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Economic and Quality of Life Indicators for Allegheny National Forest Counties in Pennsylvania



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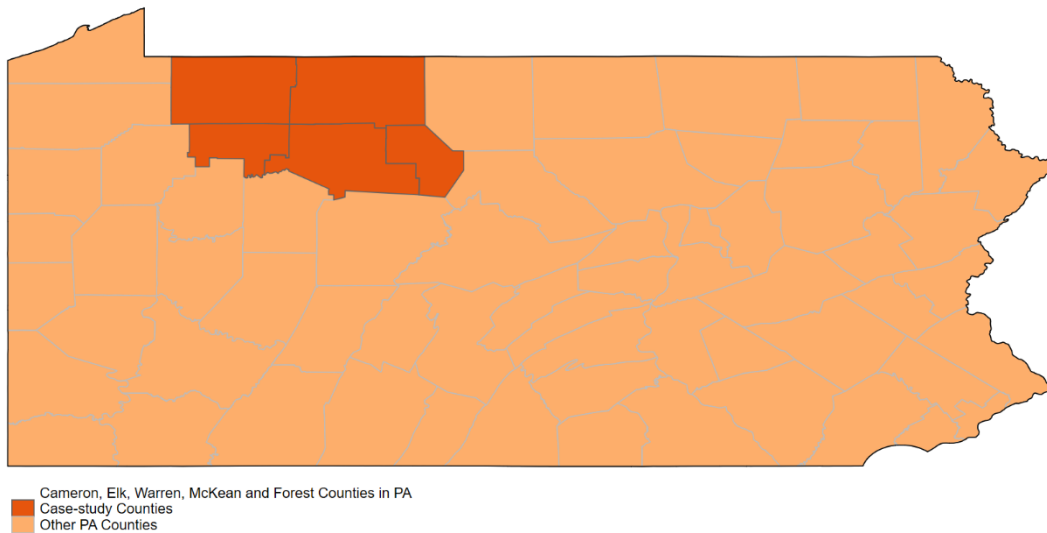
1. Introduction

Tourism and leisure activities play vital roles in the economic landscape of Pennsylvania's rural counties, particularly in the northern region of the state. The five counties of Cameron, Elk, Warren, McKean, and Forest represent a significant rural tourism cluster that has experienced various economic challenges and transformations over the past two decades. This report examines the employment trends in these counties' Leisure and Hospitality (L&H) sector from 2000 to 2023, providing insights into the sector's resilience and vulnerabilities during major economic or other shocks.

2. Geographic Context

The five counties form a contiguous block in northern Pennsylvania, representing a significant portion of the state's rural landscape. As shown in Figure 1, these counties are strategically positioned in the northern tier of Pennsylvania, sharing borders with each other and creating a unified regional tourism economy. This area is known for its natural attractions, including the Allegheny National Forest, state parks, and outdoor recreation opportunities, which contribute significantly to their tourism-based economy.

Figure 1 Locations of Cameron, Elk, Warren, McKean and Forest Counties in PA



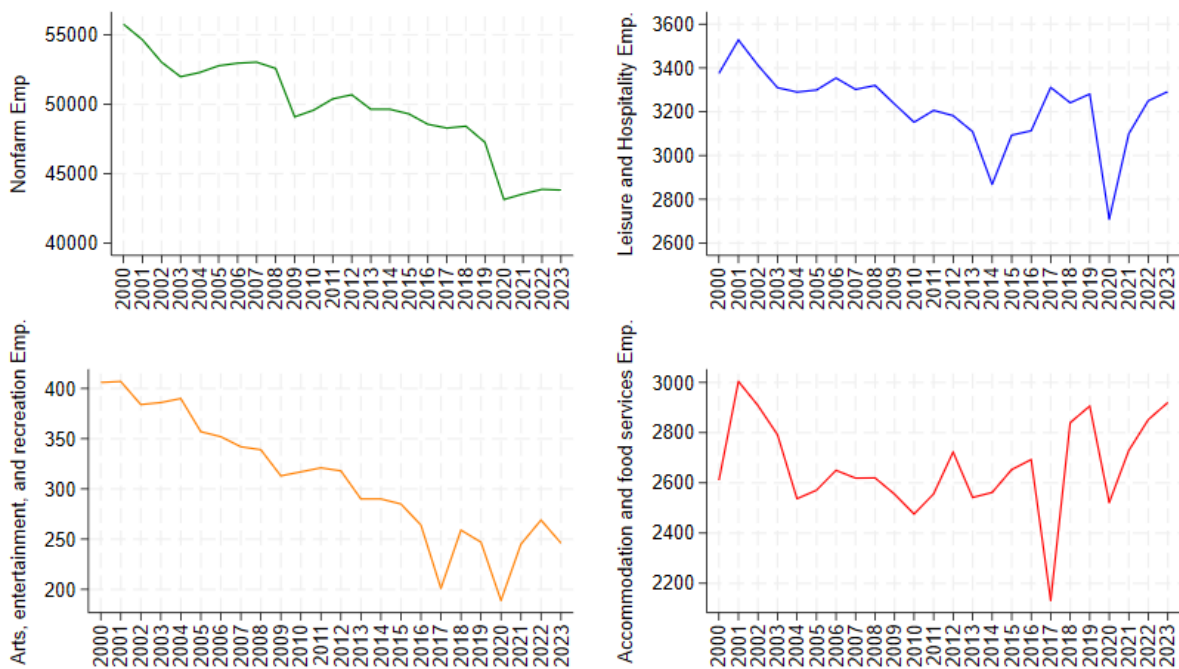
Note: Authors' mapping.

3. Employment and Industry Analysis

Overall Employment Trends

The region's employment trends can be examined using complementary data from Quarterly Census of Employment and Wages (QCEW). As shown in Figure 2, total employment has declined since 2000, with significant impacts from the 2008-2009 recession, limited post-recession recovery, and sharp declines during the COVID-19 pandemic followed by partial recovery. Also shown are Leisure and Hospitality employment, and its sub-sectors NAICS 71 Arts, Entertainment, and Recreation, and NAICS 72 Accommodation and Food Services.

Figure 2 Non-farm and Leisure and Hospitality (L&H) Employment in the Five Counties



Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics. Due to disclosure rules of the QCEW data, there are missing values for NAICS 71 (Arts, entertainment, and recreation sector) and NAICS 72 (Accommodation and food services sector) data. adding NAICS 71 and NAICS 72 will not be equal to the total L&H employment.

Industry Composition

Analysis of current employment distribution (Table 1 and Figure 3) reveals distinct patterns across industries in these counties. The manufacturing sector maintains dominance in Cameron (46.5%) and Elk (42.6%) counties, while education and health services represent the largest employment sector in Forest County (36%). Trade, transportation, and utilities employ significant portions of the workforce in Warren (19.6%) and McKean (19.0%) counties.

