



# Quarterly Economy Tracker



The Institute is a partnership among Geisinger Commonwealth School of Medicine, Johnson College, Keystone College, King's College, Lackawanna College, Luzerne County Community College, Marywood University, Misericordia University, Penn State Scranton, Penn State Wilkes-Barre, The Wright Center for Graduate Medical Education, University of Scranton, and Wilkes University

## Economic Impact of Tourism & Travel

By Saidat Sanni, Graduate Assistant

In Northeastern Pennsylvania, tourism supports a wide variety of industries including hotels, restaurants, entertainment venues, transportation businesses. The economic ripple effects of tourism reach virtually all sectors of the economy due to the supply chains and labor income of those businesses directly engaged in tourism.

The table below shows total economic impact of travel to Lackawanna and Luzerne Counties, including those

downstream indirect and induced impacts. In the two counties combined, travel and tourism accounted for over \$730 million in labor income in 2017, in addition to \$166 million in federal taxes and \$159 million in state and local taxes.

Both counties have reported increasing economic impact of the travel industry. Lackawanna County has shown higher economic gains in terms of year-over-year growth in labor income and tax impacts of tourism and travel.

***"Both counties have reported increasing economic impact of the travel industry."***

*continued on Page 3*

Travel Economy Impacts, 2016 & 2017 (in millions)						
	2016		2017		% Change	
	Lackawanna	Luzerne	Lackawanna	Luzerne	Lackawanna	Luzerne
Labor Income	\$250.1	\$463.5	\$258.3	\$472.6	3.3%	2.0%
State & Local Taxes	\$58.7	\$94.5	\$61.6	\$97.7	4.9%	3.4%
Federal Taxes	\$59.6	\$102.0	\$62.0	\$104.1	4.0%	2.1%

The Economy Tracker is a quarterly publication of The Institute for Public Policy & Economic Development which seeks to explore economic data, trends, and issues related to our region's economy. Subscribe at [www.institutepa.org](http://www.institutepa.org) to receive an electronic edition of the Tracker free of charge. In all its publications, The Institute uses the most current data available at the time of release.

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## Labor Market at a Glance

In both counties, Pennsylvania, and the United States, unemployment rates fell in 2018 compared with the prior year. Lackawanna and Luzerne County saw declines of 0.5 percent in their unemployment rates, matching the nationwide drop in unemployment and nearly matching the statewide decline. The overall unemployment rates remain higher than the Commonwealth and nation as a whole, however.

The first three months of 2019 showed an initial uptick in unemployment, followed by further decline in March—reaching 4.4 percent in Lackawanna County and 5.2 percent in Luzerne. Data analyzed here is not seasonally adjusted.

These statistics suggest that both regionally and nationally, the labor market is at or approaching full employment, the baseline unemployment rate below which higher rates of inflation and wage growth can be expected. The remaining unemployment regionally can be largely expected to reflect frictional unemployment, the short-term unemployment during the time it takes a worker to find a new job after becoming unemployed.

Regionally, these trends have been driven by two simultaneous phenomena: modest gains in total employment and a shrinking labor force.

Unemployment Rate (Not Seasonally Adjusted)				
	Lackawanna	Luzerne	Pennsylvania	United States
2009	8.2	9.0	8.0	9.3
2010	9.0	10.0	8.5	9.6
2011	8.8	9.6	7.9	8.9
2012	8.8	9.8	7.8	8.1
2013	8.3	9.4	7.4	7.4
2014	6.6	7.3	5.9	6.2
2015	5.8	6.4	5.3	5.3
2016	5.6	6.3	5.4	4.9
2017	5.1	5.9	4.9	4.4
2018	4.6	5.4	4.3	3.9
Jan 2019	4.8	5.7	4.2	4.4
Feb 2019	4.6	5.6	4.2	4.1
Mar 2019	4.4	5.2	3.9	3.9

Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics  
 March 2019 data is preliminary, except for national rate

Labor Force & Employment				
	Lackawanna County		Luzerne County	
	Labor Force	Employment	Labor Force	Employment
2009	107,192	98,396	161,298	146,781
2010	106,992	97,407	159,767	143,867
2011	107,276	97,816	159,846	144,503
2012	107,642	98,123	160,859	145,107
2013	107,648	98,713	160,771	145,695
2014	106,658	99,644	158,948	147,310
2015	106,329	100,137	158,643	148,413
2016	106,753	100,722	158,706	148,726
2017	105,903	100,481	158,505	149,208
2018	105,330	100,502	157,784	149,255
Jan 2019	105,032	100,009	157,411	148,508
Feb 2019	105,186	100,329	157,857	148,991
Mar 2019	105,152	100,485	157,417	149,218

Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics  
 March 2019 data is preliminary

## What's New at The Institute: Workforce Research

By Teri Ooms, Executive Director &  
 Susan Magnotta, Director of Community Outreach

### Indicators 2019

The Institute is set to present its annual Indicators report on May 9th. The report, as well as several reports from The Institute's topic-based task forces, will be released on [www.institutepa.org](http://www.institutepa.org) in the coming weeks.

### Join Task Force Report on Workforce

The Jobs, Economy, and Economic Development Task Force and Education and Workforce Development Task Force have joined to release a Joint Report on Economic Competitiveness. The study focuses on analyzing the region's top workforce needs and challenges in a tight labor market.

