WORKFORCE TRENDS #5

Tracking Pennsylvania's Economic Performance by Industry in the Wake of COVID-19

How is the Pennsylvania labor market performing compared to pre-pandemic levels, and how strong is the post-pandemic economic recovery? This analysis addresses these questions by examining industry job growth trends in the Pennsylvania labor market.

Pennsylvania's economy experienced a robust recovery from COVID-19 followed by a historically tight labor market. Job seekers enjoyed atypical leverage in the job market—extremely low unemployment rates, steady month-over-month increases in employment, and job openings that exceeded the number of unemployed workers. Pennsylvania's local workforce development boards used these dynamics to help reintegrate long-term jobless workers into employment and support low-wage workers to advance.

In this report, we reassess the Pennsylvania labor market coming out of a period of tight labor markets by examining overall and sectoral employment trends in four time periods:

- ◊ from before the pandemic to the pandemic recession employment trough in April 2020,
- ◊ in the period since the trough of the recession,
- ◊ from before the pandemic until today—i.e., spanning both of the first two periods, and
- ◊ in the last year.

PA Workforce Development Association
The Voice of Pennsylvania Workforce Development

Executive Summary:

In the first of our four periods:

- Total non-farm employment in Pennsylvania plunged in April 2020 to 81% of pre-pandemic employment in February 2020, compared to 86% nationally. The likely reason: to stem the early spread of COVID-19, Pennsylvania shut down more "non-essential" businesses with extensive worker-to-worker and/or worker-to-customer contact than the average state.
- Employment fell most precipitously in leisure and hospitality (down to 42% of pre-pandemic employment).
- Construction employment dropped to 61% of its pre-pandemic level (second highest drop in Pennsylvania industries), and manufacturing dropped to 86% (fourth highest drop).

In the second of our periods, since the trough of employment in April 2020:

- Employment recovered and surpassed pre-pandemic levels. Moreover, Pennsylvania's employment grew slightly faster than the nation's whereas it usually averages only about half the national job growth rate. Current Pennsylvania employment is over 125% of its April 2020 levels compared to the national number of 122%.
- Sectorally, leisure and hospitality experienced the fastest employment growth relative to the nation since the pandemic employment trough.
- Pennsylvania's rapid job growth compared to U.S. since April 2020 is partly the flip side of our job plunge in March-April 2020. Pennsylvania's deeper job losses created greater ground for recovery, helping fuel post-recession growth.

Our third period looks at current employment compared to before the pandemic. We do this comparison using a single month of data, three months, and 12 months of data—and the results remain the same. We find:

- On net, Pennsylvania's employment trends relative to the nation since before the pandemic look typical for our state. Overall employment nationally now exceeds pre-pandemic levels by about 5% compared to less than 3% in Pennsylvania.
- In two critical sectors that pay non-college workers better than most other sectors, manufacturing and construction, our employment today is below pre-pandemic levels. In manufacturing, our employment growth is about 2% below pre-pandemic levels compared to unchanged employment nationally. In construction, Pennsylvania employment today is roughly 1% below pre-pandemic levels (depending on whether you compare one month of data, three months, or 12 months); national construction employment today exceeds pre-pandemic levels by 9%.
- Recent employment is also below pre-pandemic levels in the government sector, in contrast with the 3% gain in jobs nationally.
- Education and health and professional business services enjoyed the most robust growth in employment both nationally and in Pennsylvania from pre-pandemic to the present. In both these sectors, Pennsylvania employment growth equaled more than half national employment growth and, depending on the length of period used, as much as 80%.

Honing in on the last 12 months compared to before the pandemic:

- Pennsylvania's overall employment growth of 1.4% was higher than the national average of 1.1%.
- Our leisure and hospitality industry employment jumped more than doubled that nationally (3.5% versus 1.5%).

- Our manufacturing sector employment ticked down slightly over the last 12 months.
- Our construction industry job growth was slightly positive in the last 12 months but only about half the 1.3% employment increase nationally.

Sectoral trends in Local Workforce Development Areas (LWDAs) represent variations on the statewide trends. In construction, a huge decline took place in the past year in the Southwest Corner, which may reflect, in part, the end of large-scale construction of Shell Oil's Beaver cracker plant. Construction employment trends in the Southeast and South Central Pennsylvania look much more like national trends, with growth ranging from 3% to nearly 13%. In manufacturing, no clear regional patterns exist. For example, Southwest Corner LWDA enjoyed 4.3% growth in manufacturing jobs, second only to the Lehigh Valley at 5.6%.

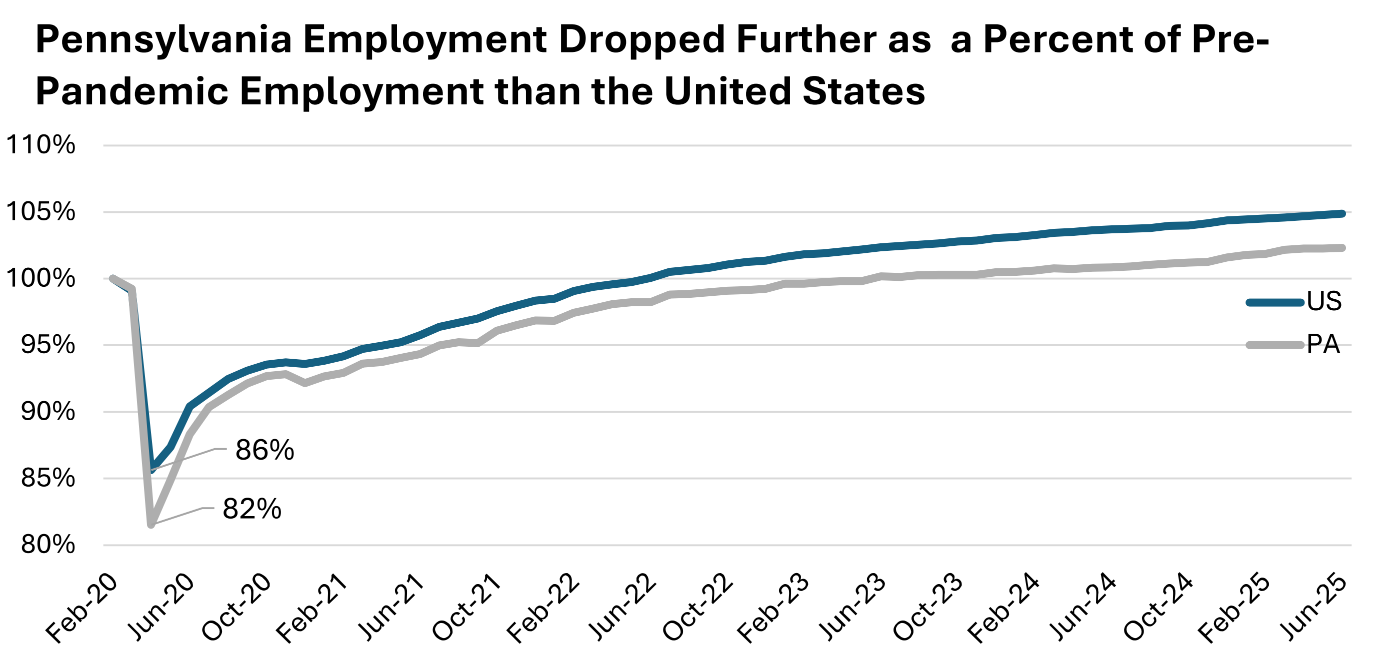
The significant variation in sectoral employment trends by LWDA underscores the need for localized workforce development. Investments in apprenticeships, pre-apprenticeships, industry partnerships, on-the-job training and other workforce training must respond to the distinct needs of local employers, in close collaboration with their local workforce development boards.

