



QUANTITATIVE RESEARCH:

**Branding Initiative for  
The Pennsylvania Heartland**

**Final Report**

**Prepared for:**

**Marketing Solutions**

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## **I. INTRODUCTION**

The Pennsylvania Heartland Partnership, as part of the “Stay Invent the Future” initiative, engaged Marketing Solutions to create a brand and branding strategy for the 10-county region (Juanita, Mifflin, Centre, Clinton, Lycoming, Northumberland, Montour, Columbia, Union, and Snyder) that encompasses Central Pennsylvania.

The intent of this branding effort is to encourage young adults from the region to remain in the geographic area after they have finished their secondary and post-secondary education. A concomitant aim is to encourage existing businesses to remain and grow within the region, and to attract businesses from outside the region.

In order to move the branding effort forward to implementation it is essential to consider the perspectives of students attending colleges in the region and adult influencers that now reside in and benefit from the region’s resources. To assist in gathering valuable information about what young adults and their parents value about Central Pennsylvania, Marketing Solutions contracted with The Melior Group, a Philadelphia-based marketing research firm, to conduct a web survey of the area’s students.

The survey was designed to learn:

- **Attitudes and perceptions toward the Pennsylvania Heartland area and its desirability as a place for young people to settle;**
- **Career/job expectations of students in the area, including types of industries and locations;**
- **Reactions to a possible brand concept promoting the region as a place for young people to live and work; and,**
- **What young people in the region see as the competition for their talents (e.g., urban areas, other states).**

A total of 1169 web surveys were collected between September and November 2003. The survey population comprised:

*Parents:* guardians of high school students in the 10-county region (including college students who are parents of high schoolers who reside within this region. They were enlisted to participate in the web survey via letter, a specially-designed postcard and/or letters mailed by high school administrators.

*High school students:* current high school seniors at local high schools that agreed to assist in soliciting participants. Letters were submitted to high school principals asking for cooperation from their students.

*College students:* senior college students who attend local colleges/universities in the 10-county region. Letters were sent to administrators at the various college/universities in the area asking for their help in getting student participation. Students were solicited via e-mail generated by the college.

*Adult Influencers:* to include community members from non profits (such as chambers, tourist commissions, economic development agencies), school districts, prominent industries as well as parents who are college-enrolled . A mailing list developed in cooperation with the Heartland Committee was the source for these individuals who were notified of the survey availability via e-mail or postcard.

The survey data were cross-tabulated by the following analytics:

- Respondent segments
- Reasons for coming to region
- Age
- Years in region
- Gender

These analytics have been presented when there is reason (or evidence) to believe that some differences between demographic and attitudinal segments exists.

The data displayed in tables, then, are the data that are pertinent to describing the survey's results. Analytics that do not show differences or add significant amplification are not shown. This means that some tables will only display the results of the core populations being studied and others will show the core population plus selected other analytics that are significant.

A full set of data tables (cross tabulations) will be submitted with the final report. As well, complete electronic data files containing all data from all surveys that was used to develop this report will be made available for The Pennsylvania Heartland Partnership's use.

Findings are reported as percentages, and totals may not add to 100% due to rounding. Some survey questions invite multiple responses, and for those questions, totals are over 100%. Those questions are noted in the body of the report.

## II. EXECUTIVE SUMMARY

### Attitudes and Perceptions of region

Survey respondents strongly tend to use “emotional comforts” to describe the 10-county region. Of the nineteen descriptors presented for respondents to select among, the ones most often chosen are *beautiful* (55%), *quiet* (53%), *peaceful* (52%), *safe* (51%) and *affordable* (50%).

Viewing responses by segments, the older age respondents (parents and adult influencers) have a more upbeat view of the area with regard to aspects of personal contentment. The top regional descriptors chosen by both parents and adult influencers are *beautiful* (75% of parents, 79% of adult influencers). Other descriptors mentioned were *quiet*, *peaceful*, *safe*, *affordable*, and *with a lot of potential*. It should be noted, however, that over half of parents (61%) and adult influencers (58%) segments chose descriptors such as *economically depressed* to describe the region.

There are differences among the student segments. The top descriptors chosen by high school students also tilt toward emotional features. Words most often chosen by high school students are: *quiet* (65%), *boring* (66%), *peaceful* (54%), *affordable* (57%), *safe* (49%), and *family-oriented* (43%).

In comparison, most college students indicate viewpoints suggesting that in addition to the region’s natural beauty, their foremost perceptions are that the region has a *young population* (60%), *growing (population)* (54%), *is safe* (50%), *with a lot of potential* and *peaceful* (47% each).

### Region’s Natural Aesthetics

The 10-county region’s natural beauty is an appealing attraction. Nearly all (96%) survey respondents agree they would use the phrase “*the region has a lot of natural beauty*” to describe the area.

### Employment

Most industry sectors tested are considered static or declining. The vast majority (82%) of respondents is not optimistic about the potential for the region as a place to find employment.

The industries seen as “growing” are hospitality, construction, and computer technology. Even though respondents believe the computer technology industry is growing, they do not believe the region is becoming a leader in technology. (The premise – becoming a leader in technology – was specifically tested for participants’ agreement/disagreement.)

### Quality of Living

The 10-county region is well regarded as “a place to raise a family” with seven in ten (69%) of survey respondents believing the region is either “excellent” or “good”. As well, using the phrase “strong and proud tradition” strikes over 7 in 10 respondents as appropriate. The notion of coming back to settle/raise a family holds strong appeal among high school students and adults but less so among college students. (Well over half the high school students and adults agree with the place-to-raise-a-family premise; just under half, 45%, of the college students do.)

There is even less certainty among students about worth of anchoring one’s life in the region. Only half the high school students and a third of the college students agree with the statement: “It’s worth staying in the region to live”. What seems evident, then, is that young people, now considering paths for life after their education, acknowledge the desirability of the region for families but half to two-thirds don’t envision settling here in their near-term futures.

There is a strong perception among respondents that there is good, affordable housing available in the region. The overall quality of life in the area is perceived “good” by the majority (63%) of survey respondents.

Over 4 in 10 respondents perceive the region is increasing in diversity. This perception is higher among high school students and least among adults.

Feelings about the regions' social and entertainment aspects for young people are mixed. About a third of high school teens and adults, compared with two-thirds of the college students, say there are social and entertainment activities available to young people. This difference in perception may reflect on-campus and near-campus entertainment activities specifically developed for college students.

### Marketing the Region

The phrase, "The Pennsylvania Heartland", was tested for its perceived capability to convey an accurate description for the region – and for its perceived effectiveness as an enticing image. About 8 in 10 of each segment considers the phrase accurately (very and somewhat) describes the region. The expectation that the phrase is or will be "enticing" is held by about 6 in 10 (very and somewhat).

Far and away, employment potential is seen as an essential need for the 10-county region. Asked what important features to stress when marketing the region to young people, the overwhelming choice among the factors tested is – job opportunities. About seven in ten college students and adult influencers see this as the paramount need; for nearly half the high school students, job opportunities are seen as the most important thing to stress for young people. And among those who see employment opportunities as an essential need, the employment sectors they feel should be stressed are – professional services and science/technology.

### Desirable Place to Live

Substantially, adult residents and adult influencers are pleased with the region as a place to live – 6 in 10 consider the place where they reside now as the "most desirable place to live". Among those who see other places as most desirable, the choices are other suburban or rural locales. Students on the other hand, are least likely to find their present location "most desirable place to live". Two-thirds of the high school students

indicate a greater consideration toward living elsewhere. Eight in ten (87%) college students view other areas as being desirable.