### Workforce Disruption Index

The Institute is also developing a report on workforce disruption due to automation as a special project in 2019. This report is anticipated to be released in May 2019, and will show regional and county-level workforce impacts of automation. ♦

## Economic Impact of Tourism — continued from Page 1

### Visitor Spending Trends

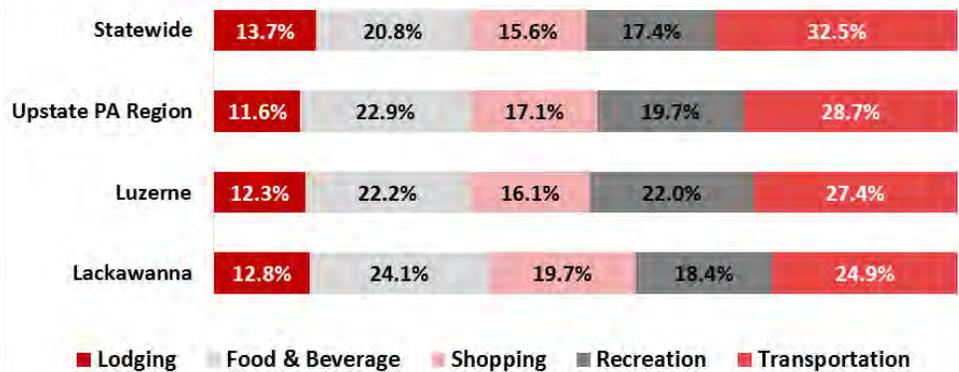
The tables below show visitor spending and year-over-year spending change in the travel industry for both counties, statewide, and for the Upstate PA tourism region (which includes Lackawanna, Luzerne, Bradford, Schuylkill, Sullivan, Susquehanna, and Wyoming Counties).

Over time, both counties have experienced fluctuations in total traveler spending, with Lackawanna County having the most recorded declines as shown by the red highlights in the table below. All four regions saw a decline in traveler spending between 2008 and 2009, coinciding with the recession. In this time frame, all four regions saw double-digit declines in visitor spending. Aside from this period, the state of Pennsylvania has consistently seen positive increments in traveler spending.

Between 2016 and 2017, all four geographies reported increase in traveler spending. Lackawanna and Luzerne County and the Upstate PA region as a whole outperformed the statewide growth rate of four percent. For Lackawanna County and the overall Upstate PA region, this amounts to a reversal following several years of small declines in visitor spending. Spending growth in Luzerne County has been steadier in recent years.

Traveler Spending, 2008-2017 (in Millions)				
Year	Lackawanna	Luzerne	Upstate PA	Statewide
2008	\$566.5	\$818.6	\$1,923.7	\$36,200
2009	\$483.1	\$708.3	\$1,658.6	\$31,300
2010	\$536.5	\$795.5	\$1,860.2	\$34,200
2011	\$615.5	\$870.3	\$2,086.6	\$37,000
2012	\$632.1	\$870.2	\$2,168.5	\$38,500
2013	\$648.4	\$859.9	\$2,174.1	\$39,200
2014	\$633.3	\$875.1	\$2,178.6	\$39,700
2015	\$618.4	\$889.7	\$2,161.8	\$40,900
2016	\$605.7	\$913.9	\$2,144.3	\$41,600
2017	\$649.9	\$965.3	\$2,275.5	\$43,300

### 2017 Traveler Spending by Category



### Spending by Category

Amongst the state's 11 tourism regions in 2017, the Upstate PA region has continued to have the second highest share of spending by travelers on food and beverage purchases. However, the region ranked 8th in the share of spending by travelers on lodging. Compared to the State, food and beverage purchases, recreation, and shopping made up a larger share of traveler spending in the Upstate PA region. Conversely, the region saw lower share of traveler spending in lodging and transportation.

These trends extended to Lackawanna and Luzerne Counties as well. Shopping and food and beverages make up a particularly large share of spending in

Lackawanna County. Luzerne County had a disproportionate share of visitor spending in the recreation category.

Recent growth in visitor spending suggests that tourism is continuing to play an important role in the region's economy, where its impacts are felt in virtually all industries. ♦

***"Lackawanna and Luzerne County and the Upstate PA region as a whole outperformed the statewide visitor spending growth rate from 2016 to 2017"***

Traveler Spending, 2008-2017 (Percentage Change)				
Year	Lackawanna	Luzerne	Upstate PA	Statewide
2007-08	10.1%	8.8%	9.9%	11.4%
2008-09	-14.7%	-13.5%	-13.8%	-13.5%
2009-10	11.1%	12.3%	12.2%	9.3%
2010-11	14.7%	9.4%	12.2%	8.2%
2011-12	2.7%	0.0%	3.9%	4.1%
2012-13	2.6%	-1.2%	0.3%	1.8%
2013-14	-2.3%	1.8%	0.2%	1.3%
2014-15	-2.4%	1.7%	-0.8%	3.0%
2015-16	-2.1%	2.7%	-0.8%	1.7%
2016-17	7.3%	5.6%	6.1%	4.1%

*Green shading shows positive change, red shows negative change*

# Measuring Our Economic Resilience: Examining Negative-Outlook Industries

By Andrew Chew, Senior Research & Policy Analyst  
and Liliana Cepeda, Research Intern

Though several key indicators point to a strong national economy, it is inevitable that there will be an eventual tide change. Though it is outside the scope of this publication to predict the exact timing, severity, or nature of the next economic downturn, it is vitally important to understand our region's economic resilience: the ability of our economy to whether a downturn when one occurs.

