



Monroe County, Pennsylvania

**ECONOMIC
SCORECARD 2019**



A MESSAGE FROM Marcia G. Welsh, Ph.D., President

On behalf of East Stroudsburg University, I am proud to present the **2019 Monroe County Economic Scorecard**. ESU takes seriously its role in promoting the economic vitality of the region, and with an eye toward constant improvement, this year's Scorecard takes a different approach to analyzing the economic trends in Monroe County.

For the first five Scorecards, Monroe was compared to its seven closest neighbors: Carbon, Lackawanna, Lehigh, Luzerne, Northampton, Pike and Wayne Counties.

Having passed the milestone of five years of the Economic Scorecard, the 2019 edition forges a new path, providing data from the Northeastern Pennsylvania Alliance (NEPA) counties, the Commonwealth of Pennsylvania, and the United States. Lehigh and Northampton have been replaced by Schuylkill County, enabling the Scorecard to focus on counties that are more similar to Monroe County in demographics, resources, and infrastructure.

And therein lies the particular value of this year's analysis. By focusing the data on similar counties, we can more fully understand the positive impact that Monroe County has upon the Pocono Mountains and the NEPA region, and how Monroe is setting the bar for regional transformation across Pennsylvania and the US.

The Scorecard also presents the findings of the "**Monroe County, PA: Why do we live here?**" Survey, which was open to all of Monroe County. The collected responses reflect the diverse reasons that have brought our residents to Monroe County and the benefits and rewards of living here.

As you review the 2019 Scorecard, I invite you to share in our accomplishments as a County, but more importantly, I congratulate all those who have worked together to achieve excellence as a Community.

Sincerely,

A handwritten signature in black ink that reads "Marcia G. Welsh". The signature is fluid and cursive, with the first name being the most prominent.

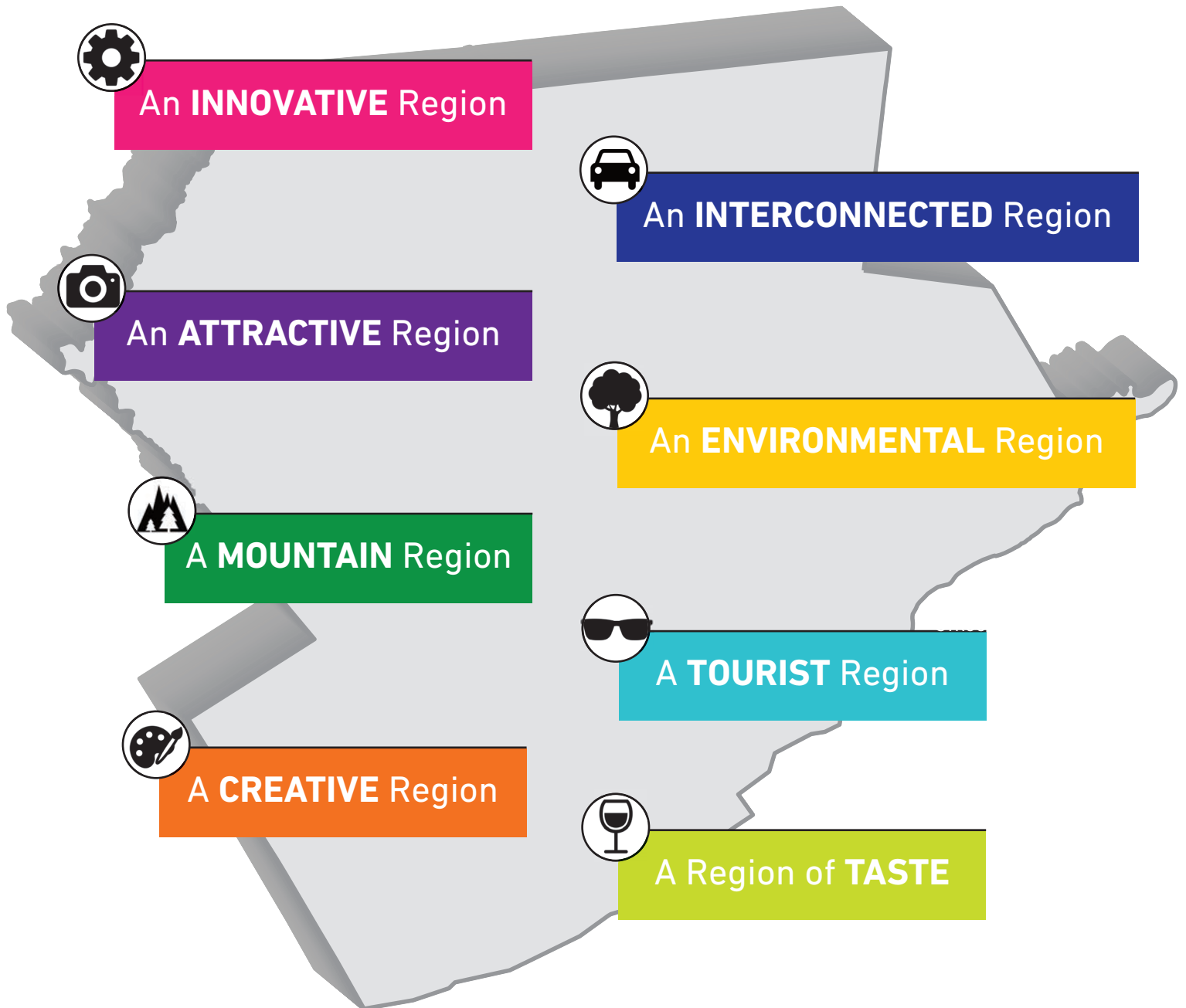
Marcia G. Welsh, Ph.D.
President

The 2019 Economic Scorecard of Monroe County is the sixth annual report reflecting the economic trends in the County. This year's data was prepared by the Northeastern Pennsylvania Alliance (NEPA).

The geographic areas reflected in the Scorecard include: Monroe County; the Northeastern Pennsylvania NEPA counties which consist of: Carbon, Lackawanna, Luzerne, Monroe, Pike, Schuylkill, and Wayne; the Commonwealth of Pennsylvania; and the United States.

The data includes information on Income/Wages; Employment; Business Climate; Housing; Health Care; Arts, Entertainment and Recreation; and Education.

The 2019 Scorecard presents the most recent available data and compares it to that of previous years.



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MONROE COUNTY



An INTERCONNECTED Region



Visit Philadelphia

70 miles from New York City and
85 miles from Philadelphia

2 major Interstates, 2 municipal airports, 1 regional rail provider with 2 Class I rail connections



ESU University Relations/Susie Forrester



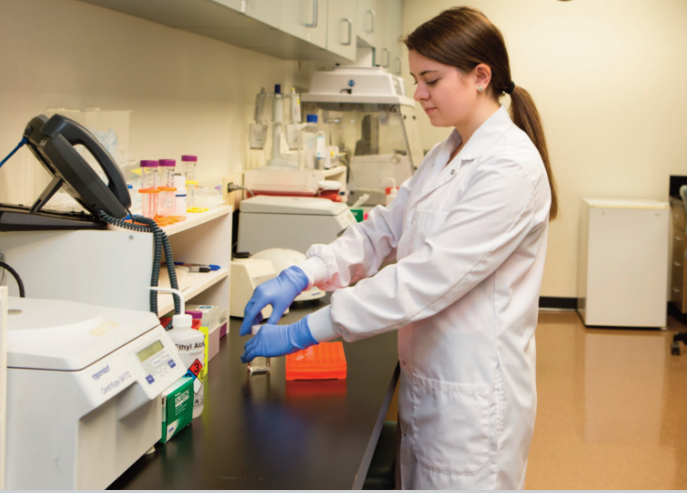
ESU University Relations/Mike Grippi

A CREATIVE Region

- 11 festivals
- 10 art galleries/
museums
- 3 performing arts
venues
- 35 vocal/
instrumental/
theatrical
performance
groups