Pennsylvania vs. National Employment Trends in Four Time Periods

Job Losses in the Pandemic Recession

The first of the four periods we look at examines Pennsylvania's job trends compared to the nation in the pandemic recession. Figure 1 shows monthly employment from February 2020 to June 2025 as a percentage of employment in February 2020. The period from February to April 2020 shows the precipitous pandemic decline in Pennsylvania jobs. We lost 18.5 of every 100 jobs in just two months compared to 14.4 of 100 in the United States.

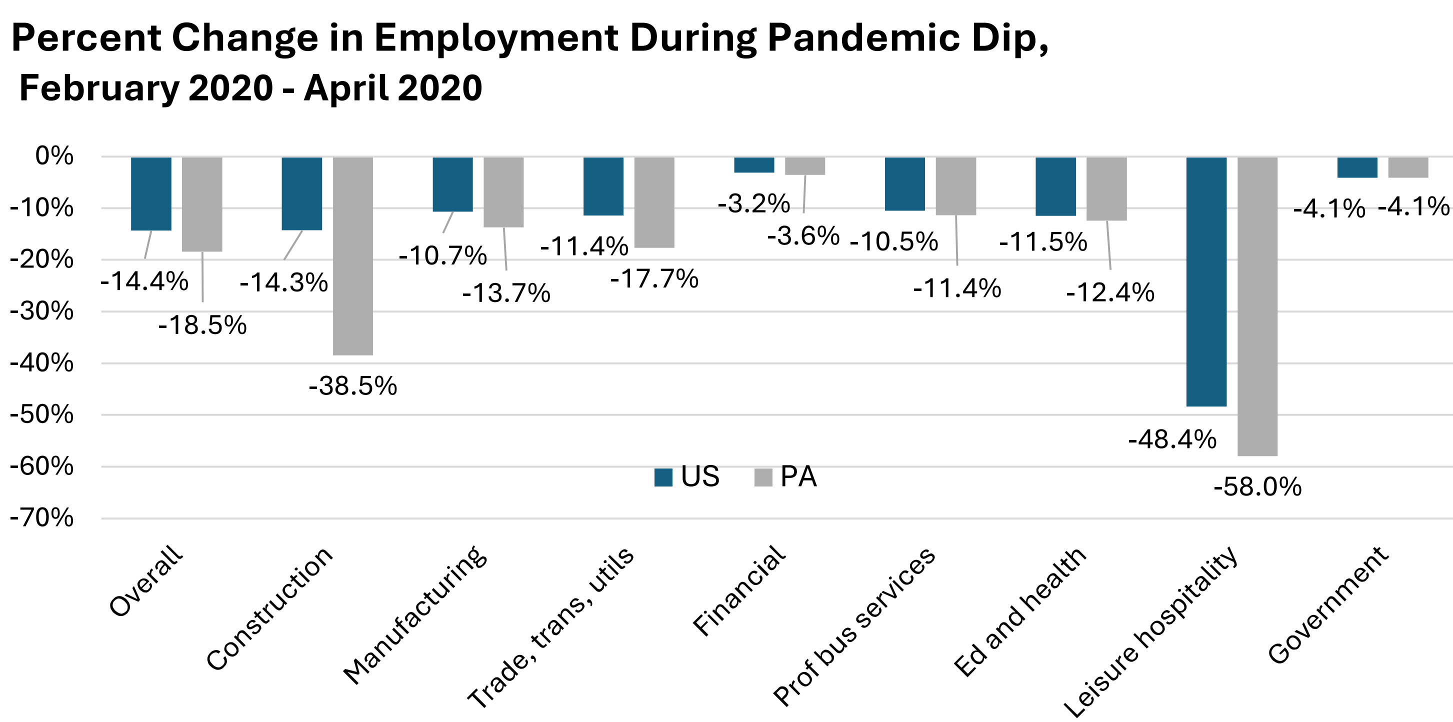
Figure 1



Source: Economic Policy Institute analysis of Current Establishment Survey data Table 5 accessed by Keystone Research Center: http://www.bls.gov/news.release/laus.t05.htm

Turning to Figure 2, the leisure and hospitality industry led our steep overall decline in jobs from February 2020 to April 2020 with a plunge of 58% compared to 48.4% nationally. Construction had the second biggest drop in employment in Pennsylvania, 38.5% compared to 14.3% nationally. Pennsylvania's job declines in transportation, trade, and utilities and in manufacturing also exceeded the national declines. The overall and sector-specific trends in employment from February to April 2020 reflected Governor Wolf's mid-March 2020 shut down of non-essential Pennsylvania businesses to stem the spread of COVID-19.[1]

Figure 2



Source: Economic Policy Institute analysis of Current Establishment Survey data from Table 5 accessed by Keystone Research Center: http://www.bls.gov/news.release/laus.t05.htm

The Pandemic Trough to the Present

Figure 1 also tells the Pennsylvania employment trend story in the second of our four periods: from the trough of the pandemic recession to the present. It shows that, while Pennsylvania's employment decline from February to April 2020 was 4.1 percentage points greater than the nation's, by fall 2020 Pennsylvania employment loss since February 2020 was only about a percentage point behind the nation. From April to September 2020, the number of jobs in Pennsylvania grew 13% whereas the country experienced an 8% increase. Since September 2020, Pennsylvania's employment increases have nearly kept pace with the nation's.

Table 1 drills into sectoral employment dynamics since the pandemic trough. It compares Pennsylvania and U.S. employment growth in one-month, three-month, and 12-month periods just after the pandemic trough to the most recent one-month, three-month, and 12-month periods (i.e., the table compares June 2025 to April 2020, April-June 2020 to April-June 2025, and April 2020-March 2021 with July 2024 to June 2025). Our robust employment recovery in the first year or two after April 2020 likely stemmed from our big employment drop from

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[1] The Pennsylvania Key: March 17, 2020. "Governor Wolf Orders Statewide Shutdown of Non-Essential Business": https://www.pakeys.org/governor-wolf-orders-statewide-shutdown-of-non-essential-business-2/.

February to April 2020. The one-month and three-month comparisons show big COVID bounce back effects in construction and leisure and hospitality. That is, in April 2020 and April-June 2020, Pennsylvania employment in these two sectors was much more depressed than U.S. employment in those same time periods. For that reason, as policies requiring the closing of non-essential businesses lifted, Pennsylvania recovered more jobs because it had more jobs to recover. Construction work, for example, was largely exempt from shutdown orders starting May 1, 2020, as long as businesses abided by new guidance for limiting the spread of COVID from the Governor and Secretary of Health.[2] The state permitted leisure and hospitality to reopen in-person service (as opposed to take-out) more gradually.