In the January edition of the Quarterly Economy Tracker, this topic was approached with an analysis of economic diversity: the share of the regional and subregional employment that is concentrated in the largest four industries in each region or subregion. That analysis found that regionally, about half of all employment was concentrated in the four largest industries, compared to 45 percent statewide, 42 percent nationally, and 51.5 percent in the seven counties adjacent to Lackawanna and Luzerne. There was also significant variation in employment diversity between ZIP codes.

One shortcoming of this measure is that it does not take into consideration the differing strengths and weaknesses of industry groups, only the degree of concentration of employment in the top industries. It is certain that any future economic downturn will impact some industries more significantly than others. In this analysis, the second in a series on the region's ability to whether the next economic downturn, data was analyzed

**"It is hypothesized that having a lower share of employment in industries with relatively poor outlooks is a sign of greater ability to withstand a recession."**

to determine what share of employment in the region (and in several comparison regions) is within industries with a below average or negative growth outlook. It is hypothesized that having a lower share of employment in industries with relatively poor outlooks (either below average or negative growth forecast) is a sign of greater ability to withstand a recession within the forecast time frame (10 years).

### Below Average Industries

The two-county region has a projected 10-year employment growth of slightly below zero. The adjacent counties are projected to see a nearly four percent decline in total employment, while statewide and nationwide employment are projected to see growth of 2.4 and 7.3 percent, respectively.

In the region, 56.8 percent of total employment is within industries that

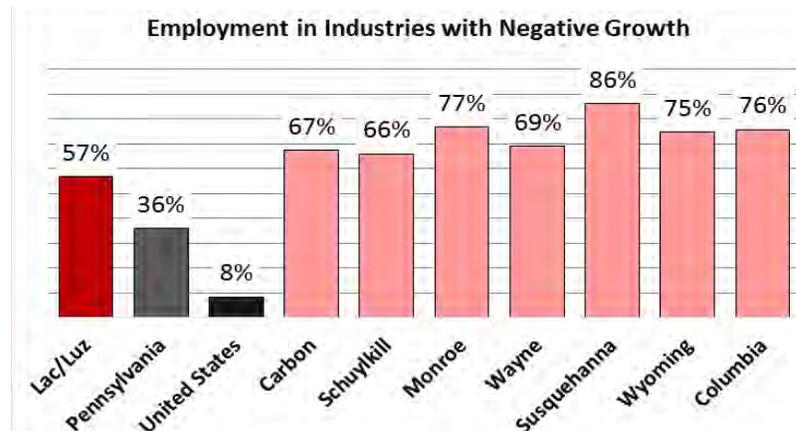
have growth rates below that regional average growth rate of -0.2 percent. This share of employment is comparable to the national average. The adjacent counties have the highest share—nearly two-thirds of jobs in those seven counties are within industries that have below average projected growth in that region. The statewide share is lowest at 53.3 percent.

### Negative Growth Forecast

Because the two county region's forecast employment growth in near zero, the share of employment in below average and below zero growth industries is the same. Nationwide, only 8.3 percent of jobs are in negative growth industries; this share is 36 percent statewide and over 70 percent in the counties surrounding Lackawanna and Luzerne.

*(continued on the next page)*

Employment in High-Risk Industries			
Geographic Region	10 Year Forecast Employment	Percent of Employment in Industries with:	
		Below Average Growth Forecast	Negative Growth Forecast
Lackawanna & Luzerne	- 0.2%	56.8%	56.8%
7 Neighboring Counties	- 3.8%	64.6%	70.4%
Pennsylvania Statewide	+ 2.4%	53.3%	36.0%
United States	+ 7.3%	56.5%	8.3%



Source: Chmura Economics via JobsEQ

## Economic Resilience — continued from Page 4

### Which Industries are High-Risk?

The graphic below shows which industry categories had below average growth forecasts in the Lackawanna/Luzerne region, and their 10-year forecast employment change. Manufacturing, Extraction, Information, and Utility industries have the most negative outlooks. Two of the region's largest

industries, Transportation and Warehousing and Health Care, have above average growth outlooks.

### Implications

The region's share of employment in industries that may be at higher risk during a recession in the next ten years is higher than that share in

Pennsylvania as a whole. Still, the region shows more resilience through these measures than the seven adjacent counties. ♦

### Industries with Below Average 10-Year Forecasted Growth in Lackawanna & Luzerne Counties

<b>Agriculture (-2.8 %)</b>	<b>Finance and Insurance (-2.5 %)</b>
<b>Mining, Quarrying, Oil &amp; Gas Extraction (-11.3 %)</b>	<b>Real Estate (-3.9 %)</b>
<b>Utilities (-9.5 %)</b>	<b>Management of Companies/Enterprises (-2.9 %)</b>
<b>Manufacturing (-14.9 %)</b>	<b>Education (-1.5 %)</b>
<b>Wholesale Trade (-6.7 %)</b>	<b>Accommodation &amp; Food Service (-1.6 %)</b>
<b>Retail Trade (-5.0 %)</b>	<b>Other Services (-3.8 %)</b>
<b>Information (-9.6%)</b>	<b>Public Administration (-5.7 %)</b>

Source: Chmura Economics via JobsEQ

## Math Skills Are Important to Regional Economy

By Vanessa Duboski, Research Intern  
and Andrew Chew, Senior Research & Policy Analyst

In Lackawanna and Luzerne County, 26 degrees were awarded in mathematics in 2016-2017. Across Pennsylvania, there were just over 1,300 degrees in mathematics awarded. For comparison, just over 200,000 degrees in total have been earned across Pennsylvania, meaning that less than one percent have been in mathematics.