What are the attractive “other” locales? Among the college students who see other urban areas as desirable, New York City is the preferred locale (cited by a third); 2 in 10 look to cities in the western states and 1 in 7 each view Washington DC or cities in the southern states as places to be. A similar pattern is evident among high school students in that New York City is viewed as the choice by most (20%) of those who say an urban area somewhere else is desirable. That locale is followed in preference by western state cities, southern cities, Harrisburg and State College (each cited by roughly 1 in 7).

The main alluring places for those students who view other suburban locales are: Northeast states (cited by 15% of the high school students; 23% of the college students); State College (22% in high school; 4% in college) and Harrisburg/Hershey (11% high school; 6% college).

Students who think of other rural areas as most desirable for the most part (about 2 in 10) would opt for other places in Pennsylvania.

### III. CHARACTERISTICS OF THE SAMPLE

The senior high school students who participated in the survey (36%; n=418) attend the following schools: Juniata High School (33%), Indian Valley High School (30%), Central Columbia High School (28%), Columbia Montour Area Vo-Tech School (5%), Berwick Area Senior High School (2%).

Half (53%, n=619) the respondents were college students. These respondents attend the following colleges: Penn State University (70%), Lock Haven University (9%), Bloomsburg University (7%), Bucknell University (6%), Pennsylvania College of Technology (5%), and Lycoming College (2%).

#### **Survey Respondent Segments** (Multiple Responses Accepted)

	<b>n=1169</b>	<b>%</b>
A Parent of a High School or College Student	75	6
A Junior or Senior in High School	418	36
A College Student	619	53
Adult Influencers	132	11

Q1

**High School Attended by Senior Segment**

	<b>n=418</b>	<b>%</b>
Juniata High School	137	33
Indian Valley High School	126	30
Central Columbia High School	118	28
Columbia Montour Area Vo-Tech School	23	5
Berwick Area Sr. High School	8	2
Hughesville High School	1	--
Other Miscellaneous Mentions	2	--
Don't Know/Refused	3	1

Qa

**College/University Attended by College Senior Students Segment**

	<b>n= 619</b>	<b>%</b>
Penn State University	428	70
Lock Haven University	57	9
Bloomsburg University	44	7
Bucknell University	36	6
Pennsylvania College of Technology	33	5
Lycoming College	13	2

Qb

Nearly one-third (33%) of college students live off campus, one-quarter (27%) live on campus and another 29% commute from home.

### **College Students' Living Arrangement**

	<b>n=619</b>	<b>%</b>
Commute From Home	176	29
Live On Campus	166	27
Off Campus	201	33
In Town	26	4
Other Miscellaneous/Not Specified	46	7
Don't Know/Refused	4	1

Q18

### **College Students' Geographic Origins (Permanent Home)**

	<b>n= 166</b>	<b>%</b>
PA Towns	123	73
Northeastern States (ME, CT, RI, VT, NH, MA, NJ, DE, MD and D.C.)	22	14
Southern States( VA, WV, KY, TN, NC, SC, GA, FL, AL, LA, TX, OK, AR, and MS)	8	5
Mid-Western States (OH, IN, IL, MI, WI, MN, IA, MO, KS, NE, SD, and ND)	4	3
Western States (CA, OR, WA, ID, NV, AZ, UT, CO, NM, WY, MT)	2	1
Foreign Countries/Over Seas	1	1
Don't Know/Refused	6	4

Q18a

Seven in ten (69%) of the survey population reside in a rural location and one-quarter (23%) are in suburban locales.

**Region (%)**

	<b>Respondent Segments</b>				
	<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	<i>1169</i>	<i>75</i>	<i>418</i>	<i>619</i>	<i>132</i>
Rural	69	85	87	55	80
Suburban	23	11	9	35	14
Urban	7	4	4	10	5
Don't Know/Refused	<1	--	2	<1	--

Q3

Over half (53%) respondents have lived in the area for 10 years or more. Another four in ten (39%) are new to the region, (i.e., under 5 years in tenure). The assumption is that these newer residents are not “locals,” but originate elsewhere in Pennsylvania or other states.

**Length of Time in Region (%)**

<b>Length of Time</b>	<b>Total</b>	<b>Respondent Segments</b>			
		<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	1169	75	418	619	132
Under 5 Years	39	11	6	67	11
5 – 9 Years	7	3	8	6	6
10 – 19 Years	34	17	84	5	16
20+ Years	19	69	1	21	67
Don't Know/Refused	2	--	4	1	1
<b>Median</b>	<b>11</b>	<b>28</b>	<b>14</b>	<b>4</b>	<b>28</b>

Q23

Both college and high school students were asked the highest level of education that their parents or guardians completed. Seven in ten (69%) of the college students' mothers have at least some college as do half (49%) the high school students' mothers.

**Highest Level of Mother's Education (%)**  
(Asked of High School and College Students Only)

	Total	Respondent Segments	
		H.S. Students	College Students
<i>n=</i>	1037	418	619
Did Not Complete High School	5	8	3
High School Grad / GED	34	43	28
Some College/Tech School	15	11	18
College Grad	26	22	28
Tech School Grad	3	4	2
Some Graduate School	3	1	5
Graduate Degree	14	11	16
Don't Know/Refused	3	6	<1

Q22

Post-secondary school education among fathers is greater; three-quarters (75%) of college students' fathers and 47% of the high school students have at least some college education.

**Highest Level of Father's Education (%)**  
(Asked of High School and College Students Only)

	Total	Respondent Segments	
		H.S. Students	College Students
<i>n=</i>	1037	418	619
Did Not Complete High School	6	10	4
High School Grad / GED	29	43	21
Some College/Tech School	15	11	17
College Grad	23	15	28
Tech School Grad	4	5	4
Some Graduate School	3	2	3
Graduate Degree	20	14	23
Don't Know/Refused	4	8	--

Q22

Four in ten (45%) respondents work part-time and 40% of respondents who do not work are students.

- Three-quarters (73%) of the responding parents are employed full-time and 8% are part-time workers. Of the students who do not work, a third (34%) are high school students and half (50%) are college students.
- Among the students who do work, part-time employment is typical (59% of high school students and 44% of college students).

**Employment Status (%)**

	<b>Respondent Segments</b>				
	<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	1169	75	418	619	132
Employed Part -Time	45	8	59	44	6
Employed Full-Time	13	73	3	5	81
Retired	--	--	1	--	--
Homemaker	--	11	--	--	6
Student	40	7	34	50	6
Unemployed	1	1	2	1	1
Don't Know/Refused	2	--	5	--	1

Q25

- The substantial majority of non-students in the sample are employed. Eight in ten parents work full-time (73%) or part-time (8%). Among adult influencers, 81% are full-time employed, 6% part-time.
- Six in ten (59%) high school students work part-time as do 44% of the college students. A small portion holds full-time employment (3% of high school students, 5% of college students).

- Parents' employment is substantially in *education* (29%), *professional services* and *healthcare* (16% each) and *manufacturing* (11%).
- Students predominantly find employment in the *hospitality industry* and *retailing* (61% of high school students and 38% of college students). A third of college students are employed in *professional services* (15%), *education* (10%) and *healthcare* (8%).
- Non-students in the sample are primarily employed in *education*. An average of one-third of adults, parents (29%) and adult influencers (35%), report their employment is in the educational field. About one in six are employed in professional services fields (16% parents, 17% other adults). Another 16% of parents are employed in computers/technology enterprises and about one in ten (11%) are in manufacturing. The remainder of employed adults work in numerous other industry sectors.

