



New York State and Metropolitan Area Employment Trends

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I. Executive Summary

The New York State Department of Labor recently released revised employment data for 2002 and 2003, which show that Statewide employment was higher than the preliminary data indicated. After the revisions, total employment in the State was higher by 18,900 jobs in 2002 and 5,200 jobs in 2003. This pattern was repeated in many of the metropolitan areas in the State. Results varied, however, within the State's regions and employment sectors. This report examines Statewide and regional employment trends for 2001 through 2003.

The national economy has been in recovery since the fourth quarter of 2001, but the recovery has yet to dramatically increase job growth. National employment (also recently revised) declined by 1.1 percent in 2002, with the rate of decline slowing to 0.3 percent in 2003. Statewide, the rate of job decline was higher but has also slowed, with declines of 1.5 percent in 2002 and 0.7 percent in 2003. New York City has been hit particularly hard, losing jobs at a rate of 2.9 percent in 2002 and 1.5 percent in 2003. Fortunately, not all areas of the State experienced job losses during these years. The suburban region surrounding New York City weathered the recession better than the City and most of the upstate areas; in fact, much of the region experienced annual employment gains. In general, all areas of the State except the North Country showed an improvement in 2003 relative to 2002—either through increased job gains or smaller job losses.

Statewide, the educational and health services sector and the leisure and hospitality sector added jobs in 2002 and 2003. Employment in the financial activities sector declined in 2003 largely because of job losses in the City, primarily in the securities industry. Losses in the City were partially offset by gains in upstate regions, but most of the upstate financial activities jobs were in lower-paying industries such as real estate. Government employment increased throughout the State in 2002, but declined in 2003, reflecting the budget strains faced by all levels of government.

One of the key factors that determine a region's employment performance is its sectoral composition. For example, the financial activities sector is a critical component of the New York City economy (see Report 1-2005, *The Impact of Wall Street on Jobs and Tax Revenues*, April 2004), and weakness in this sector contributed heavily to the City's employment declines in 2002 and 2003. Moreover, job declines in this sector have caused significant employment declines in other sectors, including business and professional services and leisure and hospitality. In other areas of the State, the manufacturing sector plays a major role—in Rochester, for example, manufacturing accounts for 16 percent of all employment—so recent large declines in

this sector have contributed to the poor performance of many upstate areas. Nearly half of the State's total job losses in 2002 and 2003 were in manufacturing, and of the 93,600 manufacturing jobs lost in these two years, 64,300 were outside of New York City. This sector has been in decline for many years, and by 2003 manufacturing accounted for only 7.3 percent of all jobs in the State.

II. New York State

New York State continued to lose jobs in 2003, although the rate of decline was lower than in 2002. National employment also fell in each of the last two years, though by smaller percentages than in New York, declining by 1.1 percent in 2002 and 0.3 percent in 2003. Private sector employment in both the State and the nation was also lower in 2003 than in 2002.

Table 1
Average Annual Employment
New York State
 (in thousands)

| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|-----------------------------------|----------------|----------------|-------------------|----------------|-------------------|
| Private | 7,123.9 | 6,966.4 | -2.2% | 6,917.7 | -0.7% |
| Mining & Construction | 335.9 | 327.0 | -2.6% | 324.7 | -0.7% |
| Manufacturing | 708.2 | 652.2 | -7.9% | 614.6 | -5.8% |
| Trade, Transportation & Utilities | 1,514.8 | 1,479.1 | -2.4% | 1,472.7 | -0.4% |
| Information | 324.8 | 296.4 | -8.8% | 277.2 | -6.5% |
| Financial Activities | 731.7 | 704.8 | -3.7% | 697.1 | -1.1% |
| Professional & Business Services | 1,098.1 | 1,054.0 | -4.0% | 1,041.2 | -1.2% |
| Education & Health Services | 1,429.2 | 1,465.7 | 2.6% | 1,496.4 | 2.1% |
| Leisure & Hospitality | 637.2 | 639.8 | 0.4% | 644.8 | 0.8% |
| Other Services | 344.1 | 347.4 | 0.9% | 349.0 | 0.5% |
| Government | 1,467.8 | 1,492.6 | 1.7% | 1,485.8 | -0.5% |
| Total | 8,591.7 | 8,459.0 | -1.5% | 8,403.5 | -0.7% |

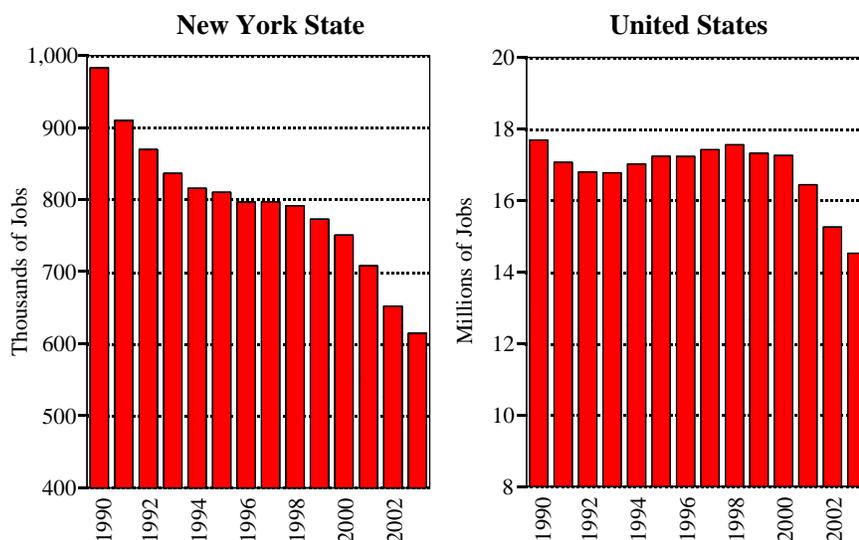
Source: NYS Department of Labor

The educational and health services sector (see Appendix for a list of sectors and their component subsectors and industries) continues to be the strongest source of job growth in the State. This sector mirrors the national trend, increasing at a faster rate than other sectors. Within the educational and health services sector the rate of growth in educational services (3.1 percent) was higher than for health services and social assistance (1.8 percent) in 2003. In addition, the leisure and hospitality sector and the other services sector experienced job growth during 2003.

In both the State and the nation, growth in the educational and health services sector is creating jobs to replace those lost in the manufacturing sector. During 2003, manufacturing employment in the State had the second-highest rate of decline (5.8 percent) among all sectors, and even exceeded the national rate (4.8 percent). In

New York, manufacturing employment has been declining over the long term, and over the last decade this sector has struggled more in the State than in the nation, losing jobs in virtually every year since 1990 (see Graph 1). By contrast, during the latter half of the 1990s manufacturing employment increased in the nation. In 1990, New York State had 983,100 manufacturing jobs, which comprised 12 percent of total Statewide employment. In 2003, the number of manufacturing jobs had declined to 614,600, and the sector now makes up only 7.3 percent of all jobs in the State.