Analysis from JobsEQ shows neither a shortage nor a surplus of mathematics degree graduates. Nonetheless,

mathematical occupations are projected to grow at a rate of 1.8 percent per year over the next five years, and have a total demand of 119 job openings over that time period.

Furthermore, many occupations, including accountants, financial clerks, actuaries, and healthcare professionals are a few among the many professions that require mathematics in their daily jobs. In fact, to receive these degrees, mathematics courses are often a requirement.

As shown in the table below, there are thousands of jobs in the two county region in fields that require strong quantitative skills, including financial specialists, engineers, and postsecondary math teachers. Numerous other occupations also require strong math education. Building a STEM-literate workforce will continue to be necessary for the region's continued economic growth. ♦

Regional Employment Trends in Occupations Requiring Math Skillsets			
	Employment	5-year Forecast Demand	5-year Annual Growth
All Occupations	256,359	141,298	0.0 %
Mathematical Occupations	283	119	+1.8 %
<i>Other Selected Occupations Requiring Math Skillsets:</i>			
Financial Specialists	3,466	1,464	+0.1 %
Engineers	1,898	584	-0.3 %
Math Teachers, Postsecondary	115	44	+0.1 %

***"Mathematical occupations are projected to grow at a rate of 1.8 percent per year."***

Source: Chmura Economics via JobsEQ

# Retail Update: Some Categories Growing, Others in Decline

By Kara McGrane, Research Assistant

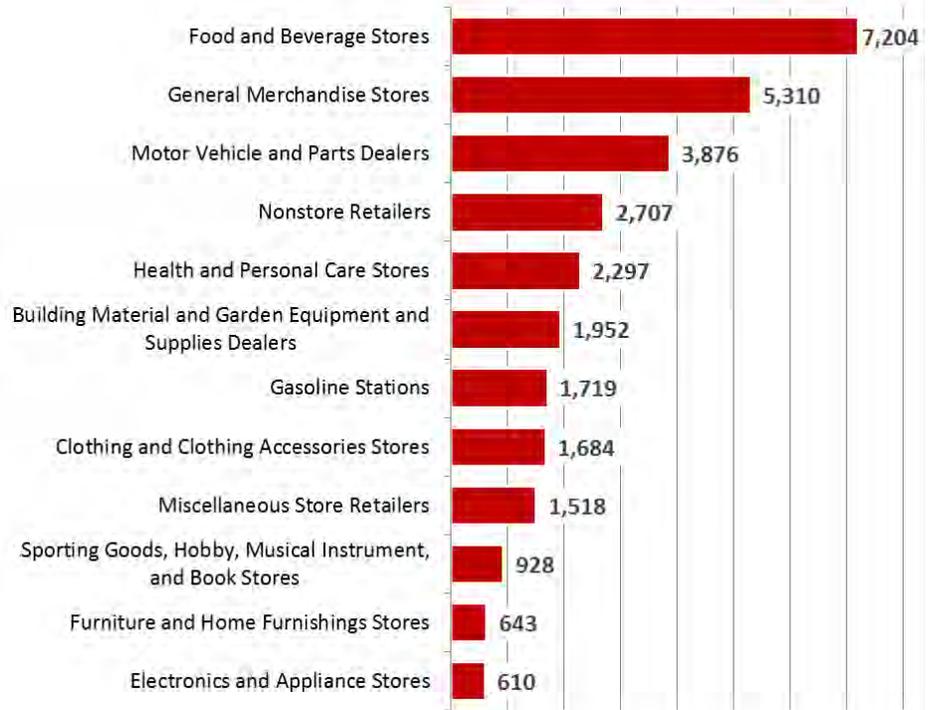
The retail sector employs 12 percent of Lackawanna and Luzerne County's combined populations, about the same as it did in spring 2016 when a retail industry profile was last published in the QET. The overall total employed in this industry has decreased by one percent over the past five years, in parallel with nationwide trends. Many media reports suggest a grim reality for the retail shopping. Coresight Research reported that as of April 2019 more stores have closed in the first few months of the year than in the entire year 2018. Currently 16 percent of all sales are completed online. Regional data, however, shows a more complicated story.

Currently, the largest category within the retail industry by employment is food and beverage stores, followed by general merchandise stores. While general merchandise stores experienced a slight employment drop since 2013, food and beverage store employment has grown. This is one of three component industries of retail trade experienced employment growth from 2013 to 2018: the others are furniture and home furnishings stores and motor vehicle and parts dealers. These three industries share the commonality of selling goods which are more difficult or more costly to ship from ecommerce businesses.