### **Employment Industry (%)**

	<b>Respondent Segments</b>				
	<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	<i>663</i>	<i>61</i>	<i>247</i>	<i>302</i>	<i>114</i>
Hospitality	26	2	39	24	3
Retail (Store)	15	2	22	14	3
Professional Services	11	16	4	15	17
Education	10	29	--	10	35
Healthcare	7	16	4	8	8
Computers/Technology	4	5	--	7	3
Manufacturing	4	11	5	1	7
Retail Services	3	5	3	2	3
Construction	2	--	3	1	2
Farming	2	--	4	1	--
Lumber and Wood Products	--	2	--	--	1
Social Services	3	2	1	5	4
Arts/Entertainment	2	2	3	2	1
Government	1	2	--	1	5
Mechanic/Auto Body	1	--	3	--	--
Theology Services	1	2	--	1	1
Military	--	--	--	--	--
Other Miscellaneous Mentions	8	5	8	8	6

Q26

The average age of responding parents is 50, high school students 17, college students 23, and adult influencers 47.

**Ages (%)**

	<b>Respondent Segments</b>				
	<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	<i>1169</i>	<i>75</i>	<i>418</i>	<i>619</i>	<i>132</i>
14 - 18	32	--	93	--	--
19 - 24	52	--	7	90	8
25 - 29	3	--	--	6	4
30 - 39	2	8	--	2	10
40 - 49	5	54	--	1	40
50 or Older	5	37	--	1	38
Refused	2	4	5	--	2
<b>Mean Years</b>	<b>23</b>	<b>50</b>	<b>17</b>	<b>23</b>	<b>47</b>

Q17

Typically, females are more likely than males to answer web surveys. This is true for this survey, as well, although the percentage of males responding is substantial. The proportion of female (58%) to male (42%) respondents is representative of the gender distribution typically found in mail and telephone surveys.

**Gender (%)**

	<b>Respondent Segments</b>				
	<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	1169	75	418	619	132
Male	42	40	49	38	43
Female	58	60	51	62	57

Q27

#### IV. ATTITUDES AND PERCEPTIONS

To derive understandings of respondents' perceptions of and attitudes toward Central Pennsylvania, a set of nineteen descriptors was provided from which respondents were asked to choose those they feel characterize the 10-county region. The descriptors used reflected emotional appeals as well as perceptual statements as to the vitality of the area. Respondents were permitted to make multiple responses (i.e., choose all that apply). On average respondents chose seven descriptors.

Overall, the descriptors receiving the greatest number of mentions are those reflecting emotional comforts -- *beautiful* (55%), *quiet* (53%) *peaceful* (52%), *safe*, *affordable* (51% and 50% respectively) plus one descriptor that indicates vitality – *growing (population)* (46%) .

- Descriptors to characterize the region that were selected by smaller proportions, (four in ten or fewer respondents), are *boring* (41%), *young (population)* and *family-oriented* (40%, each), *with a lot of potential* (36%), and *old (population)* (30%).

The analysis of results that follows is keyed to the six descriptors receiving the most “votes” overall (i.e., selected by half or more, 46% to 55%, of all respondents). Comparisons of the top six descriptors by each of the segments are provided.

When analyzed by segments, not surprisingly, the segments having older age respondents (parents and adult influencers) have a more upbeat view of the area than is indicated by the overall results. However this view is tempered with a dose of reality as to the economic circumstances of the region.

- Emotional appeal descriptors are among the top six references chosen by both at least half of the parents and adult influencers. By far, *beautiful* tops their characterizations (selected by 75% of parents, 79% of other adults). The majority (over 60% of parents and 50% of adult influencers) also selected *quiet*, *peaceful*, *safe* and *affordable*. Notably, both of these respondent segments (56% each) cite *with a lot of potential* as a descriptor for the region. And, *family-oriented* scores high as a descriptor among parents (63%).

At the same time, there is some uneasiness indicated among the parent and adult influencers segments with six in ten (61% and 58% respectively) choosing *economically depressed* as one of their descriptors.

Among the students, predictably, there are variances in perspectives between high school students and college students, as well as variances from the respondents in the parents and adult influencers segments.

- The top six descriptors chosen by high school students are substantially among the emotional attributes: *quiet* (65%), *boring* (66%), *peaceful* (54%), *affordable* (57%), *safe* (49%), and *family-oriented* (43%).

“Boring” is a term of expression with peculiar connotations among teenagers. It is also safe to infer that “quiet” has different meanings for teenaged respondents than when expressed by adults such as parents and adult influencers. Only a review of these descriptors in qualitative group settings (focus groups) can develop a real sense for the meaning of these terms as used by high school students in the region. It is worth noting that although low on the descriptor-selection “votes”, one-quarter (25%) of high school respondents cite the descriptor *with little potential* as applicable to the region.

College students’ top six descriptors are: *beautiful* (62%), *young population* (60%), *growing* (population) (54%), *safe* (50%), *with a lot of potential* and *peaceful* (47% each), *well-known* (40%) and *economically healthy* (32%). These appear to reflect a generalized feeling of comfortability about the region.

Selected by fewer college student respondents, but notable nonetheless are: *boring* (30%), *exciting* (28%), *economically depressed* (24%), *old* (population) (22%), and *flourishing* (20%). It will be important in focus group settings to examine how these ambiguous perceptions actually play a role in students’ after-college decision-making.

**Description of Area Currently Living In (%)**  
(Multiple Responses Accepted)

	<b>Total</b>	<b>Respondent Segments</b>			
		<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	<i>1169</i>	<i>75</i>	<i>418</i>	<i>619</i>	<i>132</i>
Beautiful	55	75	36	62	79
Quiet	53	60	65	42	65
Peaceful	52	65	54	47	71
Safe	51	60	49	50	59
Affordable	50	59	57	43	63
Growing (Population)	46	20	42	54	23
Boring	41	23	66	30	18
Young (Population)	40	11	21	60	10
Family-Oriented	40	63	43	33	64
With A Lot of Potential	36	56	14	47	56
Old (Population)	30	48	38	22	48
Unknown	28	29	43	18	29
Well Known	27	4	14	40	6
Economically Depressed	26	61	20	24	58
Economically Healthy	23	8	14	32	10
Under-Appreciated	19	45	16	18	39
Exciting	18	5	8	28	5
With Little Potential	16	11	25	11	11
Flourishing	14	8	7	20	5
Shrinking (Population)	11	37	8	7	33

Q4

## A. Region's Natural Aesthetics

The region's natural beauty is an appealing asset. A significantly high percentage of respondents (87%) believe the region is *someplace to enjoy nature*. Of these respondents, nearly half (49%) rate the region as an excellent place to enjoy nature.

- Nine in ten parents (92%) and adult influencers (96%) are highly receptive to the region's natural surroundings. College students (86%) and high school students (84%) are also positive about the natural environment.
- Nearly all (96%) of those who moved to the region because of a job believe the region is a *place to enjoy nature*.

### **Rating for Area Currently Residing In (%)** **"Someplace to enjoy nature"**

	Total	Respondents Segments				Reasons For Coming to Region			
		Parents	H.S. Students	College Students	Adult Influencers	Born Here	School	Family Moved Here	Job
<i>n=</i>	1155	75	406	617	132	463	459	129	31
Excellent	49	56	49	45	64	52	46	43	61
Good	38	36	35	41	32	36	40	39	35
Fair	11	7	13	11	3	11	11	15	3
Poor	2	1	3	2	1	2	3	3	--

Q5d

Consistent with the ratings for *someplace to enjoy nature*, 96% say they would be “*very*” or “*somewhat*” likely to describe the region as having natural beauty, of which nearly seven in ten (68%) are “*very*” likely.

- By respondents’ segments, there are significant differences at the *very likely* level to use the phrase “*this region has a lot of natural beauty.*” Eight in ten parents (83%) and adult influencers (86%) are very likely to use the phrase while only seven in ten (71%) college students and only five in ten (58%) high school students would do so.