ESU University Relations/Susie Forrester



An INNOVATIVE Region

East Stroudsburg University drives innovation with its Business Accelerator, Coworking Space, G3D Stratasys Super Lab, Bloomberg Finance Lab and PA Tick Research Lab

Sanofi is one of the largest manufacturers of human vaccines in the US, helping to protect millions from more than 10 different infectious diseases at every stage of life

ESU University Relations/Bob Weidner



An ENVIRONMENTAL Region



Uniquely pristine natural resources that support economic growth

The 'cradle' of American trout fishing



ESU University Relations/Mike Grippi

ESU University Relations



Pick Up the Poconos 2018

327 volunteers filled 741 bags of litter and covered approximately 90 miles

An **ATTRACTIVE** Region

80 million people reside within a three-hour drive from Monroe County
27.9 million visitors come to the Poconos annually, a 3.3 million increase since 2014



3.26 million
people visit
the Delaware River
National Recreation
Area annually



Pocono Mountains Visitors Bureau

A **MOUNTAIN** Region

Big Pocono State Park, at an elevation of 2,133 feet above sea level, provides breathtaking vistas spanning portions of PA, New Jersey and New York including the Catskill Mountains located 80 miles away.

The Poconos have 6 major ski areas and over 155 trails



"Pocono" is a Native American word meaning "stream between two mountains"



A TOURIST Region

Guest spending exceeds \$3.3 billion annually



On NASCAR race day at **Pocono Raceway**, Long Pond becomes the third-largest city in the Commonwealth of PA

Mount Airy Casino Resort was PA's first AAA Four Diamond Casino Resort generating \$45.5M for Monroe County Local Share Projects

Pocono Mountains Visitors Bureau



A Region of TASTE

9 Wineries and Tasting Rooms, 4 Breweries, 4 Distilleries, 2 Cideries
119 preserved farms (14th in the Commonwealth of PA for number of preserved farms)
Monroe Farmers Market
Open since 1979 - 23 summer vendors



Monroe County Demographic Snapshot

Total Population:

167,306



Population Change

From 2010 to 2019 the population decreased by 2,536 or 1.5%

From 2000 to 2010, **Monroe County saw an overall increase of 22.5%** and was the **third fastest growing county** in the Commonwealth of PA. (169,842)

Labor Force:
82,400

Total Employment:
78,500

Median Household Income:
\$61,430

Per Capita Income:
\$27,439

Average Hourly Wage (All Occupations):
\$20.26 (\$42,154 annually, 40 hours/week)

Source: U.S. Census Bureau and JobsEQ - July 2019

Commuting Patterns



Work in Monroe County and Live Elsewhere:
27,249

Live and Work in Monroe County:
47,104

Live in Monroe County, Work Elsewhere:
23,071

Source: U.S. Census Bureau and JobsEQ - July 2019

Higher Education

1,857 Degrees



awarded by Monroe County Colleges and Universities 2016-2017 Academic year

[1,294 four-year degrees at East Stroudsburg University (ESU); 244 post-graduate awards at ESU; 319 two-year degrees at Northampton Community College-Monroe]

Source: JobsEQ and Northampton Community College - July 2019

Employment by Industry (Top 10) and Number of Employees

Accommodation & Food Service	10,308
Retail Trade	9,299
Health Care & Social Assistance	8,379
Manufacturing	5,074
Educational Services	5,181
Public Administration	4,251
Transportation & Warehousing	3,431
Construction	2,786
Other Services (Except Public Administration)	2,660
Administrative and Support & Waste Management and Remediation Services	2,392

Source: JobsEQ - July 2019

Employment by Industry (Top 10) and Average Salary

Accommodation & Food Service	\$21,764
Retail Trade	\$26,302
Health Care & Social Assistance	\$47,076
Manufacturing	\$79,278
Educational Services	\$53,715
Public Administration	\$63,614
Transportation & Warehousing	\$47,968
Construction	\$43,363
Other Services (Except Public Administration)	\$26,205
Administrative and Support & Waste Management and Remediation Services	\$34,442

Source: JobsEQ - July 2019

Occupation (Top 10) and Average Salary



Office and Administrative Support	\$34,800
Sales and Related	\$32,700
Food Preparation and Serving Related	\$24,000
Transportation and Material Moving	\$35,800
Education, Training, and Library	\$56,000
Health Care Practitioners and Technical	\$74,000
Personal Care and Service	\$25,400
Building and Grounds Cleaning and Maintenance	\$27,100
Production	\$39,800
Management	\$100,600

Source: JobsEQ – July 2019

5-Year Job Growth: 1.1%

5-Year Job Growth (Annualized by Industry)

Utilities	6.4%
Management of Companies	4.8%
Transportation & Warehousing	4.0%
Accommodations and Food Service	3.7%
Health Care & Social Assistance	3.3%

Source: JobsEQ – July 2019

431

Jobs Created by 2018 Business Development Projects



418

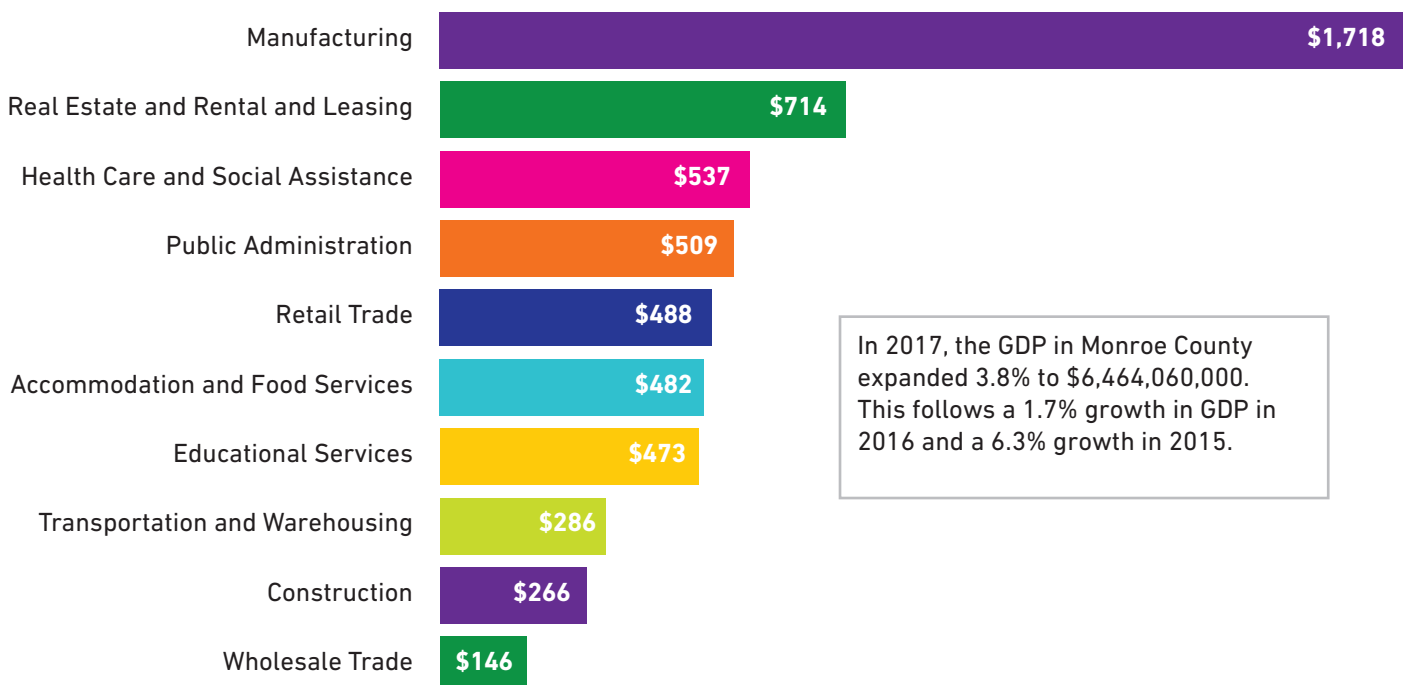
Jobs Retained by 2018 Business Development Projects