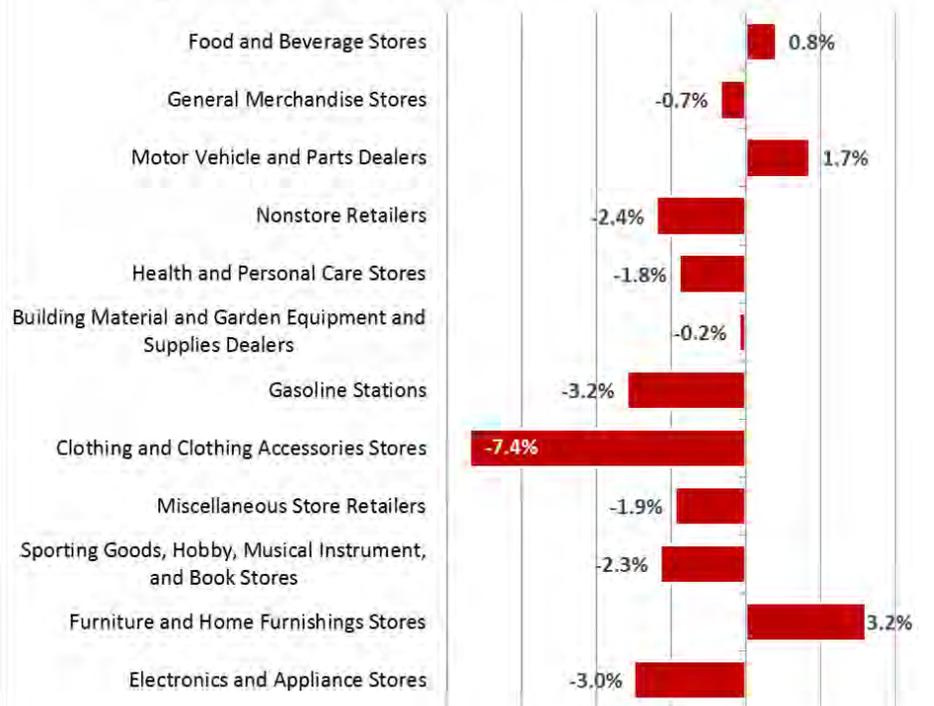
On the other hand, employment at clothing and clothing accessories stores shrank by 7.4 percent from 2013 to 2018. This coincides with declines in occupancy in some shopping centers. Electronics and appliance stores, gasoline stations, and nonstore retailers also saw employment declines in the region of more than two percent since 2013.

From 2011 to 2016, nonstore retailers saw an almost 9 percent increase in employment but in 2013 to 2018, this trend had reversed. Nonstore retailers include direct sales establishments, fuel retailers, vending machine operators, and ecommerce retail operations (excluding distribution centers). Regionally, this group has shown mixed prospects while other retailer types (like motor vehicle dealers) perform well while others (such as clothing retailers) continue to be pressed by nationwide changes in the economy. ♦