**Likelihood of Using Phrase to Describe Region (%)**  
**“This region has a lot of natural beauty.”**

	Total	Respondent Segments			
		Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	1154	75	405	618	131
Very likely	68	83	58	71	86
Somewhat likely	28	15	37	26	12
Not very likely	3	3	3	2	1
Not at all likely	1	--	3	1	--

Q13a

## B. Employment

Respondents' perception of the employment outlook for the region is conscious of problems. Overall, the vast majority (82%) of survey respondents does not believe the region in which they live or go to school is a place to find employment.

- High school and college students are slightly more optimistic about finding a job in the region with two in ten rating job prospects positively (20% excellent/good and 17% excellent/good respectively) compared to parents and adult influencers (8%each).
- Surprisingly, only 7% of those who came to the region because of employment reasons believe the region is a *good* place for employment.

### **Rating for Area Currently Residing In (%)** **"To find a job"**

	Total	Respondent Segments				Reasons For Coming to Region			
		Parents	H.S. Students	College Students	Adult Influencers	Born Here	School	Family Moved Here	Job
<i>n=</i>	1149	75	415	603	131	462	448	134	31
Excellent	2	--	2	1	--	2	2	1	--
Good	16	8	18	16	8	17	16	22	7
Fair	39	45	41	38	40	38	39	37	61
Poor	43	47	38	44	53	43	43	40	32

Q5b

When considering the phrase *job opportunities in this region are growing* to describe the area, few (29%) respondents overall are “*very*” or “*somewhat*” likely to do so. The substantial majority does not see opportunity growing.

- By respondent segments, three in ten high school students (35%) as well as, 28% of college students are “*very*” or “*somewhat*” likely to use the phrase when describing the region. Their elders do not hold that view. Only 15% of parents and adult influencers see job opportunities growing.

**Likelihood of Using Phrase to Describe Region (%)**  
***“The job opportunities in this region are growing.”***

	<b>Respondent Segments</b>				
	<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	<i>1107</i>	<i>75</i>	<i>394</i>	<i>581</i>	<i>132</i>
Very likely	4	--	5	4	--
Somewhat likely	25	15	30	24	15
Not very likely	45	49	45	45	49
Not at all likely	26	36	20	27	36

Q13b

Technology is not readily associated with the region despite the fact that nearly all survey respondents believe that industry is *growing* or *staying the same* in the region (see table on page 31). Only one-quarter (24%) of survey respondents are likely (very or somewhat) to say “*the region is on its way to being a leader in technology.*”

- Likelihood to use the phrase is relatively consistent among the respondent segments with the exception of college students who indicate more optimism than any other segment (29% very/somewhat likely).
- Respondents living in the region for a short length of time (31%) are more optimistic about increases in technology for the region compared to residents who have been here considerably longer (19%). They are more likely to describe the area as being on its way to being a leader in technology.

**Likelihood of Using Phrase to Describe Region:**  
***“This region is on its way to being a leader in technology.” (%)***

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5 - 9	10-19	20+
n=	1075	74	378	570	127	409	76	359	215
Very likely	7	--	3	10	1	12	8	3	3
Somewhat likely	17	13	16	19	13	19	16	16	16
Not very likely	39	41	44	36	39	32	42	43	42
Not at all likely	37	46	37	35	47	36	34	38	38

Q13f

Eleven industries were listed in the survey for respondents to cite their estimation of growth potential for each. Of the eleven industries, respondents believe there is little growth opportunity for most.

Manufacturing

Half (51%) of survey respondents believe that employment opportunities in the *manufacturing industry* are *declining*, while another 40% believe opportunities are *staying the same*.

- At least eight in ten parents (82%) and adults influencers (79%) believe *manufacturing* is *declining* in the region. Significantly fewer high school students (33%) and college students (58%) hold this view.
- Seven in ten (71%) of those living in the region for 20 years or more find the *manufacturing industry* is in a decline.

**Employment Opportunities (%)**  
**“Manufacturing”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	891	74	355	407	129	278	67	332	195
Growing	9	3	12	7	4	7	7	11	8
Staying the same	40	15	55	35	17	41	48	49	21
Declining	51	82	33	58	79	53	45	40	71

Q7a

Education

Half (49%) survey respondents believe the education sector *is staying the same*, while another 44% say it is *growing*.

- In comparing the segments, significantly fewer parents (22%) believe the education sector in the region is *growing* compared to high school students (41%), college students (49%) and adult influencers (30%).
- Those in the region less than 5 years are more optimistic about the region’s education industry *growing* than those who have been in the area for a longer time.

**Employment Opportunities (%)**  
**“Education”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	1057	72	388	544	125	389	75	366	207
Growing	44	22	41	49	30	52	44	40	36
Staying the same	49	67	51	45	62	42	48	54	57
Declining	7	11	7	6	8	6	8	6	7

Q7b

Healthcare

The *healthcare industry* is seen to have a better opportunity for *remaining the same* or *growing*, with 87% of respondents saying so.

- High school students have a better outlook for the *healthcare industry* as do the other adults (primarily people in civic development endeavors). Four in ten (41%) high school students believe the industry is *growing* as compared to parents (35%), college students (36%) and adult influencers (41%).
- Long-term residents (10-20+ years) are more optimistic about employment opportunities in *healthcare* than others in the segment.

**Employment Opportunities (%)**  
**“Healthcare”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	949	74	362	460	127	323	64	348	196
Growing	39	35	41	36	41	35	37	41	42
Staying the same	48	41	49	51	37	52	53	49	39
Declining	13	24	10	13	22	13	9	10	19

Q7c

Lumber and Wood Products

Six in ten (60%) survey respondents believe the *lumber and wood products industry* is static, while only 14% say it is *growing*.

- Significantly more (89%) high school students say the industry is the *same* or *growing* compared to adult influencers (65%), college students (63%), and parents (54%).
- When viewed by length of residency in the region, it can be seen that long-term residents (20 years or more) see less strength in the status of the *lumber and wood products industry* than others. Six in ten say it's *growing* or *staying the same*. The perspective of people with less than 20 years in the region is considerably different. Approximately eight in ten (average) think of the industry as *staying the same* or *growing*.

**Employment Opportunities (%)  
“Lumber and Wood Products”**

	Respondent Segments					Years in Region			
	Total	Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	779	61	343	327	109	214	53	323	172
Growing	14	10	22	7	14	9	15	17	13
Staying the same	60	44	67	56	51	62	60	68	45
Declining	25	40	12	37	36	29	25	15	42

Q7d

Retail

Four in ten (44%) respondents believe the *retail industry* is *growing*, with another 37% believing *it is staying the same*.

- Eight in ten college (84%) and high school (81%) students say the *retail industry* is either *growing* or *staying the same* compared to adult influencers (67%) and parents (60%). (It should be noted that a considerable number of students, high school and college, cited they find employment in retail. They may not be thinking of the industry in terms of the vitality of retail establishments.)
- Long-term residents (20 years +) are not as optimistic about the *retail industry* as shorter term (19 years or less residents (69% vs. 80% or more).

**Employment Opportunities (%)**  
**“Retail (Stores)”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	1068	74	377	563	128	403	73	361	212
Growing	44	26	34	53	29	56	42	37	34
Staying the same	37	34	47	31	38	30	38	44	35
Declining	19	40	19	16	33	13	19	19	31

Q7e

Retail Services

Nine in ten (91%) survey respondents are of the opinion that the *retail services industry* is *staying the same* or *growing*.

- In comparing the respondent segments, four in ten (43%) college students believe *retail services* is *growing* while the same viewpoints is held by 31% of high school students, 18% of adult influencers, and 14% of parents.
- Short-term residents believe the *retail services industry* has better employment opportunities compared to long-term residents.