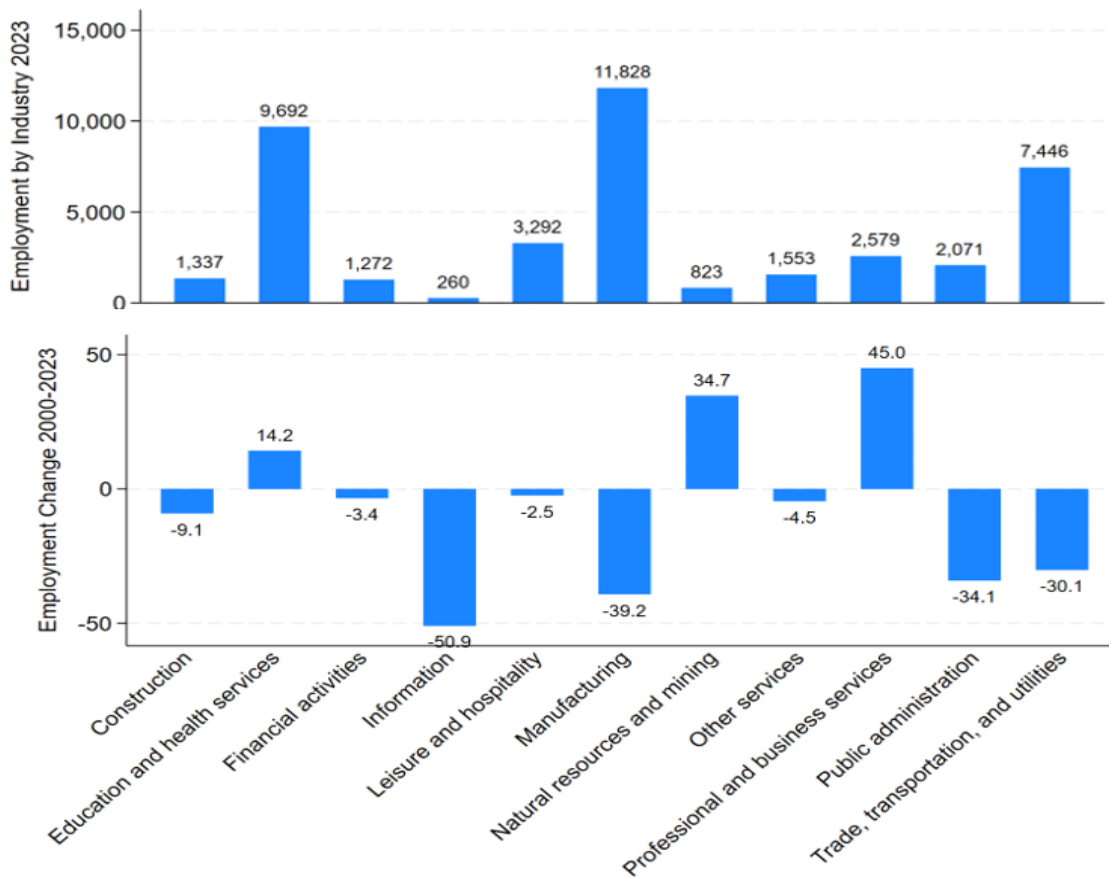
Long-term employment changes from 2000 to 2023 (Figure 3) show varying trajectories for different sectors. The natural resources sector displayed distinctly different patterns from other industries, showing significant growth periods that do not align with general economic cycles. Manufacturing experienced the largest decline over this period, while education and health services showed the most growth. The natural resources sector experienced substantial growth between 2008 and 2012, primarily due to increased natural gas extraction activities in the region, demonstrating a trend that was countercyclical to the general economic downturn.

Table 1 Employment by Sector for Five PA Counties 2023

Sector	Cameron		Elk		Forest		McKean		Warren	
	No.	%	No.	%	No.	%	No.	%	No.	%
Natural resources and mining	14	0.9	80	0.6	37	3.6	439	3.2	253	2.0
Construction	22	1.4	491	3.7	28	2.7	540	3.9	256	2.0
Manufacturing	721	46.5	5,657	42.6	184	17.7	2,875	20.9	2391	19.1
Trade, transportation, and utilities	150	9.7	2,081	15.7	144	13.8	2,619	19.0	2,452	19.6
Information	11	0.7	98	0.7	0	0.0	82	0.6	69	0.6
Financial activities	22	1.4	249	1.9	14	1.3	261	1.9	726	5.8
Professional and business services	49	3.2	614	4.6	11	1.1	885	6.4	1,020	8.1
Education and health services	281	18.1	2,165	16.3	375	36.0	3,524	25.6	3,347	26.7
Leisure and hospitality	126	8.1	925	7.0	176	16.9	1156	8.4	909	7.3
Other services	54	3.5	485	3.7	22	2.1	502	3.6	490	3.9
Public administration	99	6.4	428	3.2	50	4.8	881	6.4	613	4.9
Total	1,549	100	13,273	100	1,041	100	137,64	100	12,526	100

Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics.

Figure 3 2023 Employment by Industry (top) and Industry Employment Change 2000-2023 (bottom), five counties combined



Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics. The top panel shows number of employment and the bottom panel shows percentage changes from 2000-2023.

4. Tourism Economy

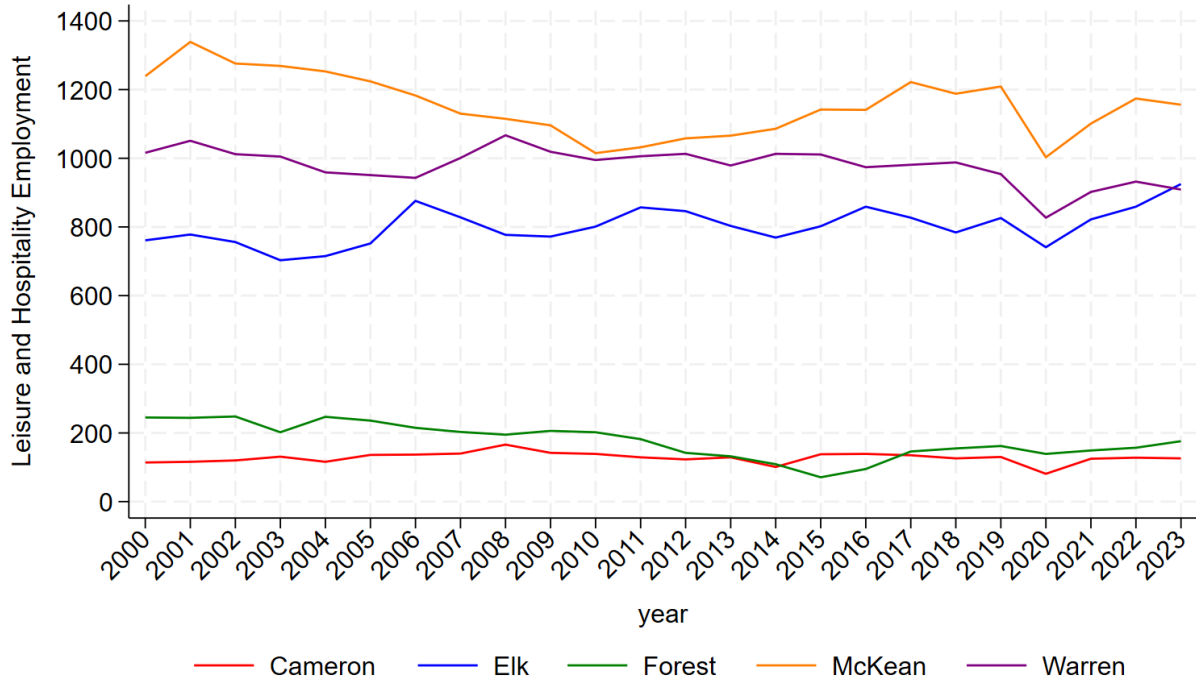
Leisure and Hospitality Employment Trends

As shown in Figures 4 and 5, the L&H sector demonstrated notable volatility in both employment and establishment numbers from 2000 to 2023. Total L&H employment across the five counties declined from 3,375 jobs in 2000 to 3,292 jobs in 2023, with significant fluctuations throughout this period. During the 2008 financial crisis, the L&H sector experienced a sharper initial decline than most other industries but also showed a relatively quick recovery by 2010, returning to near pre-crisis levels by 2012.