Source: PMEDC



Monroe County GDP (in \$millions) by Industry Sector

Monroe County, Pennsylvania 2017 (2018 information is not yet available)



In 2017, the GDP in Monroe County expanded 3.8% to \$6,464,060,000. This follows a 1.7% growth in GDP in 2016 and a 6.3% growth in 2015.

Monroe County, PA: Why do we live here?

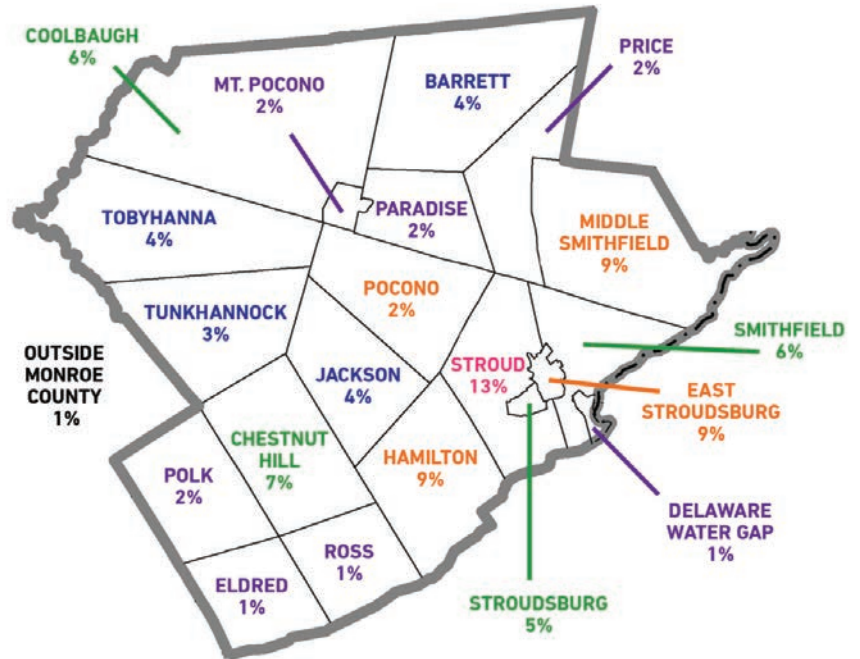
Survey Responses

A brief survey was distributed in August 2019 to collect some of the reasons why Monroe County's 168,000 residents have chosen to settle here. More than 700 responses were collected.

Overwhelmingly, residents indicated that the natural beauty of the Pocono Mountains, along with ties to family and friends, combine to provide an excellent quality of life.

Prior to settling in Monroe County, 86% of residents lived elsewhere in the northeastern United States, with 38% moving here from within the NY/NJ/PA tri-state area.

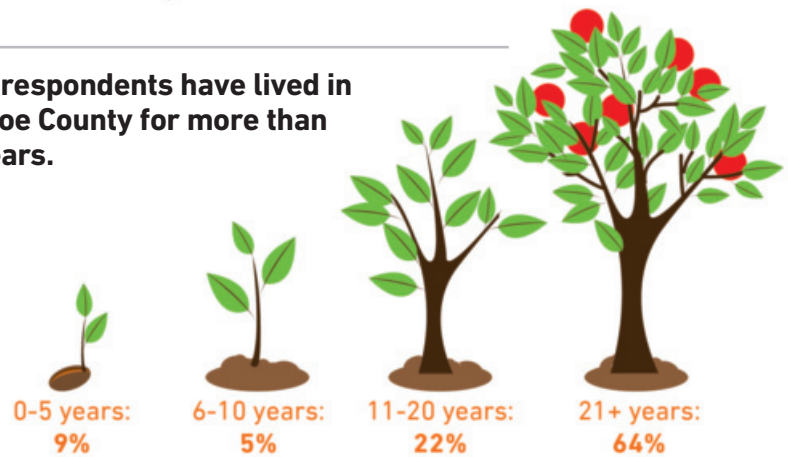
Survey responses represented all 20 municipalities and boroughs in Monroe County.



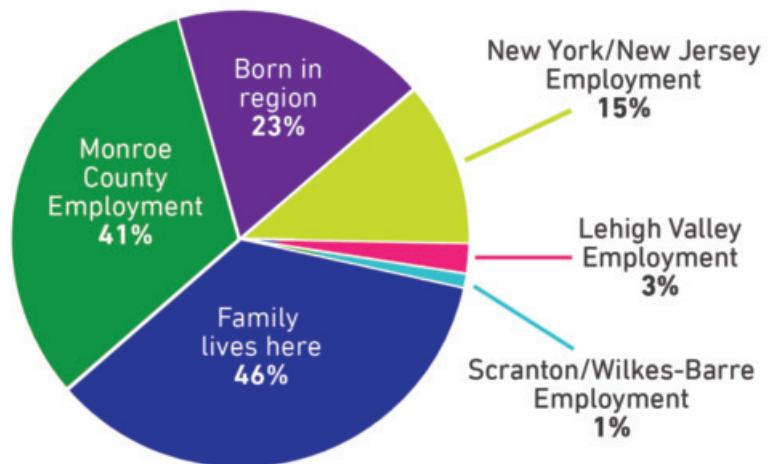
Pocono Proud

- I loved growing up here •
- There is a strong sense of community and a hometown feel •
- Here, friends become family •
- I'm proud to be a multi-generational resident of Monroe County •
- Great place to raise a family - small town atmosphere and sense of community •
- We are a diverse and welcoming community •
- There are good people who care and are working to make this area better •

Most respondents have lived in Monroe County for more than 20 years.



Family ties and employment within the county are the primary anchors for Monroe residents. Respondents could choose more than one answer.



Northeastern Pennsylvania Alliance

The NEPA Alliance provided all of the data and analytics for the 2019 Monroe County Economic Scorecard. A regional community and economic development agency, the NEPA Alliance serves the seven counties of Northeastern Pennsylvania including Carbon, Lackawanna, Luzerne, Monroe, Pike, Schuylkill and Wayne. NEPA Alliance services include business financing, government contracting assistance, international trade assistance, nonprofit assistance, transportation planning, research and information, and local government services. For more information about NEPA Alliance, visit www.nepa-alliance.org or call 866-758-1929. "This institution is an equal opportunity provider and employer."



Jeffrey K. Box
President & CEO



Kurt R. Bauman, MBA
Vice President, Community & Economic Development Services
Executive Director, Nonprofit & Community Assistance Center (NCAC)



Steven N. Zaricki
Research & Information Manager

Summary of 2019 Economic Scorecard Indicators

The 2019 Scorecard differs from previous editions by comparing Monroe County to the Northeastern Pennsylvania Alliance (NEPA) region which includes Carbon, Lackawanna, Luzerne, Monroe, Pike, Schuylkill and Wayne counties; the Commonwealth of Pennsylvania; and the United States.