**Employment Opportunities (%)**  
**“Retail Services (e.g., Hair/Beauty Salon, Auto Mechanic, Dry-cleaning)”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
<i>n=</i>	1027	71	371	531	125	378	72	350	207
Growing	35	14	31	43	18	45	42	31	24
Staying the same	56	73	59	50	71	49	51	61	63
Declining	9	13	10	8	11	6	7	9	13

Q7f

Hospitality/Entertainment (e.g. Restaurants, Hotels)

Respondents see growth in the *hospitality/entertainment industry*. Half (51%) survey respondents believe the *hospitality/entertainment industry* is *growing*, with another 39% saying it is *staying the same*.

- Six in ten (61%) of college students are optimistic about the industry and believe it is growing. In comparison, this growth view is also held by adult influencers (45%), but less so by high school students (39%) and parents (37%).
- Respondents who have been in the region for 5 years or less believe the industry is growing (62%) compared to their counterparts (43%-45%).

**Employment Opportunities (%)**  
**“Hospitality/Entertainment (e.g. Restaurants, Hotels)”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
<i>n=</i>	1087	75	388	569	130	410	76	368	213
Growing	51	37	39	61	45	62	45	45	43
Staying the same	39	48	49	31	44	31	47	44	44
Declining	10	15	12	8	11	7	8	11	13

Q7g

Computers/Technology

Nine in ten (91%) say the *computer/technology industry* is *growing* or *staying the same*.

- Younger respondents, high school students (47%) and college students (50%), are more assured that the computer/technology industry is growing compared to parents (35%) and adult influencers (31%).
- Long-term residents are the least optimistic about employment opportunities in the *computer/technology industry* compared to other residents with a shorter length of stay.

**Employment Opportunities (%)**  
**“Computers/Technology”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	968	71	357	490	121	344	68	341	196
Growing	47	35	47	50	31	52	46	46	38
Staying the same	44	49	46	40	55	40	47	45	48
Declining	9	15	7	10	14	8	7	9	14

Q7h

- It might be speculated that younger respondents have a heightened interest in computers and technology and are as a result more attuned to developments in the region. At the same time, note they don not accept the tested reference to the region’s being “*on its way to being a leader in technology.*”

Professional Services (e.g., Physicians, Attorneys, Accountants)

Professional services in the region are believed to be *staying the same* among survey respondents with 68% saying so. On the other hand, a small percentage (21%) of the survey population believes the industry is *growing*.

- This finding is consistent across the respondent segments and years in region segments.

**Employment Opportunities (%)**  
**“Professional Services (e.g., Physicians, Attorneys, Accountants)”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influence rs	<5	5-9	10-19	20+
<i>n=</i>	938	72	359	455	124	319	67	342	192
Growing	21	11	21	23	13	22	16	21	22
Staying the same	68	68	69	68	69	70	78	67	65
Declining	10	21	9	9	19	8	6	12	13

Q7i

Farming

Eight in ten survey respondents are of the opinion that the *farming industry* is *staying the same* (41%) or *declining* (46%).

- Fewer high school students (28%) believe the industry is declining as compared to college students (56%), parents (64%) and adult influencers (65%).
- Six in ten (61%) of respondents who have lived in the region for 20 years or more say the *farming industry* is declining in comparison to respondents with a shorter tenure (at least 34%-53%).

**Employment Opportunities (%)**  
**“Farming”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
<i>n=</i>	983	69	388	474	121	329	68	364	202
Growing	13	--	25	5	1	8	15	20	4
Staying the Same	41	36	47	39	34	41	32	46	35
Declining	46	64	28	56	65	51	53	34	61

Q7j

Construction

There are perceived employment opportunities in *construction*. Half (52%) survey respondents believe the *construction industry* is *growing*, with another 42% who believe it is *staying the same*.

- Younger respondents, college students (59%) and high school students (53%), believe the *construction industry* has better employment opportunities than do adult influencers (20%) and parents (16%).
- Long-term residents are the least optimistic about the growth potential for the construction industry.

**Employment Opportunities (%)**  
**“Construction”**

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	989	68	364	506	119	370	67	347	188
Growing	52	16	53	59	20	63	58	50	33
Staying the same	42	62	43	36	61	32	39	45	55
Declining	6	22	4	5	19	5	3	5	12

Q7k

### C. Quality of Living

Respondents hold the region in high regard, with over three-quarters (78%) agreeing they are likely to use the phrase *this region has strong and proud tradition* to describe the region.

- Among the respondent segments, high school students (71%) are less likely to attach this phrase to themselves. Nonetheless, seven in ten endorse the thought.
- There are no real disparities by the length of time in the region.

**Likelihood of Using Phrase to Describe Region (%)**  
***“This region has a strong and proud tradition.”***

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
n=	1112	75	383	597	132	436	75	366	218
Very likely	38	36	24	47	38	51	40	25	34
Somewhat likely	40	44	47	35	41	31	36	45	48
Not very likely	18	16	23	14	20	13	19	26	16
Not at all likely	4	4	6	4	1	5	5	4	2

Q13C

Three of the survey’s questions examine the respondents’ attitude with regard to the desirability of *raising a family* in the 10-county region. These included ratings, agreement, and likelihood of endorsing the region for families.

The region has a strong family-orientation. In rating the region, seven in ten (69%) survey respondents believe the region is either an “excellent” or “good” *place to raise a family*.

- Over eight in ten (88%) adult influencers and parents (87%) say the region is an “excellent” or “good” *place to raise a family*, with seven in ten high school students (72%) rating the region the same way. Fewer, but still high proportions of college students (62%) believe the region is “excellent” or “good” *to raise a family*.

**Rating for Area Currently Residing In (%)**  
***“A place to raise a family”***

		<b>Respondent Segments</b>				
		<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>		<i>1150</i>	<i>75</i>	<i>413</i>	<i>605</i>	<i>132</i>
	Excellent	27	47	27	22	49
	Good	42	40	45	40	39
	Fair	23	12	23	27	10
	Poor	8	1	5	11	2

Q5a

In the agreement question (which indicates attitude for personal decision-making) half (55%) of the survey respondents *agree strongly* or *somewhat* that the region is *worth coming back to settle and raise a family*.

- College students are the least in agreement with the statement (45%) compared to high school students (64%), parents (72%), and adult influencers (77%).

**Agreement with the statement (%)**  
**“It’s Worth Coming Back to This Area to Settle/Raise a Family”**

	Total	Respondent Segments			
		Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	1125	75	403	591	131
Agree Strongly	15	28	16	11	30
Agree Somewhat	40	44	48	34	47
Disagree Strongly	24	19	18	30	15
Disagree Somewhat	21	9	17	25	8

Q6c

In the likelihood questions, indicating disposition toward endorsing an idea, three-quarters (76%) of the survey respondents are likely (*very* or *somewhat*) to use the phrase *this region is a great place to raise a family*.

- In comparing the respondent segments, more than eight in ten of respondents [high school students (81%), parents (89%), and adult influencers (91%)] are *very* or *somewhat* likely to use the phrase, while significantly fewer (68%) college students say they would be so endorsing.

**Likelihood of Using Phrase to Describe Region (%)**  
***“This Region is a great place to raise a family.”***

	Respondent Segments				
	Total	Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	1141	75	402	607	132
Very likely	30	52	31	23	52
Somewhat likely	46	37	50	45	39
Not very likely	18	5	14	24	6
Not at all likely	6	5	5	8	2

Q13d

People make all the difference. Three-quarters (75%) of the survey respondents say they would likely use “*this region has great people living in it*” as a phrase to describe the area.

- Parents (89%) and adult influencers (87%), are more likely than high school students and college students (74% each) to use the phrase to describe the 10-county region.

