

Chapter 3 - Regional Economic Profiles

New York is made up of ten regional economies, each with unique economic characteristics. Upstate regions have long been more dependent on manufacturing than the downstate region for employment and income. The downstate region is more diverse, but has been extraordinarily dependent on the financial sector for wages and jobs. The upstate region is more like the U. S. economy than the downstate region, thus, economic cycles affect these two areas differently.

The State has experienced large job losses in the current recession. Although New York City accounts for a large portion of the job loss in the current recession, as indicated earlier, upstate areas have not been immune. The upstate regions have lost over 50,000 jobs many of which were high wage jobs. Low unemployment rates in the upstate region are largely a result of the declining share of working age population rather than an indication of a healthy economy. Education, social services and the health sector have played an increasingly important role in sustaining the level of employment in many areas of New York State.

The longer-term economic review suggests that the state is comprised of super economic regions which reflect a pattern of economic activity that is unbalanced and unequal across and within regions in the state. The Western and Northern regions appear to be worse off than those on the Eastern part of the State including Long Island. New York City, the third super region, is the most dynamic and volatile adding jobs and income but also suffering large job losses during the current downturn.

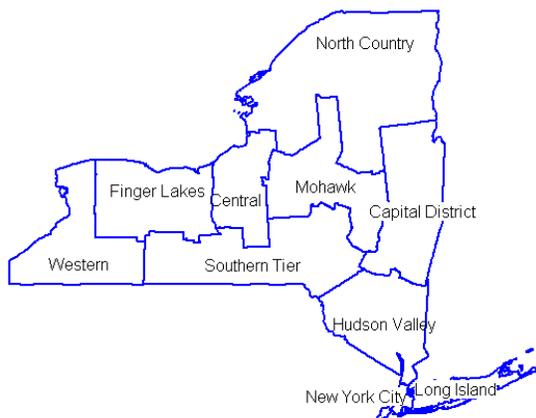
In the 1990s, the state's stagnant economy also contributed to an increase in the poor and near poor. Although there is a concentration of poverty in New York City, every region has experienced an increase in the number of individuals who make less than 200 percent of the poverty line. (See Chapter 2 for an explanation on the reason for using this definition of poverty.) More recent data reveal that wages and salaries have remained flat in the 2000—2001 period. Proprietors and dividend income have also declined. The only component of personal income that posted an increase was transfer payments.

Guide to the Regional Profiles

The regional profiles that follow provide area specific demographic, employment, income and industry data for each of the 10 labor market regions of the state. The main value of these profiles is that they pull together data from diverse sources at the regional level, allowing analysis of regional economic conditions and trends for specific regions relative to statewide averages. These profiles make extensive use of information on population and income from the decennial 2000 Census. The employment and industry wage data analysis uses ES 202 data collected by the New York State Department of Labor. Unemployment data for the first half of 2001-2003 are from the state Local Area Unemployment Statistics Unit (LAUS). The personal income analysis is based on data from the Bureau of Economic Analysis (BEA). A detailed list of sources is provided in the data source section. The regional profiles contain analyses of demographic, employment, and income data and discuss economic prospects. Each profile identifies major industry clusters and employers in the region.

These profiles analyze economic and demographic trends since 1990, including the 2000-2002 time period. The analysis of the industrial employment gains and losses uses data based on the new North American Industry Classification System (NAICS); which was created by the NAFTA trade agreement. This new classification system is intended to be a structure for economic statistics that is common to U.S., Canada, and Mexico. The NAICS nomenclature divides the economy into two major parts (goods producing and service producing) that are organized into categories based on similar production processes.

New York State



New York City continues to be the most dynamic, and volatile experiencing substantial population, employment and income growth in the nineties, but also severe job losses in the current recession. Eastern New York is less dynamic, but continues to grow. In contrast, Western and Northern New York is stalled—experiencing both population and employment declines.

New York is experiencing a gradually improving economy. However, the effects of the downturn on Wall Street, the Dot-Com bust, 9/11, manufacturing erosion, and the recession linger, making it unlikely that the state economy can expand fast enough to alleviate the burden of joblessness, low wages and regional distress.

New York’s economic performance in the nineties did not create the conditions necessary for either an equitable or a balanced economic future. The state experienced job growth, but most of it was in low paying jobs. The state continued to lose jobs that paid well. And, the disparity between the types of jobs being created and those being lost was matched by the uneven economic performance regionally. These trends were compounded by the loss of a significant portion of the state’s manufacturing base in regions where it was the main source of decent wages and local income. In turn, the absence of job opportunities and economic stagnation in many upstate areas contributed to the thinning of the young work force population.

The pattern of economic and population growth in the state suggest, that the state is made up of three broad regional economies: New York City; Eastern New York (the Capital District, Hudson Valley and Long Island); and, Western and Northern New York (North Country, Mohawk, Central New York, the Southern Tier, the Finger Lakes, and Western New York.)

NEW YORK STATE DATA BANK		
	NYS	US
Population		
2002	19,157,532	288,317,559
% Change 1990-2002	6.5	15.9
Employment		
2002 level	8,116,000	130,376,000
% Change 2000-2002	-2.3	-1.1
2000 level	8,308,000	131,785,000
% Change 1992-2000	11.2	20.9
Unemployment		
2003 1st half (#)	584,900	8,771,571
2003 1st half (rate)	6.3	6.0
%Pt Change 2001-2003 1st half	1.8	1.7
2000 (rate)	4.8	4.0
%Pt Change 1990-2000	-0.8	-1.6
Labor Force Participation		
2000 (rate)	61.0	63.7
%Pt Change 1990-2000	-2.5	-1.2
Per Capita Income (2002\$)		
2001	36,449	30,897
% Change 1990-2001	17.3	18.3
Poverty Rate		
2000	14.6	12.4
%Pt Change 1990-2000	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level,		
2000	30.5	29.6
%Pt Change 1990-2000	2.7	-1.3
Median Family Income		
	2000	% Change
	(2002\$)	1990-2000
USA	54,011	9.5
New York State	55,786	0.2

Income

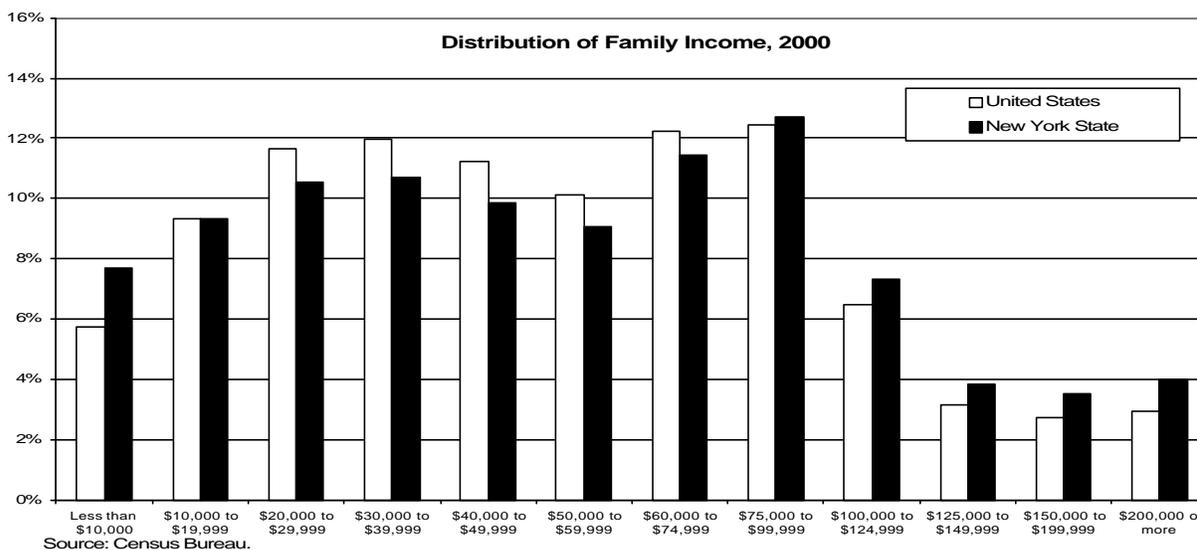
New York State - Change in Personal Income and Components, Selected Years						
(in billions of 2002 dollars)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	402.8	242.3	32.1	69.3	57.7	-16.9
1990	560.0	331.3	43.6	113.8	76.0	-18.7
2000	695.3	420.1	64.9	127.2	104.5	-29.4
2001	695.5	417.7	64.7	126.8	108.3	-30.4
1980-1990						
Change	157.2	89.0	11.5	44.6	18.3	-1.8
Ann Avg % Change	3.3%	3.2%	3.1%	5.1%	2.8%	1.0%
1990-2000						
Change	135.3	88.8	21.2	13.4	28.5	-10.6
Ann Avg % Change	2.2%	2.4%	4.0%	1.1%	3.2%	4.6%
2000-2001						
Change	0.2	-2.4	-0.2	-0.5	3.9	-1.1
Ann Avg % Change	0.0%	-0.6%	-0.3%	-0.4%	3.7%	3.6%

Source: BEA. Deflator applied by Fiscal Policy Institute.

- During the nineties, the poverty rate increased across New York State. During the decade the share of the poor and near poor in the population increased to over 30%. This occurred across most regions of the state.
- Working New Yorkers experienced a downward trend in median hourly wage. In 2001, median wages of New Yorkers grew by 3.4% compared to 1.5% this year.
- The state continues to lose high wage jobs. The state lost 107,000 manufacturing jobs or 39% of the total jobs lost in the state during the current recession. The loss of these high-wage manufacturing jobs was compounded by job

losses in finance and information technology industries.

- Over the 1990-2000 decade, growth in real wages and salaries was not uniform either across regions or within regions in the state. Most counties experienced a total 10 year growth rate of less than 12% in wages and salaries. In this period, the adjusted median income for New Yorkers increased by only two-tenths of one percent.



Employment

New York State: 20 Industries with the Largest Employment Gains 2000-2002						
NAICS	Industry	Employment		Change 2000-2002		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	8,307,907	8,116,190	-191,716	-2.3%	\$45,888
92	Government	1,389,899	1,413,588	23,689	1.7%	\$42,577
611	Educational Services	228,547	247,320	18,773	8.2%	\$35,810
624	Social Assistance	234,953	252,289	17,335	7.4%	\$20,870
722	Food Services and Drinking Places	414,209	426,340	12,132	2.9%	\$15,325
623	Nursing and Residential Care Facilities	203,039	214,080	11,041	5.4%	\$26,730
621	Ambulatory Health Care Services	305,298	314,731	9,434	3.1%	\$41,620
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	127,688	133,039	5,351	4.2%	\$30,027
622	Hospitals	322,626	326,848	4,222	1.3%	\$42,556
713	Amusement, Gambling, and Recreation Industries	59,030	62,480	3,449	5.8%	\$18,394
551	Management of Companies and Enterprises	113,674	116,162	2,488	2.2%	\$101,330
444	Building Material and Garden Equipment and Supplies Dealers	58,278	60,118	1,840	3.2%	\$28,077
425	Wholesale Electronic Markets and Agents and Brokers	24,532	26,350	1,818	7.4%	\$59,450
493	Warehousing and Storage	15,043	16,321	1,278	8.5%	\$36,530
221	Utilities	41,014	42,012	999	2.4%	\$77,778
237	Heavy and Civil Engineering Construction	27,382	28,103	721	2.6%	\$57,987
112	Animal Production	6,699	7,345	646	9.6%	\$23,370
441	Motor Vehicle and Parts Dealers	77,922	78,448	526	0.7%	\$39,795
525	Funds, Trusts, and Other Financial Vehicles	9,070	9,584	514	5.7%	\$84,857
312	Beverage and Tobacco Product Manufacturing	7,018	7,508	490	7.0%	\$65,032
515	Broadcasting (except Internet)	38,308	38,780	473	1.2%	\$78,107
	Total of above industries	3,704,228	3,821,446	117,218	3.2%	\$38,430

Source: ES 202. NYS DOL.

- New Yorkers and their families have borne a large share of the burden in the current recession. At a time when the nation's job base shrunk by 2%,--between March 2001 and June 2003—New York's job base decreased by 3.2%. New York lost 279,000 jobs during this period, more than any other state. This figure does not include those who have dropped out of the workforce entirely or are underemployed in part-time jobs.
- While the pace of aggregate job loss has slowed, those seeking unemployment benefits rose through the first 27 weeks of 2003, about 1.8% above the same period in 2002.
- New York's unemployment benefit exhaustion rate at 57%--compared to 42.4% nationally—was higher than the 42% exhaustion rate reached in New York in the third year of the last recession.
- New York City's economic downturn was a major factor influencing the state economy and the poor fiscal conditions of both New York City and the state. New York City lost 240,000 jobs since the December 2000 peak of New York employment. This represents 71% of the statewide job loss.
- Over the 1990-2000 decade, employment growth did not occur uniformly within and across regions in the State. Growth was concentrated in the downstate region. Western New York had one of the lowest employment growth rates. Over this period, declining unemployment rates did not reduce the ranks of the poor and near poor, suggesting that many of these people had access to only low paying jobs.

New York State: 20 Industries with the Largest Employment Losses 2000-2002						
NAICS	Industry	Employment		Change 2000-2002		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	8,307,907	8,116,190	-191,716	-2.3%	\$45,888
541	Professional, Scientific, and Technical Services	530,338	492,342	-37,996	-7.2%	\$68,650
561	Administrative and Support Services	407,623	374,599	-33,024	-8.1%	\$29,903
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	208,087	183,303	-24,784	-11.9%	\$217,112
423	Merchant Wholesalers, Durable Goods	186,670	166,007	-20,663	-11.1%	\$53,555
315	Apparel Manufacturing	65,064	45,545	-19,520	-30.0%	\$33,310
332	Fabricated Metal Product Manufacturing	69,037	60,041	-8,996	-13.0%	\$39,515
424	Merchant Wholesalers, Nondurable Goods	144,775	136,336	-8,440	-5.8%	\$54,898
333	Machinery Manufacturing	68,667	60,243	-8,424	-12.3%	\$51,260
339	Miscellaneous Manufacturing	54,857	46,933	-7,924	-14.4%	\$37,463
481	Air Transportation	37,449	29,583	-7,867	-21.0%	\$58,803
518	Internet Service Providers, Web Search Portals, and Data Processing Services	34,714	27,367	-7,347	-21.2%	\$61,200
511	Publishing Industries (except Internet)	93,902	86,744	-7,158	-7.6%	\$68,714
512	Motion Picture and Sound Recording Industries	46,812	40,045	-6,767	-14.5%	\$67,316
325	Chemical Manufacturing	66,746	60,277	-6,469	-9.7%	\$57,610
522	Credit Intermediation and Related Activities	182,904	176,436	-6,468	-3.5%	\$78,718
238	Specialty Trade Contractors	213,648	207,286	-6,362	-3.0%	\$46,470
334	Computer and Electronic Product Manufacturing	86,593	80,425	-6,168	-7.1%	\$65,796
492	Couriers and Messengers	43,690	37,815	-5,874	-13.4%	\$33,254
323	Printing and Related Support Activities	43,633	38,191	-5,442	-12.5%	\$41,146
326	Plastics and Rubber Products Manufacturing	33,103	28,218	-4,884	-14.8%	\$36,715
	Total of above industries	2,618,311	2,377,735	-240,576	-9.2%	\$66,505

Source: ES 202. NYS DOL.

Upstate

Although the job loss has been concentrated in New York City, every region has had significant job losses upstate, particularly Binghamton and Rochester. Job losses in upstate regions are of special concern because many of them are manufacturing jobs that cannot easily be replaced. With the exception of the Hudson Valley, every region of the state experienced job losses between the fourth quarters in 2000 and 2002. Since the first half of 2001, the upstate region lost 56,000 jobs.

Low unemployment rates in the upstate region are explained by dramatic declines in the working age population. Most significant is the loss of the 20-34 aged cohort. With the exception of New York City and a few sparsely populated counties, every county and region in the state lost this cohort at a significantly higher rate than the nation—in some cases at a rate over 150% of the national average.

Between 1990-2000, migration increased from center cities and incorporated localities to suburbs. This has added to the disparity between center cities and suburbs and has worsened suburban and rural sprawl.

Capital District

The Capital District includes four of the six counties in the Albany-Schenectady-Troy metropolitan statistical area (MSA) and the two-county Glen's Falls MSA. Two adjacent counties, Montgomery and Schoharie are also part of the Albany-Schenectady-Troy MSA, but are included in the Labor Department's Mohawk Valley Region.



Demographics

- The Capital District's population grew an estimated 36,836 from 1990 to 2002, a 3.7% gain compared to 6.5% growth statewide. The region comprises 5.4% percent of the total state population and is the 6th largest region in the state.
- From 1990 to 2000, the Capital District experienced a net loss of 54,117 persons aged 20-34, or 21.6% of the 20-34 young adult cohort. The region also experienced population growth of 1.9% in the 16-64 age cohort compared to 4.4% growth statewide.