Regional Retail Employment, Q4 2018



Regional Retail Employment, 2013-2018 Percent Change



Source: Chmura Economics via JobsEQ

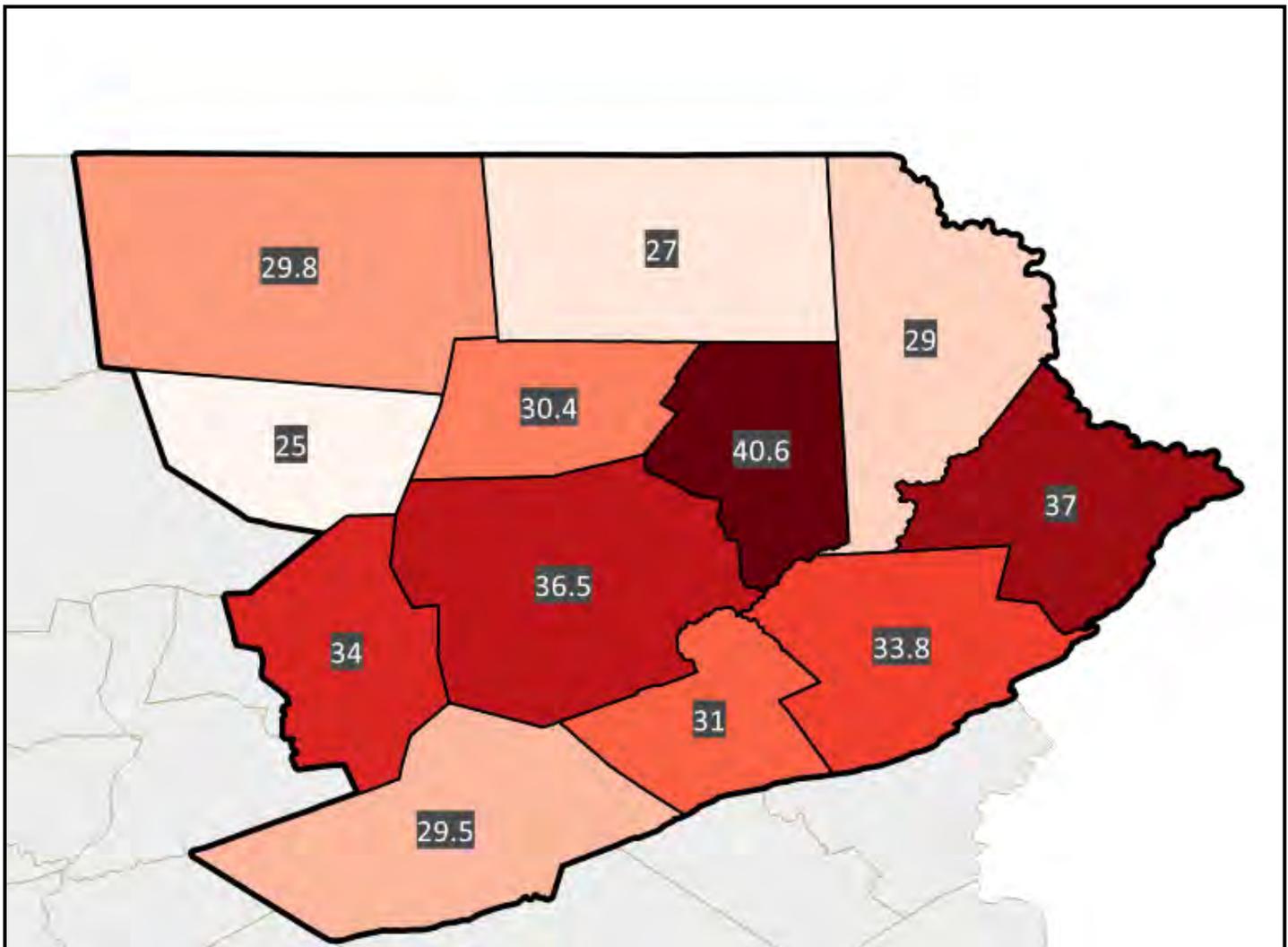
## Cartography Corner

### County-by-County Workforce Education Levels

The education level of a region's workforce is critical for many aspects of its economic and social wellbeing. The map below shows the percentage of the working age population (age 25 to 64) with an associate's degree or higher educational attainment. A higher share of the workforce with this level of attainment can be associated with greater economic resiliency as well as less impact from worker displacement by industrial automation.

The highest shares are found in Lackawanna, Pike, and Luzerne Counties. The more rural counties within Northeastern Pennsylvania tended to have lower levels of higher education attainment. In Sullivan and Susquehanna Counties, 25 and 27 percent of the population aged 25 to 64 have an associate's degree or higher, respectively.

### Percent of Working Age Population with Associate's Degree or Higher by County for Northeastern Pennsylvania



Lower  Higher

 Region Outline  
 County Boundary

Source: U.S. Census Bureau American Community Survey

## Data Spotlight

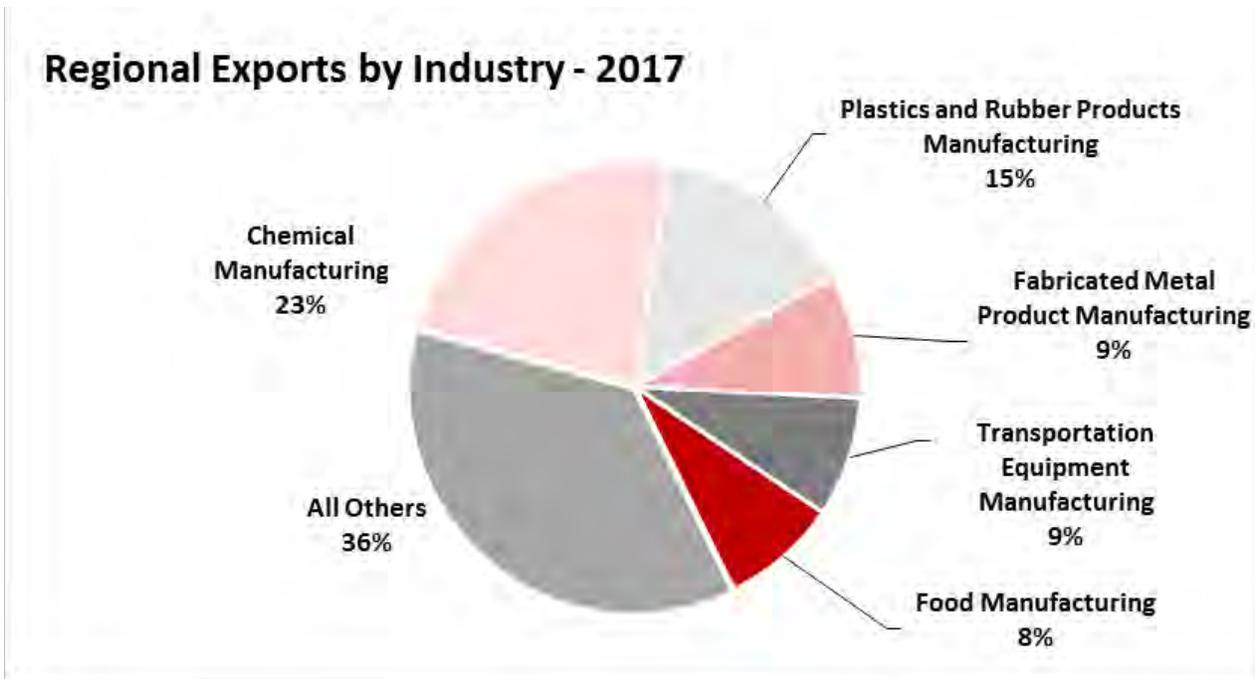
### The Export Economy

The region’s economic base is comprised of all goods and services that are exported to consumers outside the region. A considerable portion of this economic activity stems from international exports. Regionally, \$1.5 billion per year of goods and services are exported abroad.