**Likelihood of Using Phrase to Describe Region (%)**  
***“This region has great people living in it.”***

	Respondent Segments				
	Total	Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	1132	74	403	601	128
Very likely	27	47	25	24	50
Somewhat likely	48	42	49	50	37
Not very likely	18	7	19	20	11
Not at all likely	6	4	7	7	2

Q13e

Additional examination regarding the region as a place to live was undertaken in two questions seeking understanding about attitudes closely related to actual behavior.

Six in ten (67%) survey respondents feel they and their peers hold similarly positive feelings about living in the region. They agree that *most people I know in this area think it is a great place to live.*

- Parents and adult influencers (85% each) feel their peers think of the region as a great place to live to a greater extent than students. However, the strong majority of students [college (68%); high school (59%)] also feel their peers hold the region as a desirable place to live.
- Eight in ten (84%) of the people who came to the region because of employment/job reasons feel they live among others who think highly of the area.

**Agreement with the statement (%)**  
**“Most people I know in this area think it is a great place to live.”**

	Total	Respondent Segments				Reasons For Coming to Region			
		Parents	H.S. Students	College Students	Adult Influencers	Born Here	School	Family Moved Here	Job
<i>n=</i>	1137	74	404	602	131	458	445	130	31
Agree Strongly	13	24	6	14	27	10	16	11	26
Agree Somewhat	54	61	53	54	58	53	56	56	58
Disagree Strongly	23	8	28	21	11	26	19	26	16
Disagree Somewhat	10	7	12	11	4	11	10	7	--

Q6a

Independent of the high positives expressed for the region as a place to live, there is less certainty about anchoring one’s life here.

- College students are least likely of all segments to concur with this idea, 7% *agree strongly* and 28% *agree somewhat*. Among high school students, agreement reaches to half (10% *very*; 41% *somewhat*). Adult influencers (72%), and parents (71%), hold the strongest feelings about the “worth” of staying in this region to live.

**Agreement with the statement: (%)**  
**“It’s worth staying in this region to live.”**

	Total	Respondent Segments				Reasons For Coming to Region			
		Parents	H.S. Students	College Students	Adult Influencers	Born Here	School	Family Moved Here	Job
<i>n=</i>	1137	75	404	602	131	457	447	130	31
Agree Strongly	10	28	10	7	26	14	4	11	26
Agree Somewhat	35	43	41	28	46	42	27	36	39
Disagree Somewhat	34	21	32	38	20	29	39	37	26
Disagree Strongly	21	8	17	27	8	15	29	16	10

Q6b

Four in ten (46%) survey respondents are *very* or *somewhat* likely to use the phrase *this region is increasingly diverse* in its description of it.

- High school students (54%) are more likely than college students (44%), adult influencers and parents (34% each) to describe the region as becoming more diverse.
- In comparing the length of time in the region, half (56%) of the respondents living in the region 10 to 19 years are either *very* or *somewhat* likely to use the phrase *this region is increasingly diverse* to describe the region. Short-term as well as long-term residents are less likely to see such changes (about four in ten would say so, the majority would not).

**Likelihood of Using Phrase to Describe Region (%)**  
***“This region is increasingly diverse.”***

	Total	Respondent Segments				Years in Region			
		Parents	H.S. Students	College Students	Adult Influencers	<5	5-9	10-19	20+
<i>n=</i>	1110	73	384	597	129	436	78	366	213
Very likely	14	5	14	15	6	16	8	14	12
Somewhat likely	32	29	40	29	28	26	28	42	32
Not very likely	32	36	31	32	39	32	39	30	35
Not at all likely	21	30	15	25	27	26	26	14	22

Q13g

Two-thirds (66%) respondents are likely to say that *there are good affordable housing opportunities in this region for young people*.

- Surprisingly, over three-quarters (77%) of high school students and 72% adult influencers are likely to describe the region as having *good affordable housing opportunities for young people* compared to parents (66%), and college students (57%).
- Respondents who are life-long residents of the region are more likely than those coming to the region for school and job purposes to describe area’s housing situation positively (74% versus 55% and 56% respectively). As well, nearly seven in ten (69%) of those who say their families moved to the region are likely to use the phrase.

**Likelihood of Using Phrase to Describe Region (%)**  
***“There are good, affordable housing opportunities in this region for young people.”***

	Respondent Segments					Reasons for Coming to Region			
	Total	Parents	H.S. Students	College Students	Adult Influencers	Born Here	School	Family Moved	Job
<i>n=</i>	1095	74	387	577	131	444	427	128	31
Very likely	19	28	21	15	32	21	16	17	29
Somewhat likely	47	38	56	42	40	53	40	52	26
Not very likely	20	24	16	23	21	18	21	20	35
Not at all likely	14	9	8	21	8	8	23	11	10

Q13h

Survey respondents are split on opinions about social and entertainment activities for young people. When respondents were asked to rate the area where they currently reside on a *place to have fun* and a *place for young people* (20-35 years old) to live, there are mixed responses, with half agreeing and half disagreeing with each.

- College students find more fun in the region than others do. Six in ten see the area where they currently reside as a place where fun activities are.
- Notably, the highest proportion of respondents who rate the region *excellent* or *good* for young people (25-35 years old) to live are college students (55% say so compared with four in ten or fewer in other segments.)

**Rating for Area Currently Residing In (%)**  
**“To have fun”**

	Total	Respondent Segments				Reasons For Coming to Region			
		Parents	H.S. Students	College Students	Adult Influencers	Born Here	School	Family Moved	Job
<i>n=</i>	1150	74	403	616	131	453	459	134	29
Excellent	19	7	5	31	6	7	36	5	10
Good	27	37	18	31	40	26	31	22	35
Fair	29	35	33	26	36	35	22	38	38
Poor	24	22	45	13	18	33	11	34	17

Q5c

**Rating for Area Currently Residing In (%)**  
**“For Young People (20-35 Years Old) To Live”**

	Respondent Segments					Reasons For Coming to Region			
	Total	Parents	H.S. Students	College Students	Adult Influencers	Born Here	School	Family Moved Here	Job
<i>n=</i>	1156	75	409	617	130	459	460	131	31
Excellent	16	3	7	25	3	8	28	8	3
Good	31	29	32	30	29	34	29	33	16
Fair	33	39	37	29	38	36	29	35	45
Poor	20	29	24	16	29	22	15	24	35

Q5e

Half (50%) are likely to describe the region as *having social and entertainment activities for young people*, while the other half are not.

- Two-thirds (66%) of college students are likely to use the phrase to describe the area (with 42% are *very likely* to do so). All other segments (32% each) are far less likely to use the phrase.
- Seven in ten (71%) of those living in the region for less than 5 years are likely to use the phrase. Most of these respondents are college students. Only three in ten long-term residents see the phrase as characteristic of the region.