CAPITAL DISTRICT DATA BANK			
	CAP	NYS	US
Population			
2002 Estimate	1,040,898	-	-
% Change 1990-2002	3.7	6.5	15.9
Employment			
2002 Level	492,685	8,116,000	130,376,000
% Change 2000-2002	0.0	-2.3	-1.1
2000 Level	492,492	8,308,000	131,785,000
% Change 1992-2000	8.7	11.2	20.9
Unemployment			
2003 1st Half (#)	18,249	584,900	8,771,571
2003 1st Half (rate)	4.0	6.3	6.0
%Pt Change 2001-2003 1st Half	0.7	1.8	1.7
2000 (rate)	3.6	4.8	4.0
%Pt Change 1990-2000	-0.3	-0.8	-1.6
Labor Force Participation			
2000 (rate)	65.0	61.0	63.7
%Pt Change 1990-2000	-0.2	-2.5	-1.2
Per Capita Income (2002\$)			
2001	28,988	36,449	30,897
% Change 1990-2001	17.2	17.3	18.3
Poverty Rate			
2000	9.4	14.6	12.4
%Pt Change 1990-2000	0.7	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	24.4	30.5	29.6
%Pt Change 1990-2000	1.2	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Albany	61,218	4.9	
Columbia	53,267	8.2	
Greene	47,328	3.7	
Rensselaer	57,052	4.7	
Saratoga	62,825	7.0	
Schenectady	57,922	6.6	
Warren	50,500	1.6	
Washington	46,946	3.2	

Employment and Labor Force Characteristics

Capital District: 10 Industries with the Largest Employment Gains 2000-2002						
NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	492,492	492,685	193	0.0%	\$35,315
92	Government	117,601	119,549	1,948	1.7%	\$41,190
722	Food Services and Drinking Places	26,338	28,094	1,756	6.7%	\$12,091
623	Nursing and Residential Care Facilities	15,548	16,754	1,207	7.8%	\$22,566
624	Social Assistance	10,237	11,224	987	9.6%	\$19,796
611	Educational Services	12,257	13,119	862	7.0%	\$39,190
621	Ambulatory Health Care Services	17,473	17,969	496	2.8%	\$41,281
493	Warehousing and Storage	1,340	1,815	475	35.5%	\$32,382
425	Wholesale Electronic Markets and Agents and Brokers	880	1,235	355	40.3%	\$49,981
622	Hospitals	18,728	19,079	351	1.9%	\$30,311
713	Amusement, Gambling, and Recreation Industries	4,232	4,547	315	7.4%	\$17,192
	Total of above industries	224,632	233,385	8,752	3.9%	\$33,837

Source: NYS DOL.

- The Capital District region's stagnant employment growth, only 193 jobs between 2000 and 2002, reflects the slow state of the New York economy, which suffered a 2.3% decline in total insured employment over the two year period. Between 1990 and 2000 the Capital District's employment grew 8.6% compared to 11.3% growth statewide.
- Industries in the government, educational services, health care and social services sectors were among the best performers during the period between 2000 and 2002. While the food services and drinking places industry gained almost 1,800 jobs (6.7%), average wages in the industry (\$12,091) represent 34% of the average overall annual wage in the Capital District of \$35,315.
- Declining industries in the Capital District were concentrated in manufacturing and services with merchant wholesalers, nondurable goods, plastics and rubber products manufacturing and paper manufacturing experiencing the largest employment losses in the region. Nine out of the ten industries with the largest employment losses in the region had higher average wages than the Capital District's 2002 average annual wage of \$35,315.
- The region's unemployment rate rose 0.7 percentage points to 4.0% in 2003, less than the 1.8 percentage point increase experienced by the state overall. The labor force participation rate declined slightly over the decade to 65% in 2000.

Capital District: 10 Industries with the Largest Employment Losses 2000-2002						
NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	492,492	492,685	193	0.0%	\$35,315
424	Merchant Wholesalers, Nondurable Goods	7,180	6,427	-753	-10.5%	\$40,002
326	Plastics and Rubber Products Manufacturing	2,501	1,755	-746	-29.8%	\$36,579
322	Paper Manufacturing	4,122	3,440	-682	-16.6%	\$52,166
561	Administrative and Support Services	18,957	18,395	-562	-3.0%	\$22,081
492	Couriers and Messengers	2,372	1,820	-552	-23.3%	\$31,011
333	Machinery Manufacturing	5,680	5,137	-543	-9.6%	\$66,970
541	Professional, Scientific, and Technical Services	26,713	26,177	-536	-2.0%	\$54,883
484	Truck Transportation	3,445	3,043	-402	-11.7%	\$36,473
332	Fabricated Metal Product Manufacturing	3,036	2,662	-373	-12.3%	\$41,751
323	Printing and Related Support Activities	2,750	2,381	-368	-13.4%	\$36,674
	Total of above industries	76,755	71,237	-5,518	-7.2%	\$42,864

Source: NYS DOL.

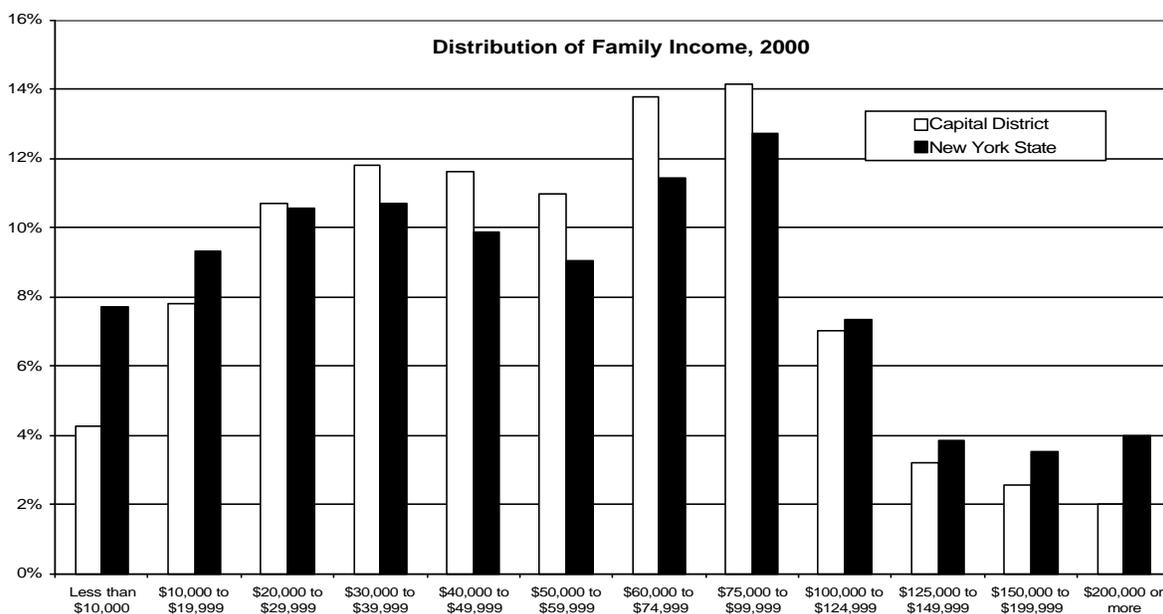
Income and Poverty

Capital District - Change in Personal Income and Components, Selected Years (in billions of 2002 dollars)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	19.2	11.3	1.1	3.2	2.9	-0.4
1990	26.7	15.7	1.5	5.4	3.5	-0.2
2000	32.1	18.3	2.1	6.3	4.8	-0.2
2001	32.5	18.6	2.1	6.3	5.0	-0.3
1980-1990						
Change	7.5	4.4	0.4	2.2	0.6	0.1
Ann Avg % Change	3.3%	3.3%	2.9%	5.4%	2.0%	-5.0%
1990-2000						
Change	5.4	2.6	0.6	1.0	1.3	0.0
Ann Avg % Change	1.9%	1.6%	3.5%	1.7%	3.3%	0.3%
2000-2001						
Change	0.4	0.3	-0.1	0.0	0.2	0.0
Ann Avg % Change	1.4%	1.8%	-3.2%	-0.5%	4.5%	14.9%

Source: BEA. Deflator applied by Fiscal Policy Institute.

• Four out of eight counties in the Capital District have median family incomes below the median family income for the state. Saratoga County experienced the largest dollar increase in real median family income (\$4,103) while neighboring Warren County experienced the lowest (\$802).

- Per capita income in the Capital District rose 17.2% to \$28,988 in the period between 1990 and 2001. The increase was slightly below the New York State average increase in per capita income of 17.3%.
- In the last decade, the poverty rate in the Capital District rose 0.7 percentage points to 9.4% in 2000, remaining below the state's 14.6% poverty rate. During the same period the share of the population earning less than 200% of the poverty level grew 1.2 percentage points to 24.4% of individuals. The region ranks 8th (out of 10) in both its percent of people living below the poverty level and its share living below 200% of poverty.
- Family income in the Capital District is more evenly distributed than is generally true in New York State, since more families fall into middle income brackets (\$30,000 to \$75,000) and fewer into the highest and lowest income brackets.
- From 1990 to 2000, real total personal income increased \$5.4 billion. Between 1990 and 2000, the proprietors income component of personal income grew an average of 3.5% annually from \$1.5 billion to \$2.1 billion. During the 1994-2000 expansion period the region witnessed a 6.2% annual increase in proprietors income.



Prospects

The Capital District is home to the state government and a number leading universities. Industry clusters in the region include: business services, financial services, tourism, distribution, and communications and media services.

The presence of universities in the Capital District enables the region to attract firms that cluster to take advantage of the positive externalities from academic research and the high concentration of skilled workers. According to the Capital District Regional Planning Commission, the Capital District is home to 14 colleges and universities with a total enrollment of over 65,000 students.

The largest private university in the region, Rensselaer Polytechnic Institute, is a major economic engine for the area—directly in terms of employment and purchasing, and indirectly via its efforts and ability to foster innovative technologies for existing and nascent high-tech firms. Between 2003 and 2006 the university plans on spending an average of over \$65 million a year on construction alone.

According to NYSDOL labor market analysts for the Capital Region, the Capital District is experiencing promising growth in the professional, scientific, and technical services sector. One of the most notable developments revolves around the decision by SEMATECH (a consortium of 12 international semiconductor companies) to locate a research and development facility in Albany County, bringing 250 scientists and technicians to the region.

This is a significant development for a region that has been dependent on government employment. A similar effort in Austin, Texas, was commercially successful. However, it remains to be seen whether or not the R&D activities from the SEMATECH initiative spill over into significant commercial operations.

In a related development, high-tech manufacturer Tokyo Electron Ltd. (TEL) is opening a research and development center in conjunction with SEMATECH at the State University of New York at Albany's Center of Excellence in Nanoelectronics, adding an additional 300 workers to the region. In addition to these, new investments are being made in biotechnology and medical sciences including: a biotechnology center at RPI, a cancer research center at SUNY Albany, a R&D medical facility at Albany Medical Center, and a neuroscience center

at General Electric. However General Electric continues to downsize in the region.

According to an analysis of the economic impact of the Hudson River cleanup by Klios, Inc., \$88.5 million dollars of the \$460 million remediation project will be spent on payroll in Washington and Saratoga counties, creating over 3,500 jobs during the life of the project (5 years plus planning and monitoring). The cleanup of the nation's largest Superfund site will also enhance the region's prospects for tourism and fishing/boating once the river is restored to its full capacity.

The major threat to the employment base is the poor condition of the state budget which may lead to layoffs in the region.

Top Employers in the Capital District, 2002
Albany Medical Center Hospital
Albany Medical College
Capital Area Community Health Plan
City of Albany
City School District of Albany
County of Albany
County of Rensselaer
County of Schenectady
Ellis Hospital
Empire Blue Cross & Blue Shield
Fleet National Bank (FNB)
General Electric Co
Glens Falls Hospital Inc
Keybank National Association
Knowles Atomic Power Laboratory
NYS Legislative Branch
Price Chopper Operating Co Inc
Rensselaer Polytechnic Institute
Schenectady City
Shenendehowa Central School
St Peters Hospital
State Of New York - State Agencies
State University of NY at Albany
Stewarts Ice Cream Co Inc
Super Shop N Save
Verizon Communications
Wal-Mart Associates Inc

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

Central New York

The Central New York Region is composed of four counties, three of which (Oswego, Onondaga and Cayuga) are included in the Syracuse MSA. The fourth county in the region, Cortland, is not included in the Syracuse MSA. Madison County, the fourth county in the Syracuse MSA is included in the Mohawk Valley Region



Demographics

- Between 1990 and 2002, Central New York's population declined by nearly 8,000 persons or 1.1% compared to a 6.5% increase statewide and nearly 16% increase for the US.
- From 1990 to 2000, the region's working age population (16-64 years) decreased by 2.6% or 12,255 persons compared to a 4.4% and 13.4% increase at the state and national levels respectively. A larger decline occurred among the younger members of the workforce (ages 20-34). The region lost 47,327 persons from this cohort, a decrease of over 25% and nearly twice the statewide rate and over four times the US rate.

CENTRAL NEW YORK DATA BANK			
	CEN	NYS	US
Population			
2002 Estimate	714,084	-	-
% Change 1990-2002	-1.1	6.5	15.9
Employment			
2002 Level	324,810	8,116,000	130,376,000
% Change 2000-2002	-1.8	-2.3	-1.1
2000 Level	330,771	8,308,000	131,785,000
% Change 1992-2000	3.0	11.2	20.9
Unemployment			
2003 1st Half (#)	20,679	584,900	8,771,571
2003 1st Half (rate)	5.7	6.3	6.0
%Pt Change 2001-2003 1st Half	1.1	1.8	1.7
2000 (rate)	4.5	4.8	4.0
%Pt Change 1990-2000	-0.4	-0.8	-1.6
Labor Force Participation			
2000 (rate)	64.2	61.0	63.7
%Pt Change 1990-2000	-0.5	-2.5	-1.2
Per Capita Income (2002\$)			
2001	24,629	36,449	30,897
% Change 1990-2001	11.9	17.3	18.3
Poverty Rate			
2000	12.3	14.6	12.4
%Pt Change 1990-2000	0.0	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	29.4	30.5	29.6
%Pt Change 1990-2000	-0.5	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Cayuga	48,536	5.9	
Cortland	45,547	0.0	
Onondaga	55,986	3.0	
Oswego	47,292	-0.3	

Employment and Labor Force Characteristics

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	330,773	324,810	-5,963	-1.8%	\$33,526
92	Government	57,572	58,744	1,172	2.0%	\$33,676
624	Social Assistance	6,007	7,076	1,069	17.8%	\$17,952
621	Ambulatory Health Care Services	12,221	12,740	519	4.2%	\$43,469
221	Utilities	4,802	5,286	484	10.1%	\$79,068
722	Food Services and Drinking Places	19,827	20,300	473	2.4%	\$11,045
493	Warehousing and Storage	541	1,013	472	87.3%	\$26,471
541	Professional, Scientific, and Technical Services	12,912	13,344	432	3.3%	\$43,823
611	Educational Services	8,731	9,131	401	4.6%	\$33,282
425	Wholesale Electronic Markets and Agents and Brokers	1,196	1,485	289	24.2%	\$37,329
713	Amusement, Gambling, and Recreation Industries	2,589	2,848	259	10.0%	\$12,225
	Total of above industries	126,396	131,968	5,572	4.4%	\$32,637

Source: NYS DOL.

- From 2000-2002, the region lost nearly 6,000 jobs or 1.8% compared to a decrease of 2.3% statewide. Between 1992 and 2000, the Central Region's employment base grew by 3.0% compared to 11.3% at the state level.
- In terms of job gains, the best performing sectors were government and social services, where wages were below that of the average for the region.
- The main job losses were in manufacturing, where wages were significantly above the average wage for the region. Eight of the job-losing industries paid wages that were substantially higher than the regional wage.
- The unemployment rate rose by 1.1 percentage points to 5.7% in 2003, less than the 1.8 percentage point gain experienced at the state level. Labor force participation decreased by half a percent to 64.2% in the 1990s.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	330,773	324,810	-5,963	-1.8%	\$33,526
333	Machinery Manufacturing	7,382	5,652	-1,730	-23.4%	\$52,801
561	Administrative and Support Services	13,412	11,926	-1,486	-11.1%	\$18,991
517	Telecommunications	3,589	2,487	-1,102	-30.7%	\$58,940
332	Fabricated Metal Product Manufacturing	4,921	4,177	-744	-15.1%	\$38,762
424	Merchant Wholesalers, Nondurable Goods	5,172	4,569	-603	-11.7%	\$42,529
423	Merchant Wholesalers, Durable Goods	9,382	8,802	-581	-6.2%	\$44,764
331	Primary Metal Manufacturing	3,155	2,594	-561	-17.8%	\$48,230
339	Miscellaneous Manufacturing	2,780	2,314	-466	-16.8%	\$43,614
443	Electronics and Appliance Stores	1,415	966	-449	-31.8%	\$29,792
323	Printing and Related Support Activities	2,107	1,677	-430	-20.4%	\$33,573
	Total of above industries	53,315	45,164	-8,151	-15.3%	\$38,368

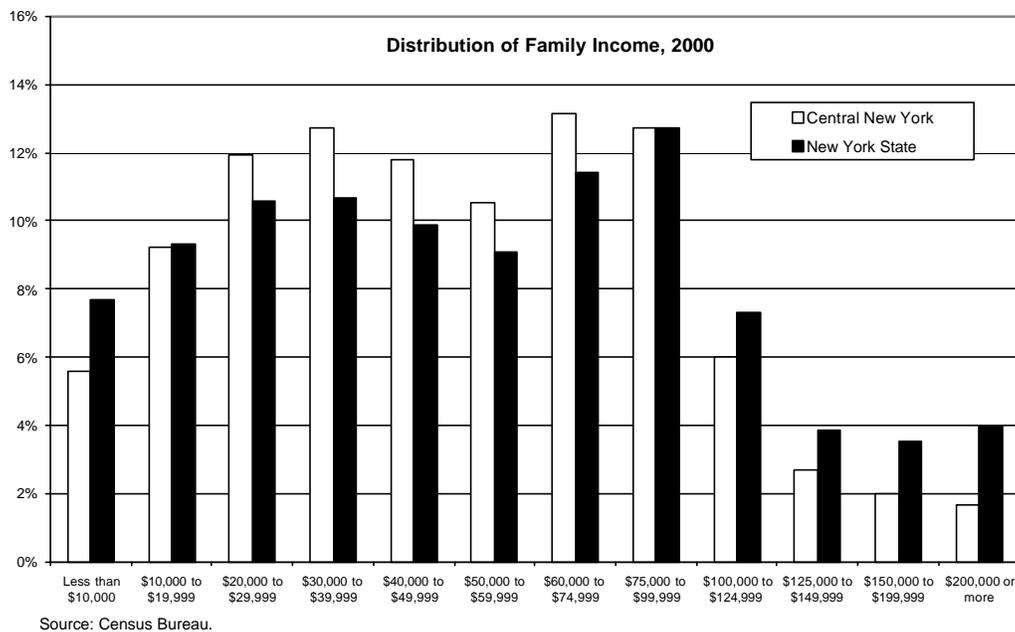
Source: NYS DOL.

