143; N, 55+ = 146)

Chart: Aidan Bobik • Source: CEDS Update Public Survey • Created with Datawrapper

Results were also broken out into the different age cohorts to observe any differences or trends. (As noted previously, the small sample size for the 19–34 year old cohort (n=51) should be kept in mind before making generalized conclusions.)

The youngest cohort was more likely to select "a region that attracts and keeps young professionals and families" (78.4% vs. 69.6%), "high-wage job creation" (51.0% vs. 47.0%), "ensuring all neighborhoods have consistent access to essential services" (45.1% vs. 39.3%), and "improved quality of life" (37.3% vs. 27.8%) than the overall sample. Of these, only the difference for "a region that attracts and keeps young professionals and families" was found to be statistically significant (p=0.03 using a Fisher's exact test for a chi-square analysis).

The difference among responses to "improved quality of life" may also be worth additional attention, however. When looking at responses for this youngest cohort, quality of life becomes the fourth most cited measure of success, leapfrogging other measures including workforce participation and new housing development. This suggests increased importance for public spaces, arts and culture, and social capital among this age cohort, presenting new focuses for economic and community development efforts in the region. Conclusive results are mitigated, however, due to the small sample sizes and lack of statistical significance.

Quality of Life
Selection As A Success Measure

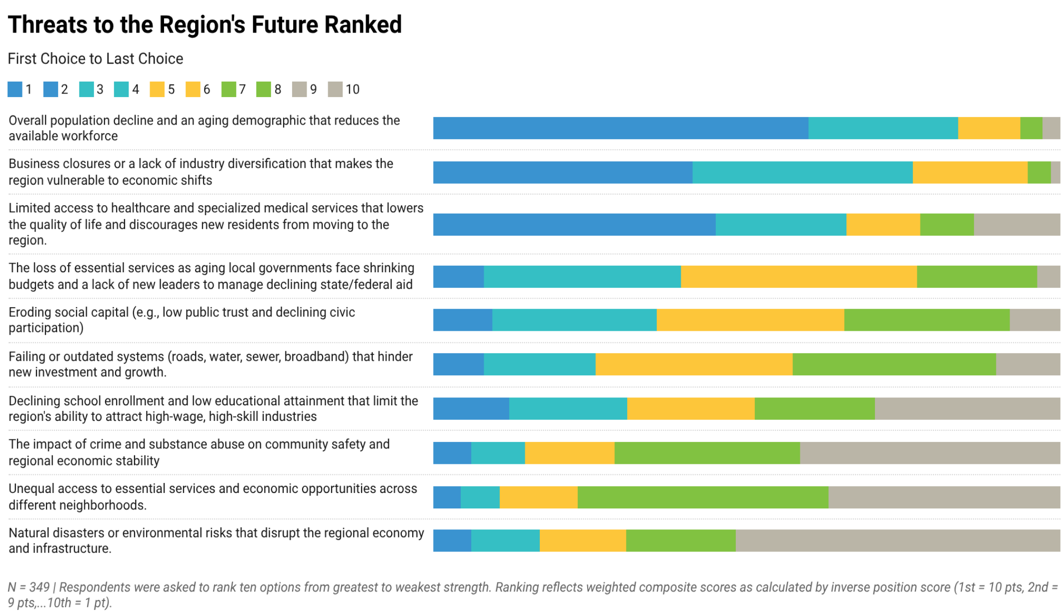
27.8% Overall

37.3% 19–34

Younger respondents, overall, were less likely to select the other success measures, with notable differences for "increased workforce participation" (29.4% vs. 38.7%) and "a sustainable, collaborative government structure" (5.9% vs. 16.1%); the latter was statistically significant at the $p < 0.05$ level. (As noted in the previous question, part of this distinction may have to do with who the respondents were, though that analysis was not conducted for this report.)

Threats

The survey also included a question on threats to the region's future to round out the SWOT analysis. Respondents were asked to rank a set of ten statements as regional threats. Composite rank was calculated using the same methodology explained in previous sections. The top three threats identified were "overall population decline and an aging demographic," "business closures or a lack of industry diversification," and "limited access to healthcare and specialized medical services." These results closely align with the findings of the previous sections, further illuminating the importance of population decline and healthcare access in the region.