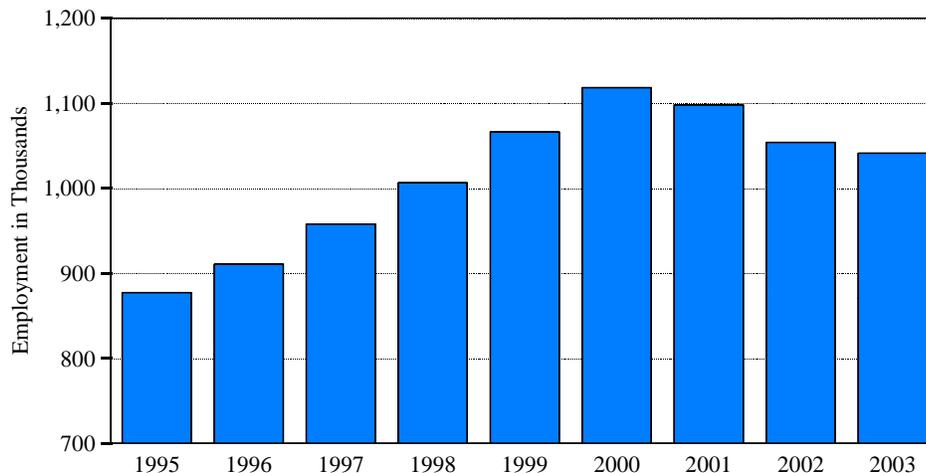
Graph 1
Manufacturing Employment



Sources: NYS Department of Labor; U.S. Bureau of Labor Statistics

The professional and business services sector was a major growth sector in the late 1990s (see Graph 2), experiencing employment growth at an average annual rate of 5 percent between 1995 and 2000 and a total gain of 214,000 jobs in this period. During 2003, however, employment in this sector declined by 1.2 percent, following a 2002 decline of 4 percent. Within this sector, jobs in advertising and related services fell by 3.2 percent in 2003, following a greater decline in 2002.

Graph 2
Statewide Employment in Professional and Business Services



Source: NYS Department of Labor

The information sector had the highest rate of job loss of any sector in the State—a 6.5 percent decline in employment in 2003—although the rate of decline was lower than the 8.8 percent drop in 2002. Within this sector, employment in telecommunications was hit particularly hard in 2003, losing jobs at a rate of 12.1 percent after a decline of 11.6 percent in 2002.

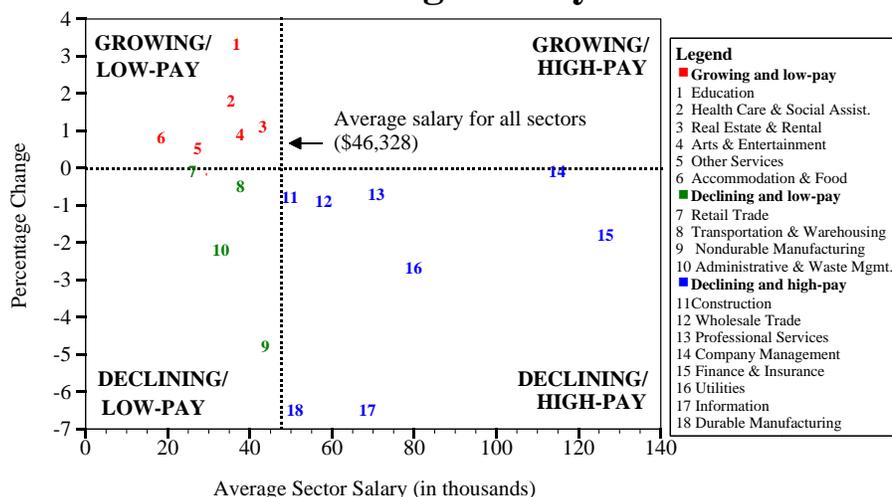
Employment fell by 1.1 percent in the financial activities sector, which continues to be negatively affected by events and activities on Wall Street. Within this sector, the securities industry experienced an employment decline of 5.2 percent in 2003, which was significantly lower than the 2002 decline of 9.6 percent. Real estate employment growth of 1.6 percent in 2003 partially offset the loss of securities jobs.

In the remaining sectors, employment declined but by a lower rate than the previous year. The rate of job loss in the trade, transportation, and utilities sector (0.4 percent) was well below the 2.4 percent decline in 2002. In 2002 job losses were hurt by an employment reduction of 18.2 percent within air transportation. In 2003, however, this industry stabilized and employment declined by only 0.1 percent. The rate of job decline in the construction and mining sector during 2003 (0.7 percent) also improved from a 2002 rate of 2.6 percent.

The overall pattern of job growth or decline in the different sectors of the State economy shows that the sectors and subsectors that experienced job growth in 2003

all had average salaries below the Statewide average for all industries (\$46,328), while the sectors and subsectors with average salaries greater than the Statewide average experienced employment declines. As shown on Graph 3, most industries appear in the upper left quadrant (industries that show employment growth but are low-paying) or the lower right quadrant (industries that are losing jobs but pay higher salaries). No industries appear in the upper right portion of the graph, which would indicate that they were simultaneously gaining jobs and paying higher salaries. As an example, growing subsectors such as education and health care had lower levels of pay (\$35,775 and \$34,357, respectively) than areas losing jobs such as durable manufacturing (\$48,925), information (\$66,569), professional, scientific, and technical services (\$68,729), and finance and insurance (\$124,531).

Graph 3
Changes in Employment by Sector and Average Salary

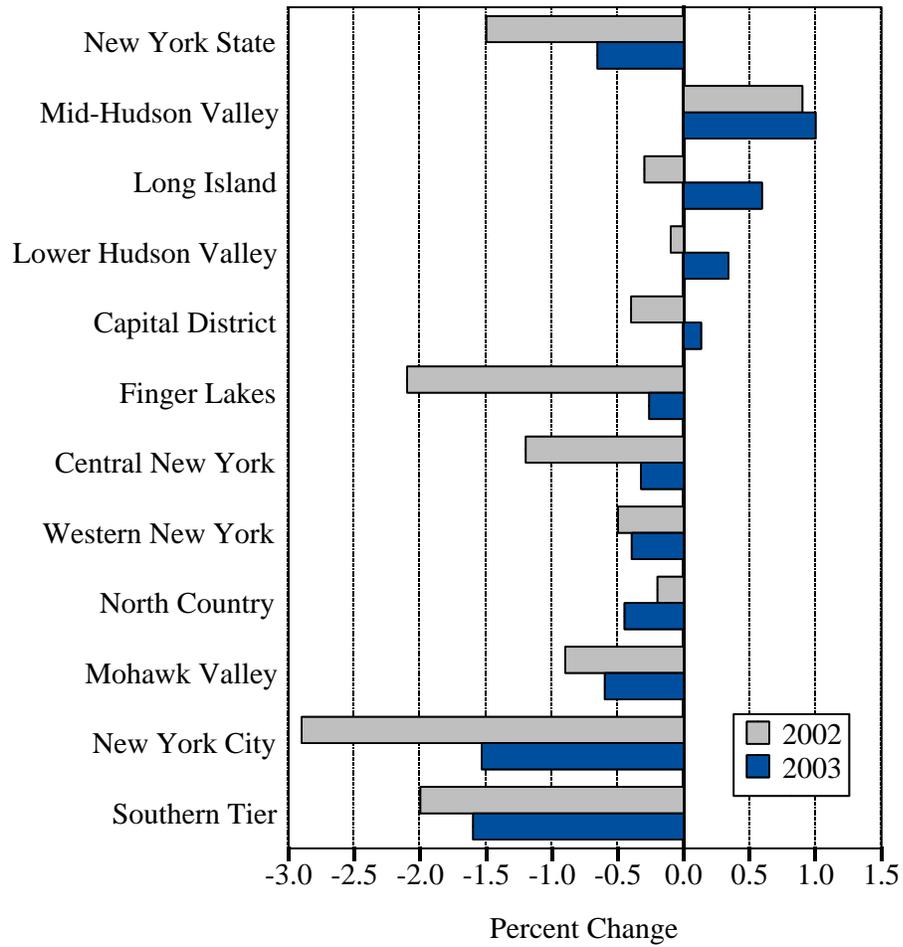


Note: Average salaries are for 2002, the latest year for which data are available.
 Sources: NYS Dept. of Labor; OSDC analysis