The largest industry contributing to this total is chemical manufacturing, representing nearly \$349 million or 23 percent of the total. This is followed by plastics and rubber manufacturing, fabricated metal product manufacturing, transportation equipment manufacturing, and food manufacturing.

Scranton/Wilkes-Barre/Hazleton Metropolitan Area Exports by Industry					
Exports Industry	2013	2014	2015	2016	2017
Chemical Manufacturing	\$206,018,614	\$284,644,441	\$345,272,932	\$320,013,102	\$349,497,168
Plastics and Rubber Products Manufacturing	\$237,199,875	\$201,374,652	\$168,129,912	\$215,380,841	\$219,873,249
Fabricated Metal Product Manufacturing	NA	NA	NA	\$118,656,658	\$132,988,975
Transportation Equipment Manufacturing	\$129,840,846	\$114,448,245	\$116,356,927	\$134,778,947	\$129,917,050
Food Manufacturing	\$120,096,105	\$114,980,865	\$116,515,838	\$124,077,469	\$126,405,862
Computer and Electronic Product Manufacturing	NA	NA	\$94,951,070	NA	NA
Machinery Manufacturing	\$104,009,201	NA	NA	NA	NA
Primary Metal Manufacturing	NA	\$90,747,988	NA	NA	NA
All Others (Residual)	\$534,724,661	\$532,364,954	\$480,760,575	\$533,799,525	\$548,240,201
All Products	\$1,331,889,302	\$1,338,561,145	\$1,321,987,254	\$1,446,706,542	\$1,506,922,505

*Source: International Trade Administration*



*Source: International Trade Administration*

## Data Spotlight

### The Export Economy

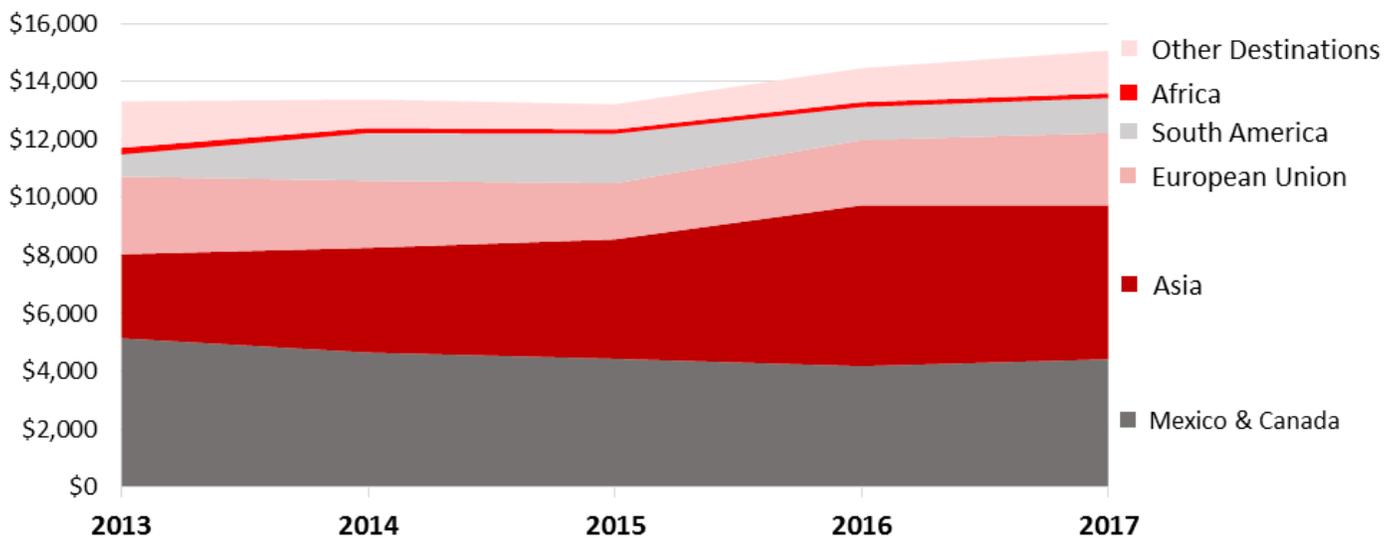
Of the region's total exports, the largest share had historically been to Mexico and Canada. However, over the past several years, these trading partners have been overtaken by Asia. As of 2017, nearly \$532 million in goods and services were exported annually to Asia from the Scranton/Wilkes-Barre/Hazleton Metro Area, which includes Lackawanna, Luzerne, and Wyoming Counties.

Smaller export markets include Africa, South America, and the European Union. The latter two grew in regional export totals in 2017, the most recent year for which data is available.