It is important to note that while Monroe County is not always at the top of the comparisons with NEPA, Pennsylvania, and the US, the rate of change frequently outperforms the other three geographic groups studied. This demonstrates that Monroe County has a strong infrastructure across all the indicators, allowing the County to effectively weather fluctuations that may have more severely impacted the other geographic areas. Highlights of Monroe County's successes in each indicator include:

Monroe County's **Per Capita Personal Income** growth from 2010-17 of 27.7% is the highest among the four geographic areas measured.

Monroe County's **Living Wage** of \$11.77 (one adult) and \$15.97 (two working adults/two children) are both the highest of the four geographic areas, per 2015 data.

Monroe's **Average Earnings per Job** in 2017 of \$55,115 is higher than the regional average of \$51,300.

The County's **Poverty Rate** of 9.3% was the lowest of the four geographic areas in 2017, and it has been below the state and national averages each year since 2010.

Employment has increased by 2,900 workers from 2010-18 while unemployment has decreased by 3,600 workers. The County's unemployment rate has decreased from 9.7% to 5.4% in that time frame.

The **Business Climate** in Monroe County has benefited from a decrease in the Serious Crime Rate of 28% since 2010.

In the **Housing** category, Monroe has the most affordable housing compared to Median Household Income, and the Median Household Income has ranked highest among the four geographic areas since 2010.

In **Health Care**, Monroe County has seen growth in the number of General Hospital Beds per 1,000 Population when the other regions have undergone a decline. The County has also experienced a higher rate of growth in Primary Care Physicians than NEPA and the state.

In **Arts, Entertainment & Recreation**, Monroe County's employment as a Percent of Total Employment of 3.6% is almost double the regional, state and national averages.

Monroe County's **Education** percentage of attaining a Bachelor's degree or higher (24% of population 25 years and over) is ahead of the regional rate (22.5%). The County's percentage of population with no high school degree or equivalency degree of 10.8% is ahead of the national average (12.7%).

INCOME AND WAGES

Per Capita Personal Income (PCPI) measures the average income per person.

At 27.7%, Monroe County's PCPI growth from 2010-17 is the highest among the four geographic areas measured. US growth was 27.4%, followed by PA at 27.1% and NEPA at 23.4%.

Since 2010, Monroe County's PCPI has held at a steady percentage of both the US and PA rates. In some years, Monroe County's PCPI increased when the US and PA percentages decreased, indicating a stable local economy and wage base.

Personal Income Summary: Per Capita Personal Income

	2010	2011	2012	2013	2014	2015	2016	2017
United States	\$40,545	\$42,727	\$44,582	\$44,826	\$47,025	\$48,940	\$49,831	\$51,640
Pennsylvania	\$41,997	\$44,146	\$45,986	\$46,348	\$48,314	\$50,261	\$51,407	\$53,363
NEPA	\$35,065	\$36,384	\$37,099	\$37,472	\$38,915	\$40,718	\$41,857	\$43,259
Monroe County	\$31,879	\$33,392	\$33,329	\$35,051	\$36,564	\$38,178	\$39,385	\$40,706

PCPI as a % of the US

	2010	2011	2012	2013	2014	2015	2016	2017
United States	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Pennsylvania	103.6%	103.3%	103.1%	103.4%	102.7%	102.7%	103.2%	103.3%
NEPA	86.5%	85.2%	83.2%	83.6%	82.8%	83.2%	84.0%	83.8%
Monroe County	78.6%	78.2%	74.8%	78.2%	77.8%	78.0%	79.0%	78.8%

PCPI as a % of PA

	2010	2011	2012	2013	2014	2015	2016	2017
United States	96.5%	96.8%	96.9%	96.7%	97.3%	97.4%	96.9%	96.8%
Pennsylvania	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
NEPA	83.5%	82.4%	80.7%	80.8%	80.5%	81.0%	81.4%	81.1%
Monroe County	75.9%	75.6%	72.5%	75.6%	75.7%	76.0%	76.6%	76.3%

PCPI Growth

	(2010-2017)	2011	2012	2013	2014	2015	2016	2017
United States	27.4%	5.4%	4.3%	0.5%	4.9%	4.1%	1.8%	3.6%
Pennsylvania	27.1%	5.1%	4.2%	0.8%	4.2%	4.0%	2.3%	3.8%
NEPA	23.4%	3.8%	2.0%	1.0%	3.9%	4.6%	2.8%	3.3%
Monroe County	27.7%	4.7%	-0.2%	5.2%	4.3%	4.4%	3.2%	3.4%

Notes: Census Bureau midyear population estimates. (2010-17 reflects estimates available as of March 2018).

Per capita personal income was computed using Census Bureau midyear population estimates. (2010-17 reflects estimates available as of March 2018).

Source: Bureau of Economic Analysis

Living Wage

Living Wage is the estimate of the cost of living based on typical expenses. It is the wage that is high enough to maintain a minimum standard of living.

Monroe County's Living Wages of \$11.77 (one adult) and \$15.97 (two adults/two children) are both the highest of the four geographic areas. NEPA's Living Wages of \$11.15 and \$15.52 are both lower than the PA Living Wages of \$11.45 and \$15.75.

	Living Wages for 1 Adult (2015)	Living Wages for Family of 4 (2 working adults, 2 children) (2015)
United States	n/a	\$15.12
Pennsylvania	\$11.45	\$15.75
NEPA	\$11.15	\$15.52
Monroe County	\$11.77	\$15.97

Source: Dr. Amy K. Glasmeier, Massachusetts Institute of Technology, Living Wage Calculator

Average Earnings per Job

Average Earnings per Job is primarily the average income of wage earners.

In 2017, Monroe County's percentage growth in Average Earnings per Job demonstrated an increase comparable to those in other geographic areas measured, after a major dip across the board in 2016.

This shows that Monroe County is in step with regional and national trends upward in Average Earnings.

Compensation of Employees by NAICS (North American Industry Classification System) Industry

Average Compensation per Job (Dollars)

	2010	2011	2012	2013	2014	2015	2016	2017
United States	\$58,421	\$59,953	\$61,241	\$62,136	\$63,803	\$65,590	\$66,330	\$68,463
Pennsylvania	\$56,847	\$58,454	\$59,482	\$60,881	\$62,204	\$64,174	\$64,235	\$66,191
NEPA	\$44,833	\$45,776	\$46,107	\$47,231	\$48,135	\$49,650	\$49,964	\$51,300
Monroe County	\$50,835	\$51,867	\$52,166	\$52,024	\$52,497	\$53,955	\$54,010	\$55,115

Average Earnings per Job as a % of the US

	2010	2011	2012	2013	2014	2015	2016	2017
United States	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Pennsylvania	97.3%	97.5%	97.1%	98.0%	97.5%	97.8%	96.8%	96.7%
NEPA	76.7%	76.4%	75.3%	76.0%	75.4%	75.7%	75.3%	74.9%
Monroe County	87.0%	86.5%	85.2%	83.7%	82.3%	82.3%	81.4%	80.5%

Average Earnings per Job as a % of PA

	2010	2011	2012	2013	2014	2015	2016	2017
United States	102.8%	102.6%	103.0%	102.1%	102.6%	102.2%	103.3%	103.4%
Pennsylvania	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
NEPA	78.9%	78.3%	77.5%	77.6%	77.4%	77.4%	77.8%	77.5%
Monroe County	89.4%	88.7%	87.7%	85.5%	84.4%	84.1%	84.1%	83.3%

Growth in Average Earnings per Job

	2010	2011	2012	2013	2014	2015	2016	2017
United States		2.6%	2.1%	1.5%	2.7%	2.8%	1.1%	3.2%
Pennsylvania		2.8%	1.8%	2.4%	2.2%	3.2%	0.1%	3.0%
NEPA		2.1%	0.7%	2.4%	1.9%	3.1%	0.6%	2.7%
Monroe County		2.0%	0.6%	-0.3%	0.9%	2.8%	0.1%	2.0%

Notes: Average compensation per job is compensation of employees divided by total full-time and part-time wage and salary employment. All dollar estimates are in thousands of current dollars (not adjusted for inflation). Statistics presented in thousands of dollars do not indicate more precision than statistics presented in millions of dollars.