Among the different regions of the State, employment changes in 2003 ranged from a gain of 1 percent in the Mid-Hudson Valley to a decline of 1.5 percent in New York City and the Southern Tier (see Graph 4). In most regions employment gains increased, job losses turned into job gains, or employment losses diminished compared to 2002. The exceptions were Central New York and the North Country, where employment losses increased in 2003.

Graph 4

Percent Change in Total Employment



Source: NYS Department of Labor

III. Regions

A. New York City

New York City accounts for 42 percent of the State's jobs, and had a total employment of 3.5 million in 2003. The City's loss of 55,000 jobs in 2003 was a major factor in the State's overall drop in employment last year. The jobs lost in the City represented all but 500 of the jobs lost Statewide, and offset gains elsewhere in the State. The City's private sector employment fell by 1.4 percent, and the 43,000 private sector jobs lost in the City represented 88.6 percent of the private jobs lost in the State.

Table 2
Average Annual Employment
New York City
(in thousands)

| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|--------------|---------|---------|-------------------|---------|-------------------|
| Total | 3,692.0 | 3,583.5 | -2.9% | 3,528.5 | -1.5% |

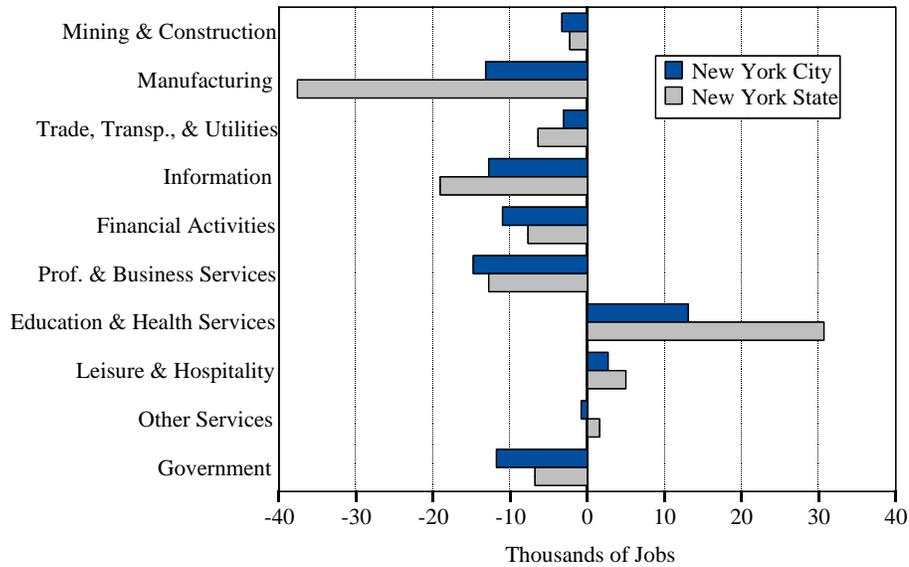
Source: NYS Department of Labor

Not all of the City's employment sectors experienced job losses in 2003. Jobs in the educational and health services sector and in the leisure and hospitality sector increased, by 2 percent and 1.1 percent, respectively.¹ Employment in all other sectors declined, and in some instances the number of jobs that were lost exceeded the job losses in the remainder of the State (see Graph 5). Like the State as a whole, the City is continuing to lose manufacturing sector employment at a significant rate. During 2003, City employment in the manufacturing sector declined by 9.5 percent, and nondurable manufacturing lost 11.2 percent of its jobs. Many of the jobs lost in nondurable manufacturing are associated with apparel manufacturing, which declined by 16.6 percent in 2003. Manufacturing overall now accounts for only 3.6 percent of all jobs in the City—one of the lowest concentrations in the State. Because the rate of decline in manufacturing during 2003 was higher in the City than it was Statewide, the City accounted for over one third of the State's manufacturing job losses last year.

¹ A more detailed discussion on New York City employment will be included in our upcoming report on the City's economy.

Other sectors with large employment losses in the City in 2003 included information (7.2 percent, or 12,800 jobs), professional and business services (2.7 percent, or 14,800 jobs), and financial activities (2.5 percent, or 11,000 jobs).

Graph 5
Changes in Employment by Sector in 2003



Source: NYS Department of Labor

B. Long Island

Although much of New York State had a decline in employment during 2003, Long Island and other downstate regions outside of New York City added jobs.² Long Island's growth in total employment (0.6 percent) exceeded its growth in private sector employment (0.4 percent). The difference reflects a 1.3 percent increase in government jobs, driven by an increase of 4.5 percent in local education employment. Including these added jobs, total employment in the area has reached its highest level on record, and made up 14.5 percent of Statewide employment in 2003.

Table 3
Average Annual Employment
Long Island
(in thousands)

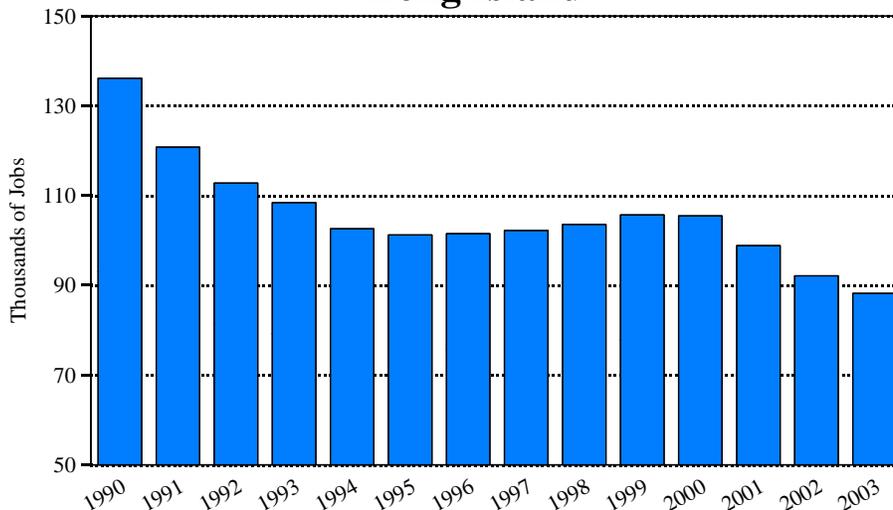
| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|--------------|---------|---------|-------------------|---------|-------------------|
| Total | 1,218.7 | 1,215.5 | -0.3% | 1,222.7 | 0.6% |

Source: NYS Department of Labor

As in many State regions, the educational and health services sector led all sectors in employment growth on Long Island, increasing by 3.1 percent in 2003 (following an increase of 3.6 percent in 2002). The recent job growth has contributed to the sector's increasing significance; it has grown from 17.4 percent of private employment in 2000 to 18.9 percent in 2003. Within the sector, educational service employment has grown faster than employment in health care and social services in recent years. During 2003, jobs in educational services grew by 6.8 percent, which followed growth of 4.7 percent in 2002, while employment in health care and social services increased by 2.4 percent in 2003 and 3.4 percent in 2002.