Table 1

Pennsylvania Industries Experienced a Faster Initial Employment Bounce-Back Compared to the United States

Industry	April 2020 To June 2025		Three Month Pandemic Recovery (April 2020 - June 2020) to Last Three Months		12 Month Pandemic Recovery (April 2020 - March 2021) to Last 12 Months	
	PA	US	PA	US	PA	US
Construction	61.0%	27.6%	24.9%	20.6%	9.1%	15.0%
Manufacturing	14.0%	12.0%	9.6%	9.5%	5.8%	6.5%
Trade, Trans, Util	23.7%	18.5%	17.1%	15.6%	8.6%	9.4%
Financial	5.7%	7.8%	5.2%	7.5%	3.9%	6.2%
Education and Health	22.8%	25.8%	19.8%	22.8%	14.7%	17.1%
Leisure Hospitality	139.2%	95.5%	106.7%	67.7%	47.5%	38.2%
Prof Business Services	17.0%	17.6%	15.1%	16.1%	9.9%	11.3%
Government	3.3%	8.2%	4.4%	9.6%	4.3%	8.4%
Overall	25.5%	22.5%	20.4%	19.3%	12.4%	13.4%

Note: Last three months used are April 2025 to June 2025 and last 12 months of data used is July 2025 to June 2025.
Source: Keystone Research Center analysis of Current Employment Survey data Table 5.

Pre-Pandemic to the Present

We now look both economy-wide and within sectors at employment trends from before the pandemic to the present. The first two columns of Table A1 tell the overall story. We have experienced less than 3% employment growth since February 2020 compared to about 5% nationally. This small difference is similar but somewhat above the norm for Pennsylvania. (The 20 years before the pandemic illustrates the norm: from January 2000 to February 2020, Pennsylvania non-farm jobs grew 7.6% compared to 16.2% nationally.)

Figure 3 shows sectoral employment trends from pre-pandemic to the present. In three big sectors, Pennsylvania employment growth is similar to but a bit below national employment growth: education and health, professional and business services; and leisure and hospitality. In education and health, our aging population may contribute to employment growth that is over two-thirds the national level (rather than less than half). In a fourth sector shown in Figure 3, manufacturing, Pennsylvania's negative employment growth of minus

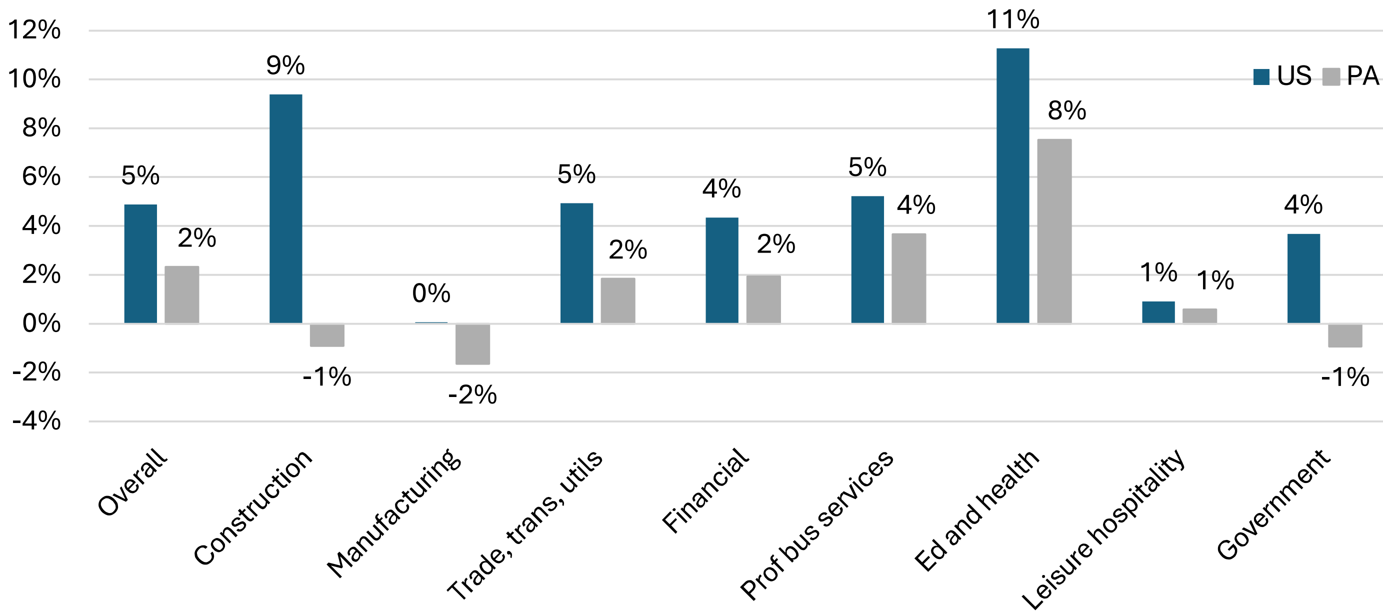
[2] Guidance for businesses in the construction industry permitted to operate during the COVID-19 disaster emergency: https://stsweb.phila.gov/streetclosure/guide/Construction_Industry_Guidance_4.23.20.pdf.

2% is below the national level but by only two percentage points. In construction, another sector that pays non-college workers relative well—at least in parts of non-residential construction—Pennsylvania is still 1% **below** the February 2020 levels, whereas national employment is 9% **above** February 2020 levels. Two factors that likely contributed to the large difference between construction employment growth nationally and in Pennsylvania are the phase down of construction at the Beaver cracker plant and the fact that federal and private investments in clean energy and manufacturing did not increase as much in Pennsylvania from 2022 to 2024 as in other states on average.[3]

As well as construction, government jobs are another sector in which national and Pennsylvania trends diverge from before the pandemic to the present. National employment grew almost 4% while employment in Pennsylvania dropped 1%. The national trend growth of government employment may shift because of changes to federal government hiring and efficiency policies.

Figure 3

Percent Change in Employment by Industry for United States & Pennsylvania February 2020 - June 2025



Source: Economic Policy Institute analysis of Current Establishment Survey data from Table 5 accessed by Keystone Research Center: http://www.bls.gov/news.release/laus.t05.htm

Table A1 presents sectoral employment trends from before the pandemic to the present in two other ways (in addition to a month-to-month comparison): by comparing a three-month period before the pandemic to April-June 2025; and by comparing the 12 months before the pandemic to the most recent 12 months. The