**Likelihood of Using Phrase to Describe Region (%)**  
***“This region has social and entertainment activities for young people.”***

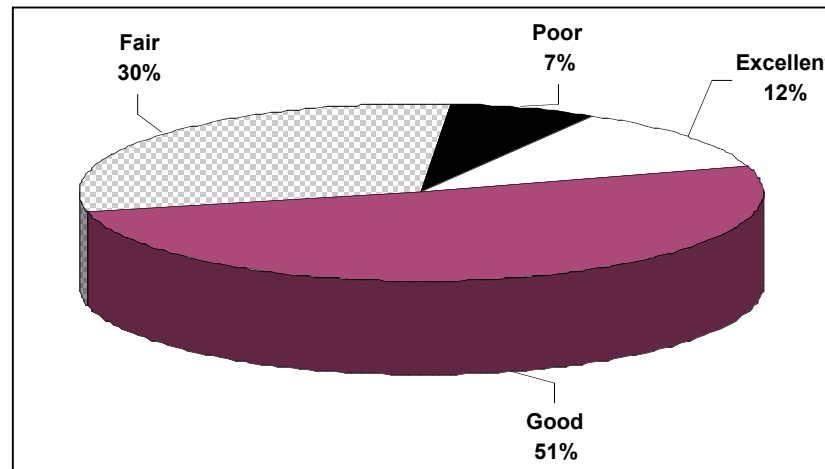
	Respondent Segments					Years in Region			
	Total	Parents	H.S. Students	College Students	Adult Influencers	<5	5 - 9	10-19	20+
<i>n=</i>	1143	75	399	613	131	448	80	379	219
Very likely	25	4	8	42	5	45	27	9	14
Somewhat likely	24	28	24	24	27	26	21	23	25
Not very likely	26	37	29	21	41	17	26	30	39
Not at all likely	24	31	39	13	28	12	25	38	22

Q13i

Overall, six in ten (63%) respondents believe that the quality of life in Central Pennsylvania is either *excellent* or *good*. Only 7% believe it is *poor*.

- Parents have the highest perception of the *quality of life in the area* (70% say *excellent* or *good*). But, substantial majorities of other segments also see quality of life positively: college students (66%), other adult influencers (64%) and high school students (55%).

**Overall Perception of the Quality of Life in the Area (%)**  
(n=1160)



**Overall Perception of the Quality of Life in the Area (%)**  
(n=1160)

Rating	Respondent Segments			
	Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	75	410	618	132
Excellent	13	8	14	16
Good	57	47	52	55
Fair	23	36	26	24
Poor	7	9	7	5

Q8

## D. Marketing the Region

When asked what important features of the community to stress to young people when “marketing” the region, the overwhelming choice is for employment potential. Six in ten (60%) respondents, overall, say *job opportunities*, (one of four features presented). This emphasis on employment potential rises to seven in ten among college students and adult influencers (67% each).

Among the remaining features tested, respondents’ interest drops precipitously. Only 14% to 18% of students feel social activities and social opportunities for young people should be emphasized. Emphasizing family-oriented activities holds interest only among parents (34%) with smaller proportions of high school students (18%) and adult influencers (26%) recommending it. Affordable housing opportunities is seen as a marketing emphasis for only 15% high school students and even fewer in other segments.

### Important Features of the Community to Stress to Young People (%)

	Total	Respondent Segments			
		Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	1159	74	410	618	131
Job opportunities	60	63	46	67	67
Social activities and social opportunities for young people	15	--	14	18	4
Family-oriented offerings and opportunities (good schools, other families, etc.)	14	34	18	8	26
Affordable housing opportunities	9	3	15	7	3
Other mentions	1	--	3	--	--
Don't know	1	--	3		

Q14

Respondents who want to see employment potential featured in marketing efforts were asked about specific employment sectors. Three in ten suggest the sectors to stress to young people are *professional services* (33%) and *science/technology* (32%). Others results were: *blue collar* (13%), *healthcare* (11%), and *education* (10%).

- Significantly more college students believe the *professional services* and *education* sectors should be stressed in comparison to the views of parents, high school students and adult influencers.

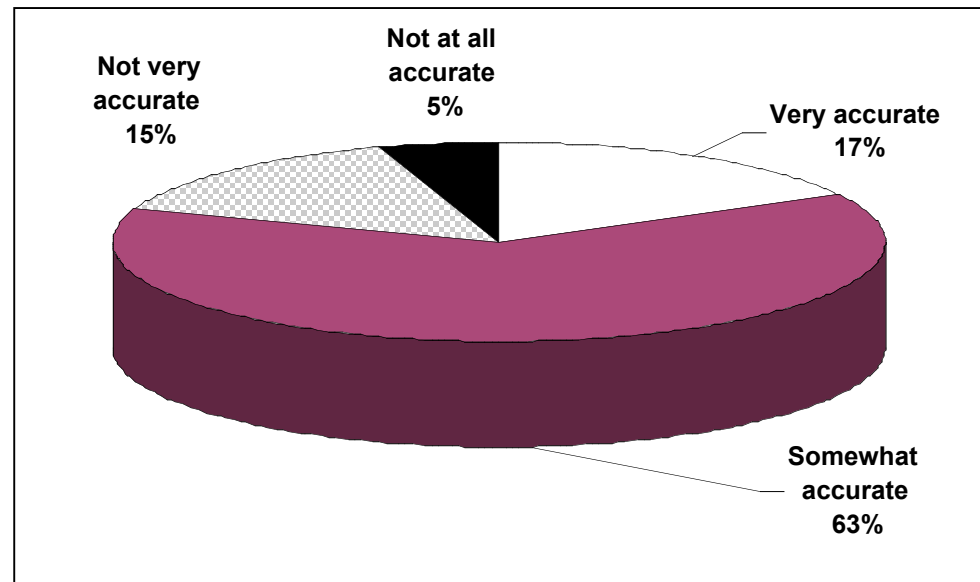
**Employment Sector to Stress to Young People (%)**  
(Those who chose job opportunities as a feature to stress)

	Total	Respondent Segments			
		Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	507	40	119	316	72
Professional Services	33	30	21	40	24
Science/Technology	32	40	26	31	43
Blue Collar	13	27	19	7	26
Healthcare	11	13	14	10	10
Education	10	5	6	13	4
Financial Services	6	7	3	8	7
Hospitality/Entertainment	6	5	5	6	6

Q14-1

Overall, eight in ten (80%) respondents believe the reference to the 10-county region as *The Pennsylvania Heartland* is an accurate description. While this is perceived accurate, it does not necessarily generate a vision of what people might want to see in marketing for the region.

**Accuracy of Description – The Pennsylvania Heartland (%)**



Q14a

One-third (39%) of parents and adult influencers (36%) believe the description is *very accurate*, while descriptor only rings true for 15% of high school students, and 13% of college students.

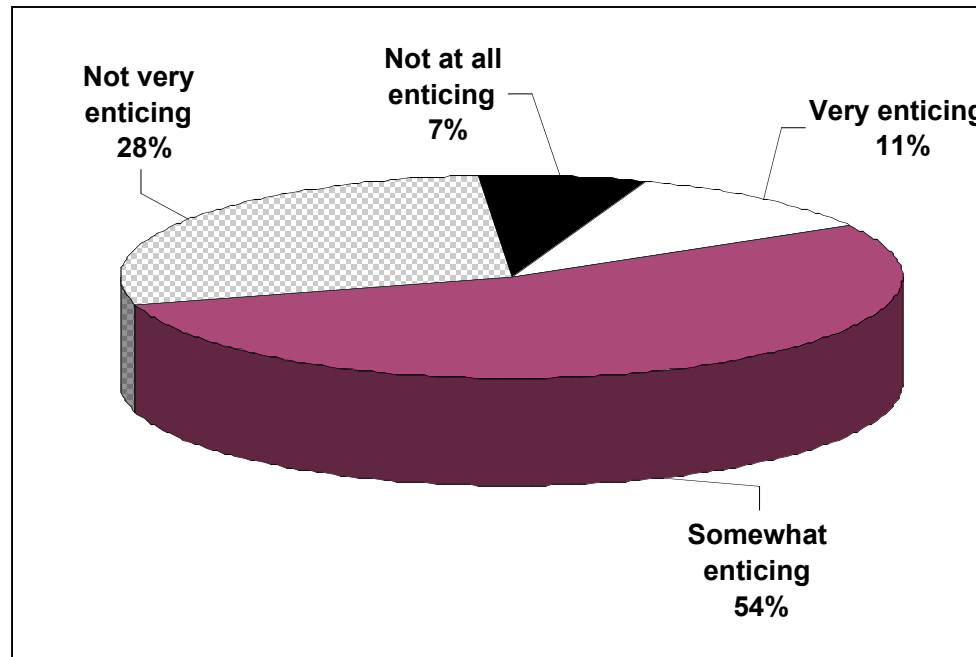
**Accuracy of Description – The Pennsylvania Heartland (%)**

		<b>Respondent Segments</b>			
		<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
	<i>n=</i>	75	408	610	132
Very accurate		39	15	13	36
Somewhat accurate		48	67	66	45
Not Very accurate		7	13	17	11
Not at all accurate		7	6	4	7

Q14a

Nearly two-thirds (65%) respondents believe the description of the region is either “very” or “somewhat” enticing.