² Long Island is a Metropolitan Statistical Area (MSA) encompassing Nassau and Suffolk counties. The NYS Department of Labor does not report nonagricultural employment data for MSAs by county.

**Graph 6
Manufacturing Employment on
Long Island**



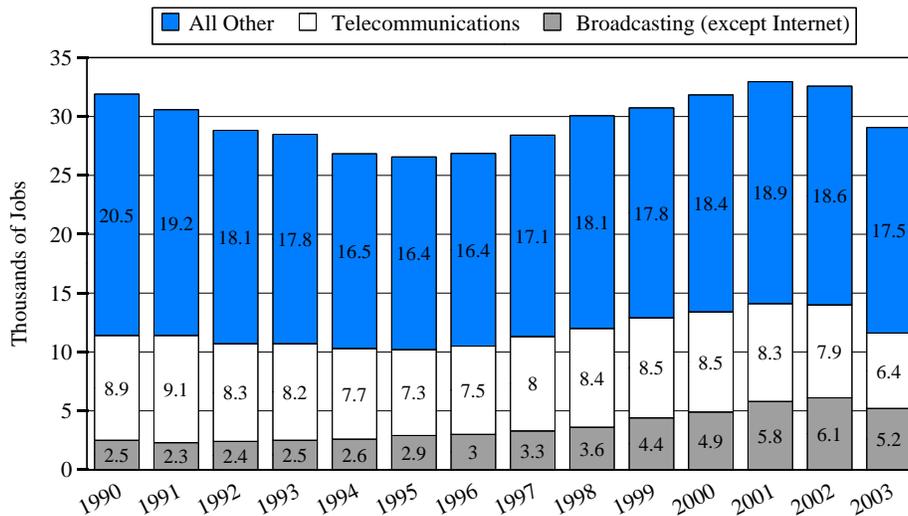
Source: NYS Department of Labor

Long Island is similar to the rest of the State in that it continues to lose manufacturing jobs. During 2003, manufacturing employment declined by 4.2 percent, although the rate of decline was lower than the 6.8 percent decline in the previous year. Since 1990, Long Island has lost 35.2 percent of its manufacturing employment, equal to 48,000 jobs (see Graph 6). The decline since 1990 occurred despite some growth in nondurable manufacturing jobs in the late 1990s. The decline in 2003 includes a loss of 1,800 jobs in the high-paying computer and electronic product industry.

In a trend that differs from other areas of the State, employment in Long Island's trade, transportation, and utilities sector increased by 1.1 percent during 2003. Within this sector, employment fell by 0.4 percent in the higher-salaried transportation and warehousing industries, but these losses were offset by gains in the lower-salaried jobs associated with the trade industries—in particular, retail trade at food and beverage establishments, especially grocery stores, which increased 4.5 percent. This industry added 1,400 jobs in 2003, equal to 29.5 percent of all jobs added to the private sector. Long Island's financial activities sector was another sector that grew in contrast to the Statewide trend of decline. This sector, in which salaries tend to exceed the average, expanded by 1.3 percent in 2003.

Employment in the information sector, which declined 10.3 percent during 2003, experienced the highest rate of decline among all sectors on Long Island, although the absolute number of jobs lost (3,300) was lower than the number of jobs lost in the manufacturing sector (3,900). Most of the losses were in the telecommunications and broadcasting industries, where employment declined by 18 percent and 13.8 percent, respectively. Both of these industries pay higher salaries than the overall State average. In general, employment in Long Island's information sector has remained stagnant, with the number of jobs fluctuating with the economic cycle (see Graph 7).

Graph 7
Employment Levels in Long Island's Information Sector



Source: NYS Department of Labor

The remaining sectors that showed job gains on Long Island in 2003 were leisure and hospitality (3 percent) and other services (1.3 percent). Statewide, employment also increased in each of these sectors. Also in parallel with the State, Long Island lost jobs in the construction and mining sector (0.1 percent) and the professional and business services sector (0.7 percent).

C. Lower Hudson Valley

The Lower Hudson Valley, which includes Rockland and Westchester counties, was one of four regions in New York State where employment grew in 2003. This region accounts for 6.3 percent of total employment Statewide, and grew by 1,800 jobs in 2003 after a small decline in 2002. Rockland County’s private sector expanded by 1.1 percent, while Westchester County’s essentially stayed flat. Government employment increased in both counties, as growth in local education employment more than offset declines at the federal and State levels. Growth in industry employment in Rockland generally outpaced growth in Westchester.

Table 4
Average Annual Employment
Lower Hudson Valley
(in thousands)

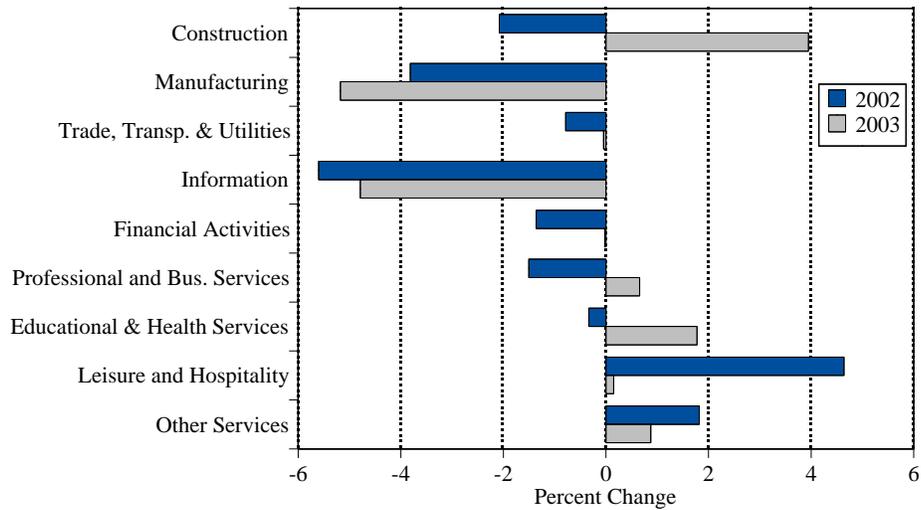
| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|--------------------|--------------|--------------|-------------------|--------------|-------------------|
| Westchester County | 418.2 | 415.6 | -0.6% | 416.3 | 0.2% |
| Rockland County | 111.1 | 113.3 | 2.0% | 114.4 | 1.0% |
| Total | 529.3 | 528.9 | -0.1% | 530.7 | 0.3% |

Source: NYS Department of Labor

Construction was the fastest-growing sector in the region in 2003 and increased by 3.9 percent—with 6 percent of all workers employed in this sector, only 1,200 jobs were added (see Graph 8). The educational and health services sector, which accounts for about 19 percent of all jobs in the region, grew by 1.8 percent in 2003 and has nearly recouped all its recent job losses. The professional and business services sector also added jobs in 2003, growing by 0.7 percent.