Income and Poverty

Central New York - Change in Personal Income and Components, Selected Years						
(in billions of 2002 dollars)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	13.6	8.6	0.9	1.9	1.9	-0.3
1990	17.7	11.1	1.1	3.0	2.4	-0.5
2000	19.5	11.6	1.3	3.4	3.3	-0.5
2001	19.4	11.5	1.2	3.3	3.4	-0.5
1980-1990						
Change	4.1	2.5	0.3	1.1	0.5	-0.1
Ann Avg % Change	2.7%	2.6%	2.9%	4.6%	2.6%	3.6%
1990-2000						
Change	1.8	0.4	0.2	0.4	0.9	0.0
Ann Avg % Change	1.0%	0.4%	1.6%	1.4%	3.2%	0.5%
2000-2001						
Change	-0.1	-0.1	-0.1	-0.1	0.1	0.0
Ann Avg % Change	-0.5%	-0.7%	-9.6%	-1.5%	4.4%	-0.8%

Source: BEA. Deflator applied by Fiscal Policy Institute.

- Per capita income in the Central New York Region grew by nearly 12% to \$24,629 between 1990 and 2001, compared to a 17.3% increase for the state.
- Family income in the Central New York Region was more evenly distributed than in the state. More families fell into the \$30,000 to \$75,000 bracket and fewer were in the higher or lower income brackets.
- In the last decade, the poverty rate in the region held steady near 12.3% compared to the 1.6 percentage point increase statewide. During the same period the share of population earning less than 200% of the poverty threshold rose about half a percent to nearly 30% of the population.
- With the exception of Onondaga where the median income was higher than for the state, all counties had median incomes that were lower than the state's. Cayuga County gained the most over the decade(+\$2,687), but Oswego County actually experienced a decline(-\$160).
- From 1990 to 2000, real total personal income increased by \$1.8 billion at an annual rate of 1.0%. Wages and salaries grew by less than half a percent. Transfer payments on the other hand grew by 3.2%.



Prospects

Industry clusters in the region include: biomedical, distribution, electronics manufacturing, industrial machinery, and materials processing.

Manufacturing employment is at the lowest level since the heyday of manufacturing in the state. Durable goods manufacturers have been hard hit. The area lost 2,700 manufacturing jobs since June 2003. Nestle USA is expected to shut down its operations costing the region nearly 500 jobs. The medical cluster seems to be doing well—Bristol-Myers is carrying through a \$61 million expansion and Hanford Pharmaceuticals may add a few temporary jobs.

Carrier Corporation (United Technologies), long a major employer in the region and employing 2,700 workers, is reviewing its worldwide operations and intends to downsize. Its market for goods produced in Syracuse is in the Pacific Rim and there is serious concern that Carrier will close down its operations in Syracuse and relocate production facilities to that part of the world. Efforts are being made at the federal and state levels to encourage the firm to remain in the region. (The parent company, United Technologies, derives 20 percent of its revenue from federal contracts, but only 50 percent of its workers are in the United States.) The corporation is expected to make a decision on staying or leaving this fall.

A diversified economy has enhanced the region's ability to resist excessive job loss in the current downturn. Services industries—educational and health; professional and business services; trade, transportation and utilities; and leisure and hospitality--have recently added jobs. Like many areas of the state, an aging population has increased the demand for health care workers. As in other areas of the state and country, there is a shortage of registered nurses in the region.

Destiny USA, a large retail/hotel complex, long ballyhooed as the largest shopping mall in the US and a tourism destination is yet to get off the ground. Pyramid, Inc., is seeking nearly \$52.5 million in tax incentives for 10 years before it commits to building the 4.7 million square foot complex at an estimated cost of \$2 billion. New York State legislators have asked the company to provide guarantees on projected job creation targets, and sources of private capital funding.

Syracuse is at the crossroads of the East-West and the North-South interstate transportation network. As a result, distribution is a major industry cluster in the region. Employment edged up slightly in the sector during the last year.

Syracuse University, a key economic factor in the region, has been designated a Center of Excellence for Environmental Systems Engineering.

Top Employers in Central New York, 2002

- Carrier Corp
- City of Syracuse
- Community General Hospital
- County of Onondaga
- County of Oswego
- Crouse Health Hospital Inc
- Eckerd Corp
- Excellus Healthplan Inc
- Liverpool Central School District
- Lockheed Martin Corp
- Loretto Adult Home
- New Venture Gear
- Niagara Mohawk Power Corp
- Nine Mile Point Power
- North Syracuse Central School District
- NYS Office Mental Retrdrn/Syracuse Devlpmt Ctr
- Roman Catholic Diocese Of Syracuse NY
- St Josephs Hospital Health Ctr
- SUNY at Oswego
- SUNY College at Cortland
- SUNY Research Foundation
- SUNY Upstate Medical Center
- Syracuse City School District
- Syracuse University
- The Penn Traffic Co Inc
- United Parcel Service Inc NY
- US Postal for Syracuse New York
- US Veterans Administration
- Wal-Mart Associates Inc
- Wegmans Food Markets Inc

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

Finger Lakes

The Finger Lakes Region is comprised of nine counties, five of which are part of the Rochester metropolitan statistical area which accounts for 95 percent of the total non-farm jobs in the region.



Demographics

- The Finger Lakes population grew by 3.8% from 1990-2002 compared to 6.5% for the state and nearly 16% for the US. Although the Finger Lakes' growth performance was significantly lower than for the nation on the basis of growth, it ranked 4th among New York's regions.
- While the growth in the working age population (16-64 years) was also below that for the NYS and the US, this group grew by 2.4% in the nineties. In contrast, the working population aged 20-34 declined by 21%, compared to a 12% and 5.4% decrease at the state and national levels.

FINGER LAKES DATA BANK			
	FLK	NYS	US
Population			
2002 Estimate	1,205,245	-	-
% Change 1990-2002	3.8	6.5	15.9
Employment			
2002 Level	542,696	8,116,000	130,376,000
% Change 2000-2002	-3.4	-2.3	-1.1
2000 Level	561,928	8,308,000	131,785,000
% Change 1992-2000	7.5	11.2	20.9
Unemployment			
2003 1st Half (#)	36,969	584,900	8,771,571
2003 1st Half (rate)	5.9	6.3	6.0
%Pt Change 2001-2003 1st Half	1.7	1.8	1.7
2000 (rate)	4.5	4.8	4.0
%Pt Change 1990-2000	0.2	-0.8	-1.6
Labor Force Participation			
2000 (rate)	65.4	61.0	63.7
%Pt Change 1990-2000	-0.9	-2.5	-1.2
Per Capita Income (2002\$)			
2001	24,762	36,449	30,897
% Change 1990-2001	9.1	17.3	18.3
Poverty Rate			
2000	10.3	14.6	12.4
%Pt Change 1990-2000	0.7	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	25.5	30.5	29.6
%Pt Change 1990-2000	1.6	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Genesee	51,555	3.8	
Livingston	54,515	6.7	
Monroe	60,328	1.1	
Ontario	56,873	5.7	
Orleans	46,223	1.3	
Seneca	49,045	5.2	
Wayne	55,574	6.3	
Wyoming	48,660	10.5	
Yates	43,904	8.0	

Employment and Labor Force Characteristics

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	561,928	542,696	-19,232	-3.4%	\$34,448
92	Government	85,864	89,185	3,321	3.9%	\$34,695
611	Educational Services	17,377	19,977	2,600	15.0%	\$42,725
623	Nursing and Residential Care Facilities	14,333	15,683	1,350	9.4%	\$20,674
517	Telecommunications	5,443	6,322	880	16.2%	\$60,196
813	Religious, Grantmaking, Civic, Professional, and Si	7,095	7,820	725	10.2%	\$16,172
713	Amusement, Gambling, and Recreation Industries	5,292	6,010	719	13.6%	\$13,940
624	Social Assistance	11,409	11,990	581	5.1%	\$19,330
562	Waste Management and Remediation Services	1,223	1,791	568	46.4%	\$42,975
516	Internet Publishing and Broadcasting	91	381	290	319.7%	\$57,613
812	Personal and Laundry Services	4,292	4,581	289	6.7%	\$16,823
	Total of above industries	152,418	163,739	11,321	7.4%	\$32,189

Source: NYS DOL.

- Insured employment in the Finger Lakes region fell by 3.4% or 19,232 jobs from 2000-2002; this was a greater decrease than at the state level where it declined by 2.3%. Over the period 1992-2000, employment grew by 7.5% or 39,393 jobs compared to 11.2% for the state.
- Between 2000 and 2002, the growth industries in the region included: educational services, telecommunications, and waste management and remediation services. In absolute terms, employment at nursing and residential facilities contributed to the employment base, but these jobs paid \$20,674--significantly below the average wage of \$34,448. Wages in the other growth industries were significantly higher than the average wage in the region.
- Declining industries were centered in manufacturing but included among others administrative and support services, hospitals, and accommodations. Many of the jobs lost paid significantly higher wages than the average and seven of the declining industries had wages that were higher than the average.
- Unemployment in the region rose by 1.7 percentage points to 5.9% in the first half of 2003. The labor force participation rate at 65.4% was about one percentage point less than it was a decade ago.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	561,928	542,696	-19,232	-3.4%	\$34,448
561	Administrative and Support Services	25,562	20,238	-5,324	-20.8%	\$24,182
325	Chemical Manufacturing	24,095	18,897	-5,198	-21.6%	\$60,672
622	Hospitals	23,958	21,631	-2,327	-9.7%	\$33,772
332	Fabricated Metal Product Manufacturing	11,100	9,128	-1,973	-17.8%	\$36,817
541	Professional, Scientific, and Technical Services	23,941	22,477	-1,464	-6.1%	\$44,583
334	Computer and Electronic Product Manufacturing	9,912	8,532	-1,380	-13.9%	\$56,112
333	Machinery Manufacturing	22,446	21,171	-1,275	-5.7%	\$56,268
721	Accommodation	4,571	3,460	-1,111	-24.3%	\$14,343
326	Plastics and Rubber Products Manufacturing	7,346	6,278	-1,068	-14.5%	\$36,170
722	Food Services and Drinking Places	32,571	31,517	-1,054	-3.2%	\$11,065
	Total of above industries	185,501	163,329	-22,173	-12.0%	\$36,736

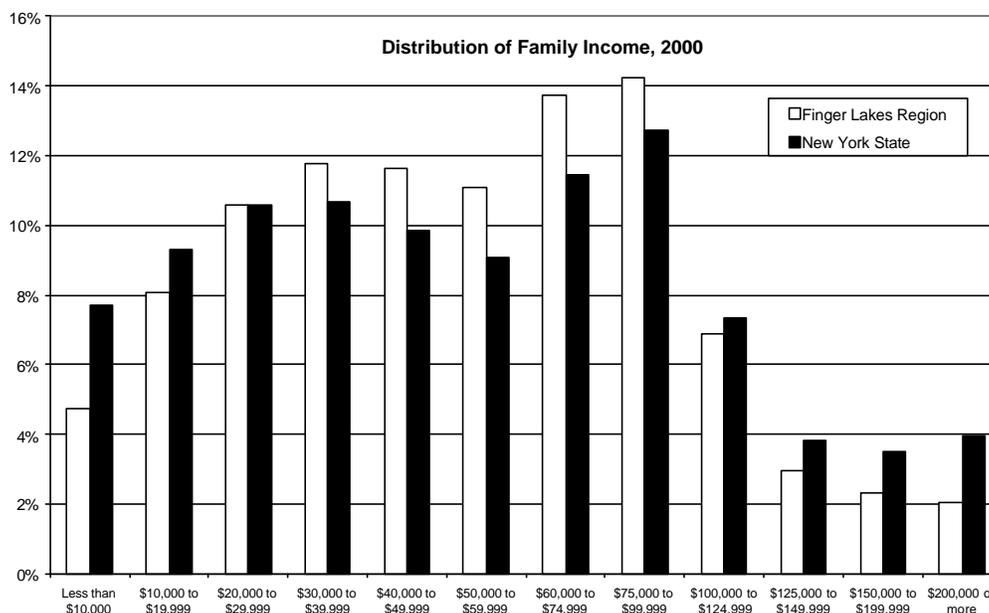
Source: NYS DOL.

Income and Poverty

Finger Lakes - Change in Personal Income and Components, Selected Years (billions, \$2001)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	25.6	15.9	1.6	3.9	3.0	0.0
1990	31.7	18.9	1.8	6.0	4.0	0.0
2000	34.8	19.9	2.3	6.6	5.5	0.0
2001	35.0	19.9	2.3	6.6	5.7	-0.1
1980-1990						
Change	6.2	3.0	0.2	2.2	1.0	-0.1
Ann Avg %	2.2%	1.7%	1.4%	4.5%	3.0%	n/a
1990-2000						
Change	3.1	1.0	0.5	0.5	1.5	0.0
Ann Avg %	0.9%	0.5%	2.3%	0.8%	3.2%	-0.7%
2000-2001						
Change	0.2	-0.1	0.0	0.0	0.2	0.0
Ann Avg %	0.7%	-0.4%	0.7%	0.0%	3.9%	72.8%

Source: BEA. Deflator applied by Fiscal Policy Institute.

- Between 1990-2000, per capita income in the Finger Lakes Region rose by 9.1%, about half of the state rate. It ranked 10th among the state's regions.
- In the last decade, poverty in the Finger Lakes region increased slightly to 10.3%. In 2000, just over 25% of the families in the region earned less than 200% of the poverty wage, and this was an increase of 1.6% compared to 2.7% for the state.
- Median income in the region ranged from \$43,904 in Yates to \$60,328 in Monroe and every county experienced a gain in family income. Wyoming experienced the largest gain--about 10.5 %.
- In 2000, family income in the region was more equitably distributed than in the state. More families in the region had incomes in the middle range than in the state as a whole.
- Between 1990 and 2000, the region's total personal income increased by \$4.1 billion, slightly over one percent. Wages and salaries grew by less than one percent. Proprietors income (2.7%) and transfer payments (3.5%) contributed the most to the increase in income in the region.



Prospects

The Finger Lakes economy has a high concentration of firms related to the optics and imaging industry and is a leading exporter of manufactured products in the state. Exports from the region are valued at \$12 billion.

Other industry clusters in the Finger Lakes region include: precision manufacturing, MIS/IT business services, telecommunications, materials processing and biotechnology/pharmaceuticals/medical research.

Services account for 40% of the private jobs in the region; the health industry, which is the largest of these industries, employs 51,700 workers. The health industry continues to restructure its work force and hospital facilities in response to an aging population, health costs and a changing approach to health care—for example, the increased emphasis on in-home healthcare.

Manufacturing employment in the Finger Lakes region continues to decline. The loss of nearly 6,200 manufacturing jobs in the last year will slow economic recovery. Eastman Kodak, Bausch and Lomb, and Xerox all face stiff international competition and have continued to lay off workers. Most recently, Kodak announced that it would lay off 3,000 workers in the Rochester area and shift manufacturing operation abroad, bringing down the company's total employment in the region to 18,000—the lowest since the Great Depression. Administrative, R&D and manufacturing related jobs will be affected causing hardship not just for workers being laid off but possibly workers in small firms that have supplier linkages to Kodak. It is going to be difficult for the region to absorb these 3,000 job cuts, and the resulting loss in income will ripple throughout the economy.

The Finger Lakes Region has a large educational infrastructure comprised of 17 colleges and universities. Educational services, which added 2,000 workers over the last year, continues to grow across the sector—colleges, technical institutions, etc.

The region has a highly skilled workforce largely because of the presence of leading firms in the optics and imaging industry. As a result of this talent, the region has the potential for emerging as a leading center of photonic (laser) technology. There is concern for holding on to this talent, particularly workers in their twenties and thirties.

In addition to leading research institutions (University of Rochester and Rochester Institute of Technology) and private R & D facilities, the region will host a new \$300 million Infotonics Technology Center in Ontario county.

The Finger Lakes economy is one of the most innovative areas in the country producing over 13,000 patents in the nineties or 1,233 per 100,000 residents. The three major firms—Kodak, Bausch and Lomb and Xerox—account for the bulk of these patents. Lack of small business access to investment capital may be a barrier to development of small technology firms in the region.

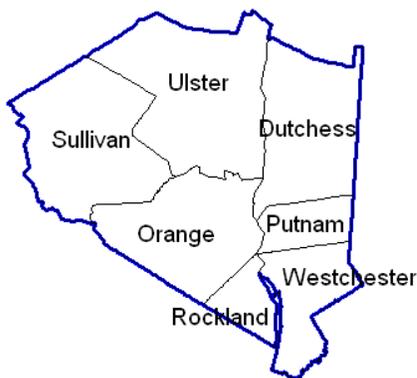
Top Employers in the Finger Lakes, 2002

- Adecco North America Llc
- Bausch & Lomb Inc
- Boces of First Supervisory District
- City of Rochester
- County of Monroe
- Delphi Auto Systems Srvcs Llc
- Eastman Kodak Co
- Fairport Central School District
- Frontier Telephone
- Greece Central School District
- Highland Hospital
- Kelly Services Inc
- Monroe County Community College
- Ortho-Clinical
- Park Ridge Hospital Inc
- Paychex Inc
- Rochester City School District
- Rochester Gas & Electric Corp
- Rochester General Hospital
- Rochester Institute of Technology
- SUNY Brockport
- The Sutherland Group Ltd
- Tops Markets Inc
- University Of Rochester
- US Postal For Rochester New York
- Valeo Electrical Systems Inc
- Wal-Mart Associates Inc
- Webster Central School District
- Wegmans Food Markets Inc
- Xerox Corporation

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

Hudson Valley

The Hudson Valley region consists of seven counties. Orange County comprises part of the Newburgh metropolitan statistical area. The three counties of Putnam, Rockland, and Westchester form part of the New York primary metropolitan statistical area (PMSA).



Demographics

- The Hudson Valley's population increased 200,183 from 1990 to 2002, a 9.9% increase compared to 6.5% growth statewide. The region's rate of population growth over this period was second only to New York City. The region comprises 11.6% percent of the state's total population, making it the 3rd-largest region in the state.
- From 1990 to 2000, the Hudson Valley experienced a net loss of 89,912 persons aged 20-34, an 18.4% decline. This was considerably greater than a statewide 5.4% average decline. The region also experienced population growth of 4.3% in the 16-64 age cohort, compared to 4.4% growth statewide.

