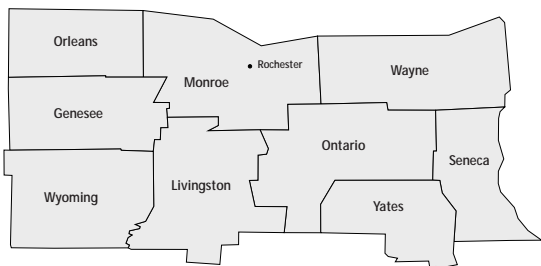


FINGER LAKES



THE FINGER LAKES REGION includes the Rochester metropolitan statistical area, which encompasses six of the nine counties in the region and represents 95 percent of the region's non-farm jobs.

Incomes and Wages

- Average nonfarm wages in 1998 were \$31,600, higher than any upstate region, and 85 percent of the statewide average. Per capita income averaged \$25,500 in 1997, compared to the \$26,400 average for all of upstate.
- From 1989-97, real total personal income grew 3.3 percent, about the same as the upstate average. Wage and salary income gained only 1.3 percent over this period.
- Despite a 35 percent increase in the number of proprietors, real total proprietors' income still declined by 4.0 percent from 1989-97. In 1997, average proprietors' income was only \$13,100, 27 percent below the 1989 average.

Employment Change, 1992-98

- Because it fared relatively better during the recession, the Finger Lakes Region led all regions in rates of job gain between 1989 and 1998. However, in 1997 and 1998, the region's job growth lagged the state. Over the last two years, job growth has been only one-half that of the state overall. Employment growth slowed down between the first half of 1998 and first half of 1999, compared to prior annual growth rates between 1996 and 1998.
- Nine of the ten industries adding the most jobs over the 1992-98 period were in services, and wholesale and retail trade. Computer and data processing services added the most jobs from 1992-98, 4,500, representing a 135 percent increase over its 1992 level. Eating and drinking places, which added about 3,800 jobs, followed. Poorly-paid service industries made up most of the remaining employment growth in the region.
- Photographic equipment and supplies, the industry in which Kodak has the bulk of its operations in the Rochester area, topped the list of industries losing employment 1992-98. Photographic equipment employment declined by 11,500 over the period. Total wage impacts from manufacturing decline may only be felt in the region once severance pay compensation drops off.

Finger Lakes Data Bank

Share of State Population, 1998	6.5%
Wage and Salary Job Growth, 1989 - 98	4.1%
Unemployment Rate, 1998	4.1%
Population, 1998	1,182,077
Insured Employment, 1998	549,131
Per Capita Income, 1997	\$25,506

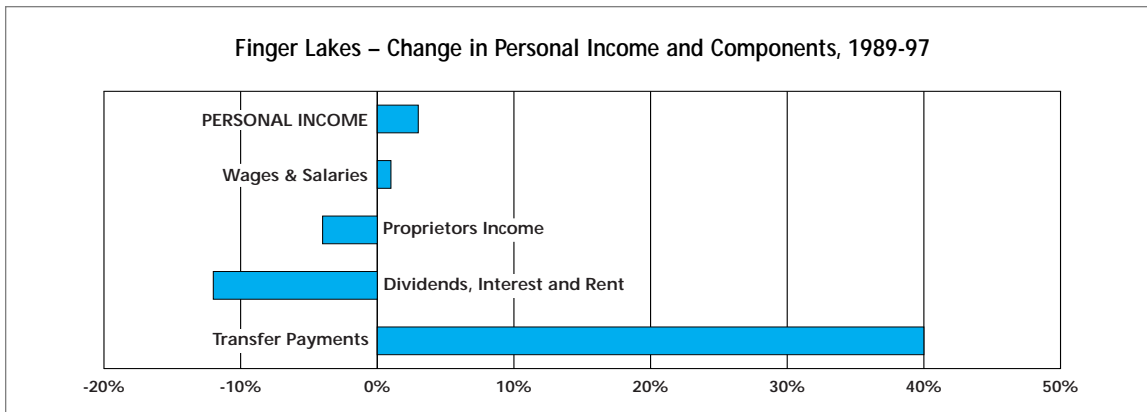
Job Mix, 1998

	Finger Lakes
Construction	3%
Manufacturing	23%
Transportation	3%
Wholesale Trade	4%
Retail Trade	17%
FIRE	4%
Services	28%
Government	15%
Other	2%
TOTAL	100%