Trade, transportation, and utilities is the largest employment sector in the Lower Hudson Valley, accounting for about 23.5 percent of private sector jobs. Similar to Statewide trends, employment was essentially flat in 2003 (job losses in retail trade were offset by gains in transportation, warehousing, and utilities), after declining in 2002 and 2001. Employment in the financial activities sector was also flat in 2003, after falling in the previous year.

Graph 8
Changes in Employment in the Lower Hudson Valley



Source: NYS Department of Labor

Following many years of job losses, manufacturing accounted for about 7 percent of the Lower Hudson Valley’s private sector jobs in 2003, a share that is well below the proportions Statewide and in upstate regions. Manufacturing employment continued to fall in 2003 with a loss of 1,700 jobs (5.2 percent). Employment in the information sector also fell in 2003, losing 900 jobs (4.8 percent).

D. Mid-Hudson Valley

The Mid-Hudson Valley accounts for 4.4 percent of all State jobs.³ During 2003, both total employment and private sector employment increased at a higher rate in the Mid-Hudson Valley than anywhere else in the State. Growth in private employment was 1.6 percent, while government employment remained at the same level as in 2002. The Mid-Hudson Valley's total and private employment have increased annually since 1994. In 2003, the number of jobs in every county of this region increased. The increase in total employment ranged from 0.2 percent in Sullivan County to 1.7 percent in Putnam County.

Table 5
Average Annual Employment
Mid-Hudson Valley
(in thousands)

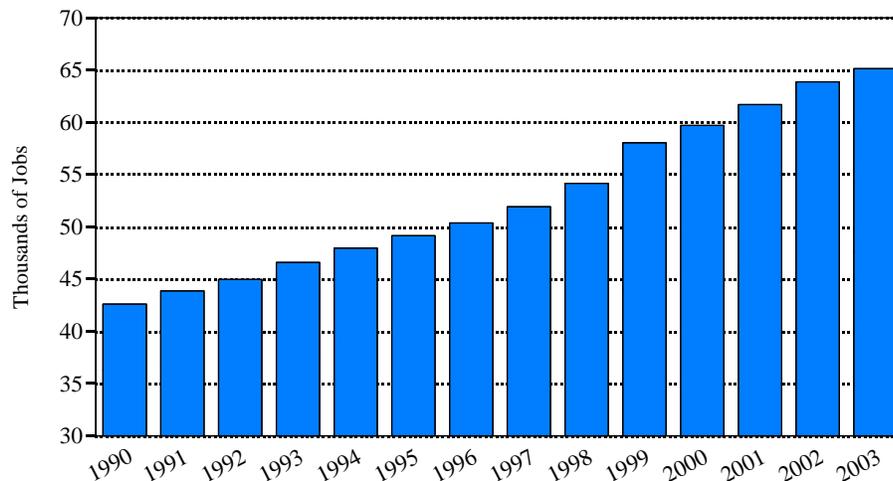
| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|---------------------|--------------|--------------|---------------------------|--------------|---------------------------|
| Newburgh MSA | 132.6 | 134.8 | 1.6% | 136.7 | 1.4% |
| Dutchess County MSA | 119.3 | 119.5 | 0.1% | 120.5 | 0.9% |
| Putnam County MSA | 23.6 | 24.0 | 1.5% | 24.4 | 1.7% |
| Sullivan County | 25.8 | 26.0 | 0.8% | 26.0 | 0.2% |
| Ulster County | 64.5 | 64.8 | 0.5% | 65.1 | 0.4% |
| Total | 365.9 | 369.0 | 0.9% | 372.7 | 1.0% |

Source: NYS Department of Labor

Most sectors experienced job growth in the Mid-Hudson Valley during 2003, with the exception of the manufacturing sector and the trade, transportation, and utilities sector. As in the rest of the State, employment growth in the lower-salaried sector of educational and health services has been strong in the region (see Graph 9), although the 1,300 jobs added in 2003 amounted to fewer jobs added than in 2002. While employment in this sector grew by 2 percent in 2003, the rate of growth was lower than growth in financial activities (2.8 percent), leisure and hospitality (3.3 percent), construction and mining (4.3 percent), and professional and business services (5.1 percent).

³ The Mid-Hudson Valley encompasses the Newburgh MSA (Orange County in New York and Pike County in Pennsylvania), the Dutchess County MSA, the Putnam County MSA, and Sullivan and Ulster counties. The State Department of Labor does not report nonagricultural employment data for MSAs by county.

Graph 9
Employment in Educational and Health Services in the Mid-Hudson Valley



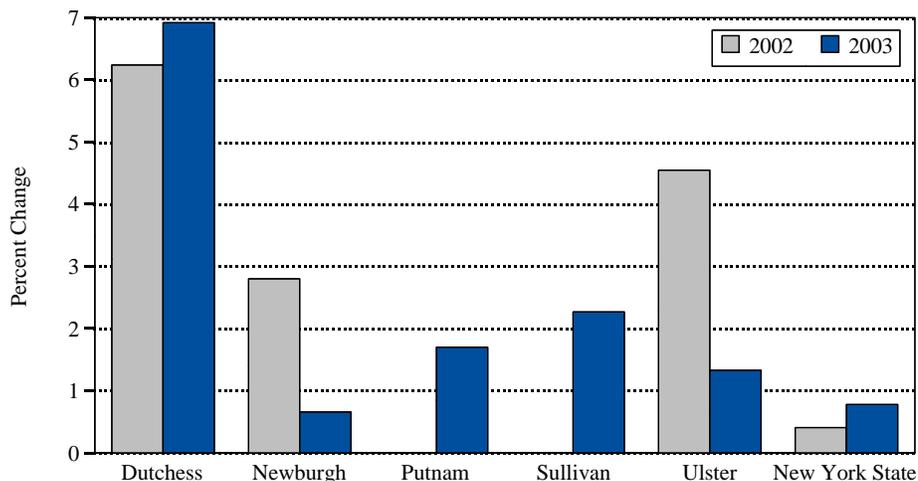
Source: NYS Department of Labor

Growth in the professional and business services sector was particularly strong in the Mid-Hudson Valley during 2003, especially compared with the sector’s Statewide decline of 1.2 percent. Within the region, this sector grew by 10 percent in Dutchess County and by 7.7 percent in Putnam County. The professional and business services sector is becoming an important part of the regional economy, and accounted for 9.5 percent of the area’s private jobs in 2003, compared with 7.9 percent in 1997.

Although many of the jobs in the leisure and hospitality sector pay low salaries—particularly those related to the accommodations and food services subsector—job growth in this sector contributed to the region’s overall employment growth during 2003 (see Graph 10). In many areas of the State, leisure and hospitality employment is not a large part of the economy. The Mid-Hudson Valley, however, encompasses recreation areas in the Catskills, and had 34,000 leisure and hospitality jobs in 2003, equal to 11.6 percent of the region’s private sector employment. In Sullivan County, 17.2 percent of private sector employment is in the leisure and hospitality sector. Since 1990, the Mid-Hudson Valley has seen strong growth in jobs in this sector—in general, the areas located west of the Hudson and bordering the Catskills have had higher growth rates. Employment growth in the construction and mining sector as well as in the financial activities sector, where salaries are higher than the Statewide average, also contributed to regional employment growth.