The COVID-19 pandemic in 2020 had a particularly severe impact on the L&H sector, causing employment to drop to 2,710 jobs, the most dramatic decline in the observed period. Figure 6

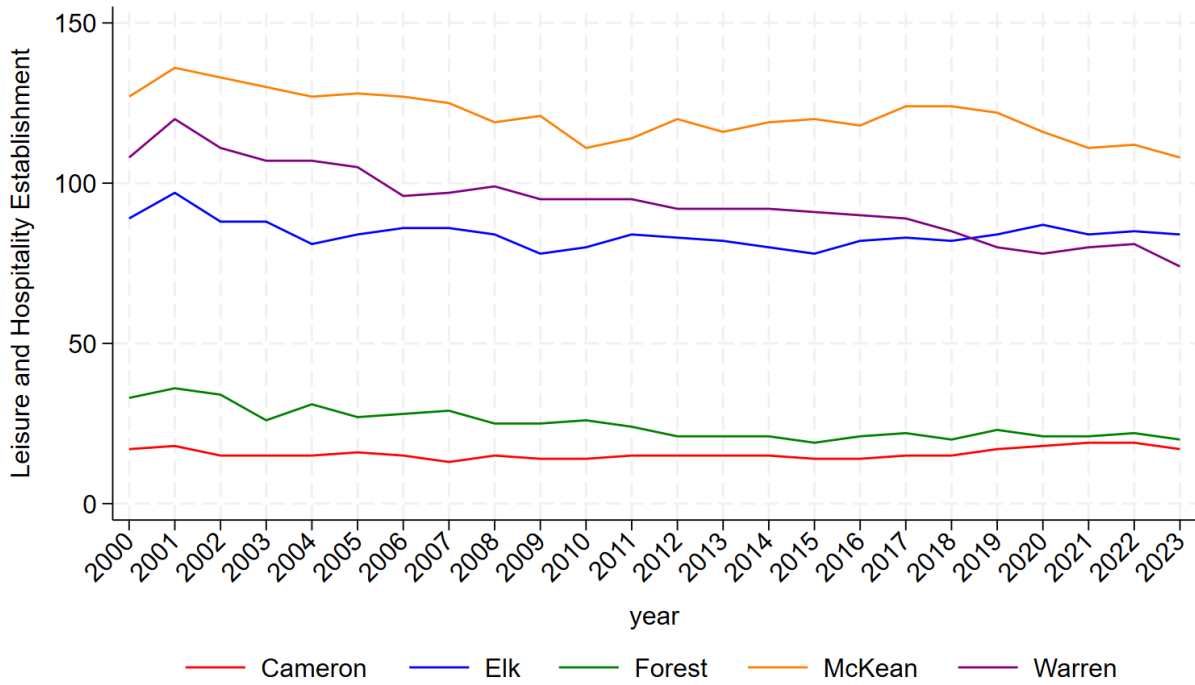
illustrates that this decline of over 15% from pre-pandemic levels significantly exceeded the impact of the 2008 financial crisis. However, employment data shows signs of resilience post-2021, with recovery to 3,292 jobs by 2023. This recovery pattern is further supported by Figure 5, which tracks the number of L&H establishments over time, showing a decline from 374 establishments in 2000 to 303 in 2023.

Figure 4 Leisure and Hospitality Employment for Five PA Counties 2000-2023



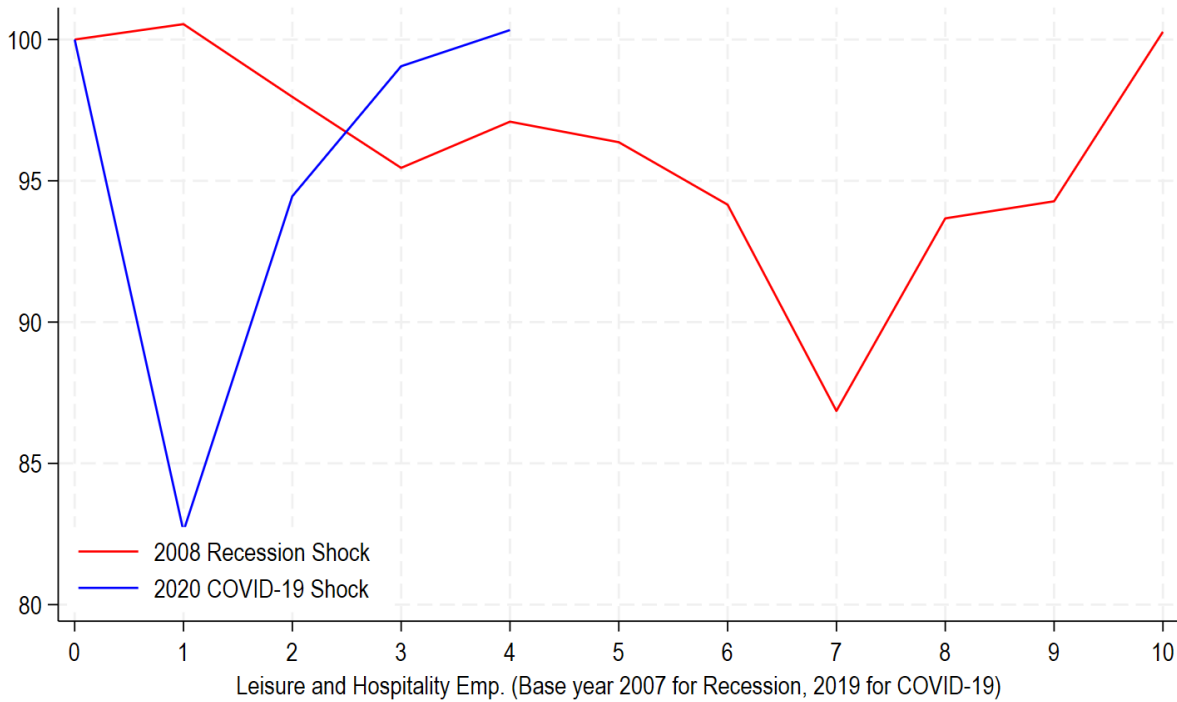
Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics.

Figure 5 Leisure and Hospitality Establishment numbers for Five PA Counties 2000-2023



Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics.

Figure 6 Leisure and Hospitality Resilience for Recession and COVID-19 Shock 2000-2023



Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics.

Tourism Spending and Economic Impacts

Analysis of spending categories in 2022 (Table 2) reveals transportation as the largest spending category at \$169.3 million, followed by food and beverages at \$108.4 million. Lodging, while essential to the tourism infrastructure, generated the smallest share at \$39.8 million. This spending pattern reflects the region's role as a drive-to destination with significant day-trip activity.