Source: Bureau of Economic Analysis

Poverty Rates

The Census Bureau uses a set of money income thresholds that vary by family size/composition to determine who is in poverty. Monroe County's 2017 Poverty Rate of 9.3% is the lowest of the four geographic areas measured. NEPA is the second-lowest at 12.0%, followed by PA at 12.5% and the US at 13.4%.

Monroe County's Poverty Percentage has been below the state and national averages each year since 2010.

Poverty Percentage

	2010	2011	2012	2013	2014	2015	2016	2017
United States	15.3%	15.9%	15.9%	15.8%	15.5%	14.7%	14.0%	13.4%
Pennsylvania	13.4%	13.7%	13.7%	13.7%	13.6%	13.1%	12.9%	12.5%
NEPA	12.7%	13.0%	13.8%	13.3%	13.6%	13.1%	12.9%	12.0%
Monroe County	13.0%	13.4%	13.4%	12.0%	13.3%	12.7%	12.0%	9.3%

Source: U.S. Census Bureau, Small Area Estimates Branch (Note: The Census Bureau determines poverty status by using an official poverty measure (OPM) that compares pre-tax cash income against a threshold that is set at three times the cost of a minimum food diet in 1963 and adjusted for family size)

EMPLOYMENT

As defined by the Pennsylvania Department of Labor and Industry, "not seasonally adjusted" data are annual averages that do not factor in seasonal influences such as weather, tourism, or holidays.

Monroe County's employment has increased by 2,900 from 2010 (74,700) to 2018 (77,600) while unemployment has decreased by 3,600 (8,000 to 4,400). This corresponds with a decrease of the unemployment rate from 9.7% in 2010 to 5.4% in 2018.

The unemployment rate in Monroe County has remained in line with variations across the geographic areas studied, including a 5% drop in both the US and Monroe unemployment rates from 2017 to 2018.

This shows that the County is enjoying an increase in employment rates at the same level as the US overall.

Employment

	2010	2011	2012	2013	2014	2015	2016	2017	2018
United States	139,064,000	139,869,000	142,469,000	143,929,000	146,305,000	148,834,000	151,436,000	153,337,000	155,761,000
Pennsylvania	5,841,000	5,889,000	5,957,000	5,968,000	6,018,000	6,076,000	6,103,000	6,111,000	6,149,000
NEPA	452,900	453,300	455,500	455,700	458,500	462,000	464,000	463,800	464,700
Monroe County	74,700	74,200	74,400	74,000	73,800	75,600	76,800	77,100	77,600

Unemployment

	2010	2011	2012	2013	2014	2015	2016	2017	2018
United States	14,825,000	13,747,000	12,506,000	11,460,000	9,617,000	8,296,000	7,751,000	6,982,000	6,314,000
Pennsylvania	540,000	507,000	506,000	475,000	374,000	340,000	347,000	314,000	276,000
NEPA	48,800	47,300	47,900	45,400	35,100	30,700	30,100	28,000	25,100
Monroe County	8,000	8,000	8,000	7,600	6,000	5,200	5,100	4,800	4,400

Source: PA Department of Labor and Industry Local Area Unemployment Statistics

Annual Not Seasonally Adjusted Unemployment Rates

	2010	2011	2012	2013	2014	2015	2016	2017	2018
United States	9.6%	8.9%	8.1%	7.4%	6.2%	5.3%	4.9%	4.4%	3.9%
Pennsylvania	8.5%	7.9%	7.8%	7.4%	5.9%	5.3%	5.4%	4.9%	4.3%
NEPA	9.7%	9.4%	9.5%	9.1%	7.1%	6.2%	6.1%	5.7%	5.1%
Monroe County	9.7%	9.7%	9.8%	9.4%	7.5%	6.5%	6.3%	5.9%	5.4%

Source: PA Department of Labor & Industry Center for Workforce Information & Analysis

BUSINESS CLIMATE

Proprietors' Income captures the income of the entrepreneurial class in each geographic area.

Monroe County has had a 1.6% increase since 2010, while the US rate has remained steady. Not only is Monroe's increase in this category on a level with that of PA, but Monroe County had risen to within 0.3% of NEPA in 2017 – a notable achievement.

Proprietors' Income as a % of Personal Income

	2010	2011	2012	2013	2014	2015	2016	2017
United States	8.9%	9.3%	9.7%	10.0%	9.7%	9.1%	8.8%	8.9%
Pennsylvania	8.6%	9.0%	9.4%	10.3%	10.3%	9.9%	10.1%	10.5%
NEPA	6.7%	6.8%	7.1%	7.4%	7.2%	7.3%	7.3%	7.5%
Monroe County	5.6%	5.4%	5.9%	6.3%	6.8%	7.2%	7.1%	7.2%

Source: U.S. Bureau of Economic Analysis

Serious Crime Rate (Part I Offenses) per 100,000 Population

Monroe County's Crime Rate has decreased by 28% since 2010. In the same time span, the NEPA rate has decreased by 20% and the PA rate has decreased by 23%.

Serious Crime Rate (Part I Offenses) per 100,000 Population

	2010	2011	2012	2013	2014	2015	2016	2017
Pennsylvania	2,537	2,587	2,534	2,403	2,258	2,132	2,064	1,966
NEPA	2,167	2,235	2,297	2,220	2,012	1,866	1,797	1,734
Monroe County	3,044	2,871	3,039	2,831	2,654	2,456	2,159	2,204

Notes: Based on Murder, Negligent Manslaughter, Rape, Robbery, Aggravated Assault, Burglary, Larceny Theft, Motor Vehicle Theft and Arson
Comparable statistics for United States are not available

Sources: Federal Bureau of Investigation (FBI) Uniform Crime Reporting System and PA Uniform Crime Reporting System

HOUSING

The 2019 Scorecard includes information on median housing values and median gross rents as a percentage of median household income.

Median Household Income

Monroe County's Median Household Income has been the highest among the four geographic areas each year since 2010 and was listed at \$61,430 in 2017, compared to NEPA (\$53,365), PA (\$56,951) and the US (\$57,562).

Monroe County's Median Household Income has been at least \$3,400 higher than the Median Household Income of the next-closest geographic area over each of the last eight years.

Percent Annual Median Housing Value to Median Household Income

Of all geographic areas measured, only the US percentage has increased since 2010. Percentages for PA, NEPA, and Monroe County have all decreased over time, indicating that these challenges are not limited to Monroe County.

Percent Annual Median Gross Rent to Median Household Income

The Median Annual Gross Rent as a Percentage of Median Income measures the affordability of rental housing.

Monroe County has achieved rates within a few tenths of a point of the US average every year since 2010. Considering the tourism industry in Monroe County, this shows that the County offers affordability on a par with non-resort regions across the US.