Mid-Hudson Valley employment in the trade, transportation, and utilities sector declined by 0.3 percent during 2003, a trend that is consistent throughout the State. Employment in this sector did increase in the Newburgh MSA on the strength of gains in the retail trade industries, but were offset by job losses in each of the other areas of the region.

Graph 10
Growth in Leisure and Hospitality
Employment Within the Mid-Hudson Valley



Note: No growth in employment occurred in Putnam and Sullivan counties in 2002.

Source: NYS Department of Labor

Putnam County, which supplied only 24,400 jobs in 2003, has demonstrated strong job growth going back to the early 1990s. Since 1990, total employment in Putnam has increased 29.3 percent and private employment is higher by 31 percent. Newburgh has the second-highest rate of job growth in the area during this period, with the increase in total employment at 19.5 percent and private employment higher by 19.9 percent. By comparison, from 1990 to 2003, Statewide total employment grew by 2.3 percent and private jobs increased by 2.7 percent.

E. Capital District

The Capital District was another one of the four regions in New York State where total employment grew in 2003, and was the only region that was not a suburb of New York City to experience growth.⁴ Total employment in the Capital District, which equals 6.5 percent of Statewide employment, had the smallest increase (0.1 percent) of the four regions that showed growth. Private sector employment growth was stronger than total employment, rising by 0.4 percent. Government, which accounts for almost a quarter of all jobs in the region, lost 1,000 positions.

Table 6
Average Annual Employment
Capital District
(in thousands)

| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|-----------------|--------------|--------------|---------------------------|--------------|---------------------------|
| Albany MSA | 461.7 | 459.7 | -0.4% | 459.1 | -0.1% |
| Glens Falls MSA | 51.3 | 50.9 | -0.8% | 52.2 | 2.6% |
| Columbia County | 21.5 | 21.0 | -2.3% | 21.0 | 0.0% |
| Greene County | 13.8 | 14.6 | 5.8% | 14.6 | 0.0% |
| Total | 548.3 | 546.2 | -0.4% | 546.9 | 0.1% |

Source: NYS Department of Labor

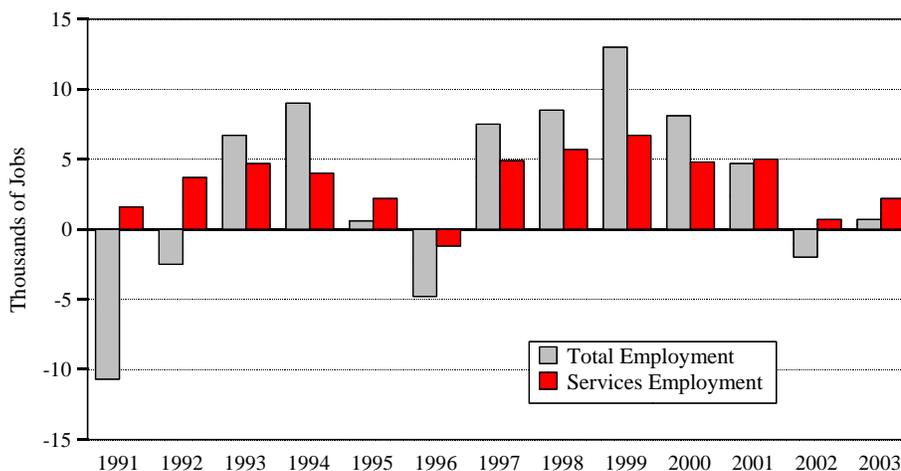
Most of the jobs in the region (almost 84 percent) are located in the Albany MSA, where private sector jobs grew by 0.2 percent but total employment fell as a result of the loss of 1,300 government jobs, mostly at the state level. The Capital District overall posted an increase in total employment because a gain of 1,300 jobs in the Glens Falls MSA more than offset the job losses in the Albany MSA.

Services have become a driving force in the economy of the Capital District and now account for over 30 percent of the region's employment. The other services sector, which includes repair and maintenance, personal and laundry services, and religious, grant making, civic, and professional organizations, grew by 4 percent in 2003. This was the highest growth among all the sectors in the Capital District, although the other services sector accounts for only 5.4 percent of private employment in the region. The educational and health services sector rose by

⁴ The Capital District consists of the Albany MSA (which includes Albany County, Montgomery County, Rensselaer County, Saratoga County, Schenectady County, and Schoharie County), the Glens Falls MSA (which includes Warren County and Washington County), Columbia County, and Greene County. The New York State Department of Labor does not report employment data for counties within an MSA.

1.9 percent, while the professional and business services sector fell by 0.7 percent. Nevertheless, these three sectors added 44,700 jobs between 1990 and 2003—more than the 38,800 job increase in total employment during the same period. While service sector employment increased less than total employment in many of these years, it also did not fall as steeply during the economic downturns (see Graph 11).

Graph 11
Changes in Employment in the Capital District



Source: NYS Department of Labor

Jobs in the financial activities sector increased by 2.6 percent in 2003, and employment in trade, transportation, and utilities, as well as in information, also experienced small increases. The Capital District was one of only two regions in the State to show an increase in the information sector in 2003.

The manufacturing sector accounted for 6.7 percent of the Capital District's employment in 2003, a substantial decline from its 10.7 percent share in 1990. In 2003, regional jobs in this sector declined by 2,000 positions, or 5 percent. Of this decline, about three times as many jobs in durable manufacturing were lost as compared to jobs in nondurable manufacturing. The leisure and hospitality sector also recorded a small decrease in employment in the Capital District.

F. Mohawk Valley

The Mohawk Valley accounts for 1.8 percent of jobs in the State.⁵ With about 132,000 jobs, the Utica-Rome MSA accounts for 86.5 percent of Mohawk Valley employment. Total employment in the Mohawk Valley declined in 2003, largely as a result of declines in the Utica-Rome MSA. Growth in government employment of 5.9 percent in the region exceeded all other regions in the State, while the decline in private sector jobs of 2 percent was also the highest in the State. Government is the largest sector in the region overall and accounted for more than one fifth of all Mohawk Valley jobs. Hamilton County is situated entirely within the Adirondack Park, so development in that area has been limited. As a result, Hamilton has a high concentration of government employment—36.8 percent of all jobs—with many related to the administration and maintenance of the parkland. In each of the other areas of the region, government represents more than 20 percent of total employment.