Table 2 Visitor Spending by Category for Five PA Counties 2021-2022 (\$millions, nominal)

2022						
	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Cameron	\$1.0	\$2.4	\$2.0	\$3.4	\$3.8	\$12.6
Elk	\$9.7	\$21.6	\$16.8	\$17.3	\$23.6	\$89.1
Forest	\$6.9	\$7.7	\$6.8	\$7.7	\$9.5	\$38.7
McKean	\$14.9	\$38.4	\$26.9	\$30.3	\$62.1	\$172.6
Warren	\$7.3	\$38.3	\$32.4	\$32.1	\$70.3	\$180.5
Total	\$39.8	\$108.4	\$84.9	\$90.8	\$169.3	\$493.5
2021						
	Lodging	Food & beverages	Retail	Recreation	Transportation	Total
Cameron	\$0.8	\$2.2	\$1.9	\$2.7	\$3.4	\$11.0
Elk	\$8.8	\$19.3	\$15.8	\$14.0	\$21.1	\$79.1
Forest	\$6.4	\$6.8	\$6.8	\$6.7	\$8.4	\$35.1
McKean	\$13.6	\$34.1	\$26.7	\$25.6	\$55.6	\$155.5
Warren	\$6.1	\$33.8	\$30.8	\$26.4	\$65.1	\$162.2
Total	\$35.7	\$96.2	\$82.0	\$75.4	\$153.6	\$442.9

Note: Source is from Economic Impact of Travel and Tourism in Pennsylvania – 2022 prepared by the Pennsylvania Tourism Office.

The Tourism Satellite Account (Table 3) shows total tourism demand reached \$522.1 million in 2022, with visitor spending comprising the vast majority at \$493.5 million. Government spending and investment/PCE (Personal Consumption Expenditure) contributed an additional \$26.8 million to the tourism economy.

Table 3 Tourism Satellite Account for Five PA Counties 2021-2022 (\$millions)

2022				
	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Cameron	\$12.6	\$0.0	\$0.9	\$13.5
Elk	\$89.1	\$0.4	\$4.8	\$94.4
Forest	\$38.7	\$0.2	\$2.8	\$41.7
McKean	\$172.6	\$0.6	\$8.8	\$182.0
Warren	\$180.5	\$0.5	\$9.5	\$190.5
Total	\$493.5	\$1.7	\$26.8	\$522.1
2021				
	Visitor Spending	Government	Investment/ PCE	Total Tourism Demand
Cameron	\$11.0	\$0.0	\$0.9	\$12.0
Elk	\$79.1	\$0.4	\$4.9	\$84.5
Forest	\$35.1	\$0.1	\$3.0	\$38.3
McKean	\$155.5	\$0.6	\$9.2	\$165.3
Warren	\$162.2	\$0.4	\$9.9	\$172.6
Total	\$442.9	\$1.5	\$27.9	\$472.7

Note: source is from Economic Impact of Travel and Tourism in Pennsylvania – 2022 prepared by the Pennsylvania Tourism Office.

Direct economic impacts (Table 4) include \$96.1 million in labor income and \$22.6 million in combined state/local and federal taxes for 2022. When considering total impacts including multiplier effects (Table 5), the tourism industry generated \$177.5 million in labor income and \$43 million in total tax revenues. This represents significant growth from 2021, with labor income increasing by \$9.2 million and total tax revenues growing by \$1.4 million.

Table 4 Tourism Industry Direct Impacts for Five PA Counties 2021-2022 (\$millions)

2022				
	Visitor Spending	Labor Income	State/Local Taxes	Federal Taxes
Cameron	\$12.6	\$1.7	\$0.5	\$0.5
Elk	\$89.1	\$17.0	\$4.2	\$4.3
Forest	\$38.7	\$5.2	\$1.6	\$1.6
McKean	\$172.6	\$37.7	\$8.2	\$9.1
Warren	\$180.5	\$34.5	\$8.1	\$8.8
Total	\$493.5	\$96.1	\$22.6	\$24.3
2021				
	Visitor Spending	Labor Income	State/Local Taxes	Federal Taxes
Cameron	\$11.0	\$1.7	\$0.5	\$0.5
Elk	\$79.1	\$16.1	\$4.0	\$4.3
Forest	\$35.1	\$4.9	\$1.5	\$1.6
McKean	\$155.5	\$35.0	\$7.9	\$9.0
Warren	\$162.5	\$33.0	\$7.8	\$8.8
Total	\$443.2	\$90.7	\$21.7	\$24.2

Note: Source is from Economic Impact of Travel and Tourism in Pennsylvania – 2022 prepared by the Pennsylvania Tourism Office.

Table 5 Tourism Industry Total Impacts for Five PA Counties 2021-2022 (\$millions)

2022				
	Visitor Spending	Labor Income	State/Local Taxes	Federal Taxes
Cameron	\$13.5	\$3.0	\$1.0	\$0.9
Elk	\$94.4	\$30.9	\$7.8	\$7.8
Forest	\$41.7	\$9.3	\$3.0	\$2.8
McKean	\$182.0	\$69.0	\$15.7	\$16.4
Warren	\$190.5	\$65.3	\$15.5	\$15.8
Total	\$522.1	\$177.5	\$43.0	\$43.7
2021				
	Visitor Spending	Labor Income	State/Local Taxes	Federal Taxes
Cameron	\$12.0	\$2.9	\$0.9	\$0.9
Elk	\$84.5	\$29.1	\$7.5	\$7.6
Forest	\$38.3	\$8.9	\$2.9	\$2.8
McKean	\$165.3	\$65.0	\$15.2	\$16.2
Warren	\$172.6	\$62.4	\$15.1	\$15.9
Total	\$472.7	\$168.3	\$41.6	\$43.4

Note: Source is from Economic Impact of Travel and Tourism in Pennsylvania – 2022 prepared by the Pennsylvania Tourism Office.

Visitor spending across the five counties totaled \$493.5 million in 2022, showing strong recovery from the pandemic-induced low of \$346.4 million in 2020 (Table 6). Warren and McKean counties consistently lead in visitor spending, each generating over \$170 million in 2022. The recovery has been uneven across counties, with Forest County showing remarkable growth, to 148% of its 2019 levels, while Warren and McKean counties remained slightly below their pre-pandemic spending levels at 92.9% and 94.5% respectively.

Table 6 Visitor Spending for Five PA Counties 2016-2022 (\$millions)

	2016	2017	2018	2019	2020	2021	2022	relative to 2019
Cameron	\$10.1	\$10.1	\$10.0	\$10.4	\$8.8	\$11.0	\$12.60	120.8%
Elk	\$78.0	\$80.2	\$79.2	\$82.5	\$62.1	\$79.1	\$89.10	108.1%
Forest	\$26.3	\$27.2	\$27.1	\$26.1	\$29.8	\$35.1	\$38.70	148.%
McKean	\$172.9	\$180.0	\$183.4	\$182.6	\$121.0	\$155.5	\$172.60	94.5%
Warren	\$182.3	\$186.8	\$190.2	\$194.1	\$124.7	\$162.2	\$180.50	92.9%
Total	\$469.6	\$484.3	\$489.9	\$495.7	\$346.4	\$442.9	\$493.5	105.1%