HUDSON VALLEY DATA BANK			
	HUD	NYS	US
Population			
2002 Estimate	2,226,155	-	-
% Change 1990-2002	9.9	6.5	15.9
Employment			
2002 Level	856,211	8,116,000	130,376,000
% Change 2000-2002	0.8	-2.3	-1.1
2000 Level	849,376	8,308,000	131,785,000
% Change 1992-2000	9.8	11.2	20.9
Unemployment			
2003 1st Half (#)	42,811	584,900	8,771,571
2003 1st Half (rate)	3.9	6.3	6.0
%Pt Change 2001-2003 1st Half	0.8	1.8	1.7
2000 (rate)	3.2	4.8	4.0
%Pt Change 1990-2000	-0.4	-0.8	-1.6
Labor Force Participation			
2000 (rate)	63.8	61.0	63.7
%Pt Change 1990-2000	-2.7	-2.5	-1.2
Per Capita Income (2002\$)			
2001	35,723	36,449	30,897
% Change 1990-2001	14.3	17.3	18.3
Poverty Rate			
2000	9.3	14.6	12.4
%Pt Change 1990-2000	2.1	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	20.7	30.5	29.6
%Pt Change 1990-2000	3.3	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Dutchess	68,265	-1.1	
Orange	65,136	5.6	
Putnam	88,709	7.6	
Rockland	85,049	0.4	
Sullivan	46,901	-1.2	
Ulster	55,804	-0.5	
Westchester	86,209	4.6	

Employment and Labor Force

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage
		2000	2002	#	%	2002
	Total Employment	849,372	856,211	6,839	0.8%	\$41,261
334	Computer and Electronic Product Manufacturing	17,269	21,870	4,601	26.6%	\$91,854
92	Government	151,058	155,495	4,437	2.9%	\$43,413
722	Food Services and Drinking Places	39,249	43,270	4,021	10.2%	\$14,728
561	Administrative and Support Services	32,931	35,202	2,271	6.9%	\$27,981
624	Social Assistance	19,888	21,637	1,749	8.8%	\$21,151
813	Religious, Grantmaking, Civic, Professional Organizations	12,778	13,843	1,065	8.3%	\$22,348
541	Professional, Scientific, and Technical Services	39,832	40,730	898	2.3%	\$63,291
238	Specialty Trade Contractors	28,869	29,750	881	3.1%	\$46,172
713	Amusement, Gambling, and Recreation Industries	11,189	12,054	865	7.7%	\$21,184
221	Utilities	5,332	5,968	636	11.9%	\$82,339
	Total of above industries	358,394	379,818	21,424	6.0%	\$41,722

Source: NYS DOL.

- Despite a serious recession in the rest of the downstate area, the Hudson Valley region managed to add 6,839 jobs (0.8%) to its economy between 2000 to 2002—more than any other region in the state. Between 1992 and 2000 employment in the region increased 9.8% (75,753)—the 4th-largest percentage increase among the state's regions.
- The region's job gains between 2000 and 2002 were concentrated in the computer/electronic manufacturing (4,601), government (4,437), and restaurant (4,021) industries. While the average wage in the computer/electronic manufacturing industry is high (\$91,854) many of the industries that contributed to the region's recent job growth have average wages well below the statewide average of \$45,888.
- The region's job losses between 2000 and 2002 were concentrated in the merchant durable goods wholesaler industry, which lost 6,796 jobs—a hefty 28.3% decline. Other significant job losses in the region were recorded in the management of companies, insurance carriers, and internet service providers industries. The four industries with the largest employment losses had average wages that were well above the region's overall average of \$41,261.
- Despite its recent job gains, the region's unemployment rate increased during the first part of 2003, edging up to 3.9%—a 0.8 percentage point increase from a first-half 2001 average of 3.1%. The region's unemployment rate remained the lowest among all the state's regions, however, and was significantly below the state's first-half 2003 average of 6.3%.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage
		2000	2002	#	%	2002
	Total Employment	849,372	856,211	6,839	0.8%	\$41,261
423	Merchant Wholesalers, Durable Goods	23,981	17,185	(6,796)	-28.3%	\$58,991
551	Management of Companies and Enterprises	11,883	10,625	(1,258)	-10.6%	\$134,363
524	Insurance Carriers and Related Activities	15,076	13,844	(1,232)	-8.2%	\$61,800
518	Internet Service Providers, Web Search Portals, and Data Processing Services	5,938	4,838	(1,099)	-18.5%	\$56,252
332	Fabricated Metal Product Manufacturing	5,979	5,144	(835)	-14.0%	\$41,880
445	Food and Beverage Stores	24,971	24,145	(826)	-3.3%	\$21,246
424	Merchant Wholesalers, Nondurable Goods	15,259	14,471	(788)	-5.2%	\$51,658
484	Truck Transportation	4,911	4,271	(640)	-13.0%	\$39,324
811	Repair and Maintenance	7,718	7,085	(634)	-8.2%	\$29,496
335	Electrical Equipment, Appliance, and Component Manufacturing	2,588	2,000	(588)	-22.7%	\$37,871
	Total of above industries	118,305	103,608	(14,697)	-12.4%	\$53,063

Source: NYS DOL.

Income and Poverty

Hudson Valley - Change in Personal Income and Components, Selected Years (in billions of 2002 dollars)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	51.7	22.0	3.4	9.7	5.5	9.4
1990	73.1	32.0	4.2	16.2	7.3	12.0
2000	94.5	36.8	6.4	20.1	10.2	20.0
2001	95.0	37.9	6.2	20.1	10.6	19.1
1980-1990						
Change	21.4	10.0	0.8	6.5	1.8	2.6
Ann Avg %	3.5%	3.8%	2.2%	5.3%	2.9%	2.5%
1990-2000						
Change	21.3	4.8	2.2	3.8	3.0	8.0
Ann Avg %	2.6%	1.4%	4.4%	2.2%	3.5%	5.2%
2000-2001						
Change	0.5	1.1	-0.3	0.0	0.4	-0.9
Ann Avg %	0.5%	3.0%	-4.3%	0.2%	4.1%	-4.5%

Source: BEA. Deflator applied by Fiscal Policy Institute.

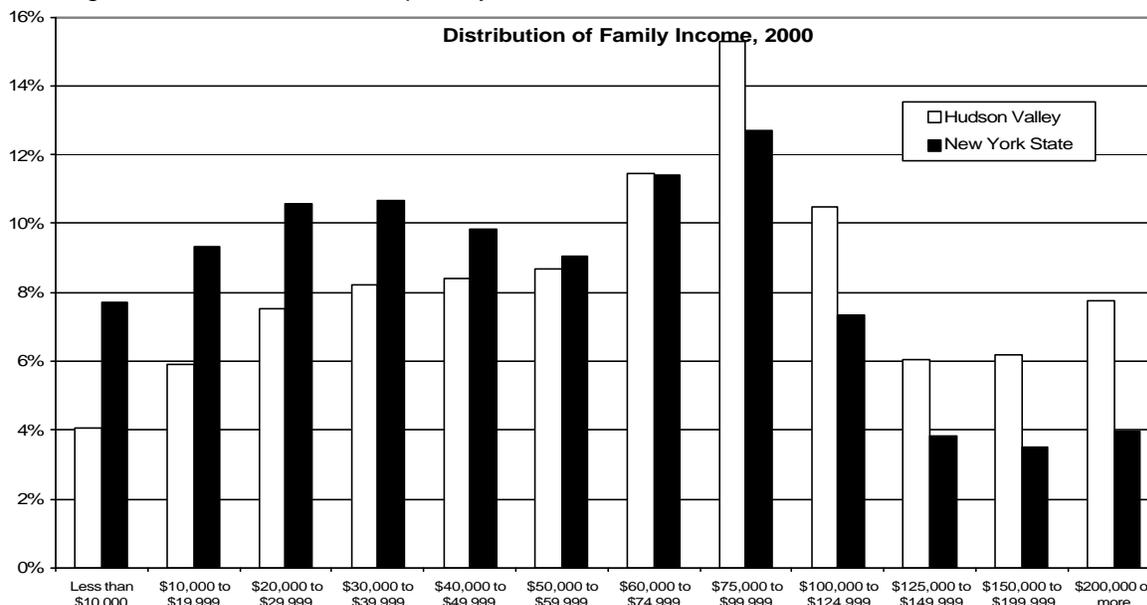
increased 3.3 percentage points to 20.7% of all individuals.

- Family income in the Hudson Valley is less evenly distributed than in the state, with proportionally more families falling into higher income brackets and fewer falling into the lower and middle income brackets.

- From 1990 to 2000, real personal income in the Hudson Valley increased \$21.3 billion, or 2.6% per annum. This rate of growth

- Per capita income in the Hudson Valley rose 14.3% (to \$35,723) between 1990 and 2001. This increase was slightly below the statewide increase of 17.3% (to \$36,445) over the same period. The region's per capita income ranks as the third-highest among the state's regions.
- The poverty rate in the Hudson Valley rose to 9.3% in 2000, remaining below the state's 14.6% poverty rate. At the same time, this represented a 2.1 percentage point increase on the region's 1990 poverty rate—the largest increase among the regions. During the same period the share of the region's population earning less than 200% of the poverty level

was the second-fastest among the regions, barely trailing New York City's 2.65% annual rate of growth. Between 1994 and 2000 (the period roughly corresponding to the state's 1990s economic expansion), the region's 4.0% average annual growth in personal income topped all other regions. Over the same period, the Valley led all regions in the growth of both the dividends/interest/rents and transfer payments components of personal income. While the former grew 4.2% per annum, the latter grew 1.9%.



Source: Census Bureau.

Prospects

The Hudson Valley is strategically located on the banks of the Hudson River, within commuting distance from both New York City and Albany.

Although well known as a center of the electronics manufacturing industry, due to IBM's presence, the region also boasts a diversified economic base that includes pharmaceutical and biotechnology clusters.

Located in East Fishkill, IBM serves as the anchor of the Hudson Valley region's high tech industry cluster, and is the region's largest private employer. In the early 1990s, IBM laid off thousands of workers in the area as it underwent a significant restructuring phase. In 2000, the company announced that it will make the largest private-sector investment in New York State history by building the world's most technologically advanced chip-making plant in East Fishkill, Dutchess County.

The \$2.5 billion plant will create 1,000 new permanent jobs at the Hudson Valley Research Park. The approximately \$660 million made available to IBM in incentives, grants, loans, and sales tax and local benefits/exemptions translates into \$660,000 per employee.

Recent layoffs at IBM suggest that the high tech industry continues to pose both up- and downside risks to the region's growth prospects. Importantly, IBM is currently examining the possibility of moving 3,000 service jobs (including software design jobs) to foreign countries by 2015.

The region also boasts an important pharmaceutical manufacturing cluster. Major firms include: Wyeth, Bayer, and Novartis. Wyeth, which employs 2,900, is among the largest private employers in the region.

Reflecting the presence of Readers Digest Association Inc.'s corporate headquarters in Pleasantville, the periodical publishing industry represents an important component of the region's economic base.

Top Employers in the Hudson Valley, 2002

- American Cyanamid Co
- Bank of New York
- Bayer
- City Of Yonkers
- Clarkstown Central School District
- County of Dutchess
- County of Orange
- County of Rockland
- County of Ulster
- County of Westchester
- East Ramapo Central School District
- Entergy Nuclear Operations Inc
- International Business Machine Corp
- Lord & Taylor
- Manpower Temp Service Inc.
- Newburgh City School District
- Novartis Corporation
- NYS Office of Mental Retardation
- Pepsico Inc
- Readers Digest
- Sears Roebuck & Co
- Shop-Rite Of Newdrop & Richmomd
- St Francis Hospital
- St Johns Riverside Hospital
- Stop & Shop
- The Gap Inc
- The Home Depot
- US Dept of Defense - West Point
- Verizon Communications
- Wal-Mart Associates Inc
- Wappingers Falls Central School
- Westchester Medical Center
- Wyeth
- Yonkers City School District

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

Long Island

The Long Island region comprises Nassau and Suffolk Counties. The region's population of 2.8 million is the second-largest among the state's regions.



Demographics

- Long Island's population increased to 2.8 million between 1990 and 2002, a 7.4% increase compared to 6.5% population growth statewide. This rate of population growth was third-highest (behind New York City and the Hudson Valley) among the state's regions. The region comprises 14.6% percent of the state's total population.
- From 1990 to 2000, Long Island experienced a net loss of 128,248 persons in the 20-34 age cohort, a 20.5% decline. This was nearly four times as great as the 5.4% decline in that age cohort statewide. Population in the region's 16-64 age cohort increased 10,308 (1990 to 2000), a 0.6% increase—well below the 4.4% gain in that cohort statewide.

LONG ISLAND DATA BANK			
	LIS	NYS	US
Population			
2002 Estimate	2,803,547	-	-
% Change 1990-2002	7.4	6.5	15.9
Employment			
2002 Level	1,172,996	8,116,000	130,376,000
% Change 2000-2002	-0.3	-2.3	-1.1
2000 Level	1,176,939	8,308,000	131,785,000
% Change 1992-2000	14.4	11.2	20.9
Unemployment			
2003 1st Half (#)	60,194	584,900	8,771,571
2003 1st Half (rate)	4.1	6.3	6.0
%Pt Change 2001-2003 1st Half	1.2	1.8	1.7
2000 (rate)	3.0	4.8	4.0
%Pt Change 1990-2000	-1.1	-0.8	-1.6
Labor Force Participation			
2000 (rate)	64.2	61.0	63.7
%Pt Change 1990-2000	-2.8	-2.5	-1.2
Per Capita Income (2002\$)			
2001	42,430	36,449	30,897
% Change 1990-2001	14.3	17.3	18.3
Poverty Rate			
2000	5.6	14.6	12.4
%Pt Change 1990-2000	1.4	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	14.9	30.5	29.6
%Pt Change 1990-2000	2.9	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Nassau	87,682	3.3	
Suffolk	77,825	4.4	

Employment and Labor Force

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	1,176,827	1,172,996	-3,831	-0.3%	\$40,388
92	Government	178,788	183,303	4,515	2.5%	\$47,294
722	Food Services and Drinking Places	60,147	63,810	3,663	6.1%	\$15,845
624	Social Assistance	19,844	22,754	2,910	14.7%	\$20,441
621	Ambulatory Health Care Services	61,246	64,106	2,859	4.7%	\$42,762
622	Hospitals	37,312	39,728	2,416	6.5%	\$42,977
611	Educational Services	24,363	26,326	1,963	8.1%	\$27,696
813	Religious, Grantmaking, Civic, Professional Organization	13,281	14,719	1,439	10.8%	\$23,125
238	Specialty Trade Contractors	42,721	43,906	1,185	2.8%	\$45,953
515	Broadcasting (except Internet)	4,839	5,959	1,120	23.1%	\$75,768
623	Nursing and Residential Care Facilities	25,310	26,269	960	3.8%	\$28,830
	Total of above industries	467,850	490,879	23,029	4.9%	\$38,482

Source: NYS DOL.

- Long Island's economy lost 3,831 jobs between 2000 and 2002. This job loss represented a 0.3% decline, making the region's performance (as measured by job growth) over the two-year period fourth-best among the state's regions. Between 1992 and 2000 employment in the region increased 14.4% (147,837)—the largest percentage gain among the state's regions.
- Job gains in Long Island over the past two years were concentrated in "soft" services industries, including: government (4,515), social assistance (2,910), ambulatory health care (2,859) and hospitals (2,416). Restaurants added 3,663 jobs. Among the ten industries with the largest job gains between 2000 and 2002, the average wage was \$38,482—below the statewide average of \$40,388.
- The region's job losses between 2000 and 2002 were concentrated in the merchant durable goods wholesale industry, which lost 4,771 jobs—an 11.2% decline.
- Reflecting the recession's impact on the manufacturing sector, four of the ten industries that experienced the greatest job losses in the region between 2000 and 2002 were in manufacturing. These included computer and electronic products, fabricated metal products, machinery, and plastics and rubber products. Combined, these four manufacturing sectors lost 7,410 jobs—or, 34.6% of all jobs lost in the region.
- Long Island's unemployment rate climbed to 4.1% during the first part of 2003—a 1.2 percentage point increase on its first-half 2001 average of 2.9%. Still, the region's unemployment rate remained low relative to many other regions, and significantly lower than the statewide first-half 2003 average of 6.3%.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	1,176,827	1,172,996	-3,831	-0.3%	\$40,388
423	Merchant Wholesalers, Durable Goods	42,759	37,988	-4,771	-11.2%	\$55,263
334	Computer and Electronic Product Manufacturing	22,706	18,871	-3,835	-16.9%	\$58,071
541	Professional, Scientific, and Technical Services	71,241	68,302	-2,939	-4.1%	\$50,488
561	Administrative and Support Services	61,213	58,346	-2,866	-4.7%	\$28,351
454	Nonstore Retailers	9,486	8,044	-1,442	-15.2%	\$47,196
332	Fabricated Metal Product Manufacturing	10,933	9,552	-1,381	-12.6%	\$42,242
333	Machinery Manufacturing	7,887	6,758	-1,130	-14.3%	\$49,007
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	6,849	5,784	-1,065	-15.5%	\$156,935
326	Plastics and Rubber Products Manufacturing	5,296	4,232	-1,064	-20.1%	\$35,595
511	Publishing Industries (except Internet)	9,369	8,417	-952	-10.2%	\$53,780
	Total of above industries	247,740	226,294	-21,446	-8.7%	\$48,270

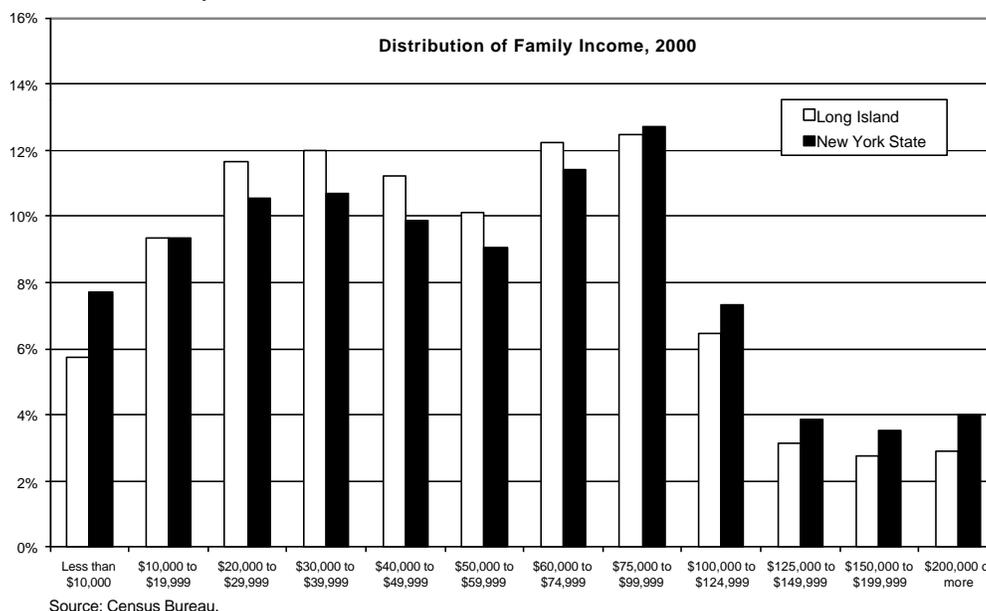
Source: NYS DOL.