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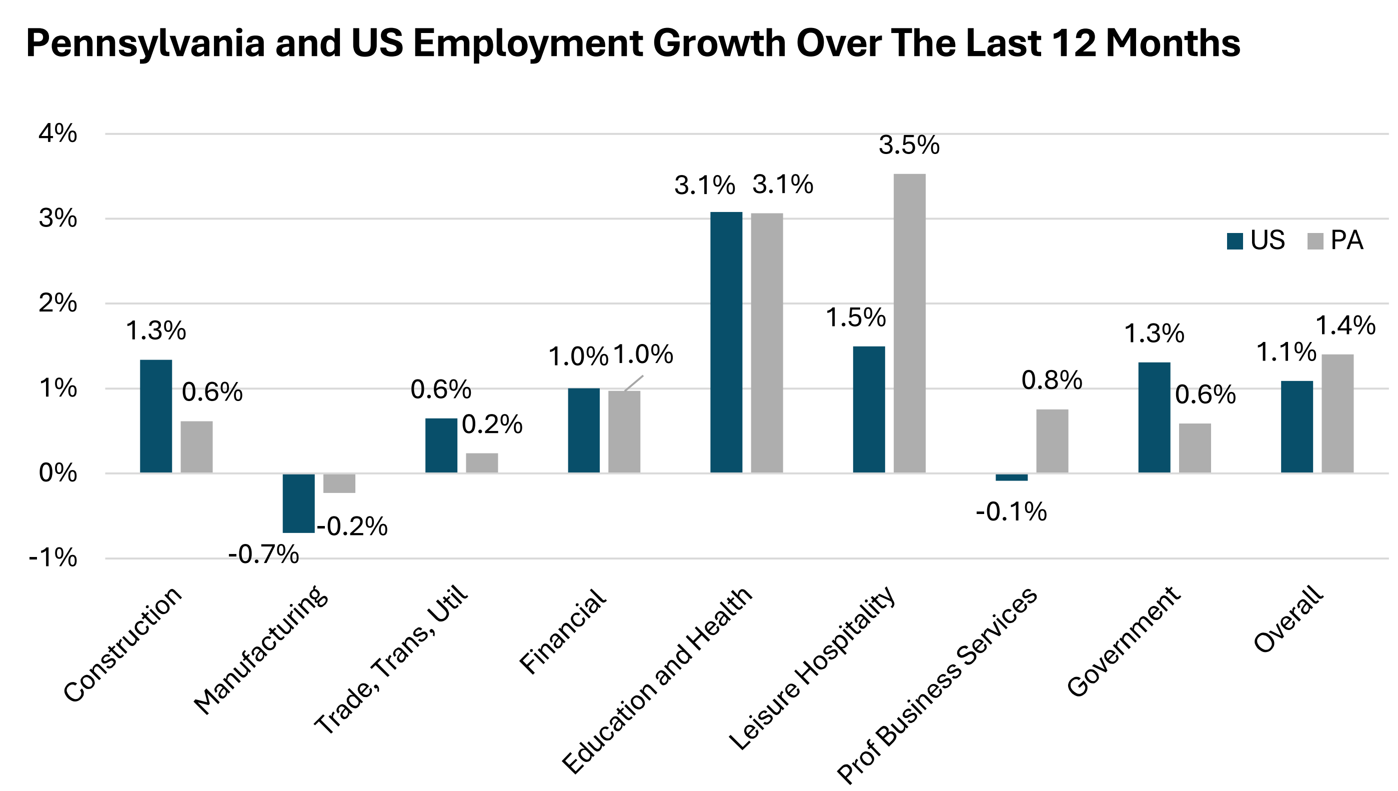
[3] The Shell Oil Beaver cracker plant construction employed about 8,500 workers from 2019 to late 2022. See Reid Frazier, "An ethane cracker in western Pa. will soon start up. We answered your questions about it," *Allegheny Front*, October 6, 2022; https://www.alleghenyfront.org/shell-ethane-cracker-beaver-county-western-pa-air-pollution-jobs/. Federal and private investment in clean energy and manufacturing increased substantially in Pennsylvania from 2022 to 2024, but not as much as in some other states. For example, federal investment increased 11 times from 2022 to 2024 in Pennsylvania but 22 times in Ohio, West Virginia, and Kentucky combined. Computed from Table 2 in Diana Polson and Rike Rothenstein, "If You Fund It, They Will Come: How Federal Clean Energy and Manufacturing Funds Spurred Private Spending, Doubling Appalachia's Climate Infrastructure Investment in Coal Country," Keystone Research Center and ReImagine Appalachia, April 9, 2025; https://reimagineappalachia.org/wp-content/uploads/2025/04/If-You-Fund-it-They-Will-Come_04_2025.pdf.

generalizations made above based on the one-month comparison also hold up in the three-month and 12-month comparisons.

The Last 12 Months

Figure 4 shows Pennsylvania vs. U.S. job growth from July 2024 to June 2025. The good news for Pennsylvania is that our job growth exceeds U.S. levels. Four-to-five years out from the COVID recession, our fast relative employment growth in the last 12 months is no longer a COVID bounce-back effect. Sectorally, our robust job performance in the past 12 months is driven by leisure and hospitality—in which our job growth in the past year exceeded the national job growth 3.5% to 1.5%—and also by professional and business services, in which our employment grew 0.8% whereas national jobs dropped 0.1%. In the big and fast-growing education and health care sector, Pennsylvania and national job growth both equaled 3.1%. In other sectors, Pennsylvania and national employment growth in the last year fell within half a percentage point.

Figure 4



Source: Keystone Research Center analysis of Current Employment Survey data Table 5.

Pennsylvania Workforce Development Areas Industry Employment

We now turn to an examination of overall and sectoral employment trends by local workforce development area (LWDA). Data suppression—to ensure confidentiality of businesses reporting jobs and other information—makes it challenging to analyze industry employment by county and multi-county workforce development areas. In smaller counties, especially, some industry data are suppressed. To address this challenge, we limit our analyses to industries that report data in all LWDAs or have only one or two results missing.

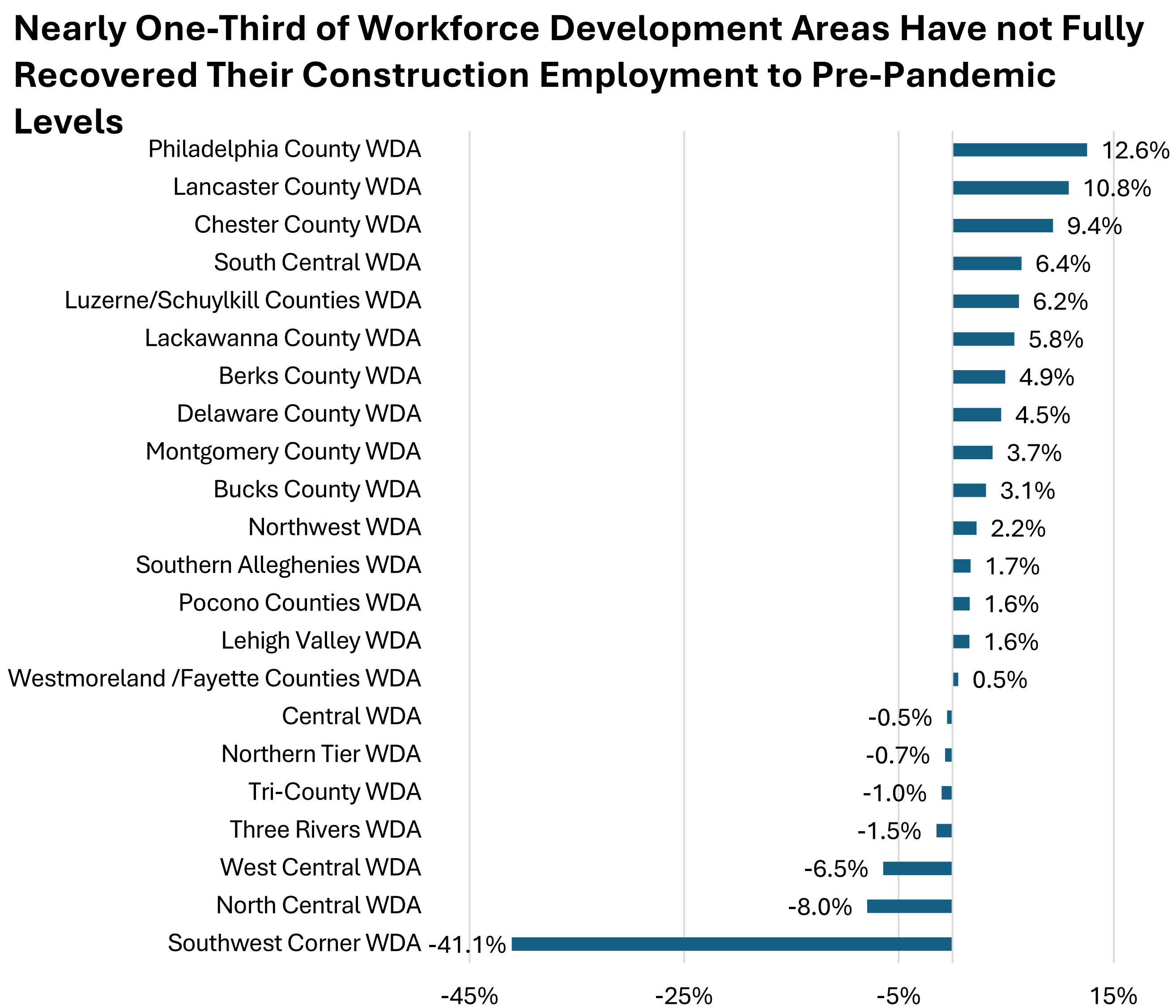
We analyze employment change by industry and LWDA in two periods: the last pre-pandemic quarter (Q4 of 2019) to the current latest available quarterly data (Q4 of 2024); and the trough in Q2 of 2020 to Q2 of 2024.