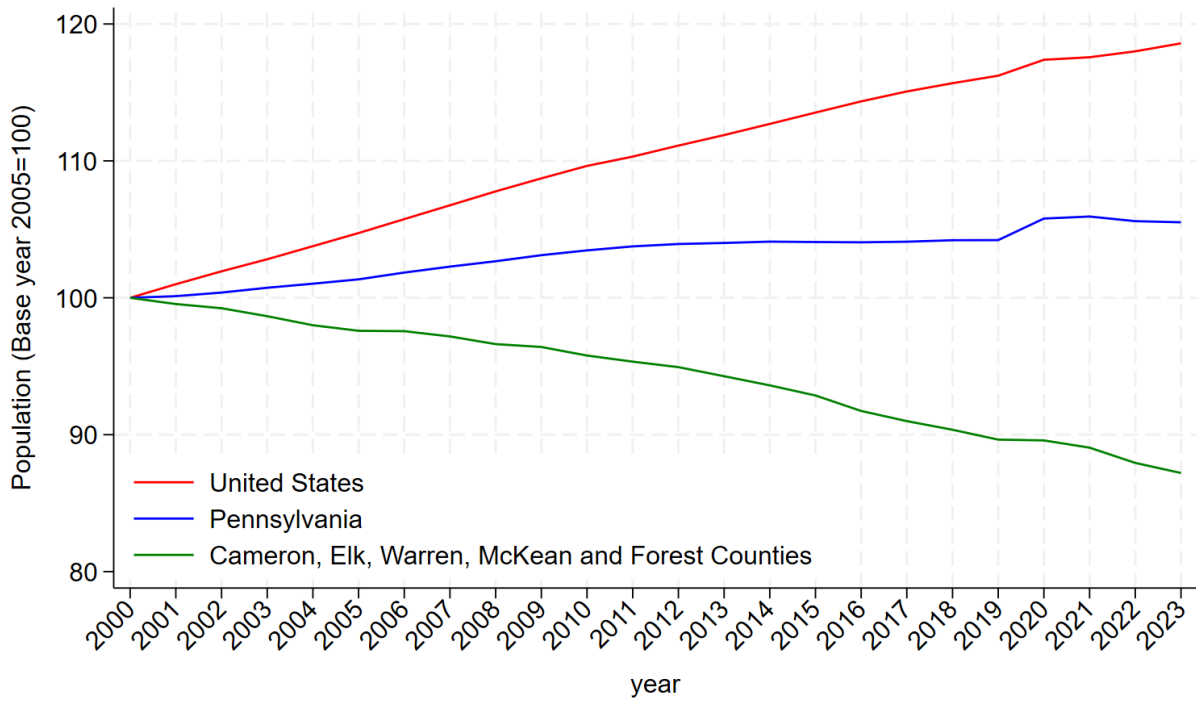
Note: Source is from Economic Impact of Travel and Tourism in Pennsylvania – 2022 prepared by the Pennsylvania Tourism Office.

5. Quality of Life Indicators

Population and Demographics

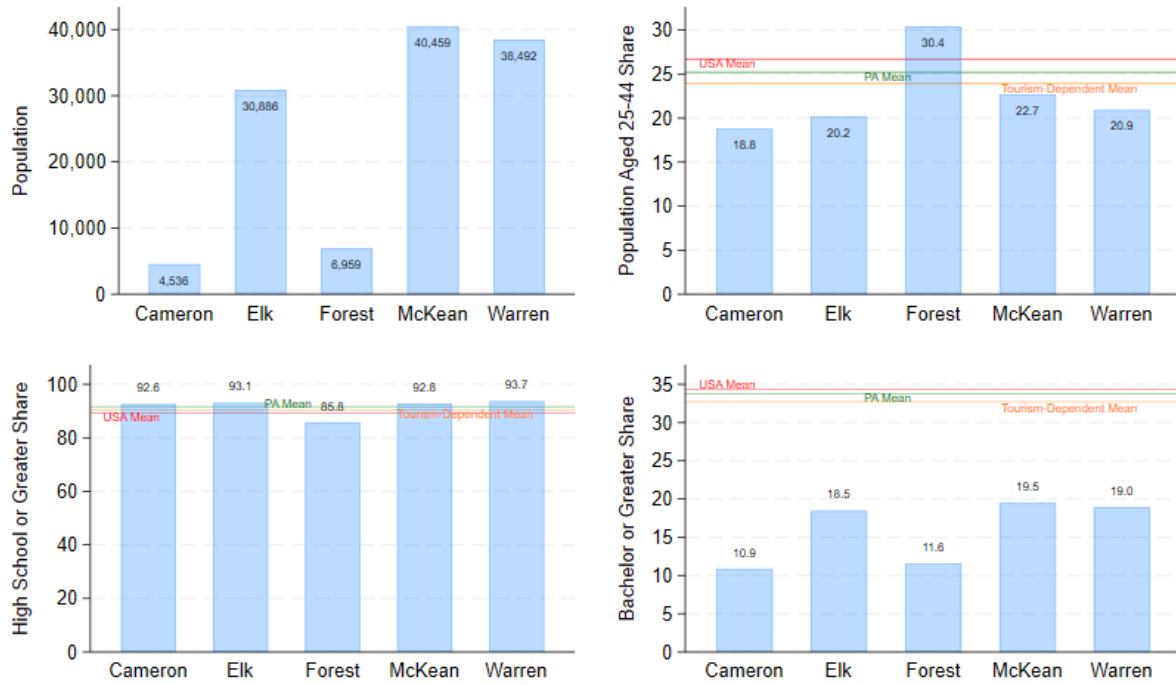
Population trends across the five counties show consistent decline since 2000 (Figure 7). All counties have experienced negative growth rates that significantly lag behind both Pennsylvania state and national averages. As shown in Figure 8, McKean County has the largest population among the five counties at approximately 40,000 residents, followed by Warren and Elk counties with populations near 38,000 and 30,000 respectively. Cameron and Forest counties have notably smaller populations, with under 7,000 residents each.

Figure 7 Population Trend for Cameron, Elk, Warren, McKean and Forest Counties and Comparison Geographies



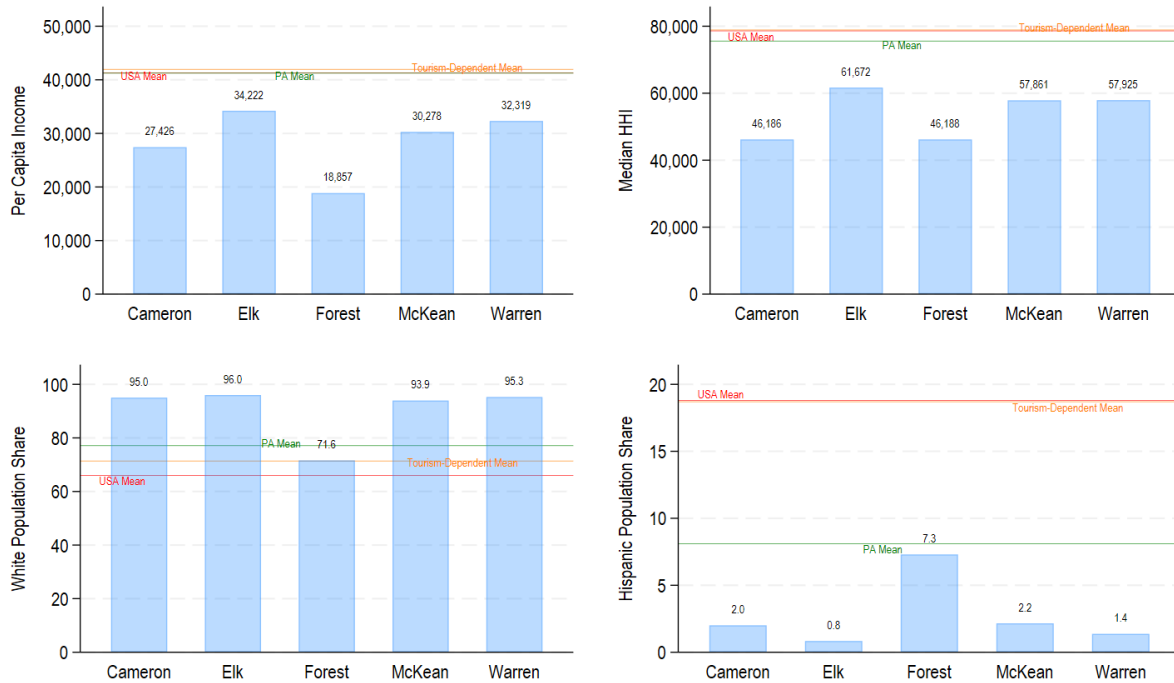
Note: Source is from the US Census Bureau.