Table 7
Average Annual Employment
Mohawk Valley
(in thousands)

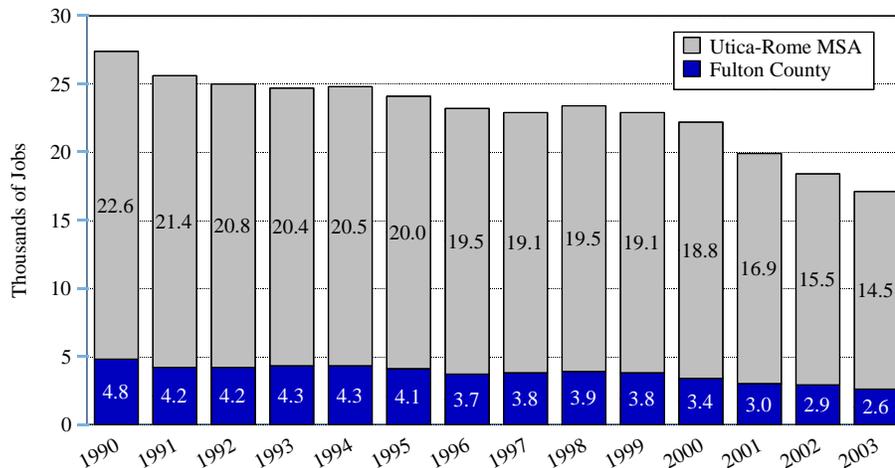
| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|-----------------|--------------|--------------|---------------------------|--------------|---------------------------|
| Utica-Rome | 134.2 | 132.6 | -1.2% | 132.1 | -0.4% |
| Fulton County | 19.0 | 19.1 | 0.5% | 18.6 | -2.7% |
| Hamilton County | 1.8 | 1.9 | 5.6% | 2.0 | 6.1% |
| Total | 155.0 | 153.6 | -0.9% | 152.7 | -0.6% |

Source: NYS Department of Labor

Historically, the manufacturing sector has been an important part of the regional economy in the Mohawk Valley. In 1990, manufacturing was the second-largest sector behind trade, transportation, and utilities, and accounted for 24.5 percent of all private sector jobs. Manufacturing employment has been declining steadily in the region (see Graph 12) throughout the last decade, falling at an average annual rate of 3.6 percent between 1990 and 2003. The rate of decline increased during the recent recession, and continued with a 6 percent decline in 2003. As a result, the manufacturing sector accounted for only 14.8 percent of the region's private sector employment in 2003.

⁵ The Mohawk Valley is comprised of the Utica-Rome MSA (Herkimer County and Oneida County), and Fulton and Hamilton counties. The State Department of Labor does not report nonagricultural employment data for MSAs by county.

Graph 12
Manufacturing Employment in the
Mohawk Valley



Source: NYS Department of Labor

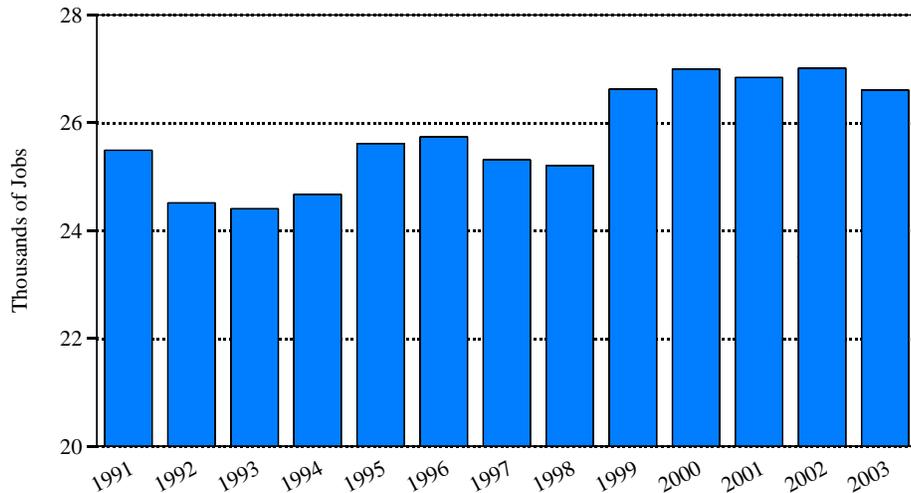
The growth experienced throughout the State in the educational and health services sector during 2003 extended to the Mohawk Valley, where these jobs increased by 2.4 percent. Education and health services was one of two sectors with job growth during the year; the other was professional and business services, which increased its jobs by 0.3 percent. In 1990, employment in the educational and health services sector represented 16.4 percent of the region's private sector jobs. In 1997, this sector became the leading private sector employer, with 20.7 percent of private jobs, and was followed by manufacturing with 20.6 percent. By 2003, educational and health services comprised 23.5 percent of private employment.

During 2003, the leisure and hospitality sector had the highest rate of decline among all sectors (9.2 percent). Combined with the information sector, where employment was lower by 5.6 percent, a total of 1,400 jobs were lost in these two sectors in 2003, exceeding the number of manufacturing jobs that were lost. All of the declines in information employment were in the Utica-Rome MSA, however, and the sector accounted for only 3.6 percent of private employment in 2003. Leisure and hospitality is also a relatively small sector, making up less than 10 percent of the private jobs in 2003.

Employment in trade, transportation, and utilities declined by 1.7 percent last year. Although this sector was the largest private employer in 2002, it is now second to educational and health services. While the sector is an important part of the

region's economy, accounting for 23.5 percent of private sector jobs, it does not show a trend of consistent job growth (see Graph 13). Although jobs were added in 1999, growth has largely been stagnant during the past four years. Unlike other areas of the State, retail trade employment within this sector declined by 1.1 percent in 2003.

Graph 13
Trade, Transportation and Utilities
Employment in the Mohawk Valley



Source: NYS Department of Labor

Employment declined by 2.1 percent in the construction and mining sector, 2.5 percent in the financial activities sector, and 3.4 percent in the other services sector in 2003. However, these sectors represent only a small portion of the Mohawk Valley's private sector jobs. The financial activities sector is the largest and accounts for only 7 percent of the region's jobs.

G. Central New York

Total employment in Central New York has been declining since 2001, although the rate of decline in 2003 was not as high as in 2002.⁶ The region accounts for 4.3 percent of all jobs in the State. Although the rate of decline in Cortland County was higher than the rate in the Syracuse MSA in both 2002 and 2003, trends in the Syracuse MSA dominate the region because it accounts for almost 95 percent of jobs in Central New York.

Table 8
Average Annual Employment
Central New York
(in thousands)

| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|-----------------|--------------|--------------|-------------------|--------------|-------------------|
| Syracuse MSA | 349.4 | 345.4 | -1.1% | 344.5 | -0.2% |
| Cortland County | 20.2 | 19.6 | -3.0% | 19.3 | -1.7% |
| Total | 369.6 | 365.0 | -1.2% | 363.8 | -0.3% |

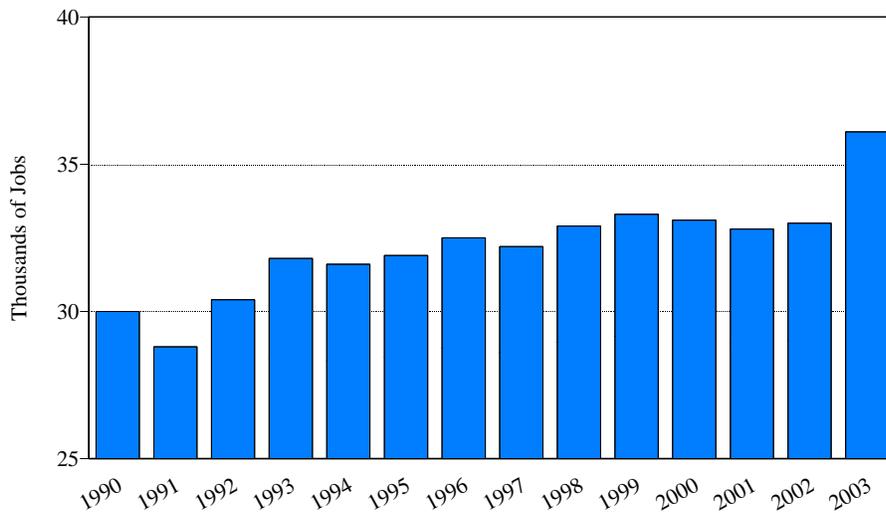
Source: NYS Department of Labor

While most employment sectors in this region experienced declines in 2003, the business and professional services sector grew by 9.4 percent—the largest increase in this sector in the entire State. This one-year increase was almost as large as the 10 percent growth that occurred between 1990 and 2002, with the result that this sector now accounts for about 10 percent of all the jobs in the region (see Graph 14).