Using these comparisons, we aim to paint a seasonally accurate picture of how employment has grown or shrunk in each LWDA within six industries: accommodation and food services, construction, health care, manufacturing, retail trade, and wholesale trade.

Construction and Retail Trade

As shown in Figure 3, Pennsylvania statewide construction employment now roughly equals its pre-pandemic level. However, our local analysis in Figure 5 and Table 2 shows substantial variations in employment recovery throughout the LWDAs. Eight LWDAs have lower construction employment in Q4 2024 than Q4 2019, with the largest drops in the Southwest Corner, North Central WDA, and West Central WDA. The SW Corner decline is likely a Beaver cracker plant effect.

Figure 5



Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data for Q4 of 2019 to Q4 of 2024 accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Figure 5 shows that the Southwest Corner LWDA also had the largest drop in construction employment in the pandemic.

Table 2

Workforce Development Area	Construction Employment in Q2 2020 as a Percent of Pre-Pandemic Employment
Southwest Corner	60.3%
Three Rivers	77.3%
Pocono Counties	77.6%
Philadelphia County	78.5%
Delaware County	79.0%
Lehigh Valley	80.2%
North Central	80.6%
Bucks County	81.0%
Berks County	82.2%
Tri-County	82.3%
Northern Tier	82.7%
Montgomery County	83.6%
Northwest	83.8%
Westmoreland/ Fayette Counties	83.9%
Lackawanna County	84.1%
Southern Alleghenies	84.8%
Chester County	85.1%
Central	85.3%
West Central	85.4%
South Central	86.3%
Luzerne-Schuylkill Counties	87.8%
Lancaster County	89.1%

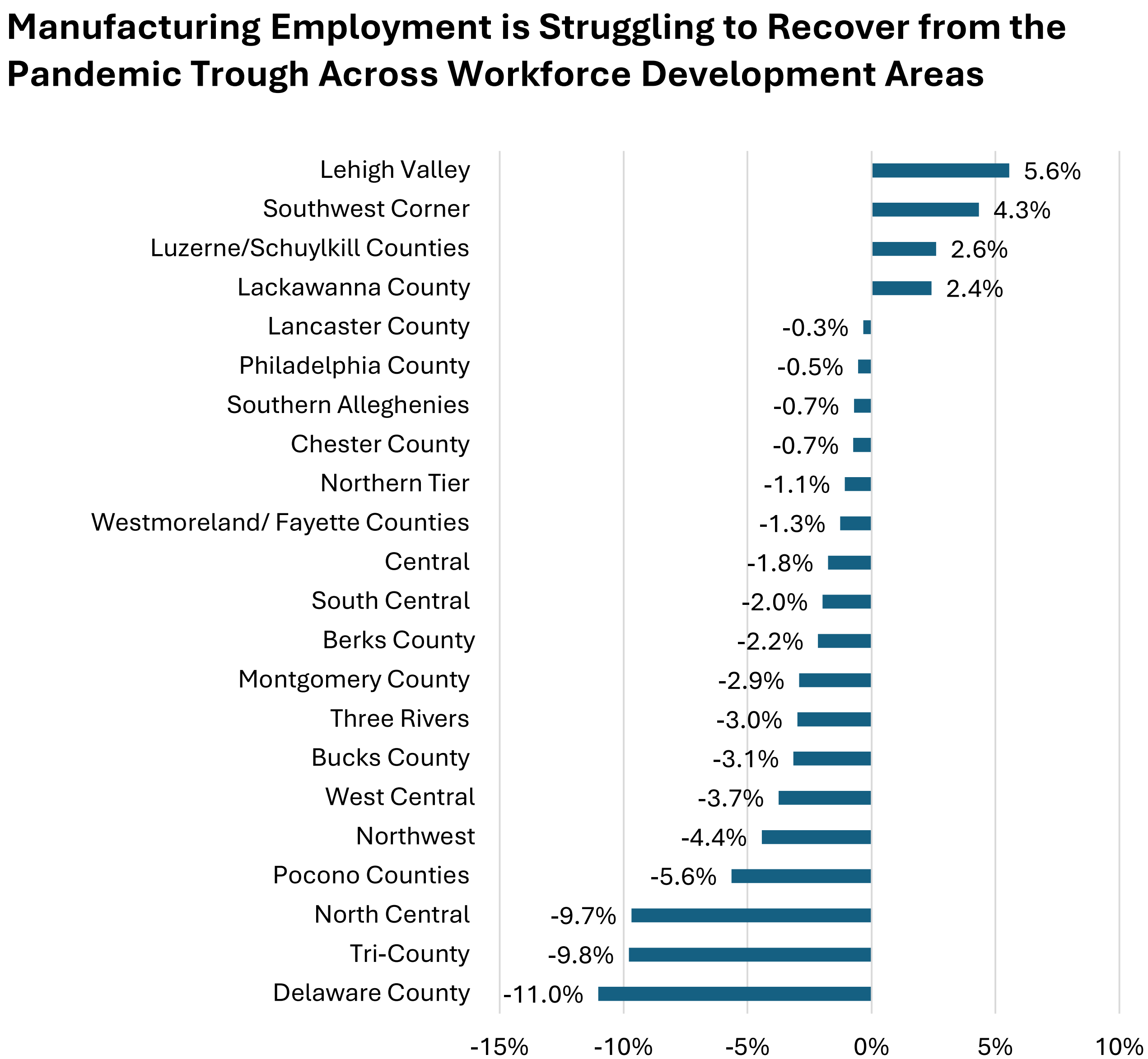
Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Employment in retail trade was hit similarly as many stories reported during the pandemic. As shown in Table A3, a dozen LWDAs lost 18% or more of their pre-pandemic employment, with Montgomery County dropping to 72%. Only five LWDAs have recovered their employment in this sector statewide (as shown in Figure A1). In 2021-23, depressed retail employment may have reflected the retail industry's challenge recruiting workers, and a high job-openings-to-unemployed-workers ratio. That ratio has now come down nationally (state data are not available by sector on the job-openings-to-unemployed-workers ratio). Although more research is necessary, it is possible that the growth in online retail as well as the expansion of self-service (e.g., self-checkout and self-ordering at restaurants) may have held back growth in retail employment.