Housing Summary (continued)

Median Household Income

	2010	2011	2012	2013	2014	2015	2016	2017
United States	\$51,914	\$52,762	\$53,046	\$53,046	\$53,482	\$53,889	\$55,322	\$57,562
Pennsylvania	\$50,398	\$51,651	\$52,267	\$52,548	\$53,115	\$53,599	\$54,895	\$56,951
NEPA	\$47,923	\$49,583	\$50,109	\$50,060	\$50,292	\$50,734	\$51,631	\$53,365
Monroe County	\$56,733	\$57,700	\$57,773	\$57,408	\$57,748	\$57,365	\$58,980	\$61,430

Median Housing Value

	2010	2011	2012	2013	2014	2015	2016	2017
United States	\$188,400	\$186,200	\$181,400	\$176,700	\$175,700	\$178,600	\$184,700	\$193,500
Pennsylvania	\$159,300	\$163,200	\$164,900	\$164,700	\$164,900	\$166,000	\$167,700	\$170,500
NEPA	\$153,786	\$156,814	\$155,871	\$152,871	\$151,071	\$148,843	\$147,543	\$147,971
Monroe County	\$206,400	\$205,400	\$198,400	\$191,800	\$183,100	\$174,500	\$170,600	\$167,200

Percent Annual Median Housing Value to Median Household Income

	2010	2011	2012	2013	2014	2015	2016	2017
United States	363%	353%	342%	333%	329%	331%	334%	336%
Pennsylvania	316%	316%	316%	313%	311%	310%	306%	299%
NEPA	321%	316%	311%	305%	300%	293%	286%	277%
Monroe County	364%	356%	343%	334%	317%	304%	289%	272%

Median Gross Rent

	2010	2011	2012	2013	2014	2015	2016	2017
United States	\$10,092	\$10,452	\$10,668	\$10,848	\$11,040	\$11,136	\$11,388	\$11,784
Pennsylvania	\$8,868	\$9,240	\$9,528	\$9,756	\$9,984	\$10,080	\$10,308	\$10,620
NEPA	\$8,604	\$8,935	\$9,185	\$9,480	\$9,753	\$9,903	\$10,061	\$10,286
Monroe County	\$11,232	\$11,316	\$11,556	\$11,880	\$12,456	\$12,168	\$12,480	\$12,852

Percent Annual Median Gross Rent to Median Household Income

	2010	2011	2012	2013	2014	2015	2016	2017
United States	19.4%	19.8%	20.1%	20.5%	20.6%	20.7%	20.6%	20.4%
Pennsylvania	17.6%	17.9%	18.2%	18.6%	18.8%	18.8%	18.8%	18.6%
NEPA	18.0%	18.0%	18.3%	18.9%	19.4%	19.5%	19.5%	19.3%
Monroe County	19.8%	19.6%	20.0%	20.7%	21.6%	21.2%	21.2%	20.9%

Source: U.S. Census Bureau, American Community Survey

HEALTH CARE

Monroe County's General Hospital Beds per 1,000 Population matched the NEPA rate of 1.9 in 2017. However, Monroe County is the only geographic area that has shown an increase since 2010, while NEPA and PA have decreased in this category.

While the percentage of Licensed/Approved Nursing Home Beds per 1,000 Population Ages 65 and Older has decreased in all areas since 2010, Monroe County has weathered the decline with only a 3% loss, compared to NEPA's 5.8% and PA's 8%.

The change from 2018 to 2019 in Ratio of Population to 1 Primary Care Physician was the same for both Monroe County and NEPA, with a decrease in both regions of about 150 physicians. However, PA's ratio has not changed significantly since 2013, indicating that similar challenges exist across the state.

General Hospital Beds per 1,000 Population

As of	7/07-6/08	7/08-6/09	7/09-6/10	7/10-6/11	7/11-6/12	7/12-6/13	7/13-6/14	7/14-6/15
Year	2010	2011	2012	2013	2014	2015	2016	2017
Pennsylvania	2.7	2.7	2.6	2.6	2.7	2.6	2.5	2.5
NEPA	2.1	2.1	2.0	2.0	1.9	1.9	2.0	1.9
Monroe County	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.9

Source: Centers for Disease Control and Prevention

Licensed/Approved Nursing Home Beds per 1,000 Population Age 65 and Older

Year	2010	2011	2012	2013	2014	2015	2016	2017
Pennsylvania	46.7	45.7	45.3	44.7	43.4	42.2	41.3	38.7
NEPA	41.5	40.8	39.9	39.3	38.8	38.1	37.6	35.7
Monroe County	21.2	20.1	19.4	22.9	21.9	21.0	20.3	18.2

Ratio of Population to 1 Primary Care Physician

Year	2011	2012	2013	2014	2015	2016	2017	2018	2019
Pennsylvania	1,067	1,067	1,273	1,244	1,249	1,220	1,230	1,230	1,230
NEPA	2,085	2,085	1,917	1,944	1,991	1,946	1,954	1,966	2,023
Monroe County	2,019	2,019	2,208	2,072	2,221	2,200	2,190	2,190	2,340

Source: County Health Rankings

ARTS, ENTERTAINMENT & RECREATION

Monroe County's 2018 Employment in Arts, Entertainment & Recreation as a Percent of Total Employment (3.6%) is nearly double the rates of NEPA, PA and the US (all 1.9%). While Monroe County's rate has dropped from 6.6% to 3.6% since 2010, this is a sign of the diversification of the workforce and increased job opportunities in other sectors.

Arts, Entertainment, & Recreation as a Percent of Total Employment

	2010	2011	2012	2013	2014	2015	2016	2017	2018
United States	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.9%	1.9%	1.9%
Pennsylvania	1.9%	1.9%	1.9%	1.9%	1.8%	1.8%	1.9%	1.9%	1.9%
NEPA	2.5%	2.5%	2.4%	2.1%	2.0%	2.0%	2.0%	1.9%	1.9%
Monroe County	6.6%	6.5%	6.3%	4.2%	4.4%	4.4%	3.9%	3.8%	3.6%

Note: Data are from the Quarterly Census of Employment and Wages (QCEW) and are based on private ownership. 2018 Data are preliminary.

EDUCATION

The 2019 Scorecard uses two indicators to evaluate educational levels - percentage of population 25 years and over with a Bachelor's degree or higher, and percentage with no high school degree or equivalency degree.

Percentage of Population with Bachelor's Degree or Higher

Monroe County has seen a slow but steady increase in this category since 2006. With increases of around 1% in all geographic areas since 2015, the pace of Monroe's increase is consistent with that of NEPA, PA, and the US.

Percentage of Population 25 Years and Older with No High School Degree or Equivalency Degree

Monroe County and NEPA both have a lower percentage of populations with No High School Degree or Equivalency Degree compared to the US, and the County's rate has decreased by 0.5% over the last eight years.