Income and Poverty

	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	69.7	28.1	4.9	13.0	6.5	14.9
1990	96.7	42.4	6.0	22.0	9.0	15.5
2000	118.2	50.9	7.2	26.0	12.8	20.0
2001	117.5	50.3	7.3	25.9	13.3	19.3
1980-1990						
Change	27.0	14.3	1.1	9.0	2.5	0.5
Ann Avg % Change	3.3%	4.2%	2.1%	5.4%	3.4%	0.3%
1990-2000						
Change	21.4	8.5	1.2	4.0	3.8	4.5
Ann Avg % Change	2.0%	1.9%	1.8%	1.7%	3.6%	2.6%
2000-2001						
Change	-0.7	-0.6	0.1	-0.1	0.5	-0.7
Ann Avg % Change	-0.6%	-1.2%	1.3%	-0.3%	3.9%	-3.4%

Source: BEA. Deflator applied by Fiscal Policy Institute.

- Per capita income in Long Island rose 14.3% to \$42,430 between 1990 and 2001. This increase was below a statewide increase of 17.3% over the same period. The region's per capita income is the highest among the state's regions.
- The poverty rate in Long Island rose to 5.6% in 2000, remaining far below the state's 14.6% rate and lowest among the state's regions.
- Both Nassau and Suffolk counties enjoy median family incomes considerably above the median family income for the state (\$55,789). Nassau's median family income of \$87,682 represents 157% of the state average and ranks as the second-highest among the state's counties. Suffolk's median family income of \$77,825 represents 139% of the state average and ranks as fifth-highest in the state.
- Fifty-one percent of all families earn more than \$75,000, compared to a statewide average of 31.4%. Only 12.2% of Long Island families earn less than \$30,000, compared to 27.6% statewide.
- From 1990 to 2000, real personal income in Long Island increased \$21.4 billion, or 2% per annum. This rate of growth was the third-fastest among the state's regions. Between 1994 and 2000 (the period roughly corresponding to the state's 1990s economic expansion), the region's 3.1% average annual growth in personal income was third-best among the regions.



Prospects

Long Island boasts one of the most diversified economies of any region in the state. At the same time, the region has several industrial clusters that are especially important to its economic makeup. These include: R&D, defense, and high-tech/information systems.

With over 68,000 employees, the professional/scientific/technical services sector—which includes the region’s scientific, biotechnology and pharmaceutical R&D industries—accounts for 5.8% of total employment in the region. Brookhaven National Laboratory, managed by Brookhaven Science Associates, a collaborative partnership between Battelle Memorial Institute and SUNY Stony Brook, serves as the industry’s anchor.

Long Island also has a significant collection of major defense contractors and hi-tech/information systems firms, including: Northrop Grumman, EDO Corporation, BAE Systems, and Telephonics. While Northrop plans to hire some 900 employees over the next few years, EDO recently sold its Deer Park site to a developer and has said it will move its operations out of the 726,000-square-foot plant, its largest, within two years, to a location that has yet to be determined. Early last year, BAE said it planned to add 148 jobs by 2005 at its Greenlawn Campus in the town of Huntington, while investing \$19 million in an expansion project.

Among Long Island’s most pressing problems is its lack of affordable housing, a fact increasingly evident in the out-migration of the region’s young working-age population. Long Island’s population aged 20-34 declined by 20%—four times the national rate of decline in this age cohort—in the last decade. Fully one-third of Long Island’s households—292,000 homeowners and renters—spend 30% or more of their monthly income to cover their housing costs. (The Census Bureau defines paying 30% or more of monthly income for housing as an unaffordable housing burden.) This figure rose twelve percentage points over the last decade.

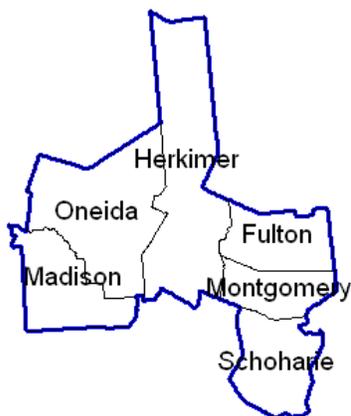
If not addressed, the region’s affordable housing problem will continue to pose a major impediment to local companies’ ability to attract and retain the workforce they need to grow.

Top Employers in Long Island, 2002
BAE Systems
Brookhaven Science
Chase Manhattan Bank
Computer Associates Inc
County of Nassau
CSC Holdings Inc - Cablevision
Eastern Suffolk Boces
EDO Corporation
Good Samaritan Hospital
Government Employees Insurance Co
Keyspan Energy Corporation
King Kullen Grocery Co Inc
Long Island University
Macys East
Nassau Boces
Nassau Health Care Corp
Newsday Inc
North Shore Long Island Jewish Health System
Northrop Grumman
Pathmark Stores Inc
Sears Roebuck & Co
Stop & Shop
Suffolk County Dept Of Civil Service
SUNY at Stony Brook
SUNY Research Foundation
Telephonics
The Home Depot
Town of Hempstead
United Parcel Service Inc NY
US Postal for Hicksville New York
US Treasury Department
Verizon Communications
Waldbaum Inc
Winthrop University Hospital

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

Mohawk Valley

The Mohawk Valley region encompasses the Utica-Rome metropolitan statistical area (MSA), consisting of Herkimer and Oneida counties, and portions of two additional MSAs that are centered in surrounding regions. Fulton County is the only county in the region that does not belong to an MSA.



Demographics

- The Mohawk Valley's population lost 19,036 from 1990 to 2002, a decline of 3.6% compared to 6.5% growth statewide. The region comprises 2.6% percent of the total state population and is the second-smallest region in the state.
- From 1990 to 2000, the Mohawk Valley experienced a net loss of 31,000 persons aged 20-34, or 25.7% of the 20-34 young adult cohort. The region also experienced population loss of 3.1% in the 16-64 age cohort compared to 4.4% growth statewide.

MOHAWK VALLEY DATA BANK			
	MOK	NYS	US
Population			
2002 Estimate	504,787	-	-
% Change 1990-2002	-3.6	6.5	15.9
Employment			
2002 Level	191,815	8,116,000	130,376,000
% Change 2000-2002	-2.5	-2.3	-1.1
2000 Level	196,674	8,308,000	131,785,000
% Change 1992-2000	10.3	11.2	20.9
Unemployment			
2003 1st Half (#)	13,877	584,900	8,771,571
2003 1st Half (rate)	5.5	5.5	6.0
%Pt Change 2001-2003 1st Half	0.5	0.5	1.7
2000 (rate)	4.8	4.8	4.0
%Pt Change 1990-2000	-0.9	-0.8	-1.6
Labor Force Participation			
2000 (rate)	60.3	61.0	63.7
%Pt Change 1990-2000	-0.1	-2.5	-1.2
Per Capita Income (2002\$)			
2001	24,651	36,449	30,897
% Change 1990-2001	17.2	17.3	18.3
Poverty Rate			
2000	12.3	14.6	12.4
%Pt Change 1990-2000	0.5	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	31.8	30.5	29.6
%Pt Change 1990-2000	-1.3	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Fulton	42,954	5.8	
Herkimer	43,784	8.9	
Madison	51,683	9.7	
Montgomery	43,911	7.2	
Oneida	48,933	7.3	
Schoharie	46,534	10.0	

Employment and Labor Force Characteristics

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	196,675	191,815	(4,860)	-2.5%	\$27,996
623	Nursing and Residential Care Facilities	7,765	8,457	692	8.9%	\$19,376
518	Internet Service Providers, Web Search Portals, and Data Processing Services	878	1,482	605	68.9%	\$22,927
493	Warehousing and Storage	2,086	2,631	546	26.2%	\$29,530
721	Accommodation	3,983	4,464	481	12.1%	\$20,751
562	Waste Management and Remediation Services	420	893	473	112.7%	\$37,738
812	Personal and Laundry Services	1,671	1,918	247	14.8%	\$17,841
611	Educational Services	3,487	3,723	236	6.8%	\$31,452
517	Telecommunications	1,391	1,567	177	12.7%	\$53,185
541	Professional, Scientific, and Technical Services	4,672	4,845	173	3.7%	\$33,334
323	Printing and Related Support Activities	1,306	1,471	165	12.6%	\$29,245
	Total of above industries	27,659	31,452	3,793	13.7%	\$26,742

Source: NYS DOL.

- The Mohawk Valley experienced a job loss of 14,860 or 2.5% between 2000 and 2002, slightly greater than the 2.3% decline statewide. Between 1992 and 2000 the Mohawk Valley experienced the 3rd-largest job gain (10.3%) among the regions. This compared to the 11.2% gain statewide.
- Industries in the information sector (including internet service providers and telecommunications), educational services, health care and social services sectors were among the best performers during the period between 2000 and 2002. While the nursing and residential care facilities industry experienced the largest gain between 2000 and 2002 (690 jobs or 8.9%), average wages in the industry (\$19,376) represent 69.2% of the average overall annual wage in the Mohawk region of \$27,996.
- Declining industries in the Mohawk Valley were concentrated in manufacturing and services with administrative support services (22.7%), textile mills (52.2%) and miscellaneous manufacturing (26.8%) experiencing the largest employment losses in the region. Six out of the 10 industries with the largest employment losses in the region had higher average wages than the Mohawk Valley's 2002 average annual wage of \$27,996.
- Unemployment rates rose 0.5 percentage points to 5.5% in 2003, less than the 1.8 percentage point increase experienced by the state overall. The labor force participation rate declined slightly over the decade to 60.3% in 2000.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	196,675	191,815	(4,860)	-2.5%	\$27,996
561	Administrative and Support Services	7,662	5,922	(1,740)	-22.7%	\$18,482
313	Textile Mills	1,444	690	(753)	-52.2%	\$27,323
339	Miscellaneous Manufacturing	2,685	1,965	(720)	-26.8%	\$31,097
92	Government	41,247	40,667	(581)	-1.4%	\$35,059
336	Transportation Equipment Manufacturing	1,601	1,090	(511)	-31.9%	\$35,352
332	Fabricated Metal Product Manufacturing	3,750	3,294	(456)	-12.1%	\$33,422
314	Textile Product Mills	982	582	(400)	-40.7%	\$25,755
424	Merchant Wholesalers, Nondurable Goods	2,311	1,958	(354)	-15.3%	\$30,173
522	Credit Intermediation and Related Activities	3,641	3,332	(309)	-8.5%	\$30,293
722	Food Services and Drinking Places	11,087	10,791	(296)	-2.7%	\$10,175
	Total of above industries	76,409	70,292	(6,118)	-8.0%	\$29,144

Source: NYS DOL.

Income and Poverty

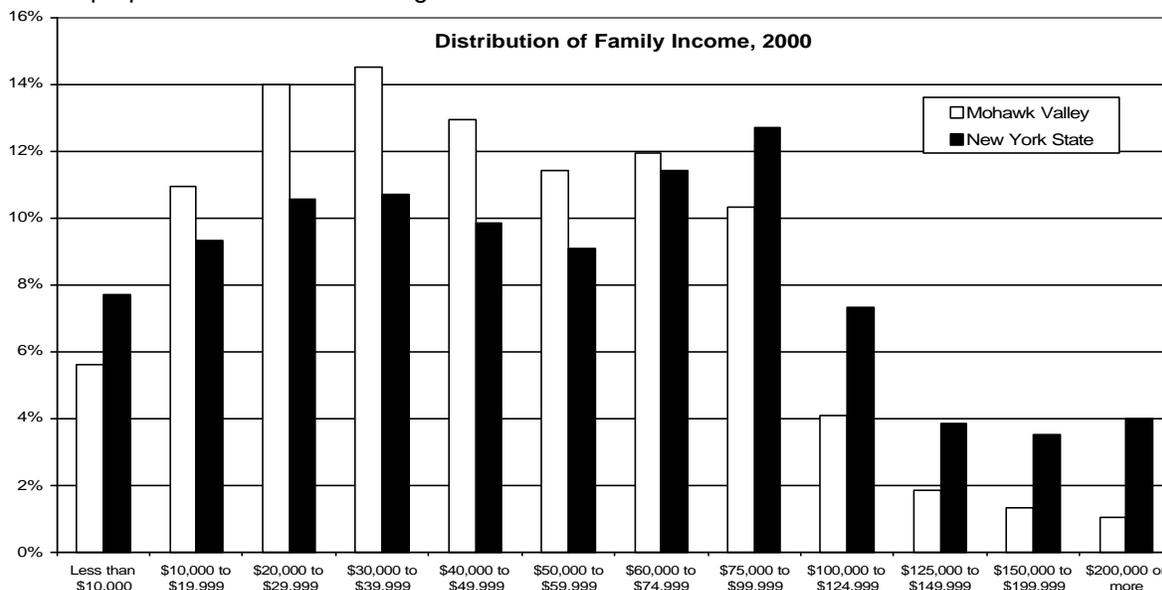
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	9.2	4.4	0.6	1.5	1.5	0.7
1990	11.4	5.3	0.7	2.2	1.9	0.9
2000	12.6	5.7	0.9	2.3	2.5	0.9
2001	12.6	5.7	0.7	2.3	2.6	1.0
1980-1990						
Change	2.2	0.9	0.1	0.7	0.4	0.1
Ann Avg % Change	2.2%	1.9%	1.9%	4.0%	2.5%	1.7%
1990-2000						
Change	1.3	0.4	0.1	0.2	0.6	0.1
Ann Avg % Change	1.1%	0.8%	1.8%	0.7%	2.9%	1.0%
2000-2001						
Change	-0.1	0.0	-0.1	0.0	0.1	0.0
Ann Avg % Change	-0.4%	-0.8%	-13.0%	-1.3%	3.9%	3.1%

Source: BEA. Deflator applied by Fiscal Policy Institute.

of poverty, yet despite this progress the region still has a high concentration of low-income families.

- All counties in the Mohawk Valley have median family incomes below the median family income for the state. Schoharie County experienced the largest percent increase in real median family income (10% or \$4,225) while Fulton County experienced the lowest (0.2% or \$138).

- Per capita income in the Mohawk Valley rose 17.2% to \$24,651 in the period between 1990 and 2001. The increase was slightly below the average New York State increase in per capita income of 17.3% and lower than the national average increase of 18.3%.
- In the last decade, the poverty rate in the Mohawk Valley grew 0.5 percentage points to 12.3%, slightly lower than New York State's 14.6% poverty rate in 2000. During the same period the share of the population earning less than 200% of the poverty level fell 1.3 percentage points to 31.8% of individuals.
- The region experienced the largest improvement in the proportion of residents living below 200%
- Family income in the Mohawk Valley is more heavily weighted towards the low end of the income spectrum with almost 25% of families falling into lower income brackets (\$10,000 to \$30,000) compared to 19.9% in New York State overall.
- From 1990 to 2000, real total personal income increased \$1.24 billion putting the Mohawk Valley 9th in the state for personal income growth. During the 1994-2000 expansion period the region witnessed a 1.0% annual increase in personal income, the lowest increase in the state.



Source: Census Bureau.

Prospects

Industry clusters include: fashion, apparel and textiles, financial services, materials processing, medical manufacturing, wood products, and business services.

According to the NYS DOL labor market analyst for the Mohawk Valley Region, tourism and high technology are two sectors that have experienced growth above the national average from 1997 to 2002 in the Mohawk Valley. A major factor in the growth of tourism is the success of the Oneida Indian Nation's Turning Stone Casino. While the Oneida Indian Nation expects to undergo a \$308 million expansion with 1,000 jobs added by 2004, the social consequences of gaming-based economic development are controversial and it is unclear whether the positive benefits of casinos in New York State outweigh the negative effects associated with gambling.

The high technology sector is also growing in the region with some 500 jobs expected over the next three years due to the location of Scienx, an optical imaging firm.

Fall 2003 also brings new hope for the Mohawk Valley's economic prospects with the first incoming class in the State University of New York's new Institute of Technology (SUNY IT) located in Utica. SUNY IT marks the transition from SUNY Utica-Rome's 2 year institution to a 4 year college, offering expanded degree programs including a new BA in Engineering. The university is the only public institution in the Mohawk Valley to offer Bachelors and Masters Degrees. These developments, requiring significant public investment to the region, may offer expanded options for residents of the Mohawk Valley and beyond to participate in the high technology economy.

A major development for the Workforce Investment Board (WIB) of Herkimer, Oneida and Madison counties includes a Department of Labor grant announced in July 2003 to provide almost \$300,000 in funding to connect people with disabilities to funding sources for skill-enhancing/work-training programs and also to educate employers about the benefits of employing individuals with disabilities. According to the WIB, the unemployment rate for individuals with disabilities in the three-county region hovers around 58%, much higher than the overall unemployment of 5.6% (1st half 2003 average) for the Mohawk Valley.