Manufacturing and Wholesale Trade

Figure 6 shows that four LWDAs have reached manufacturing employment levels above their pre-pandemic level. Meanwhile, three LWDAs have seen manufacturing employment drop by nearly 10% or more. No regional patterns exist in the higher and lower manufacturing-job-growth LWDAs. Both job gainers and the biggest manufacturing job losers span western and eastern Pennsylvania.

Figure 6



Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data for Q4 of 2019 to Q4 of 2024 accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Pandemic drops in manufacturing jobs ranged from 5% to 20%. While policies initially sought to limit manufacturing employment to “essential” industries, all manufacturing quickly became considered essential. Food processing manufacturers illustrated some of the most difficult policy calls in the pandemic because these plants put food on people’s tables but also experienced some of the highest rates of COVID-19 infection.

Table 3

Workforce Development Area	Manufacturing Employment in Q2 2020 as a Percent of Pre-Pandemic Employment
North Central	79.5%
Philadelphia County	82.4%
Berks County	83.4%
Southern Alleghenies	85.8%
Lehigh Valley	88.6%
Bucks County	88.8%
Luzerne-Schuylkill Counties	89.2%
Three Rivers	89.3%
South Central	90.3%
Southwest Corner	90.5%
Lancaster County	90.6%
West Central	90.9%
Tri-County	91.0%
Delaware County	91.2%
Central	91.2%
Lackawanna County	91.4%
Chester County	92.5%
Westmoreland and Fayette Counties	92.6%
Pocono Counties	93.1%
Montgomery County	94.6%
Northern Tier	95.7%

Note: Northwest WDA excluded due to confidential data.
Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

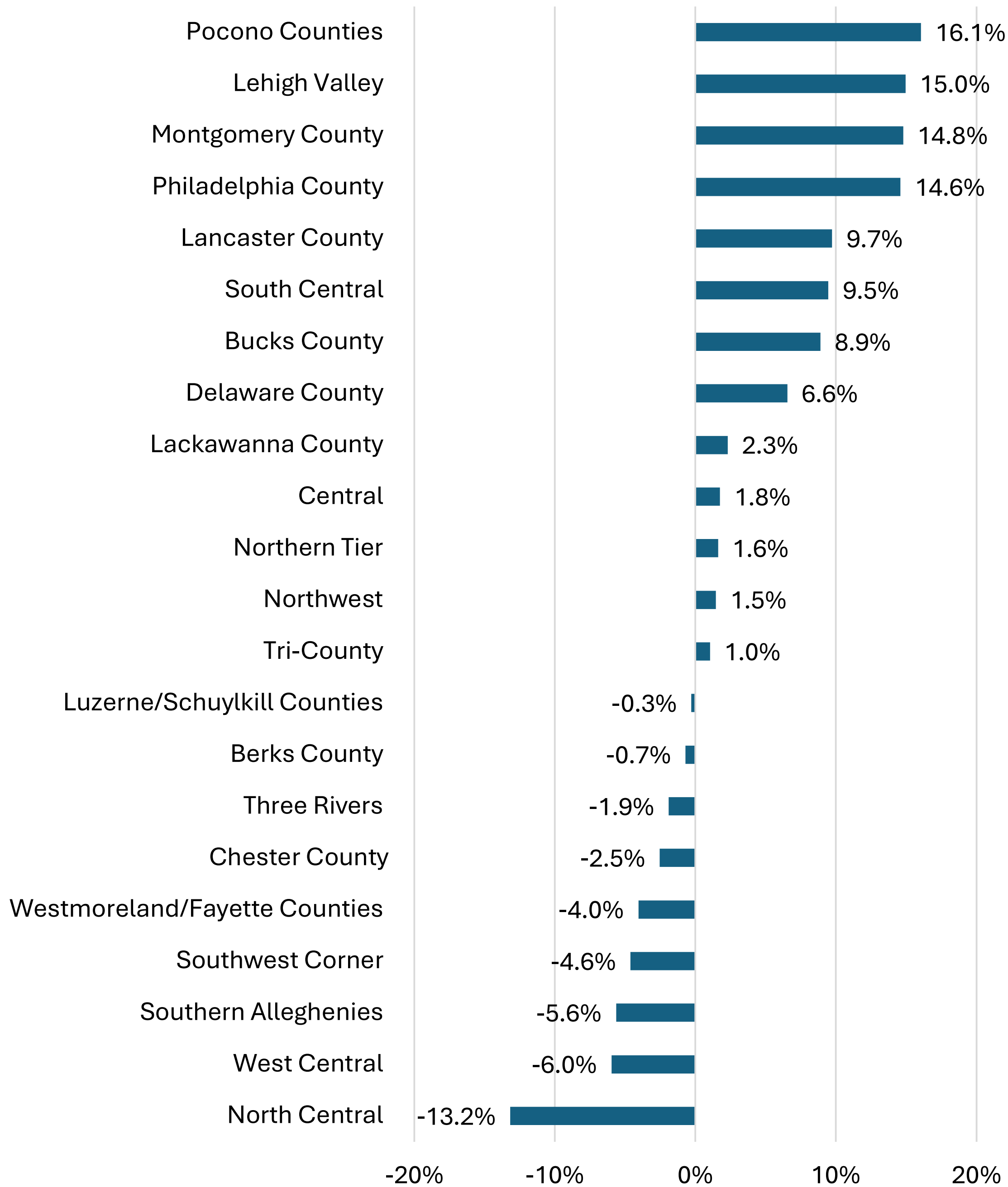
Wholesale trade employment shows similar variations across the LWDAs to manufacturing (Table A4 and Figure A2). The largest quarterly employment dip for the industry was in Pocono Counties WDA (79% of pre-pandemic employment) with 11 areas dropping below 90% of their pre-pandemic average quarterly employment. While there has been some recovery, like other industries, the variation across localities is significant. Figure A2 shows that only five areas now exceed pre-pandemic employment.

Health Care and Social Assistance

Health care and social assistance experienced more stable employment in and just after the pandemic, partly because their workers are "essential"—the wellbeing of the rest of the populations depends on these services—and also due to the continued growth of health care jobs linked with the aging of the population. More than half of the LWDAs now exceed their pre-pandemic health care employment. Even in the pandemic trough, the biggest drop in LWDA employment in health care was to 85% of pre-pandemic levels; the smallest was to 97%.

Figure 7

More Than Half of Pennsylvania's Workforce Development Areas Have Exceeded Pre-Pandemic Employment in Health Care and Social Assistance



Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data for Q4 of 2019 to Q4 of 2024 accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Table 4

Workforce Development Area	Healthcare & Social Assistance Employment in Q2 2020 as a Percent of Pre-Pandemic Employment
Bucks County	85.1%
Pocono Counties	85.3%
Chester County	86.3%
Delaware County	87.1%
Southwest Corner	88.1%
Luzerne/Schuylkill Counties	88.2%
Lehigh Valley	89.1%
Lackawanna County	89.3%
Berks County	89.4%
Westmoreland/Fayette Counties	89.5%
North Central	89.5%
Montgomery County	90.6%
Northern Tier	91.2%
Southern Alleghenies	91.5%
Tri-County	91.8%
South Central	92.7%
Central	93.1%
West Central	93.1%
Lancaster County	93.1%
Philadelphia County	93.4%
Three Rivers	95.1%
Northwest	96.5%

Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Closing Thoughts

Pennsylvania's local workforce areas (LWDAs) are not one-size-fits-all. Sectoral employment patterns vary widely—from counties experiencing growth in manufacturing and construction to others managing significant layoffs in those same sectors. In some regions, it makes sense to invest in pre-apprenticeship and apprenticeship to meet growing demand. In others, the priority is helping dislocated workers transition into new roles or industries.