**Enticement of Description – The Pennsylvania Heartland (%)**



Three-quarters high school students (76%) and parents (73%) find the Pennsylvania Heartland description *very* or *somewhat* enticing, compared to college students (58%) and adult influencers (66%).

**Enticement of Description – The Pennsylvania Heartland (%)**

	Respondent Segments			
	Parents	H.S. Students	College Students	Adult Influencers
<i>n=</i>	75	410	616	132
Very enticing description	9	17	7	12
Somewhat enticing description	64	59	51	54
Not very enticing description	21	19	33	28
Not at all enticing description	5	5	8	5

Q14b

## **E. Desirable Place to Live**

The pattern shown among adult respondents in their rankings of the most desirable place to live is that most respondents prefer to live where they are presently. However, student respondents do not feel this way.

- Six in ten (58%) parents and adult influencers (59%) consider where they reside now as their “most desirable” locale. About two in ten (17%) parents and adult influencers (12%) feel that a rural area somewhere else is even more desirable than the PA Heartland area. Neither urban centers nearby nor urban areas somewhere else hold much appeal as desirable places for these residents (fewer than one in ten cite them).
- High school students indicate a greater consideration toward living elsewhere. Only one-third (34%) see where they live now as most desirable.
- College students show a different pattern of course because so many are essentially “transients.” Among this category of respondents almost nine in ten (87%) view other areas (not the 10-county region) as being the most desirable places to live.

19% aspire toward nearby urban areas like Pittsburgh, Philadelphia or Baltimore

25% aspire toward “other” urban areas

26% aspire toward “other” suburban areas

17% aspire toward “other” rural areas

- A summary observation is important: two-thirds (67%) of high school students view other places, not the 10-county area, as being desirable locales in which to live. This viewpoint rises to eight in ten (82%) among college students.

**Most Desirable Place to Live (%)**  
 (Ranked First Among Five Locales)

	<b>Respondent Segments</b>				
	<b>Total</b>	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	1169	75	418	619	132
Where I am Living Right Now	25	58	34	12	59
A Nearby Urban Area, Like Pittsburgh, Philadelphia, or Baltimore	15	1	12	19	2
An Urban Area (City) Somewhere Else	21	7	19	25	9
A Suburban Area Somewhere Else	22	17	18	26	18
A Rural Area Somewhere Else	17	17	18	17	12

Q.15

- Among those who ranked an *urban area elsewhere* their first most desirable place to live (20% of the total sample) the City of New York is the ideal. One-third (34%) of college students and one-quarter of high school students rank the City “most desirable urban area.”

**Most Desirable Place to Live: Urban Area Elsewhere(%)**

(Base: Those who ranked a urban place elsewhere as their first most desirable place to live. n=233)

	<b>Respondent Segments</b>			
	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	5	73	149	11
New York City	20	25	34	20
West – US	20	14	20	20
South – US	--	14	13	10
Harrisburg/Hershey	--	12	2	10
Washington DC	--	--	14	--
Boston	20	2	7	10
Mid-west – US	--	2	7	20
State College	--	14	--	--
Don't Know/Refused	--	19	11	9

Q15b

- For college students who feel a suburban local that’s not in the 10-county area is the most desirable place to live, suburbs in the northeast states are the most attractive. The next most desirable locale is the south. One in seven (13%) see suburban locations in the southern states as most desirable.
- Among high school students, State College is selected as most desirable by two in ten (22%), followed in preference by 15% would opt for suburbs in the northeast states, and 11% who see Harrisburg/Hershey as most desirable.

**Most Desirable Place to Live: Suburban Elsewhere (%)**

Base: Those who ranked a suburban place elsewhere as their first most desirable place to live. n=245)

		<b>Respondent Segments</b>			
		<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adults Influencers</b>
	<i>n=</i>	12	65	157	23
	South – US	25	7	13	22
	State College	25	22	4	17
	Lancaster	8	--	2	17
	Philadelphia	8	4	9	6
	Northeast – US	8	15	23	11
	West – US	8	9	6	11
	Other PA suburb	--	7	8	--
	Harrisburg/Hershey	--	11	6	6
	New York City	--	--	3	--
	Don't Know/Refused	--	29	24	22

Q15c

- Those who see other rural areas as desirable, other parts of Pennsylvania are most often cited by both high school students (17%) and college students (23%). Western U.S. states also hold appeal for these students.

**Desirable Place to Live: Rural Elsewhere (%)**

(Base: Those who ranked a suburban place elsewhere as their first most desirable place to live. n=186)

	<b>Respondent Segments</b>			
	<b>Parents</b>	<b>H.S. Students</b>	<b>College Students</b>	<b>Adult Influencers</b>
<i>n=</i>	12	67	104	15
South – US	36	7	4	21
Other PA town	9	17	23	29
Midwest – US	9	7	3	--
West – US	9	12	16	7
Northeast – US	--	7	10	--
Don't Know/Refused	8	39	35	7

## **V. CONCLUSIONS AND IMPLICATIONS**

The lifestyle values and needs held by the target audiences of the branding initiative are materially different. To a considerable extent the survey's findings, related to attitudes and perceptions of the region held by young people (students) and adults, show divergences due to stage of life aspirations.

Moving toward independent living, students are substantially seeking footings that will advance their aspirations. Employment and career opportunities are their paramount focus. With the objective of becoming self-sustaining through employment that satisfies, locating in areas that allow for both job opportunities and for social experience and development are highly attractive. . Parents and adult influencers having originated in the region or otherwise having made deliberated decisions to locate here, necessarily view the region's attractiveness differently. Yet, on the issues most critical to attracting and retaining young settlers, specifically employment opportunities and diversity of career choices, they too express the opinion that the region holds limited potential (e.g., their observations that most industry categories in the region are in a static state or declining).

It is notable, that although a shallow examination at best, two focus groups (one each with college students and parents) aimed at examining peoples' reactions to thematic graphics and tag lines, brought forth responses demonstrative of divergent stage-of-life perspectives. Put simply, the groups' reactions suggest that 1) claims of benefits to be found by locating in the region that imply satisfactions which people see as contradictory to their personal observations and aspirations (e.g., it's all here), are dismissed; 2) Graphic symbolism that evokes the natural beauty and good-community comforts of the region is reinforcing of a decision to consider residing here primarily among those people who are already disposed to settle in the area.

In summary, quantitative data indicates that branding concepts aimed to assist the principle objective of encouraging young adults from the region to remain in the area after they have finished their secondary and post-secondary education should be more pointedly designed. The dilemma to be resolved: the region's features (those people seeking to settle and grow families say appeals to them) are, in many cases, not enticing enough to overcome the search for employment opportunities and experiences that young people just starting out feel will sustain their ambitions.

It appears that what will be needed is a thematic “umbrella” (representing the values/images that are evocative of the region). Then, under that umbrella, develop individual themes designed to branch off of it but aimed at the specific needs that students, businesses and/or industries seek, and can find, in the 10-county region.