Such efforts to provide workforce development training to all residents in the Mohawk Valley are fundamentally important if the region wants to compete in future economic growth. In a recent survey conducted by the New York State Department of Labor for the Herkimer-Madison-Oneida region, "most employers were far more likely to indicate a lack of 'job-specific' skills among both their job applicants and current workers than a lack of basic or social skills." The survey also finds that employers in the region are interested in providing skills training for incoming and continual skills improvement for existing workers.

Top Employers in the Mohawk Valley, 2002
Academic Financial Services Association (AFSA)
City of Rome
Conmed Corp
County of Fulton
County of Herkimer
County of Oneida
Faxton-Children's Hospital
Fleet National Bank (FNB)
Madison-Oneida Central School District
Masonic Home for the Aged
Metropolitan Life Insurance Co
Nathan Littauer Hospital
NYS Association For Retarded Children
NYS Government Agencies
NYS Office Mental Retardation
Oneida Company Ltd
Oneida County Employment Services Inc (Turning Stone Casino)
Price Chopper Operating Co Inc
Remington Arms Co Inc
Rome City School District
Rome Memorial Hospital
St Elizabeth Hospital
St Lukes Memorial Hospital
St Marys Hospital
Staffsource Inc
United Cerebral Palsy Association
US Postal for Grifiss Air Force Base
Utica City School District
Utica Mutual Insurance Co
Wal-Mart Associates Inc

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

New York City

New York City is comprised of five counties: New York (the borough of Manhattan), Kings (the borough of Brooklyn), Queens, Bronx, and Richmond (the borough of Staten Island).



Demographics

- New York City's population increased 761,752 to 8.1 million between 1990 and 2002, a 10.4% increase. This growth was well above a statewide population gain of 6.5% over the same period. In fact, the city accounted for 65.2% of the state's population growth and now accounts for 42.2% of the state's population, up from its' 40.7% share in 1990.
- From 1990 to 2000, New York City's population aged 20-34 increased 11,861, a 0.6% increase. This age cohort declined 5.4% statewide over the same period. The city's 16-64 age cohort grew 9.7%. This was more than double the 4.4% gain registered statewide.

NEW YORK CITY DATA BANK			
	NYC	NYS	US
Population			
2002 Estimate	8,084,316	-	-
% Change 1990-2002	10.4	6.5	15.9
Employment			
2002 Level	3,461,396	8,116,000	130,376,000
% Change 2000-2002	-4.0	-2.3	-1.1
2000 Level	3,605,994	8,308,000	131,785,000
% Change 1992-2000	12.0	11.2	20.9
Unemployment			
2003 1st Half (#)	309,702	584,900	8,771,571
2003 1st Half (rate)	8.4	6.3	6.0
%Pt Change 2001-2003 1st Half	3.0	1.8	1.7
2000 (rate)	6.0	4.8	4.0
%Pt Change 1990-2000	-1.4	-0.8	-1.6
Labor Force Participation			
2000 (rate)	57.7	61.0	63.7
%Pt Change 1990-2000	-3.9	-2.5	-1.2
Per Capita Income (2002\$)			
2001	40,395	36,449	30,897
% Change 1990-2001	20.4	17.3	18.3
Poverty Rate			
2000	21.2	14.6	12.4
%Pt Change 1990-2000	2.0	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	39.8	30.5	29.6
%Pt Change 1990-2000	3.8	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Bronx	33,113	-7.2	
Kings	39,055	-7.1	
New York	54,208	5.1	
Queens	52,459	-7.3	
Richmond	69,429	-2.1	

Employment and Labor Force

New York City: 10 Industries with the Largest Employment Gains 2000-2002						
NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	3,605,979	3,461,396	-144,583	-4.0%	\$58,895
611	Educational Services	106,253	117,201	10,948	10.3%	\$37,452
624	Social Assistance	138,133	146,425	8,292	6.0%	\$22,004
621	Ambulatory Health Care Services	113,593	120,502	6,909	6.1%	\$42,377
92	Government	549,120	553,471	4,352	0.8%	\$46,848
623	Nursing and Residential Care Facilities	70,991	75,238	4,248	6.0%	\$32,160
551	Management of Companies and Enterprises	51,293	54,928	3,635	7.1%	\$133,634
622	Hospitals	154,852	157,596	2,743	1.8%	\$50,447
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	60,563	62,205	1,642	2.7%	\$42,134
722	Food Services and Drinking Places	156,107	157,629	1,522	1.0%	\$19,860
237	Heavy and Civil Engineering Construction	7,215	8,520	1,305	18.1%	\$67,991
	Total of above industries	1,408,120	1,453,716	45,596	3.2%	\$43,123

Source: NYS DOL.

- New York City's economy lost 144,583 jobs between 2000 and 2002, a 4.0% decline. These job losses accounted for 75.4% of all jobs lost statewide during this period. Wages in the city declined 4.3%, over the same period. The region's job base stood at 3.5 million in 2002.
- Job losses between 2000-2002 in New York City were heavily concentrated in the professional, scientific, and technical services sector which shed 33,792 jobs—a 10.8% decline, and accounted for 23.3% of the jobs lost in the city over this two-year period. The sector includes: legal services, accounting, computer systems design, advertising, management consulting, architecture, and engineering.
- The securities industry, which lost 23,192 jobs (12.2%) accounted for the next largest share of jobs lost in the city at 16%. Other significant job losses were recorded in administrative/support services, apparel manufacturing, banking, and internet-related services.
- The ten industries with the largest employment losses had an average wage of \$94,158, well above the city's overall average of \$58,895.
- Job gains between 2000-2002 were recorded in education services (10,948), social assistance (8,292), ambulatory health care services (6,909), and government (4,352) industries. This pattern of job growth was largely in line with statewide trends. The average wage in the ten industries that recorded the most job gains between 2000-2002 equaled \$43,123.
- The city's unemployment rate climbed to 8.4% during the first half of 2003, up a full three percentage points from its first-half 2001 average of 5.4%. This rate was well above the state's rate of 6.3%.

New York City: 10 Industries with the Largest Employment Losses 2000-2002						
NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	3,605,979	3,461,396	-144,583	-4.0%	\$58,895
541	Professional, Scientific, and Technical Services	312,272	278,480	-33,792	-10.8%	\$82,841
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	190,366	167,172	-23,194	-12.2%	\$225,493
561	Administrative and Support Services	202,005	183,473	-18,532	-9.2%	\$35,100
315	Apparel Manufacturing	57,178	39,710	-17,468	-30.6%	\$33,777
522	Credit Intermediation and Related Activities	100,045	92,731	-7,313	-7.3%	\$105,755
518	Internet Service Providers, Web Search Portals, and Data Processing Services	15,241	8,618	-6,623	-43.5%	\$82,293
238	Specialty Trade Contractors	80,898	74,322	-6,576	-8.1%	\$54,257
481	Air Transportation	31,412	25,195	-6,218	-19.8%	\$61,357
424	Merchant Wholesalers, Nondurable Goods	76,180	70,085	-6,096	-8.0%	\$63,577
512	Motion Picture and Sound Recording Industries	39,037	32,977	-6,060	-15.5%	\$75,700
	Total of above industries	1,104,634	972,762	-131,872	-11.9%	\$94,158

Source: NYS DOL.

Income and Poverty

	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	165.8	124.1	16.6	28.8	29.1	-40.9
1990	243.2	172.7	24.3	48.1	38.4	-46.0
2000	315.8	239.4	40.2	50.3	52.7	-69.2
2001	316.5	237.2	40.8	50.1	54.5	-68.7
1980-1990						
Change	77.3	48.6	7.6	19.3	9.3	-5.1
Ann Avg % Change	3.9%	3.4%	3.8%	5.3%	2.8%	1.2%
1990-2000						
Change	72.6	66.7	16.0	2.2	14.3	-23.2
Ann Avg % Change	2.6%	3.3%	5.2%	0.4%	3.2%	4.2%
2000-2001						
Change	0.6	-2.2	0.6	-0.2	1.8	0.5
Ann Avg % Change	0.2%	-0.9%	1.5%	-0.4%	3.4%	-0.7%

Source: BEA. Deflator applied by Fiscal Policy Institute.

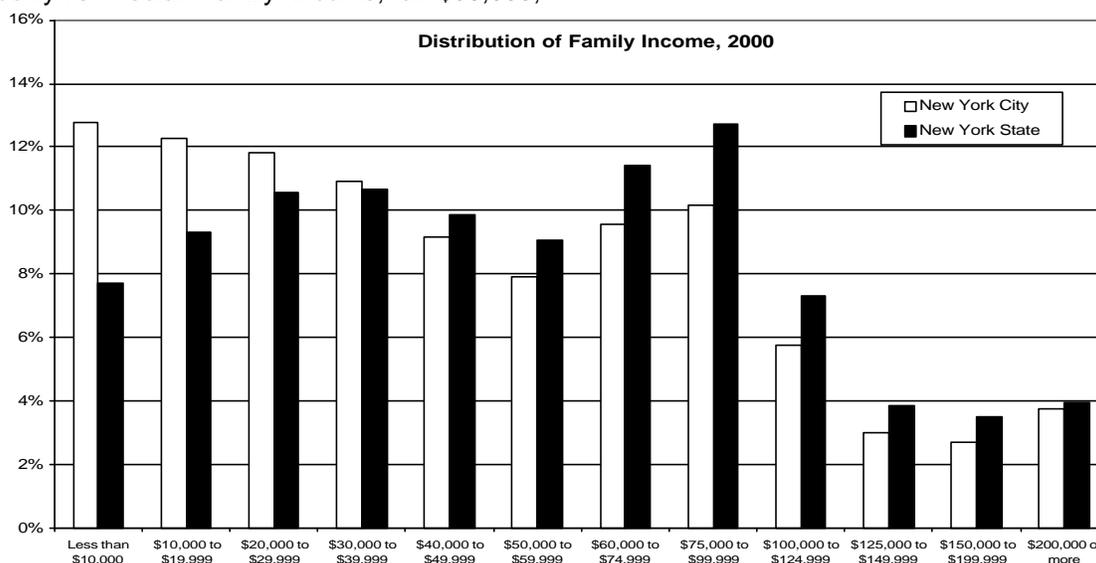
represents 70% of the state's median. At \$69,429, Staten Island's median family income is the highest in the city, and ranks as 6th-highest in the state. The \$2,635 increase in Manhattan's median family income between 1990 and 2002 was the only increase in the city.

- The distribution of family income in the City reflects its higher poverty rate. Thirty-seven

- Per capita income in New York City rose 20.4% (to \$40,395) between 1990 and 2001. This increase was above the state's 17.3% increase (to \$36,445) over the same period. The city's per capita income ranks as the 2nd-highest (behind Long Island's) in the state.
- The poverty rate in New York City rose to 21.2% in 2000, up two percentage points from its 1990 mark of 19.3%. Over the course of the decade, the share of the City's population earning less than 200% of the poverty level increased to 39.8% of all individuals, up from 36%.
- Median family incomes in four of the city's five boroughs are below that of the state (\$55,789). The Bronx's median family income of \$33,113 represents just 59% of the state's median and ranks lowest among the state's counties. Brooklyn's median family income, at \$39,055,

percent of New York City's families earn less than \$30,000, compared to 27.6% statewide.

- From 1990 to 2000, real personal income in New York City increased \$72.63 billion, or about 2.7% per annum. This rate of growth was the fastest among the state's regions over the decade, and largely reflected strong growth in the later 1990s. The City's total increase over the decade accounted for 53.7% of the total increase in personal income in the state in the 1990s. Between 1994 and 2000 (the period roughly corresponding to the state's 1990s economic expansion), New York City's 5.8% average annual growth in the wages and salaries component of personal income was significantly above the 3.5% rate recorded by Long Island--second-fastest among the regions.



Prospects

New York City accounts for 42% of the state's population, 43% of its employment base, and 45% of its personal income.

Between December 2000 (the peak month for employment at the state level) and June 2003 the city lost 240,000 jobs. This decline of 6.4% was more than three times the national decline. Roughly 40% of these job losses were related to the World Trade Center attack. Still, even before the WTC attack, the city had lost 56,000 jobs.

In addition to the dramatic job loss numbers for the city, several additional indicators reflect the severity of this recession and the toll it has taken on New York City residents:

The city's unemployment rate stood at 8.1% in June, significantly above the nation's 6.4% and up from 5.3% in December 2000.

For all of 2002, total wages fell by 8.6% in real terms, the greatest yearly decline in the quarter century for which data are available.

Since January 2002, the number of homeless men, women, and children sleeping in New York City shelters has increased dramatically. In fact, the year over year increase from January 2001 to January 2002—from 31,064 to 38,463 people per night—represented the largest one-year increase since the Great Depression.

Many of the city's job losses since December 2000 have occurred in the industries that grew rapidly during the late 1990s boom. These include several high-paying industries: securities, computer programming, advertising, publishing, motion pictures, internet-related industries, telecommunications, and consulting.

At the same time, the city's manufacturing sector has also experienced serious job losses—making clear that the recession has also affected the city's blue-collar workers. Through June of 2003, the city's manufacturing sector had lost 41,000 jobs since the recession's onset. This represents a 24% decline.

The World Trade Center attacks had a profoundly adverse impact on the city economy in a short span of time. While the economic damage inflicted by the attack was fundamentally different from what we normally associate with recession, it intensified the economic slowdown that had already been underway at the time of the attack. Beginning in September and continuing through the fourth quarter of 2001 when the impact was felt

most profoundly, the city lost approximately 100,000 jobs. The attacks acutely affected numerous industries, including: air transport, hospitality, retailing, securities, and apparel manufacturing.

Only eight industries experienced job growth of over 1,000 from the end of 2000 to the end of 2002. And, of these, only one, management of companies, is a private sector industry. Thus, most of the sectors adding jobs have been related to government or non-profit sector spending.

Top Employers in New York City, 2002

- American Airlines Inc
- American Broadcasting Co Inc
- Bank of New York
- Bear Stearns & Co
- Beth Israel Medical Center
- Chase Manhattan Bank
- City of New York Government Agencies
- City of New York Health & Hospitals Corp
- City of New York Housing Authority
- City of New York School District
- City of New York Transit Authority
- City University of New York
- Columbia University
- Consolidated Edison Co of NY
- Credit Suisse First Boston Inc
- Goldman Sachs & Co
- Macys East
- Manhattan & Bronx Surface Operating Authority of MTA
- Merrill Lynch Pierce Fenner & Smith
- Montefiore Hospital & Medical Ctr
- Morgan Stanley & Co Inc
- Mount Sinai Hospital
- North Shore LI Jewish Health System
- Salomon Smith Barney Inc
- The Gap Inc
- The New York & Presbyterian Hospital
- The New York Hopsital
- United Parcel Service Inc NY
- US Postal for New York New York
- Verizon Communications

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

North Country

The North Country comprises seven counties in the northern portion of the state. The Adirondack Park has a distinct impact on the development of all counties in the region. None of the North Country counties belong to a metropolitan statistical area.



Demographics

- The North Country's population lost an estimated 2,384 from 1990 to 2002, or 0.6% compared to 6.5% growth statewide. The region comprises 2.2% percent of the total state population and is the smallest region in the state.
- From 1990 to 2000, the North Country experienced a net loss of 22,609 persons aged 20-34, or 19.8% of the 20-34 young adult cohort, a much higher rate of decrease than the state's already high rate of 12%. The region also experienced population growth of 1.7% in the 16-64 working-age cohort compared to 4.4% growth statewide.

NORTH COUNTRY DATA BANK			
	NOR	NYS	US
Population			
2002 Estimate	422,269	-	-
% Change 1990-2002	-0.6	6.5	15.9
Employment			
2002 Level	151,713	8,116,000	130,376,000
% Change 2000-2002	0.4	-2.3	-1.1
2000 Level	151,085	8,308,000	131,785,000
% Change 1992-2000	5.6	11.2	20.9
Unemployment			
2003 1st Half (#)	14,040	584,900	8,771,571
2003 1st Half (rate)	7.2	6.3	6.0
%Pt Change 2001-2003 1st Half	-0.3	1.8	1.7
2000 (rate)	5.7	4.8	4.0
%Pt Change 1990-2000	-0.6	-0.8	-1.6
Labor Force Participation			
2000 (rate)	57.6	61.0	63.7
%Pt Change 1990-2000	-1.2	-2.5	-1.2
Per Capita Income (2002\$)			
2001	22,233	36,449	30,897
% Change 1990-2001	13.2	17.3	18.3
Poverty Rate			
2000	14.3	14.6	12.4
%Pt Change 1990-2000	0.1	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	36.3	30.5	29.6
%Pt Change 1990-2000	-1.1	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Clinton	49,355	10.7	
Essex	45,248	8.4	
Franklin	41,520	12.6	
Hamilton	42,819	12.1	
Jefferson	42,409	2.5	
Lewis	42,399	3.7	
St. Lawrence	41,561	2.3	

Employment and Labor Force Characteristics

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	151,084	151,713	629	0.4%	\$28,666
622	Hospitals	5,740	6,646	906	15.8%	\$31,832
92	Government	43,549	44,180	631	1.4%	\$35,165
541	Professional, Scientific, and Technical Services	2,537	2,954	417	16.4%	\$26,995
325	Chemical Manufacturing	2,192	2,498	306	14.0%	\$48,215
236	Construction of Buildings	1,970	2,272	302	15.3%	\$30,350
621	Ambulatory Health Care Services	4,396	4,670	274	6.2%	\$38,874
624	Social Assistance	3,256	3,525	268	8.2%	\$16,484
611	Educational Services	2,273	2,503	230	10.1%	\$30,744
238	Specialty Trade Contractors	2,854	3,073	218	7.7%	\$32,613
311	Food Manufacturing	1,267	1,480	214	16.9%	\$31,288
	Total of above industries	70,033	73,800	3,767	5.4%	\$33,840

Source: NYS DOL.