Even in sectors with statewide growth—such as health care—regional dynamics matter. Decades of expansion in health care employment are now being tested by new pressures, including forthcoming cuts to Medicaid, which are expected to hit rural areas especially hard, particularly in acute care.

These local differences reinforce a clear truth: the strength of the workforce system lies in its ability to respond to the specific needs of local economies. Pennsylvania's model—grounded in local decision-making, business leadership, and regional collaboration—has delivered proven results across changing economic landscapes. The Commonwealth's efforts to expand Industry Partnerships and grow apprenticeship and pre-apprenticeship opportunities—each of these innovations driven by local employers—reflect this commitment to locally informed solutions.

As Congress debates the future of federal workforce policy, Pennsylvania's delegation has a vital role to play. They should champion a system that continues to invest in what works: flexible, regionally driven strategies that align education, employment, and economic development to the real needs of communities and employers.

Workforce Wonderings

- Pennsylvania's faster overall job growth relative to the nation has now held up for over five years, including in the past 12 months. Can the state's workforce and economic development policies sustain this positive development for the next few years?
- With the restart of the Three Mile Island nuclear plant underway and anticipated investment in data centers, construction employment in Pennsylvania seems poised for expansion. Even if overall growth stalls, will this enable our workforce system to continue expanding investment in diverse pipelines to high-paying construction careers?
- During times of economic uncertainty and unpredictable costs including of imported inputs, some businesses may freeze hiring. Will this contribute to a slowdown in job growth?
- New federal policies are reducing the immigrant labor supply in many industries and places. What is the role of the workforce system in enabling the domestic labor supply to meet employers' needs?
- Healthcare, social services, and education account for much of Pennsylvania's employment growth in recent years. Will federal funding cuts, including to Medicaid, flat-line jobs in these sectors and require local workforce systems to steer job seekers to other industries?

Appendix

Table A1.

Percent Change in Employment by Industry Indicates Pennsylvania Industries Slowing Down Relative to the United States						
Industry	One Month Pre-Pandemic to Current (Feb 2020 - June 2025)		Three Month Average Pre-Pandemic (Dec 2019 - Feb 2020) to Last Three Months		12 Month Average Pre-Pandemic (March 2019 - Feb 2020) to Last 12 Month Average	
	PA	US	PA	US	PA	US
Construction	-0.9%	9.4%	-1.0%	9.8%	-0.6%	10.1%
Manufacturing	-1.6%	0.1%	-1.8%	0.1%	-2.3%	0.0%
Trade, Trans, Util	1.8%	4.9%	1.6%	4.8%	1.6%	4.9%
Financial	1.9%	4.3%	1.8%	4.6%	1.7%	4.9%
Education and Health	7.5%	11.3%	7.4%	11.3%	6.6%	11.0%
Leisure Hospitality	0.6%	0.9%	0.4%	1.1%	-0.6%	1.7%
Prof Business Services	3.7%	5.2%	3.8%	5.3%	2.9%	5.5%
Government	-0.9%	3.7%	-0.9%	3.8%	-0.5%	3.9%
Overall	2.3%	4.9%	2.2%	5.0%	1.8%	5.0%

Note: Last three months average uses data from April 2025 to June 2025 and last 12 month average uses data from July 2025 to June 2025.
Source: Keystone Research Center analysis of Current Employment Survey data Table 5.

Table A2.

Recent Employment Growth in Key Industries has Been Slow or Negative in Both Pennsylvania and the United States						
Industry	One Month		Last Three Months		Last 12 Months	
	PA	US	PA	US	PA	US
Construction	0.6%	0.2%	0.8%	0.3%	0.6%	1.3%
Manufacturing	0.1%	-0.1%	0.0%	-0.1%	-0.2%	-0.7%
Trade, Trans, Util	0.2%	0.0%	0.1%	0.0%	0.2%	0.6%
Financial	0.3%	0.0%	0.4%	0.1%	1.0%	1.0%
Education and Health	0.4%	0.2%	0.2%	0.5%	3.1%	3.1%
Leisure Hospitality	0.2%	0.1%	0.7%	0.3%	3.5%	1.5%
Prof Business Services	-0.7%	0.0%	-0.5%	0.0%	0.8%	-0.1%
Government	-0.1%	0.3%	-0.3%	0.3%	0.6%	1.3%
Overall	0.1%	0.1%	0.1%	0.2%	1.4%	1.1%

Note: One month percent change is the latest month of available data (June 2025) compared to the month before (May 2025). Last three months indicated are the percentage change between April 2025 to June 2025. Last 12 months cover the percentage change from July 2024 to June 2025 for the last 12 months of data.
Source: Keystone Research Center analysis of Current Employment Survey data Table 5.

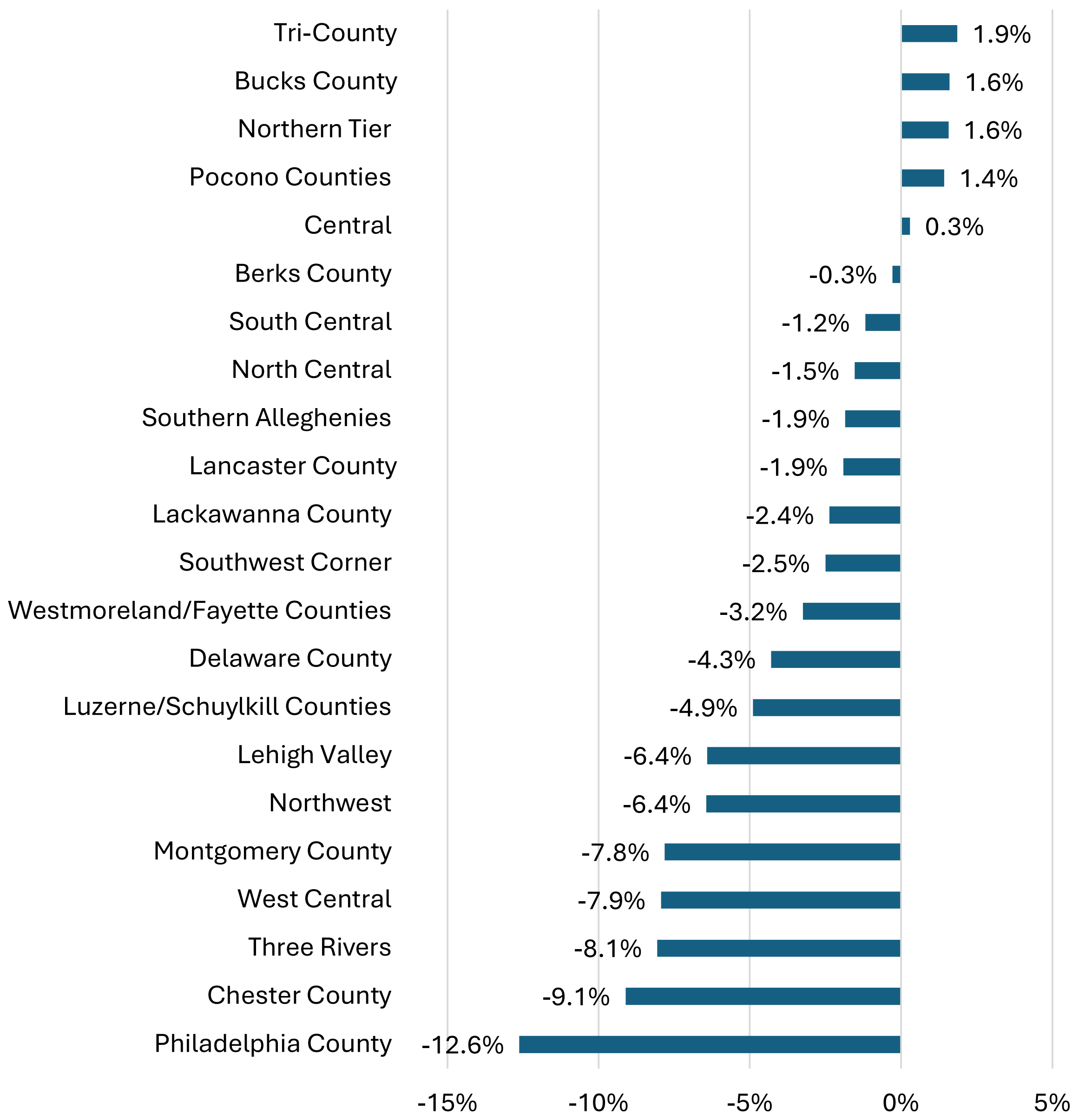
Table A3.