% of Population 25 Years and Over with a Bachelor's Degree or Higher

	2006-2010	2007-2011	2008-2012	2009-2013	2010-2014	2011-2015	2012-2016	2013-2017
United States	27.9%	28.2%	28.5%	28.8%	29.3%	29.8%	30.3%	30.9%
Pennsylvania	26.4%	26.7%	27.0%	27.5%	28.1%	28.6%	29.3%	30.1%
NEPA	20.2%	20.4%	20.6%	21.0%	21.2%	21.3%	21.8%	22.5%
Monroe County	23.8%	23.3%	23.2%	23.8%	23.2%	23.0%	23.6%	24.0%

% of Population 25 Years and Over with No High School Degree or Equivalency Degree

	2006-2010	2007-2011	2008-2012	2009-2013	2010-2014	2011-2015	2012-2016	2013-2017
United States	15.0%	14.6%	14.3%	14.0%	13.7%	13.3%	13.0%	12.7%
Pennsylvania	12.6%	12.1%	11.7%	11.3%	11.0%	10.8%	10.5%	10.1%
NEPA	12.9%	12.4%	12.0%	11.6%	11.1%	10.9%	10.7%	10.5%
Monroe County	11.3%	11.0%	10.5%	10.4%	10.2%	10.3%	10.4%	10.8%

Population 25 Years and Over with a Bachelor's Degree or Higher

	2006-2010	2007-2011	2008-2012	2009-2013	2010-2014	2011-2015	2012-2016	2013-2017
United States	55,723,738	56,977,571	58,235,765	59,497,301	61,253,446	62,952,272	64,767,787	66,887,603
Pennsylvania	2,259,495	2,299,173	2,337,895	2,396,010	2,462,892	2,522,037	2,595,950	2,673,219
NEPA	144,249	146,367	148,215	151,607	152,959	154,187	157,750	162,432
Monroe County	26,161	25,849	25,913	26,671	26,075	25,986	26,672	27,411

Source: U.S. Census Bureau, American Community Survey (5-year estimates)

MONROE 2030 ACTION TEAM ... ACTION FOR THE FUTURE

Ask yourself this question: ***Imagine Monroe County, Pennsylvania as the model for leveraging diverse natural resources, cultures, and communities to be the premier place to work, live, learn, and play in the nation. What would that look like?***

Over the past year, the Monroe 2030 Action Team focused its efforts on the development of the Monroe 2030 Five-year (2020-2025) Strategic Action Plan that addressed this aspirational question. The Plan specifically targets five baseline economic indicators:

Gross Domestic Product (GDP) - \$6.464 billion
Labor Force - 82,400
Total Employment - 78,500
Median Household Income - \$61,430
Per Capita Income - \$27,439

The Monroe 2030 Action Team will measure Monroe County's progress, against the baseline data points, over the next five years.

Additionally, eight Strategic Doing Action Teams – Public Health, Youth Entrepreneurship, Collaboration, Sustainability, Business Development, Marketing, Housing, and Workforce – were created and charged with developing strategic short-term actions for their respective area. Teams will annually assess their outcomes and develop direct/indirect connections to the five indicators. The compilation of that effort is reflected in the Monroe 2030: Five Year Strategic Action Plan.

The methodology used to develop the Action Plan is based on the Strategic Doing process which focuses on strategic conversations on four questions: *What could we do? What should we do? What will we do? and What will we do in the next 30 days? (the Strategic Doing 30/30).* The

Strategic Doing Methodology was introduced at the 2018 East Stroudsburg University Economic Outlook Summit by Strategic Doing Founder, Edward Morrison, J.D.

The Strategic Doing process encourages participants to identify and leverage assets and engage in conversations to explore opportunities and strategies that catapult ideas into actions. The Monroe 2030 Action Team set its sights on actions that promote the attraction and retention of business, the creation of family sustaining employment, and a living and working environment that attracts millennials, entrepreneurs and commuters while preserving the natural environment and culture of the region.

ACTION FOR THE FUTURE

The eight Strategic Doing Action Teams, framing questions, and projects are outlined below.

BUSINESS DEVELOPMENT

Co-Chairs: Keith Modzelewski, Director of Entrepreneurship, East Stroudsburg University, and Valerie Case, Sales Manager, Pocono Mountains Visitors Bureau

Framing Question: Imagine a downtown with a thriving Main Street and budding Tech Hub. What would that look like?

PROJECTS:

- Inaugural Monroe County Global Entrepreneurship Week, November 18-24, 2019, in coordination with the Global Entrepreneur Network's Global Entrepreneurship Week. The annual week-long event is held each November in over 170 countries and celebrates the impact of innovators, entrepreneurs and job creators.
- Startup Pocono website Continue to work with the Marketing Team to develop and enhance the website www.startupocono.org with the goal of encouraging business startup and growth.

FUTURE PROJECTS:

- Organize a Downtown Hack-A-Thon
- Sponsor video and tourism events to highlight the market and appeal to areas beyond the county
- Create mini information centers in the boroughs/townships to share local events and ideas across the county
- Develop an Angel Investor Network to support early stage companies in the region

WORKFORCE

Co-Chairs: Sharone Jones, Director Career and Workforce Development, East Stroudsburg University, and Dee Raneri, Associate Director of Community Education, Northampton Community College-Monroe

Framing Question: What would the Monroe County Workforce look like if job seekers and employers had the necessary skills and access to training to grow and develop their business?

PROJECTS:

- Develop, distribute and assess an Annual Monroe County Workforce and Training Survey - The survey will increase the knowledge rate of stakeholders by using data to derive characteristics of Monroe County employers' workforce and training needs. The outcomes of the survey will lead to the design of training and certificate programs to remediate employer gaps and forge employer partnerships.
- Create Monroe County Industry Based Consortiums - The Teams will focus on establishing industry-based consortiums for the Manufacturing, Health Care and Hospitality industries. The consortiums will provide a platform for collaboration, research, funding opportunities and professional networking. The outcomes of the consortiums will build stronger industry networks to identify training needs, educational partners who can offer the

training, and employer resources including best practices and talent pools.

- New employer resources
- In-house/shared training in specific areas
- Foster partnerships for non-competitive companies
- Technical talks, tours and informal social events to extend conversation and promote collaboration
- Organize the annual Monroe County Celebrates National Training Day June 22nd of each year - Create a new category at the Pocono Chamber of Commerce BIZZY Awards that recognizes Monroe County Employers who invests in developing their employees using key indicators: increased skillsets, promotion within, use of training dollars, and increased competitiveness in PA and globally
- Develop a Strategic Workforce Marketing Plan - Collaborate with other Monroe County 2030 Action Teams to link and leverage resources to maximize team outcomes.
 - Work with the Marketing Team to share and update Monroe County Workforce happenings
 - Work with the Business Development Team to share information on www.startupocono.org

PUBLIC HEALTH

Co-Chairs: Denise Seigart, Dean of the College of Health Sciences, East Stroudsburg University, and Judith Rex, Dean, Allied Health and Sciences, Northampton Community College-Monroe

Framing Question: What if Monroe County had the very best health care services, what would that look like?

PROJECTS:

- Establish a sustainable Diaper Bank for low income families in collaboration with ShopRite, United Way of Monroe County and county agencies.

- Develop and implement educational workshops and simulations on stigma reduction surrounding addiction in collaboration with Lehigh Valley Health Network, St. Luke's University Hospital Network, and Carbon, Lehigh, Pike Drug and Alcohol Task Force.

FUTURE PROJECTS:

- Coordinate and increase nutrition education and exercise opportunities within Monroe County/lectures on Lifestyle Medicine, etc.
- Population health screenings/coordinate screenings with food pantries
- Community Care Network Resurrection/ESU health coaches, addressing social isolation of seniors
- Transportation issues for appointments for chronic health maintenance
- Physician relocation and spousal support employment network
- Hunters for the Hungry
- Conference for health care professionals
- Nurse-managed clinic for screenings/prenatal care for recovering addicts
- Establish website to share knowledge re: existing resources in the county

SUSTAINABILITY

Co-Chairs: Pat Kelly, Owner, Waste Not Technologies, and Adam Schellhammer, District Manager, Monroe County Conservation District.

Framing Question: Imagine if Monroe County implemented a comprehensive and progressive sustainability program?