Scranton/Wilkes-Barre/Hazleton Metropolitan Area Exports by Destination					
Export Destination	2013	2014	2015	2016	2017
Mexico & Canada	\$514,027,651	\$464,899,035	\$443,218,508	\$417,750,781	\$441,627,204
Asia	\$290,258,824	\$361,524,712	\$412,268,950	\$555,437,745	\$531,975,460
European Union	\$267,888,939	\$231,676,660	\$193,358,897	\$224,905,720	\$249,205,343
South America	\$76,362,125	\$164,395,651	\$171,065,696	\$114,470,192	\$120,609,888
Africa	\$23,244,392	\$17,514,161	\$15,082,133	\$16,826,865	\$16,261,717
Other Destinations (Residual)	\$160,107,371	\$98,550,926	\$86,993,070	\$117,315,239	\$147,242,893
<b>Total</b>	<b>\$1,331,889,302</b>	<b>\$1,338,561,145</b>	<b>\$1,321,987,254</b>	<b>\$1,446,706,542</b>	<b>\$1,506,922,505</b>

Source: International Trade Administration

### Exports by Destination Region - 2013 to 2017



Source: International Trade Administration

# Understanding Commuter Characteristics

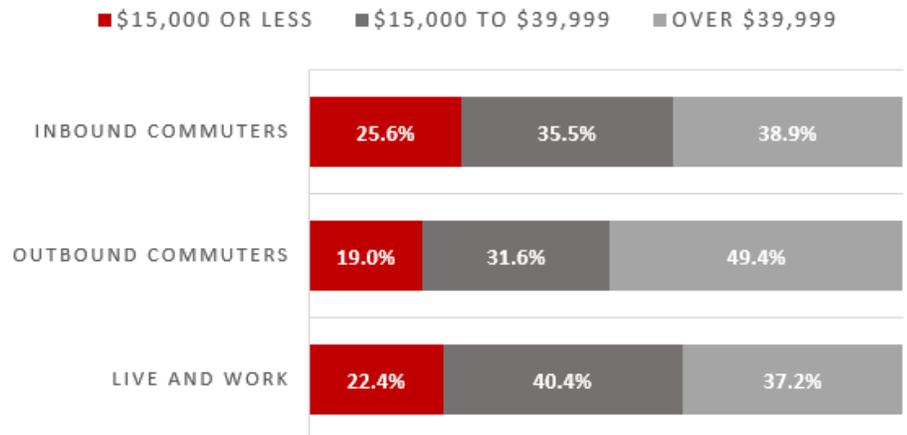
By Christopher Ritter, Research Analyst

Every day in Northeastern Pennsylvania, approximately 81,000 workers travel into the area from outside, while another 150,000 workers leave the region to work elsewhere - a net export of nearly 68,000 workers. In fact, 59 percent of jobs in Northeastern Pennsylvania are held by those who both live and work in the region, while the remaining 41 percent of jobs are held by commuters, whether inbound or outbound. This distribution of labor is part of a larger trend occurring throughout the last decade: since 2002, the percentage of "live and work" jobholders fell from 67 to 59 percent, while that of commuters increased from 34 to 41 percent.

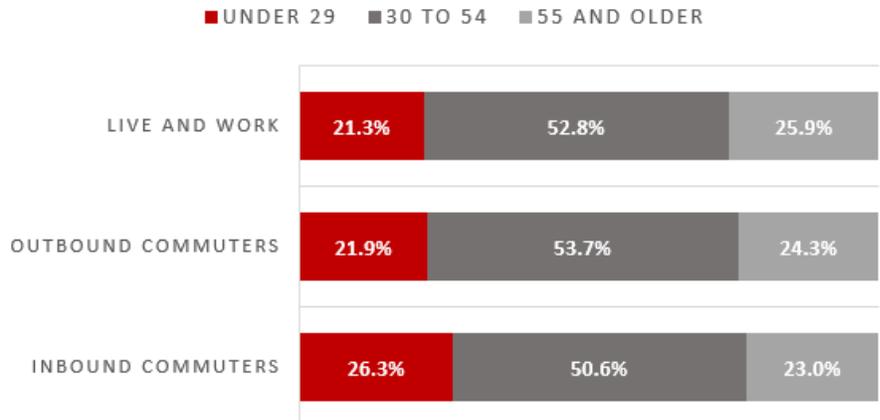
Factors connected to the increase in long-distance commuting into and out of Northeastern Pennsylvania include the prospect of earning higher wages, as well as the age of the jobholder. First, commuters have anywhere from a 5 to 32 percent greater chance of earning higher wages, as opposed to those who live and work in the region. Moreover, a longer commute may not be as daunting to younger workers, as 26 and 22 percent of inbound and outbound commuters are under the age of 29, compared to 21 percent of commuters who live and work in Northeastern Pennsylvania. Conversely, older workers are likelier to live and work in the region by a margin of 26 percent to 24 percent among outbound commuters, as well as 23 percent of inbound commuters. ♦

Further data and analysis concerning commuter data in Northeastern Pennsylvania can be found in the Institute's forthcoming labor market assessment, which will be released in the coming weeks on The Institute's website.

## EARNINGS BY COMMUTER STATUS



## AGE BY COMMUTER STATUS



Source: U.S. Census Bureau, Local Employment Dynamics (2015)

**"Since 2002, the percentage of 'live and work' jobholders fell from 67 to 59 percent, while that of commuters increased from 34 to 41 percent."**

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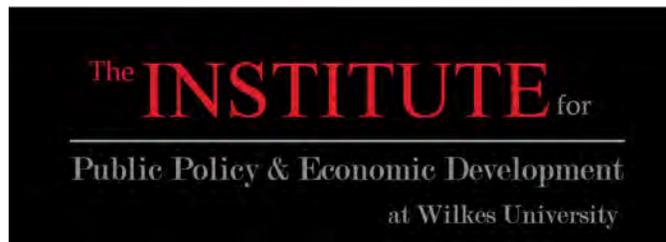
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