Finger Lakes Region's Ten Private Industries with Largest Growth, 1992-98

SIC	SECTOR	EMPLOYMENT 1998	EMPLOYMENT CHANGE 1992-98	RATE OF EMPLOYMENT CHANGE	AVERAGE WAGE 1998
	TOTAL PRIVATE	465,702	20,398	4.6%	\$31,635
737	Computer and data processing services	7,910	4,540	134.7%	\$53,825
581	Eating and drinking places	31,897	3,767	13.4%	\$9,953
384	Medical instruments and supplies	2,108	1,457	223.8%	\$50,177
736	Personnel supply services	12,309	1,440	13.2%	\$18,346
808	Home health care services	5,411	1,421	35.6%	\$18,286
836	Residential care	4,572	1,369	42.7%	\$17,631
500	Wholesale trade, durable and nondurable	22,412	1,246	5.9%	\$40,487
541	Grocery stores	18,724	1,242	7.1%	\$15,293
805	Nursing and personal care facilities	9,488	1,198	14.5%	\$19,627
860	Membership organizations	6,114	989	19.30%	\$14,887
	TOTAL, these ten private growing industries	120,945	18,669	18.3%	\$28,881

NEW YORK'S REGIONS IN THE 1990s



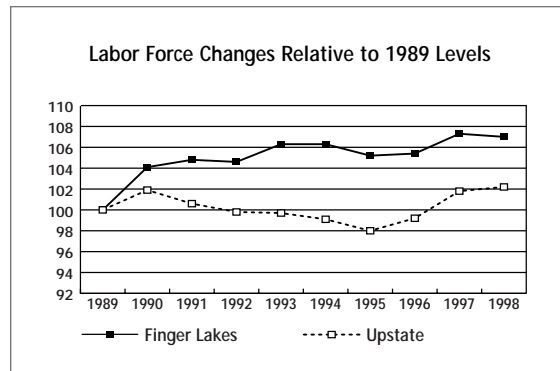
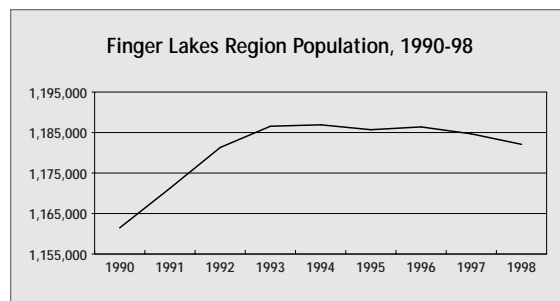
- Depository institutions lost 3,300 jobs, over one-third of its 1992 level, through industry consolidation. Apparel manufacturing followed the decline, dropping about 1,200 jobs, 44 percent of the region's 1992 total in this industry.
- Seneca County experienced employment declines, including the loss of 500 civilian jobs, due to the closing of the Seneca army depot early in the decade.

Job Change Impact on Wages

- The 10 growing industries had an average wage in 1998 of \$28,900, 9 percent less than the overall average private sector wage for the Finger Lakes.
- Declining industries had average wages of \$51,900, 64 percent higher than the overall average in 1998.
- Real average wages have remained stable over 1989-98.

Population, Labor Force, and Unemployment Change

- Since 1993, the Finger Lakes Region's population has edged downward slightly and in 1998 was 0.4 percent below its 1993 level.
- For the first six months of 1999, the unemployment rate averaged 4.6 percent, approximately the same as the first half of 1998.



Finger Lakes Region's Ten Private Industries with Greatest Decline, 1992-98

SIC	SECTOR	EMPLOYMENT 1998	EMPLOYMENT CHANGE 1992-98	RATE OF EMPLOYMENT CHANGE	AVERAGE WAGE 1998
	TOTAL PRIVATE	465,702	20,398	4.6%	\$31,635
386	Photographic equipment and supplies	44,195	-11,454	-20.6%	\$63,926
600	Depository institutions	6,344	-3,284	-34.1%	\$35,127
230	Apparel and other textile products	1,473	-1,177	-44.4%	\$26,027
273	Books	688	-1,045	-60.3%	\$49,144
490	Electric, gas, and sanitary services	2,573	-980	-27.6%	\$59,058
394	Toys and sporting goods	521	-878	-62.8%	\$28,243
371	Motor vehicles and equipment	7,330	-748	-9.3%	\$51,687
591	Drug stores and proprietary stores	2,499	-650	-20.6%	\$19,695
385	Ophthalmic goods	3,671	-642	-14.9%	\$47,877
260	Paper and allied products	2,508	-625	-19.9%	\$33,999
	TOTAL, these ten private declining industries	71,802	-21,483	-23.0%	\$51,933