Workforce Development Area	Retail Employment in Q2 2020 as a Percent of Pre-Pandemic Employment
Montgomery County	72.2%
Philadelphia County	75.9%
Lehigh Valley	76.6%
Bucks County	78.1%
Delaware County	78.5%
Lackawanna County	78.8%
Three Rivers	79.1%
Berks County	80.1%
Lancaster County	80.7%
Pocono Counties	80.9%
West Central	81.3%
Chester County	81.9%
South Central	82.1%
Luzerne/Schuylkill Counties	82.5%
Southwest Corner	83.5%
Southern Alleghenies	84.1%
Central	84.9%
Northwest	84.9%
Tri-County	85.7%
Westmoreland/Fayette Counties	86.5%
Northern Tier	91.1%
North Central	91.5%

Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Figure A1: Retail Employment Pre-Pandemic to Now

Only Five Workforce Development Areas Have Recovered and Surpassed Their Pre-Pandemic Retail Employment



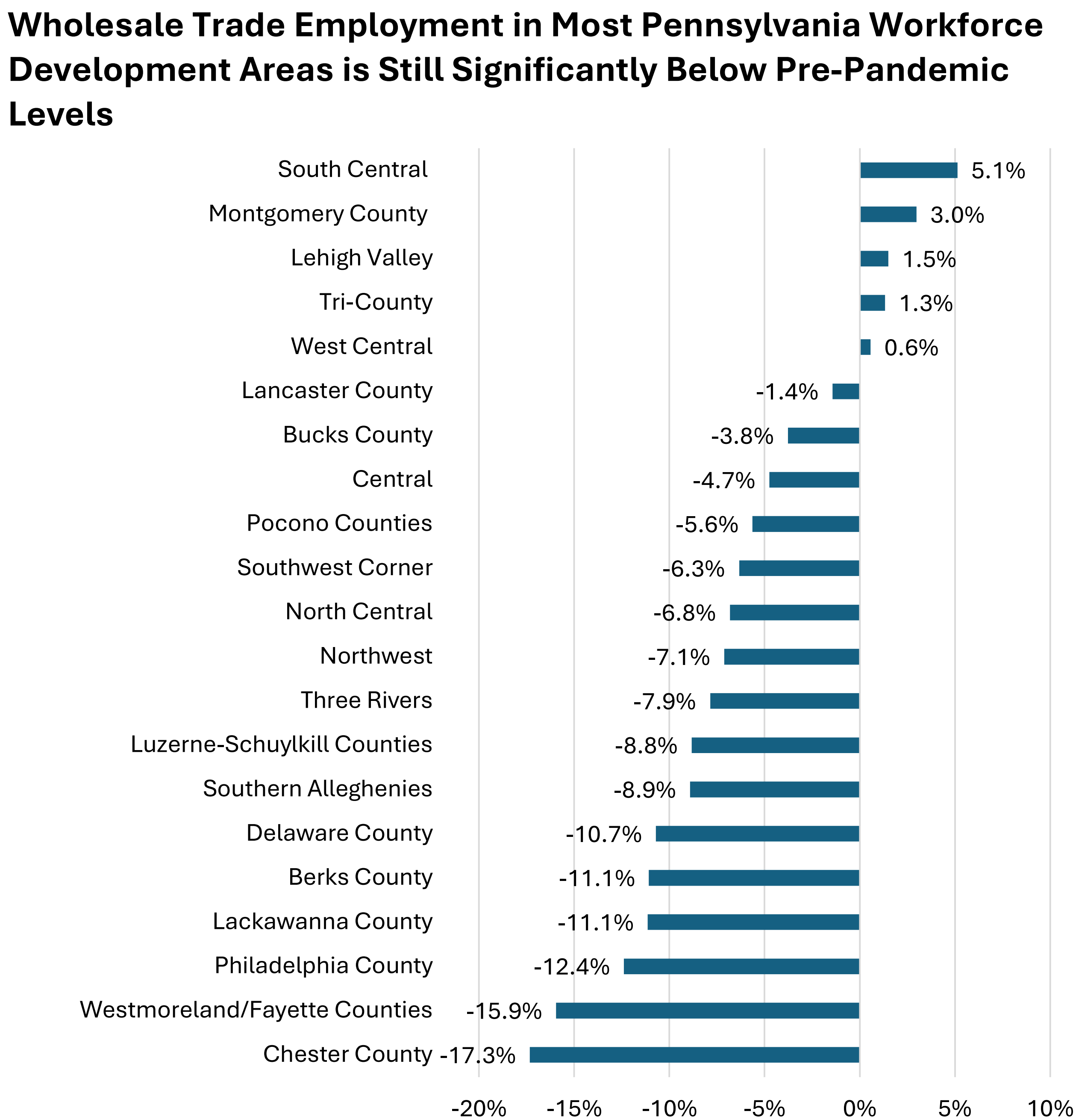
Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data for Q4 of 2019 to Q4 of 2024 accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Table A4.

Workforce Development Area	Wholesale Trade Employment in Q2 2020 as a Percent of Pre-Pandemic Employment
Pocono Counties	79.7%
Westmoreland/Fayette Counties	80.9%
Philadelphia County	83.3%
West Central	85.2%
Central	86.7%
Lackawanna County	86.8%
Berks County	87.7%
North Central	87.8%
Northwest	88.4%
Luzerne/Schuylkill Counties	88.6%
Three Rivers	89.9%
South Central	90.2%
Lancaster County	90.3%
Montgomery County	90.7%
Bucks County	91.1%
Lehigh Valley	91.6%
Southern Alleghenies	91.7%
Southwest Corner	91.7%
Delaware County	92.0%
Chester County	93.0%
Tri-County	93.5%

Note: Northern Tier WDA excluded due to confidential data.
Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com

Figure A2: Wholesale Trade Employment Pre-Pandemic to Now



Source: Keystone Research Center analysis of Quarterly Census of Employment and Wages (QCEW) data for Q4 of 2019 to Q4 of 2024 accessed from Pennsylvania Department of Labor and Industry dashboard: https://paworkstats.geosolinc.com