Figure 8 Population and Educational Attainment in Cameron, Elk, Warren, McKean and Forest Counties, 2018-2022



Note: Source is from 2018-2022 5-year American Community Survey. The bar for PA shows the average of the state over all the counties. The bar for USA shows the average of the nation over all the counties. The bar for Tourism shows the average of the tourism-dependent counties.

Figure 9 Income and Population Composition in Cameron, Elk, Warren, McKean and Forest Counties, 2018-2022



Note: Source is from 2018-2022 5-year American Community Survey. The bar for PA shows the average of the state over all the counties. The bar for USA shows the average of the nation over all the counties. The bar for Tourism shows the average of the tourism-dependent counties.

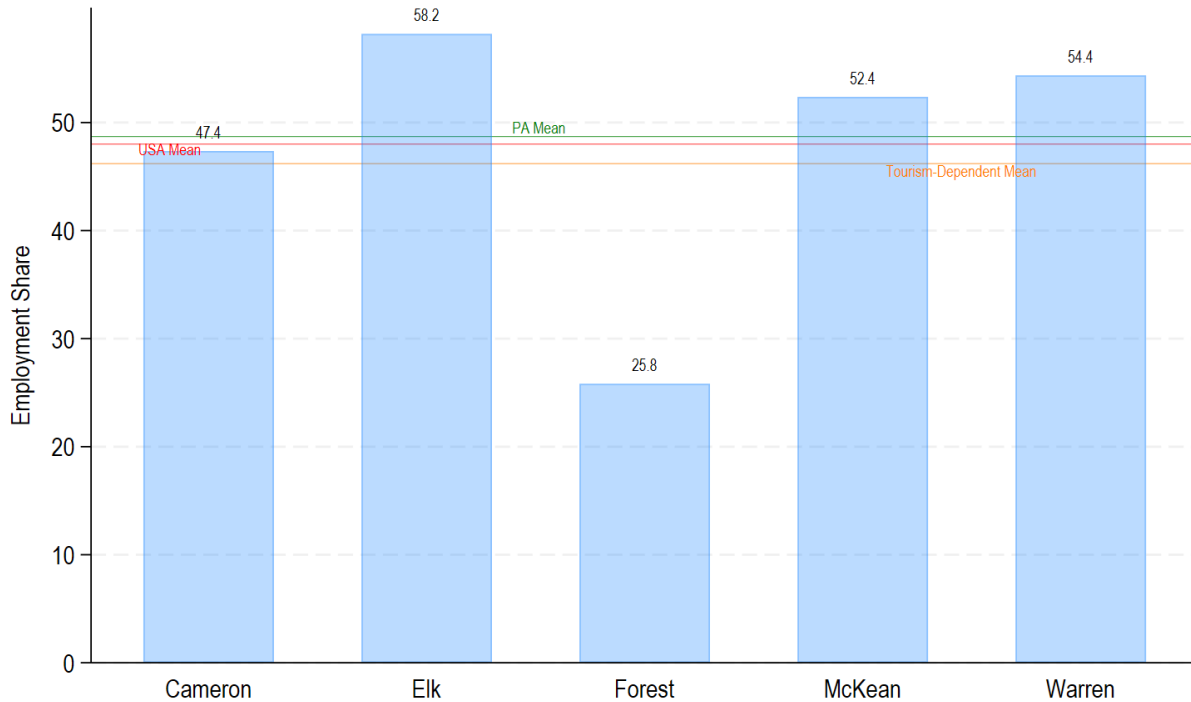
In Figure 8, the age composition of these counties reveals different demographic patterns, when compared to the nation. Figure 8 shows various demographic indicators including the percentage of the population aged 25-44, a crucial working-age demographic. The comparable number nationally is 26.7%. Counties like Cameron and Elk are significantly below the national and state averages. In Figure 9, it shows the demographic composition of the five PA counties with the averages of PA, the nation, and tourism-dependent counties.

Education and Workforce

Educational attainment patterns reveal mixed results across the region (Figure 8). High school completion rates generally range from 86% to 94% across the counties. However, bachelor's degree attainment presents a different picture. McKean County and Warren County lead the region in higher education attainment at approximately 20%, while Cameron County shows the lowest rate at about 12%. The national average of population with a bachelor's degree is 23.5%. All five counties are below the national and state averages. The extremely low levels of counties like Cameron and Forest counties could be a concern.

Figure 10 presents additional workforce indicators for employment rates across counties. Elk County shows the highest employment rate, while Forest County exhibits the lowest.

Figure 10 Share of Employment in Cameron, Elk, Warren, McKean and Forest Counties, 2018-2022



Note: Source is from 2018-2022 5-year American Community Survey. The Figure shows the percentage of population that are employed. The bar for PA shows the average of the state over all the counties. The bar for USA shows the average of the nation over all the counties. The bar for Tourism shows the average of the tourism-dependent counties.

Income

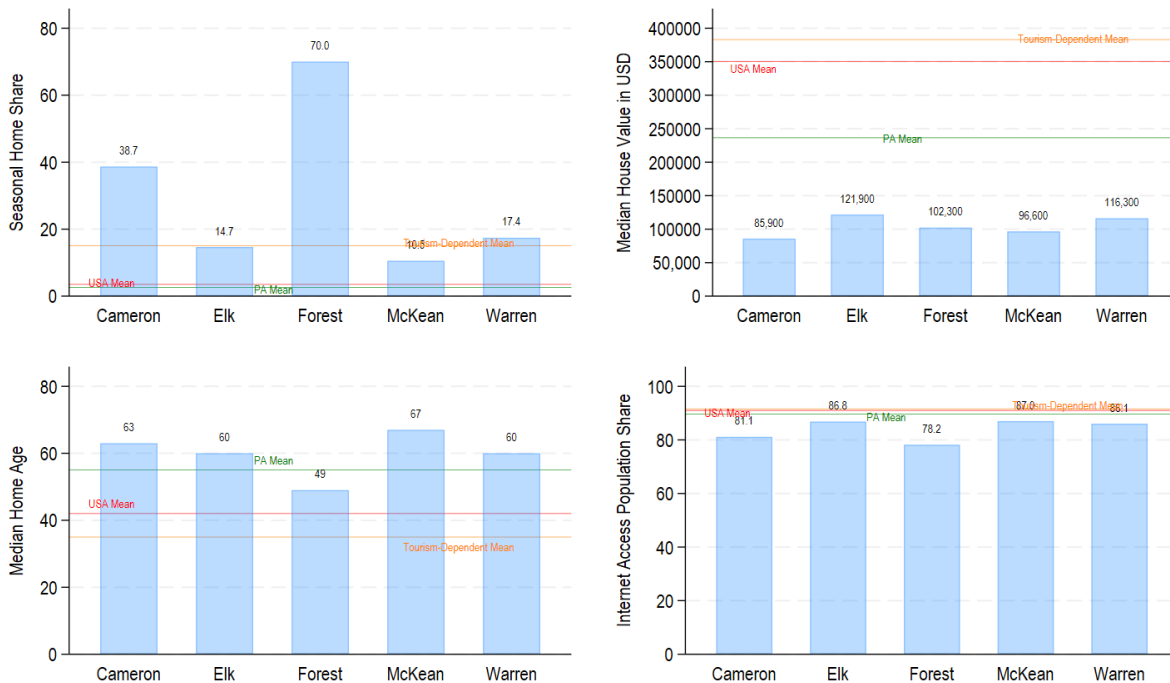
Income metrics reveal persistent economic challenges (Figure 9). Elk County leads in both per capita income and median household income, with median household income over \$60,000 and per capita income over \$30,000. Forest County shows the lowest income levels among the five counties.