PROJECTS:

- Implementation of a MINI-Municipal Recycling Facility (MRF) in Monroe County
1. Prepare plans and obtain permits for new building
 - Prepare plans for design and equipment layout
 - Obtain price quotes for new building and equipment

2. Secure funding for new building
 - Secure funding for equipment
 - Begin construction of new building
3. Complete construction of building
 - Begin purchasing equipment
 - Prepare plans for collection of post-consumer recyclables
4. Start up the MINI-MRF
 - Start collection process of post-consumer recyclables
 - Negotiate off-take agreements for commodities separated by the facility
5. Evaluate MINI-MRF operation
 - Evaluate collection process of post-consumer recyclables

FUTURE PROJECTS:

- Explore solar farm opportunities

HOUSING

Co-Chairs: Nicole Murray, Association Executive, Pocono Mountains Association of REALTORS® and Leslie Perryman, Director, RHD Crossroads Community Services/Street 2 Feet Outreach Center

Framing Question: Imagine if everyone in Monroe County had a safe and affordable place to live. What would that look like?

The Housing Team's 5 Year Plan includes actions that impact the local housing supply, needs, quality and cost with projects that address the following:

- Creating and marketing a comprehensive resource that will supply information to the public on all aspects of housing in the Poconos.
- Providing educational opportunities around housing to make sure that people are aware of the many options to build, buy and rent in Monroe County as well as the financial resources available including loans, tax incentives and subsidies.
- Identifying creative ways to ensure that all of the organizations in Monroe County that touch on housing are working together collaboratively, sharing resources, and reducing the duplication of efforts.

- Supporting a variety of housing opportunities in Monroe County's 20 municipalities including multi-family housing initiatives, zoning overlays for redevelopment projects, and updated zoning strategies for thoughtful planning and developing.

The Housing Team's currently identified projects include:

- Website Development – Design a one-stop location for the public to obtain information on buying, building, renting, and retaining housing in Monroe County from housing assistance programs to luxury accommodations. (Build, Buy, Rent, and Stay)
- Housing Coalition – Create a countywide Housing Coalition that includes representation from housing-related organizations with the goal of engaging in collaborative conversations that address the county housing needs.
- Housing Summit - Organize an Annual Housing Summit to educate buyers, renters, landlords, developers, and others on all aspects of housing in the Poconos including supply and demand.
- Collaboration – Engage the county's municipalities in conversations regarding housing from needs assessments to current zoning/planning recommendations.

MARKETING

Co-Chairs: Pat Lincoln, General Manager, Connoisseur Media, and Stephanie Fairbanks, Advertising Sales Manager, Pocono Record.

Framing Question: Imagine what Monroe County would look like if each Monroe 2030 Team had access to marketing to bring projects to life.

PROJECTS:

- Support Marketing efforts of the Strategic Doing Teams as they move forward with their 5 Year Action Plans.
- Expand the Marketing Team's link and leverage network to increase external outreach through digital campaigns, website development support from the Pocono Record, and branding and Search Engine Optimization (SEO)

assistance by the Pocono Mountains Visitors Bureau.

- Launch Pocono Proud/Pocono Pride Campaign supported by a new logo and county-wide survey that will help market the county over the next 5 years.
- Continue to enhance the StartUPocono website www.startupocono.org in collaboration with the Business Development and Workforce Teams.

YOUTH ENTREPRENEURSHIP

Co-Chairs: Phil Williams, CEO, Game Face Grooming, and Amy Polmouter, Assistant Principal, East Stroudsburg South High School.

Framing Question: Imagine if Monroe County schools, in collaboration with the business community, provided entrepreneurial education and career readiness skills to all students. What would that look like?

PROJECTS:

- Expand Monroe County's youth entrepreneurship offerings through Entrepreneurship: a Career Readiness Indicator for the Future Ready PA Index required for all students in Pennsylvania
- Increased engagement with the Future Business Leaders of America (FBLA) Region 21 Leadership Conference on the Made in the Poconos Business Pitch Competition
- Develop a Monroe 2030 Junior Board with membership open to current sophomore and junior students from: Stroudsburg, East Stroudsburg South, East Stroudsburg North, Pocono Mountain East, Pocono Mountain West, Pleasant Valley, Notre Dame. Monroe 2030 Junior Board member will have access to professional development opportunities and community involvement.

COLLABORATION

Co-Chairs: Adam Schellhammer, District Manager, Monroe County Conservation District, and Chuck Leonard, Executive Director, Pocono Mountains Economic Development Corporation

Framing Question: Imagine a Monroe County with vibrant and thriving downtowns, adequate infrastructure for economic growth, residential communities that have a sense of community and protected natural resources. What would it look like?

The Collaboration Team's 5 Year Plan focuses on projects that address the following:

- Developing a Community Infrastructure Investment Fund
- Create incentives for Local Economic Revitalization Tax Assistance Act (LERTA)
- Conduct Parking Studies and develop action plans based on study results
- Develop a natural resource inventory to support development and preservation
- Create a Monroe County Pre-Application Review Team
- Promote local government collaboration

Monroe 2030 Action Team 2019

Matthew Connell, Ph.D., Dean, Northampton Community College-Monroe (Team Chair)

Marcia G. Welsh, Ph.D., President, East Stroudsburg University

Gary Olson, CEO, ESSA Bank and Trust

Chris Barrett, CEO, Pocono Mountains Visitors Bureau

Chuck Leonard, Executive Director, Pocono Mountains Economic Development Corporation

Christine Meinhart-Fritz, Director, Monroe County Planning Commission

George Roberts, President, George Roberts Productions

Adam Schellhammer, District Manager, Monroe County Conservation District

Michael Tukeva, President/CEO, Pocono Mountains United Way

Taylor Munoz, Chief of Staff, Office of Senator Mario Scavello

Mary Frances Postupack, Vice President, Economic Development and Entrepreneurship, East Stroudsburg University

Monroe 2030 Action Team **BUSINESS SUPPORT SERVICES**

PROVIDED BY



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Helping businesses start, grow, and prosper.

AND



Northeast Pennsylvania

Free Business Consulting Services for startup and existing businesses will be provided on the **second Thursday of each month** from September 2019 through August 2020 at the following locations:

Western Pocono Community Library

wpcl.lib.pa.us/
131 Pilgrim Way, Brodheadsville, PA 18322
570-992-7934

September 12, 2019 from 9 a.m.-12 p.m.
January 9, 2020 from 9 a.m.-12 p.m.
May 14, 2020 from 9 a.m.-12 p.m.



East Stroudsburg University Innovation Center

esu.edu/ede/
562 Independence Rd, East Stroudsburg, PA 18301
570-422-7920

October 10, 2019 from 9 a.m.-12 p.m.
February 13, 2020 from 9 a.m.-12 p.m.
June 11, 2020 from 9 a.m.-12 p.m.



Mount Pocono Borough

mountpocono-pa.gov
1361 Pocono Boulevard, Suite 100, Mount Pocono, PA 18344
570-839-8436

November 14, 2019 from 9 a.m.-12 p.m.
March 12, 2020 from 9 a.m.-12 p.m.
July 9, 2020 from 9 a.m.-12 p.m.



CareerLink of Monroe County

monroecountycareerlink.org
2937 PA-611, Tannersville, PA 18372
570-620-2850

December 12, 2019 from 9 a.m.-12 p.m.
April 9, 2020 from 9 a.m.-12 p.m.
August 13, 2020 from 9 a.m.-12 p.m.



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PARTNERS



Special thanks to the Northeastern Pennsylvania Alliance and the ESU Office of University Relations.
For more information about the Monroe County Economic Scorecard or the East Stroudsburg University Economic Outlook Summit, please contact ESU Economic Development and Entrepreneurship at 570-422-7920.