- The North Country region's stagnant employment growth, adding only 629 jobs (0.4%) between 2000 and 2002, reflects the slow state of the New York economy which suffered a 2.3% decline in total insured employment over the 3-year period. Between 1992 and 2000 the North Country experienced 5.6% total insured employment growth (almost 8,000 jobs) compared to 11.2% statewide.
- The government, hospitals, chemical manufacturing and construction sectors were among the best performers during the period between 2000 and 2002. Eight out of the 10 growing industries paid higher than the average overall annual wage in the North Country of \$28,666. The top 10 growing industries in the region paid an average wage 18% higher than the North Country average wage for all industries.
- Declining industries in the North Country were concentrated in manufacturing, with primary metal manufacturing, leather and allied product manufacturing and paper manufacturing recording the largest employment losses in the region. Six out of the 10 industries with the largest employment losses in the region had higher average wages than the North Country's 2002 average annual wage of \$28,666. Job losses in primary metal manufacturing are especially severe considering the industry paid an average wage of \$62,203, 217% higher than the average wage for the North Country.
- Unemployment rates fell 0.3 percentage points to 7.2% in 2003, compared to 1.8 percentage point increase experienced by the state overall. The labor force participation rate declined over the decade by more than one percentage point to 57.6% in 2000.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	151,084	151,713	629	0.4%	\$28,666
331	Primary Metal Manufacturing	2,670	2,172	-497	-18.6%	\$ 62,203
316	Leather and Allied Product Manufacturing	254	24	-230	-90.5%	\$ 38,637
322	Paper Manufacturing	3,577	3,368	-209	-5.8%	\$ 47,293
334	Computer and Electronic Product Manufacturing	609	411	-198	-32.5%	\$ 29,267
721	Accommodation	2,980	2,785	-195	-6.6%	\$ 15,932
237	Heavy and Civil Engineering Construction	773	581	-192	-24.8%	\$ 42,613
212	Mining (except Oil and Gas)	564	373	-191	-33.9%	\$ 35,620
484	Truck Transportation	1,350	1,176	-175	-12.9%	\$ 27,798
452	General Merchandise Stores	3,560	3,389	-171	-4.8%	\$ 15,184
713	Amusement, Gambling, and Recreation Industries	1,662	1,493	-169	-10.2%	\$ 18,335
	Total of above industries	17,998	15,770	-2,228	-12.4%	\$ 31,785

Source: NYS DOL.

Income and Poverty

North Country - Change in Personal Income and Components, Selected Years (in billions of 2002 dollars)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	5.9	3.2	0.4	0.9	1.1	0.0
1990	8.3	4.5	0.6	1.4	1.3	0.0
2000	9.5	4.9	0.7	1.6	1.9	0.0
2001	9.5	4.9	0.6	1.6	2.0	0.0
1980-1990						
Change	2.4	1.3	0.2	0.5	0.3	0.0
Ann Avg % Change	3.4%	3.6%	3.6%	4.8%	2.2%	n/a
1990-2000						
Change	1.2	0.4	0.1	0.2	0.5	0.0
Ann Avg % Change	1.4%	0.8%	1.9%	1.3%	3.4%	1.5%
2000-2001						
Change	0.0	0.0	-0.1	0.0	0.1	0.0
Ann Avg % Change	-0.3%	0.4%	-16.9%	-1.4%	4.4%	67.3%

Source: BEA. Deflator applied by Fiscal Policy Institute.

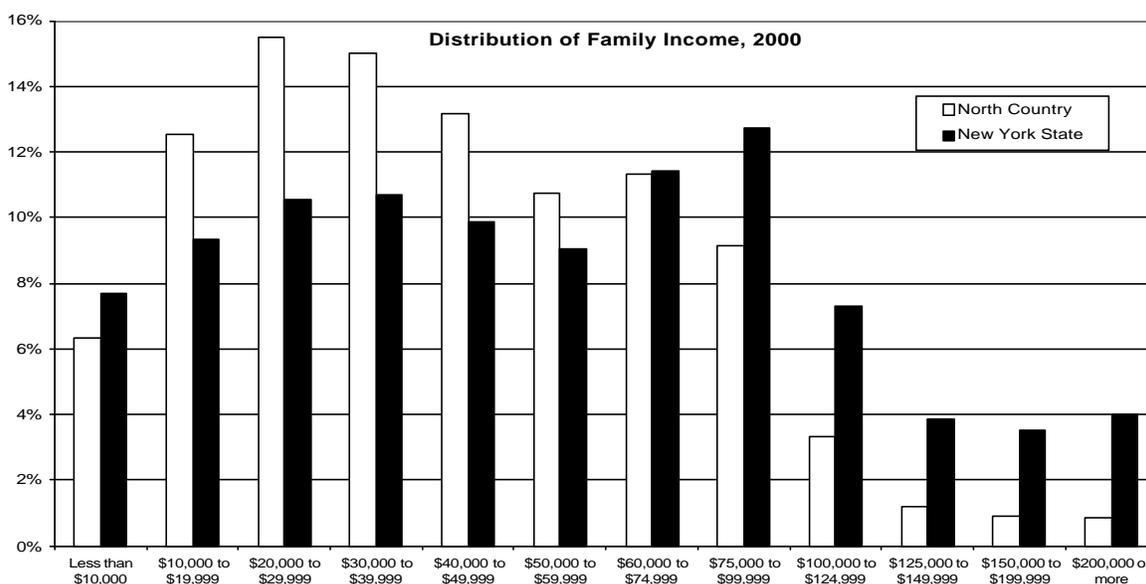
- All seven counties in the North Country have median family incomes below the median family income for the state. Clinton, Franklin and Hamilton counties all experienced growth in median family income over 10%, compared to the states' increase of 0.2% during the 1990s.

- The North Country has the highest concentration of families in the \$10,000-\$30,000 income bracket (28% compared to 20% in New

York State) and the lowest concentration of families in the \$75,000+ income bracket (15% compared to 31% in New York State).

- Per capita income in the North Country rose 13.2% to \$22,233 in the period between 1990 and 2001. The increase was well below the average New York State increase in per capita income of 17.3%.
- In the last decade, the poverty rate in the North Country grew 0.1 percentage points to 14.3%, slightly lower than New York State's 14.6% poverty rate in 2000. During the same period the share of the population earning less than 200% of the poverty level fell 1.1 percentage points to 36.3% of individuals. The region ranks 2nd (out of the 10 Labor Regions) in its share of people living below 200% of poverty.

- From 1990 to 2000, real total personal income increased \$1.2 billion, putting the North Country's personal income at \$9.5 billion, the smallest region in New York State in terms of personal income. Between 1990 and 2000, the wages and salaries component of personal income grew an average of 0.8% annually from \$4.5 billion to \$4.9 billion, yet during the 1994-2000 expansion period the region witnessed a 1.2% annual increase in wages and salaries, well below the New York State annual growth rate of 4.3% during the same time period.



Source: Census Bureau.

Prospects

Located in the Northeastern corner of New York State between the borders of Canada, Vermont and the southern border of the Adirondack Park, the North Country is strategically located to take advantage of international economic activity and tourism. The region contains the largest publicly protected area in the contiguous 48 states (the Adirondack Park), half of which is public “forever wild” forest preserve and the other half privately owned.

According to the New York State Department of Labor, the health care and social assistance sector is an engine of growth for the North Country. Due to the requirements of servicing areas with low population densities such as the North Country, the region experienced an increase in the number of small family health centers and clinics. Major hospitals in the region also have undergone capital projects to increase the scope of their services. While demand for health care services is increasing due to an aging population, North Country health care employers have noted difficulty in attracting employees due to low entry-level wages.

Due to its isolation from major metropolitan areas (there are no Metropolitan Statistical Areas in the North Country), the North Country is slightly isolated from other large-scale economic activity centers in New York State. While New York State Department of Correction’s literature cites prisons as economic engines in the North Country, a recent report by the non-profit Washington DC-based Sentencing Project challenges the generally accepted premise that rural prisons support economic growth in their host counties.

Out of 14 prison openings in rural New York from 1982 to 2001, 11 were in the North Country. The Sentencing Project study compares the experience of seven rural counties with prisons that have opened since 1982 to seven control counties that have never had a prison. King et al. conclude: “Overall, over the course of 25 years, we find no significant difference or discernible pattern of economic trends between the seven rural counties in New York that hosted a prison and the seven rural counties that did not host a prison. While prisons clearly create new jobs, these benefits do not aid the host county to any substantial degree since local residents are not necessarily in a position to be hired for these jobs.”

Counties in upstate New York that received prisons did not gain significant employment advantages or any economic advantages, as measured by per capita income, when compared to the control counties.

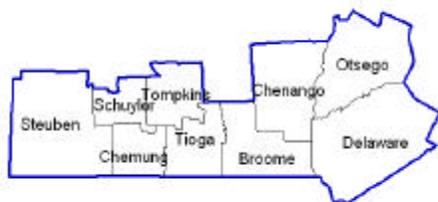
In response to the healthcare employee shortage, the New York State Department of Labor, the Iroquois Healthcare Association and the Consortium for Worker Education are collaborating on workforce development programs (such as the Health Care Career Opportunity) in the North Country. Programs such as these are intended to link community needs to sustainable job growth.

Top Employers in the North Country, 2002
Aluminum Co of America
Bombardier Mass Transit Corp
Carthage Central School District
Champlain Valley Physicians Health Plan
Citizen Advocates Inc
City of Watertown School District
Clarkson University
County of Clinton
County of Franklin
County of Jefferson
County of Lewis
County of St Lawrence
Hepburn Medical Center
Indian River Central School District
International Paper Co Corp
Jefferson Rehab Center Inc
Kinney Drugs Inc
Kraft Foods North America Inc
Price Chopper Operating Co Inc
Samaritan Medical Center
St Lawrence University
St Lawrence-Lewis Co BOCES
State of New York Government Agencies
SUNY at Plattsburgh
SUNY at Potsdam
The Penn Traffic Co Inc
Tops Inc
US Postal for Fort Drum
Wal-Mart Associates Inc
Wyeth-Ayerst

Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.

Southern Tier

The Southern Tier region consists of two metropolitan statistical areas, Binghamton (Broome and Tioga County) and Elmira (Chemung County), and six additional surrounding counties.



Demographics

The Southern Tier's population fell an estimated 9,748 from 1990 to 2002, or a 1.3% loss compared to 6.5% growth statewide. The region comprises 3.8% percent of the total state population and is the 7th largest region in the state.

From 1990 to 2000, the Southern Tier experienced a net loss of 40,448 persons aged 20-34, or 22.7% of the 20-34 young adult cohort. The region also experienced population loss of 1.4% in the working age 16-64 age cohort compared to 4.4% growth statewide.

SOUTHERN TIER DATA BANK			
	SOU	NYS	US
Population			
2002 Estimate	721,301	-	-
% Change 1990-2002	-1.3	6.5	15.9
Employment			
2002 Level	296,160	8,116,000	130,376,000
% Change 2000-2002	-2.0	-2.3	-1.1
2000 Level	302,355	8,308,000	131,785,000
% Change 1992-2000	6.0	11.2	20.9
Unemployment			
2003 1st Half (#)	20,738	584,900	8,771,571
2003 1st Half (rate)	5.7	6.3	6.0
%Pt Change 2001-2003 1st Half	1.6	1.8	1.7
2000 (rate)	4.1	4.8	4.0
%Pt Change 1990-2000	-0.6	-0.8	-1.6
Labor Force Participation			
2000 (rate)	61.6	61.0	63.7
%Pt Change 1990-2000	-0.4	-2.5	-1.2
Per Capita Income (2002\$)			
2001	24,394	36,449	30,897
% Change 1990-2001	14.9	17.3	18.3
Poverty Rate			
2000	13.4	14.6	12.4
%Pt Change 1990-2000	0.9	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	33.1	30.5	29.6
%Pt Change 1990-2000	1.3	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Broome	49,020	-2.3	
Chemung	47,479	5.9	
Chenango	42,857	0.7	
Delaware	42,840	7.1	
Otsego	44,367	4.0	
Schuyler	44,724	8.2	
Steuben	45,262	7.0	
Tioga	50,193	-0.5	
Tompkins	57,243	7.9	

Employment and Labor Force Characteristics

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	302,355	296,160	-6,194	-2.0%	\$31,315
92	Government	57,168	58,722	1,554	2.7%	\$32,066
722	Food Services and Drinking Places	16,853	17,758	904	5.4%	\$10,232
624	Social Assistance	6,910	7,578	668	9.7%	\$16,360
611	Educational Services	17,407	17,998	592	3.4%	\$40,224
621	Ambulatory Health Care Services	7,866	8,332	467	5.9%	\$42,049
622	Hospitals	13,060	13,414	354	2.7%	\$32,796
452	General Merchandise Stores	5,898	6,174	276	4.7%	\$15,346
623	Nursing and Residential Care Facilities	8,220	8,466	246	3.0%	\$19,518
522	Credit Intermediation and Related Activities	4,125	4,365	240	5.8%	\$32,394
713	Amusement, Gambling, and Recreation Industries	1,622	1,810	188	11.6%	\$11,658
	Total of above industries	139,129	144,617	5,488	3.9%	\$28,526

Source: NYS DOL.

- The Southern Tier region's sharp employment losses, 6,194 (2.0%) jobs between 2000 and 2002, reflects the state of the New York economy which suffered a 2.3% decline in total insured employment over the 3 year period. Between 1992 and 2000 the Southern Tier experienced 6.0% total insured employment growth compared to 11.2% statewide.
- Industries in the government, food services, educational services, health care and social services sectors were among the best performers during the period between 2000 and 2002. While the food services and drinking places industry gained over 900 jobs (5.4%), average wages in the industry (\$10,232) represent 32.7% of the average overall annual wage in the Southern Tier of \$31,315. The average wage of the top 10 growing industries in the region (\$28,526) is 8.9% lower than the average annual wage in the Southern Tier (\$31,315).
- Declining industries in the Southern Tier were concentrated in manufacturing and services with merchant wholesalers, nondurable goods, plastics and rubber products manufacturing and paper manufacturing with the largest employment losses in the region. Nine out of the 10 industries with the largest employment losses in the region had higher average wages than the Southern Tier's 2002 average annual wage of \$31,315.
- Unemployment rates grew 1.7 percentage points to 5.7% in 2003, slightly less than the 1.8 percentage point increase experienced by the state overall. The labor force participation rate declined somewhat over the decade to 61.6% in 2000.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	302,355	296,160	-6,194	-2.0%	\$31,315
334	Computer and Electronic Product Manufacturing	16,921	13,728	-3,193.0	-18.9%	\$61,033
561	Administrative and Support Services	12,149	10,260	-1,889.1	-15.5%	\$21,135
333	Machinery Manufacturing	6,169	4,924	-1,244.5	-20.2%	\$43,918
327	Nonmetallic Mineral Product Manufacturing	4,129	3,223	-906.0	-21.9%	\$45,800
323	Printing and Related Support Activities	2,979	2,288	-691.1	-23.2%	\$30,572
332	Fabricated Metal Product Manufacturing	4,204	3,521	-683.5	-16.3%	\$35,484
541	Professional, Scientific, and Technical Services	11,358	10,819	-538.6	-4.7%	\$43,196
337	Furniture and Related Product Manufacturing	1,623	1,188	-435.3	-26.8%	\$28,762
445	Food and Beverage Stores	9,187	8,755	-431.9	-4.7%	\$15,194
484	Truck Transportation	1,914	1,573	-340.8	-17.8%	\$31,895
	Total of above industries	70,633	60,279	-10,353.8	-14.7%	\$38,126

Source: NYS DOL.

Income and Poverty

Southern Tier - Change in Personal Income and Components, Selected Years (in billions of 2002 dollars)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	12.7	7.6	0.8	2.0	1.9	-0.3
1990	16.4	9.4	1.1	3.2	2.5	-0.3
2000	18.6	10.5	1.2	3.5	3.3	-0.3
2001	18.3	10.2	1.1	3.5	3.4	-0.3
1980-1990						
Change	3.7	1.8	0.2	1.2	0.5	0.0
Ann Avg % Change	2.6%	2.2%	2.6%	4.7%	2.5%	-1.6%
1990-2000						
Change	2.2	1.1	0.1	0.3	0.8	-0.1
Ann Avg % Change	1.3%	1.2%	1.1%	1.0%	2.9%	2.4%
2000-2001						
Change	-0.3	-0.3	-0.2	0.0	0.1	0.0
Ann Avg % Change	-1.7%	-2.9%	-13.0%	-0.7%	4.1%	-14.1%

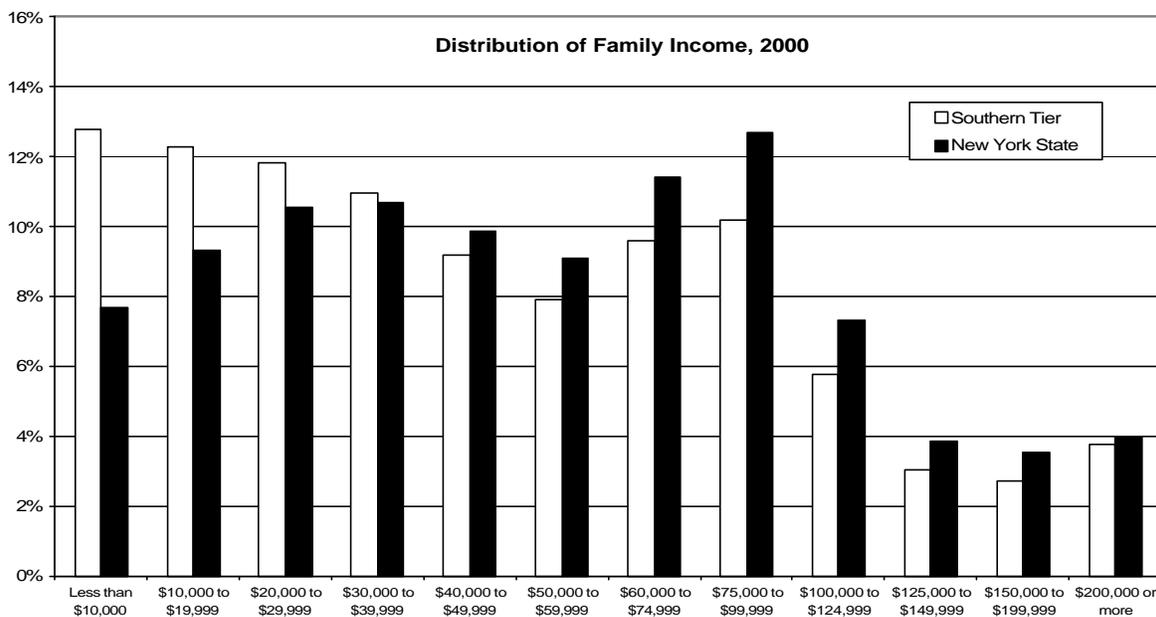
Source: BEA. Deflator applied by Fiscal Policy Institute.

family income for the state (\$55,786). Tompkins County experienced the largest dollar increase in real median family income (\$4,209) while neighboring Broome County experienced the largest decrease (1,143).