Housing Characteristics

Housing patterns reveal unique aspects of these rural economies (Figure 11). Median house values vary significantly across counties, with Elk County showing the highest values and Cameron County the lowest. The figure also provides important data on internet access across the counties.

A distinctive feature of these counties is their high proportion of seasonal homes, as shown in Figure 11. Forest County stands out with 70% of housing units classified as seasonal or recreational, significantly higher than other counties. This high seasonal occupancy rate reflects the region's role as a recreation and tourism destination while potentially affecting local housing markets and community dynamics. Figure 12 shows housing affordability, indicating both housing rent and ownership are generally affordable in these five counties, comparing to the state, the nation, and tourism-dependent counties.

Figure 11 Home and Internet in Cameron, Elk, Warren, McKean and Forest Counties, 2018-2022



Note: Source is from 2018-2022 5-year American Community Survey. The bar for PA shows the average of the state over all the counties. The bar for USA shows the average of the nation over all the counties. The bar for Tourism shows the average of the tourism-dependent counties.

Figure 12 Home Affordability in Cameron, Elk, Warren, McKean and Forest Counties, 2018-2022

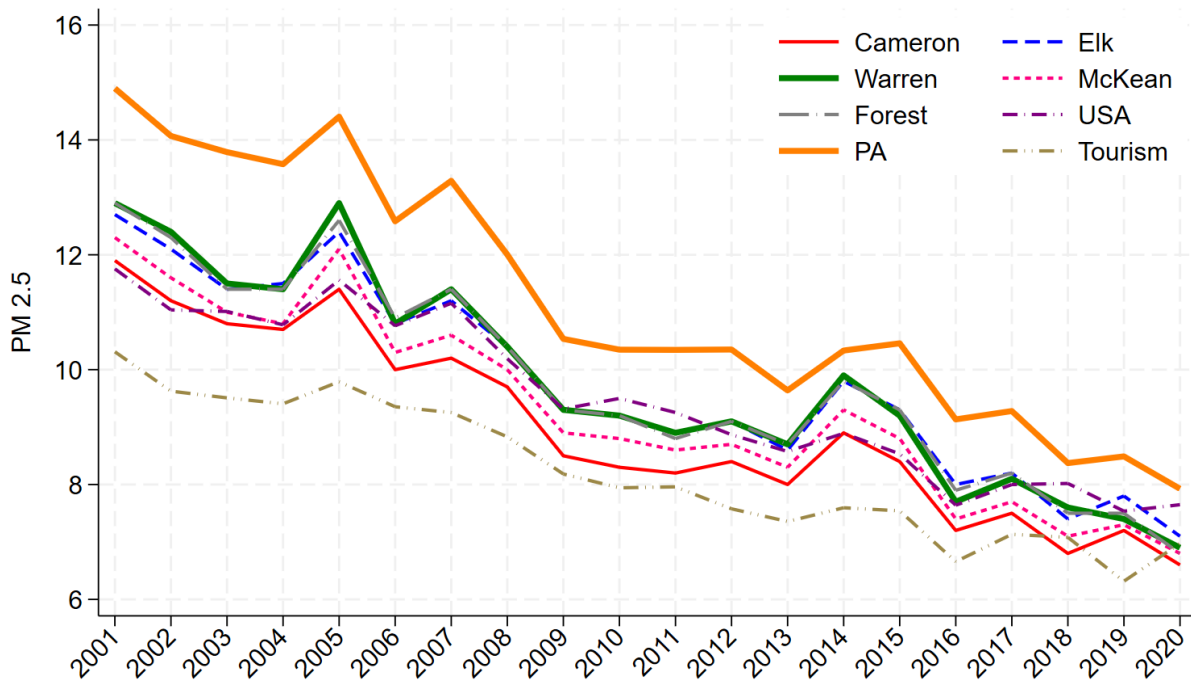


Note: Source is from 2018-2022 5-year American Community Survey. The bar for PA shows the average of the state over all the counties. The bar for USA shows the average of the nation over all the counties. The bar for Tourism shows the average of the tourism-dependent counties. The top panel shows the median household income to housing price ratio and the bottom panel shows the share of renters that the rent exceeds 30% of household income.

6. Environmental Indicators

The environmental quality of these counties can be assessed through several key metrics. Figure 13 tracks PM 2.5 levels from 2001 to 2020, showing generally improving air quality trends across all five counties. The data, sourced from the CDC National Environmental Public Health Tracking Network, indicates that air quality in these counties has generally remained within acceptable ranges, likely benefiting from their rural location and extensive forest cover, as well as the general national trend of better air quality overall.

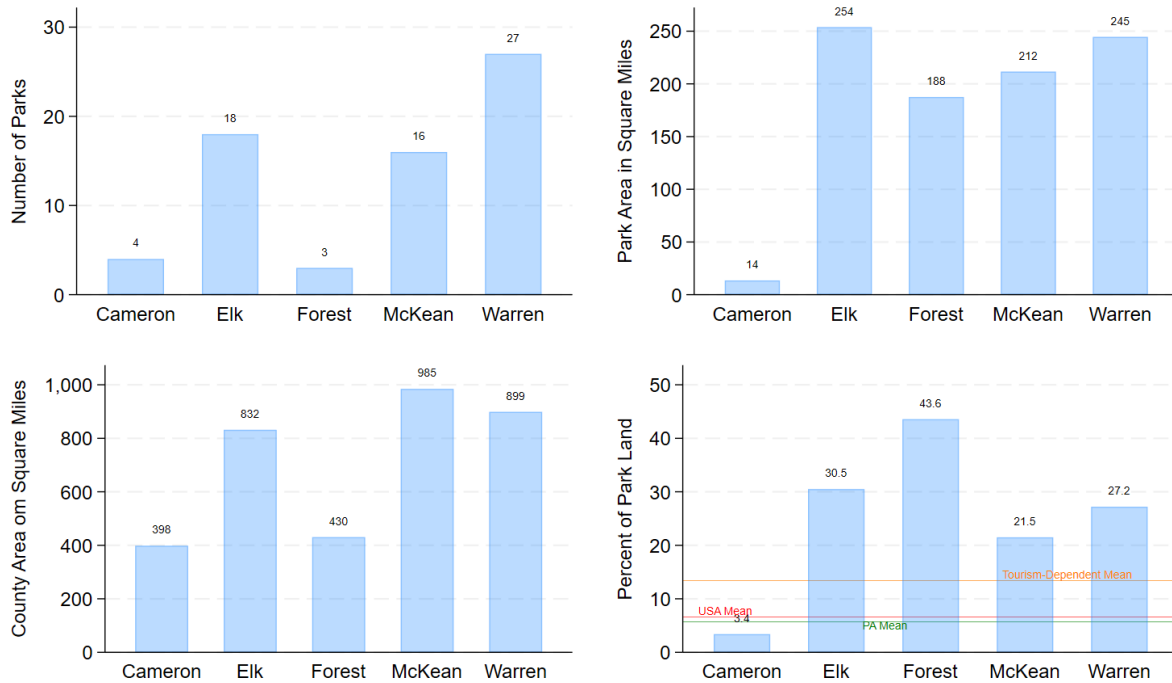
Figure 13 PM 2.5 2001-2020



Note: Source from CDC National Environmental Public Health Tracking Network with the most recent source year 2020 from <https://ephtracking.cdc.gov/DataExplorer/>

Figure 14 provides a comprehensive overview of parkland resources across the five counties, showing the number of parks, total park area, land area, and the share of park area in each county. This data highlights the significant natural recreational resources available in the region, supporting both quality of life for residents and tourism opportunities.