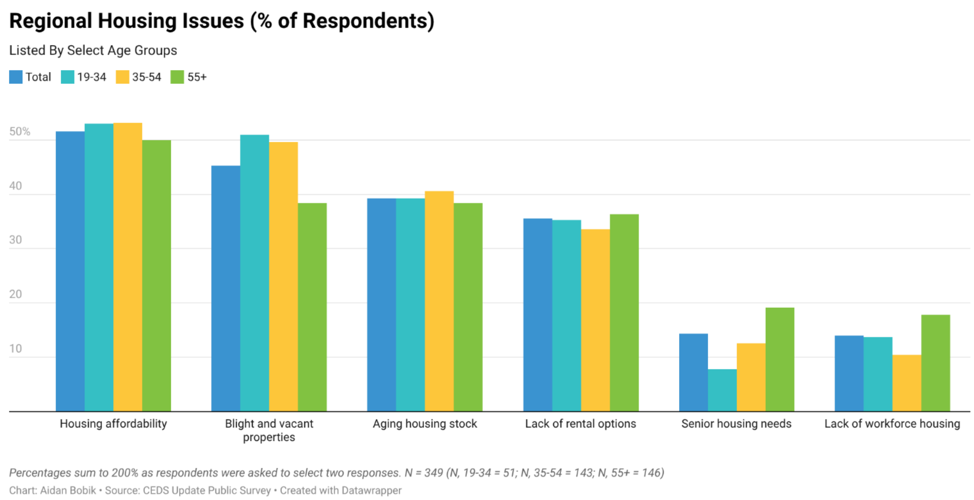


N = 349 | Respondents were asked to rank ten options from greatest to weakest strength. Ranking reflects weighted composite scores as calculated by inverse position score (1st = 10 pts, 2nd = 9 pts,...10th = 1 pt).
Source: CEDS Update Public Survey • Created with Datawrapper

One interesting finding from this question regards the previously noted lack of interest toward infrastructure issues. "Failing or outdated systems (roads, water, sewer, broadband)" was ranked sixth overall as a threat; directly above it was "eroding social capital," an issue not often prioritized in the region's economic development work. This may suggest opportunities for new directions or partnerships within the economic development space, though overly generalized conclusions should be avoided from a single data point.

Housing

Outside of supporting the development of an updated SWOT analysis, the survey asked additional questions regarding housing challenges in the region. The first of these questions asked respondents to evaluate the impact of housing availability on workforce recruitment using a likert scale. A majority of respondents (57.9%) felt housing availability had a "high" or "significant" impact on workforce recruitment. An additional 21.2% felt it had a low impact while only 5.2% of respondents felt housing had "no" or a "negative" impact.



In the second question, respondents were asked to select their top two housing issues from a set of six options. "Housing affordability" was a top concern, being selected by 51.6% of respondents. In fact, a majority of each age cohort selected housing affordability as a concern, being the most commonly selected choice for each group. These results suggest the importance of affordability concerns at the present moment. "Blight and vacant properties" (45.3%) and "aging housing stock" (39.3%) were the second and third most selected options respectively.

Overall, the age cohorts were largely aligned on housing challenges. The most notable distinctions were that the oldest cohort was less likely to select "blight and vacant properties" (38.4% vs. 45.3%) as an issue and more likely to select "senior housing needs" (19.2% vs. 14.3%), though neither difference was statistically significant. The latter, especially, seems to make intuitive sense considering the nature of the option and the affected groups.

Conclusion

This report outlined several key findings from a public survey distributed by the North Central PA Regional Planning & Development Commission to help inform the 2026–2030 Comprehensive Economic Development Strategy (CEDS) 5-year update. The survey received 349 responses over a period of roughly three weeks, including responses from every county in the North Central PA region. Response rates, however, varied across the region with higher relative rates among some counties (for example, Cameron or McKean) over others (for example, Clearfield). This data was then analyzed, including an examination of cross tabs and statistical significance. Below are a few high-level takeaways from this analysis:

1. **Healthcare and population loss are top concerns in the region.** Throughout the survey questions—including in challenges, threats, and success measures—these two topics were repeatedly ranked among the top. Importantly, while population loss and retention were equally prioritized across the region, the importance of healthcare varied wildly. Residents of northern tier counties (including McKean and Elk) where more likely to select options related to healthcare than those of southern tier counties (including Clearfield and Jefferson).
2. **Outdoor recreation and strong manufacturing remain the top perceived strengths** of the North Central PA region. However, when considering long-term, sustainable success, respondents ranked outdoor recreation more critically. Strong manufacturing, on the other hand, received more positive consideration.
3. **Respondents from different age cohorts had distinctly different results.** Across multiple questions, responses differed between age groups, especially when comparing the youngest cohort (19–34) with the oldest (55+). Younger respondents were more likely to prioritize issues related to quality of life, quality of place, and human development needs and less likely to focus on physical infrastructure. For example, the youngest cohort viewed healthcare access and childcare availability as larger economic challenges than the other cohorts; the latter being a statistically significant difference. Younger respondents also placed greater priority on wealth creation, and selected improved quality of life as a measure of success at a higher, though not statistically significant, rate. These results provide insight into priorities that may help address concerns regarding population loss and attraction, though are limited by the small sample size.
4. **Housing remains a regional concern**, with particular attention paid toward affordability. In fact, affordability was the top housing concern for all age groups in the sample.

Taken together, these results provide important insight into the priorities and concerns of residents of the North Central PA region. Often, these results neatly align with priorities commonly shared by North Central PA Regional Planning & Development Commission partners; at other times, however, especially upon closer examination, these results may provide surprising insights and new directions for regional development efforts.

Credits: The CEDS Update Public Survey was created and distributed online through Microsoft Forms. Data analysis was conducted in Excel and Jamovi, and visualizations were prepared using Datawrapper. The icon that appears on page one was provided from Flaticon.com.