- The distribution of family income in the Southern Tier is more concentrated on the lower (\$10,000-\$30,000) and middle (\$30,000 to \$75,000) income brackets than for the state overall.

- Per capita income in the Southern Tier rose 14.9% to \$24,394 in the period between 1990 and 2001. The increase was below the average New York State increase in per capita income of 17.3% and 3.4 percentage points below the US increase of 18.3%.
- In the last decade, the poverty rate in the Southern Tier grew 0.9 percentage points to 13.4% in 2000. During the same period the share of the population earning less than 200% of the poverty level grew 1.3 percentage points to 33.1% of individuals.
- Eight out of nine counties in the Southern Tier have median family incomes below the median

- From 1990 to 2000, real total personal income increased \$2.2 billion, putting the Southern Tier 8th in the state for total personal income. Between 1990 and 2000, the proprietors' income component of personal income grew an average of 1.1% annually from \$1.1billion to \$1.2 billion yet during the 1994-2000 expansion period the region witnessed a 3.3% annual increase in proprietors' income, the lowest increase in the state.



Source: Census Bureau.

Prospects

Industry clusters in the region include: Electronics manufacturing, tourism, business services, industrial machinery, financial service, materials processing, ceramics, and optics and imaging.

The Southern Tier, the birth place of IBM and home of Corning, continues to be plagued by large-scale lay-offs. IBM, Corning, Universal Instruments, Hardinge, and Mercury Aircraft, all laid off-employees. Other establishments, such as Flextronic, International Flex Technologies, and Shepard Niles have ceased operations altogether.

On the brighter side, there is encouraging news for the Southern Tier as a number of companies--CAF, Transportation and Transit Associates, and Alstom—begin producing and refurbishing rail cars. Alstom, the largest manufacturer of urban transportation vehicles has won contracts to upgrade mass transit trains in Chicago, Baltimore, Atlanta, the District of Columbia, and New York City. Westcode corporation has contracted with the MTA to supply air conditioning equipment.

The sale of IBM's Endicott operations (IBM's original home site) to Endicott Interconnect Technologies, Inc. may have saved at least 2000 jobs. The latter is a consortium of local entrepreneurs who put together money to buy the facility from IBM.

Tourism is fairly significant in the region. Wineries, the Corning Glass Museum, Watkins Glen (NASCAR) and the Baseball Hall of Fame are major attractions. Tourism accounts for about 10 percent of the employment in the region—about 26,600 workers are employed in the industry.

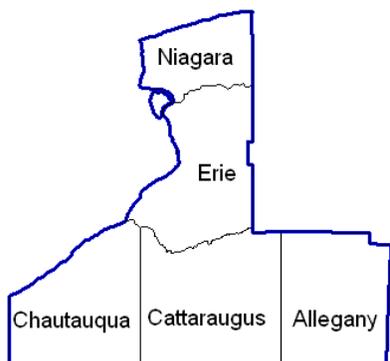
Prospects for the Southern Tier manufacturing sector do not appear to be bright as international competition and the shifting of manufacturing overseas continues to chip away at the base. The fall off in manufacturing has hurt service industries including professional and business services which lost 1400 jobs the past year.

SUNY at Binghamton, one of four major SUNY campuses, is located in the region. The Southern Tier is home to Cornell University which houses some of the leading scientific research and development facilities in the world. However, very little of the benefit of these resources at Cornell has spilled over to enhance economic development in the region; there have been very few business startups over the years. Other institutions include Cortland Community College, Elmira College, Hartwick College, SUNY College at Oneonta, and Ithaca College

Top Employers in the Southern Tier, 2002
Amphenol Corp
Arnot & Ogden Medical Center
Bae Systems Controls Inc
Borg-Warner Automotive
Broome Boces
City School District Of Binghamton
Cornell University
Corning City School District
Corning Incorporated
County of Broome
County of Chemung
County of Steuben
Elmira City School District
International Business Machine Corp
Ithaca City School District
Ithaca College
Lockheed Martin Corp
Nationwide Credit Inc
New York State Electric & Gas Corp
Our Lady of Lourdes Hospital
SDH Education West Llc
State of New York Government Offices
SUNY at Binghamton
The Mary Imogene Bassett Hospital
The Mead Corporation
Tops Markets Inc
Toshiba Display Devices Inc
United Health Services Hospital Inc
Wal-Mart Associates Inc
Wegmans Food Markets Inc
<i>Source: NYS DOL ES-202 data, compiled by the New York State Data Center. Unranked.</i>

Western New York

Western New York encompasses the Buffalo-Niagara Falls and the Jamestown metropolitan areas, as well as Allegany and Cattaraugus Counties.



Demographics

- Western New York's population declined by 31,009 between 1990-2002, a decline of 2.1% compared to a Statewide increase of 6.5%. The region accounts for about 7.5% of the State's population and is the 4th largest region in the State. It ranked 9th in terms of population growth during the period.
- From 1990 to 2000, Western New York experienced a net loss of 81,549 people aged 20-34 or 23.6% of the 20-34 young adult cohort. The region also experienced a decline of 25,463 people or 2.7% in the 16-64 age cohort compared to a 4.4% statewide.

WESTERN NEW YORK DATA BANK			
	WES	NYS	US
Population			
2002 Estimate	1,434,930	-	-
% Change 1990-2002	-2.1	6.5	15.9
Employment			
2002 Level	625,708	8,116,000	130,376,000
% Change 2000-2002	-2.3	-2.3	-1.1
2000 Level	640,424	8,308,000	131,785,000
% Change 1992-2000	4.8	11.2	20.9
Unemployment			
2003 1st Half (#)	44,526	584,900	8,771,571
2003 1st Half (rate)	6.3	6.3	6.0
%Pt Change 2001-2003 1st Half	0.9	1.8	1.7
2000 (rate)	5.4	4.8	4.0
%Pt Change 1990-2000	-0.3	-0.8	-1.6
Labor Force Participation			
2000 (rate)	62.3	61.0	63.7
%Pt Change 1990-2000	0.3	-2.5	-1.2
Per Capita Income (2002\$)			
2001	23,564	36,449	30,897
% Change 1990-2001	11.5	17.3	18.3
Poverty Rate			
2000	12.3	14.6	12.4
%Pt Change 1990-2000	0.0	1.6	-0.7
Percent of Population Earning less than 200% of Poverty level, 2000	29.4	30.5	29.6
%Pt Change 1990-2000	-0.5	2.7	-1.3
Median Family Income			
	2000 (2002\$)	% Change 1990-2000	
USA	54,011	9.5	
New York State	55,786	0.2	
Allegany	41,636	6.0	
Cattaraugus	42,433	7.5	
Chautauqua	44,306	5.7	
Erie	53,411	8.8	
Niagara	51,605	8.7	

Employment and Labor Force Characteristics

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	640,422	625,708	-14,714	-2.3%	\$31,802
92	Government	107,932	110,272	2,340	2.2%	\$36,074
524	Insurance Carriers and Related Activities	8,996	10,731	1,735	19.3%	\$41,257
551	Management of Companies and Enterprises	7,326	8,749	1,423	19.4%	\$51,125
623	Nursing and Residential Care Facilities	18,430	19,844	1,414	7.7%	\$20,168
522	Credit Intermediation and Related Activities	13,583	14,933	1,350	9.9%	\$44,540
517	Telecommunications	3,488	4,549	1,062	30.4%	\$50,300
722	Food Services and Drinking Places	42,183	43,170	987	2.3%	\$10,416
624	Social Assistance	13,413	14,181	768	5.7%	\$17,732
611	Educational Services	11,598	12,251	653	5.6%	\$25,716
424	Merchant Wholesalers, Nondurable Goods	7,431	7,820	389	5.2%	\$36,337
	Total of above industries	234,379	246,500	12,121	5.2%	\$30,273

Source: NYS DOL.

- Between 2000 and 2002, the Western New York Region lost 14,714 jobs 2.3%, the same rate as the state. Between 1992-2000, total employment in the region grew by 4.8% or 29,248 jobs compared to 11.2% for the state. The region ranked 9th in terms of employment growth in the 1992-2000 period.
- Sectors that performed the best between 2000-2002 included insurance carriers and related activities, management of companies and enterprises, and telecommunications. These industries paid well and generally above the average wage of \$31,802 in the region: Insurance \$41,257; Management \$51,125; and Telecommunications \$50,000. The region ranked seventh in terms of job growth during the period.
- Declining industries in the Western New York region were concentrated in manufacturing, including miscellaneous manufacturing, machinery, furniture and transportation equipment. Seven of the ten losing industries paid higher wages than the average annual wage in the region.
- Unemployment rates rose nearly 1 percentage point to 6.3% in 2003, less than the increase of 1.8 percentage points statewide. It ranked second in unemployment change during the period. The labor force participation rate declined slightly to 62.3% in 2000, but it ranked 1st in labor force participation growth.

NAICS	Industry	Employment		2000-2002 Change		Avg. Wage 2002
		2000	2002	#	%	
	Total Employment	640,422	625,708	-14,714.3	-2.3%	\$31,802
561	Administrative and Support Services	31,355	28,529	-2,826	-9.0%	\$22,178
336	Transportation Equipment Manufacturing	15,718	13,767	-1,952	-12.4%	\$72,904
333	Machinery Manufacturing	10,485	8,795	-1,690	-16.1%	\$44,571
339	Miscellaneous Manufacturing	5,339	4,003	-1,336	-25.0%	\$36,123
621	Ambulatory Health Care Services	24,147	22,820	-1,327	-5.5%	\$35,675
452	General Merchandise Stores	13,332	12,006	-1,326	-9.9%	\$15,556
332	Fabricated Metal Product Manufacturing	14,455	13,129	-1,326	-9.2%	\$43,462
423	Merchant Wholesalers, Durable Goods	15,967	14,756	-1,210	-7.6%	\$40,688
337	Furniture and Related Product Manufacturing	4,951	3,853	-1,098	-22.2%	\$29,277
484	Truck Transportation	6,645	5,806	-839	-12.6%	\$36,114
	Total of above industries	142,393	127,464	-14,929	-10.5%	\$36,617

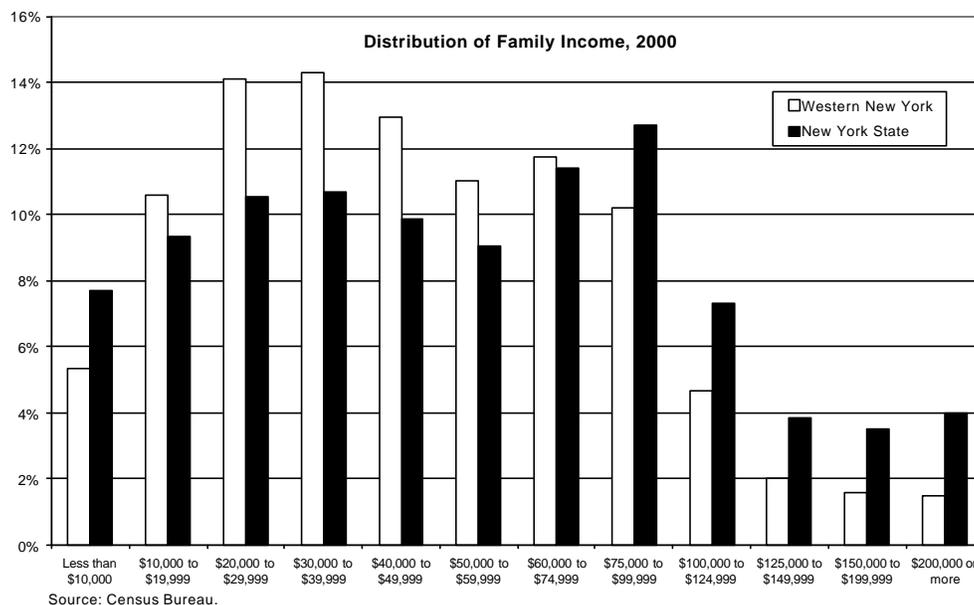
Source: NYS DOL.

Income and Poverty

Western New York - Change in Personal Income and Components, Selected Years						
(in billions of 2002 dollars)						
	Personal Income	Wages & Salaries	Proprietors Income	Dividends, Interest, Rent	Transfer Payments	Residency Adjustment
1980	30.4	17.8	1.8	4.6	4.6	-0.1
1990	35.3	19.6	2.3	6.5	5.8	-0.1
2000	39.2	21.7	2.4	7.0	7.3	0.0
2001	38.8	21.1	2.4	6.9	7.6	0.0
1980-1990						
Change	4.8	1.8	0.5	1.8	1.2	0.0
Ann Avg % Change	1.5%	1.0%	2.6%	3.4%	2.3%	-4.5%
1990-2000						
Change	4.0	2.1	0.1	0.5	1.5	0.0
Ann Avg % Change	1.1%	1.0%	0.4%	0.8%	2.4%	-4.8%
2000-2001						
Change	-0.4	-0.5	-0.1	-0.1	0.3	0.0
Ann Avg % Change	-1.0%	-2.5%	-2.2%	-1.3%	3.6%	-18.3%

Source: BEA. Deflator applied by Fiscal Policy Institute.

- Per capita income in the Western New York Region rose by 12% to \$23,564 in the period between 1990 and 2001. The gain in personal income was below the 17% gain at the state level and it ranked 9th among regions in the state.
- In the last decade, the poverty rate in the Western New York Region stayed about the same. It ranked 5th among the regions on this indicator. In 2002, 29% of the population earned less than 200% of the poverty wage - a half a percent decline compared to an increase of 2.7% at the state level and 1.3% decline at the national level.
- Every county in the region had median incomes that were below the average for the State. However, every county experienced an increase in median which ranged from about \$2000 to \$4316 compared to a negligible increase for the state.
- In 2000, family income in the region was less equally distributed than in the state. More families had make to do with less than \$50,000.
- Between 1990 and 2000, the region's total personal income increased by \$4 billion or about one percent. Wages and salaries increased by only one percent in contrast to a 2.4% increase in transfer payments.



Prospects

Industry clusters in the region include: biotechnology-pharmaceuticals, food processing, industrial machinery, materials processing, transportation equipment, and wood products.

Manufacturing is important to the region because of its relatively high wage jobs. These industries will continue to be impacted by international competition, low labor costs overseas, and exchange rate fluctuations. Even a pick-up in manufacturing activity does not guarantee that there will be new hiring because reliance on technology, outsourcing, and relocation of facilities will accelerate. The prospects do not appear to be bright. Recent Western New York's manufacturing performance somewhat follows that of the US, and, unlike in the past, job losses have not been as severe. Nevertheless, the region continues to lose manufacturing jobs--Nabisco, Ethan Allen, and Trico have reduced their presence in the region. Small manufacturers have been hit the hardest.

One reason for the relatively lower number of job losses is that the region did not have a major presence of advanced technology manufacturers. Nationwide these industries were hit hard in the recent recession.

Auto parts manufacturers, which form an important part of the economy, have been hit hard in the recession. Auto parts manufacturers—General Motors, Ford, Dunlop Tires—are closely tied to automobile assembly plants in Canada because of the 1965 US-Canada Auto agreement. When Canadian plants slow down they have a severe impact on area auto part manufacturers, and it is not certain that jobs lost in this sector will return.

Older industries continue to invest in the region. Cummins announced plans to open a heavy engine plant in Chautauqua County (250 jobs). Also, General Motors is retooling its engine plant to produce a new car in North Buffalo.

Other major new investments include the Gambling Casino in Niagara (2500 jobs) and another possible Casino investment in Erie. The expansion of Account Management, opening of Capital Mangement, and the M&T Bank merger will create 1375 jobs. The retail sector that had earlier benefited from Canadian shoppers no longer does so because of a weaker Canadian dollar over the last several years. The US dollar is not likely to weaken significantly to alter the trend.

Like some of the other regions in the state, the area is blessed with a strong educational infrastructure including numerous private and public colleges that have contributed to job gains. Increasing and changing demand for healthcare have led to increases in employment, but also led to restructuring in the industry. To some degree there continues to be a skilled worker shortage in the region, either because qualified workers are moving out, work away, or because the most skilled are hired by larger firms who pay more.

Roswell Park, the Multidisciplinary Center for Earthquake Engineering, and the Center for Biometrics are some of the leading science and technology institutions in the region.

Top Employers In Western New York, 2002

- ACC Operations Inc (Adelphia Communications)
- American Axle And Manufacturing Inc
- Buffalo City School District
- Burger King
- City of Buffalo
- County of Chautauqua
- County of Erie
- County of Niagara
- Delphi Auto Systems Srvcs Llc
- Dresser-Rand Co
- Ford Motor Co
- General Motors Corp
- HSBC Bank USA
- Kaleida Health (Group Of Hospitals)
- Kenmore Town Of Tonawanda School District
- Mercy Hospital
- Mfrs & Traders Trust Co
- Moog Inc
- Roswell Park Cancer Institute
- Sisters of Charity Hospital
- SUNY at Buffalo
- SUNY Research Foundation
- The Home Depot
- Tops Markets Inc
- US Postal for Buffalo New York
- US Veterans Medical Center
- Verizon Communications
- Wal-Mart Associates Inc
- Wegmans Food Markets Inc
- Williamsville Central School District

Source: NYS DOL ES-202 Data, Compiled By The New York State Data Center. Unranked.