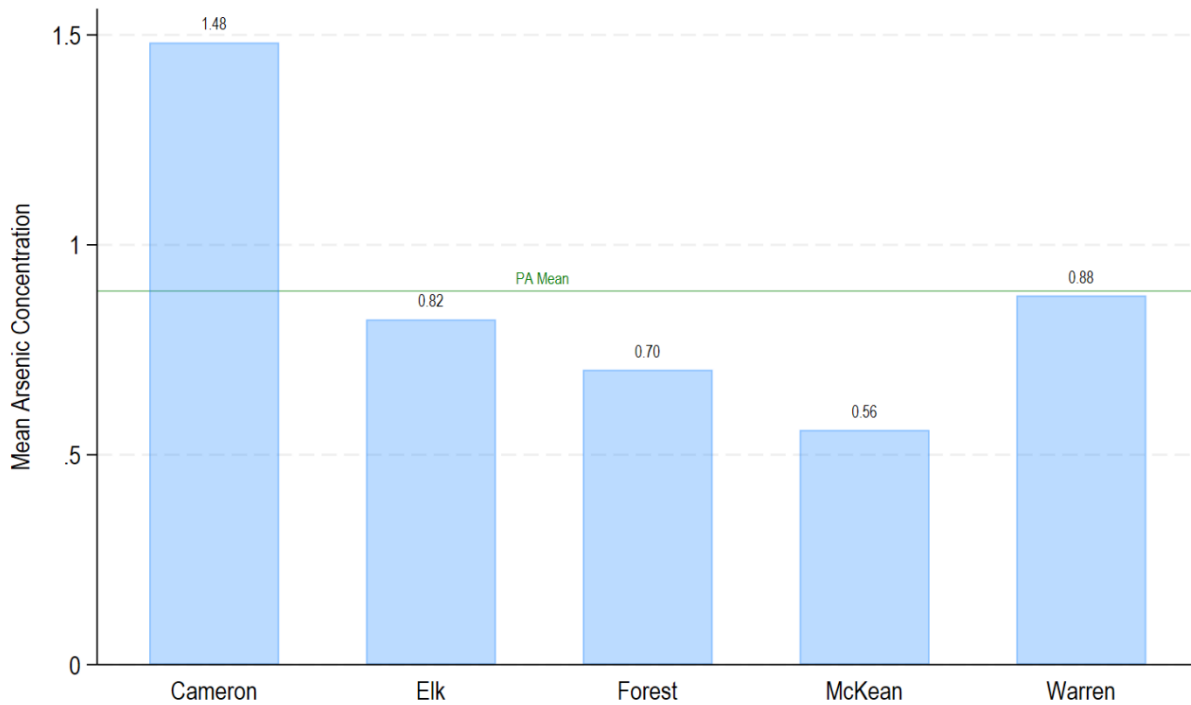
Figure 14 Number of Parks, Park Area, Land Area, and Share of Park Area in Five Counties 2022



Note: Source from National Neighborhood Data Archive. Parks refer to all the parks including public parks, some national and state parks, school and private parks w/ public access.

Water quality, another crucial environmental indicator, is examined through arsenic concentration levels as shown in Figure 15. Based on 2018 data from the PA Department of Health, the counties show varying levels of arsenic concentration, with implications for both residential water use and environmental health. This data suggests the need for continued monitoring and management of water resources across the region.

Figure 15 Water Pollution in Arsenic Concentration (ug/l) in 2018



Source: PA Department of Health with the most recent source year 2018 from <https://www.phaim1.health.pa.gov/EDD/WebForms/WaterCntySt.aspx>

7. Recommendations and Policy Implications

Economic development strategies should focus on sector diversification, supporting expansion in education and health services while investing in professional and business services infrastructure. Tourism development requires leveraging high seasonal home ownership and investing in year-round attractions while preserving natural amenities.

Workforce development initiatives should address the aging workforce through targeted retention and attraction programs, enhanced educational opportunities aligned with growth sectors, and improved skills training for tourism and hospitality workers.

Regional collaboration emerges as a critical strategy, with opportunities for coordinated tourism marketing efforts, shared workforce development resources, and complementary economic development approaches across counties.

Environmental management deserves particular attention given the region's natural assets and challenges. The improving air quality trends demonstrate effective environmental stewardship that should be maintained, while varying water quality conditions across counties suggest the need for coordinated watershed management approaches. The significant parkland resources present opportunities for expanded outdoor recreation and tourism development, but careful

planning will be needed to balance increased visitor usage with environmental preservation. Counties should consider developing integrated environmental monitoring systems and shared conservation strategies to protect these valuable natural resources.

The data suggests these counties face significant challenges but retain important assets in their natural amenities, manufacturing base, and tourism potential. Success will require balanced development that preserves natural resources while fostering economic growth and improved quality of life for residents.

8. References

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Table A1 Leisure and Hospitality Employment for Five PA Counties 2000-2023

Year	Cameron	Elk	Forest	McKean	Warren	Total
2000	114	761	245	1239	1016	3375
2001	116	778	244	1339	1051	3528
2002	120	756	248	1276	1012	3412
2003	131	703	202	1269	1005	3310
2004	116	715	247	1253	959	3290
2005	136	752	236	1224	951	3299
2006	137	876	215	1183	943	3354
2007	140	828	203	1130	1001	3302
2008	166	777	195	1115	1067	3320
2009	142	772	206	1096	1019	3235
2010	139	801	202	1015	995	3152
2011	129	857	182	1032	1006	3206
2012	123	846	142	1058	1013	3182
2013	129	803	132	1066	979	3109
2014	101	769	109	1086	1013	2868
2015	138	802	71	1142	1011	3093
2016	139	859	95	1141	974	3113
2017	135	827	146	1222	981	3311
2018	126	784	155	1188	988	3241
2019	130	826	162	1209	954	3281
2020	81	741	139	1003	827	2710
2021	125	822	149	1101	902	3099
2022	128	859	157	1174	932	3250
2023	126	925	176	1156	909	3292

Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics. Due to QCEW data disclosure requirements, the highlighted employment numbers are derived from Tapestry data.

Table A2 Leisure and Hospitality Establishment for Five PA Counties 2000-2023

Year	Cameron	Elk	Forest	McKean	Warren	Total
2000	17	89	33	127	108	374
2001	18	97	36	136	120	407
2002	15	88	34	133	111	381
2003	15	88	26	130	107	366
2004	15	81	31	127	107	361
2005	16	84	27	128	105	360
2006	15	86	28	127	96	352
2007	13	86	29	125	97	350
2008	15	84	25	119	99	342
2009	14	78	25	121	95	333
2010	14	80	26	111	95	326
2011	15	84	24	114	95	332
2012	15	83	21	120	92	331
2013	15	82	21	116	92	326
2014	15	80	21	119	92	327
2015	14	78	19	120	91	322
2016	14	82	21	118	90	325
2017	15	83	22	124	89	333
2018	15	82	20	124	85	326
2019	17	84	23	122	80	326
2020	18	87	21	116	78	320
2021	19	84	21	111	80	315
2022	19	85	22	112	81	319
2023	17	84	20	108	74	303

Note: Source is from Quarterly Census of Employment and Wages from U.S. Bureau of Labor Statistics.