Jobs in the other services sector, which includes areas such as repair and maintenance and personal and laundry services, grew by 0.3 percent in 2003. Employment in the educational and health services sector stayed unchanged, in contrast to the Statewide increase of 2.1 percent or the growth in other regions that ranged between 1.8 percent and 3.2 percent. In the leisure and hospitality sector, employment grew by 1 percent in 2003. Construction employment rose by 0.8 percent in 2003, gaining back a portion of the 3.6 percent decline in 2002.

⁶ Central New York encompasses the Syracuse MSA (Cayuga County, Madison County, Onondaga County, and Oswego County), and Cortland County. The State Department of Labor does not report nonagricultural employment data for MSAs by county.

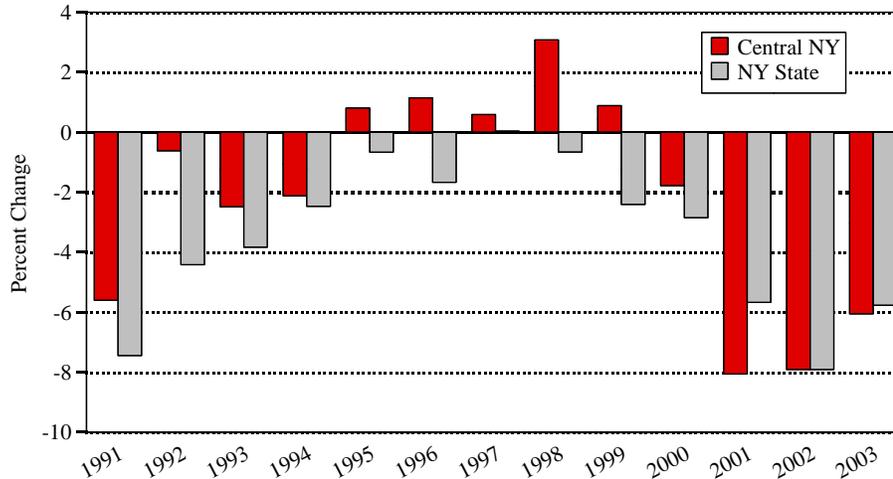
Graph 14
Professional and Business Services
Employment in Central New York



Source: NYS Department of Labor

Manufacturing employment declined by 6.1 percent in 2003, exceeding the sector's rate of decline in all of the State's regions except in New York City. The rate of job loss in 2003 was lower than the 7.9 percent decline in 2002. By comparison, from 1995 through 1999 manufacturing employment in Central New York increased annually (see Graph 15), amounting to overall gains of 6.7 percent. During the same period, the State lost 5.3 percent of its manufacturing jobs.

Graph 15
Manufacturing Employment in Central New York and New York State



Source: NYS Department of Labor

Employment in the trade, transportation, and utilities sector declined by 1.8 percent in 2003. Even in the lower-salaried subsector of retail trade, employment fell by 0.5 percent in 2003. In the Syracuse MSA, the transportation, warehousing, and utilities subsector declined at the rate of 4 percent. The information and financial activities sectors also experienced job losses, of 1.2 percent and 0.4 percent, respectively. However, these sectors made up less than 10 percent of private employment in Central New York in 2003. Finally, government employment declined by 500 jobs, mostly in State government.

H. Southern Tier

Total employment in the Southern Tier declined in 2003 by 1.6 percent.⁷ Though the decline was lower than in 2002, this region experienced the largest decline in the State. With losses of 800 government jobs and 4,400 private sector jobs, total employment in 2003 reached its lowest level since 1998. The Southern Tier accounted for 3.8 percent of the State's total employment in 2003, with 35.5 percent of area jobs located in the Binghamton MSA.

Table 9
Average Annual Employment
Southern Tier
(in thousands)

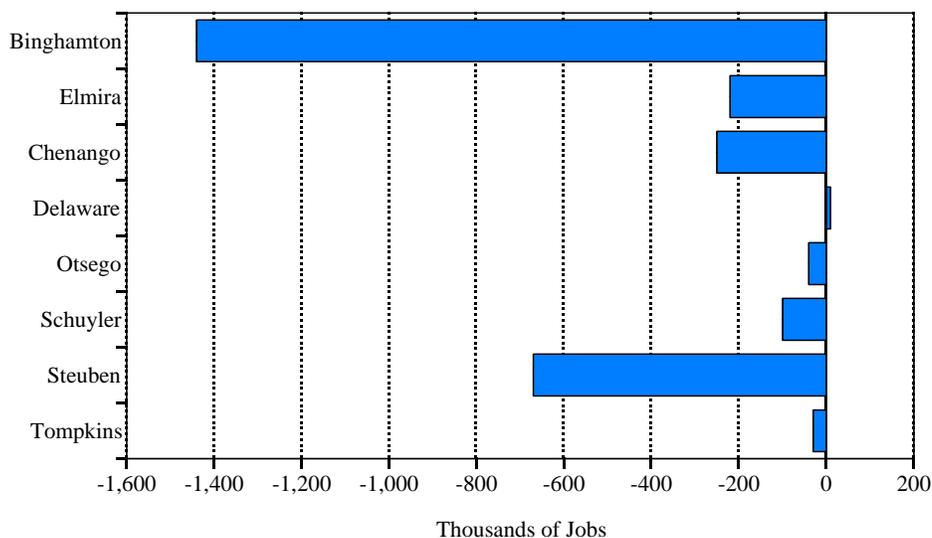
| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|-----------------|--------------|--------------|---------------------------|--------------|---------------------------|
| Binghamton MSA | 118.5 | 115.3 | -2.7% | 112.8 | -2.1% |
| Elmira MSA | 43.0 | 41.7 | -3.0% | 41.2 | -1.2% |
| Chenango County | 17.5 | 17.1 | -2.3% | 16.6 | -2.7% |
| Delaware County | 17.5 | 17.8 | 1.7% | 18.0 | 0.8% |
| Otsego County | 25.7 | 26.4 | 2.7% | 25.8 | -2.5% |
| Schuyler County | 4.5 | 4.6 | 2.2% | 4.7 | 1.6% |
| Steuben County | 43.5 | 40.6 | -6.7% | 37.8 | -6.9% |
| Tompkins County | 59.5 | 59.5 | 0.0% | 60.8 | 2.2% |
| Total | 329.7 | 323.0 | -2.0% | 317.7 | -1.6% |

Source: NYS Department of Labor

Manufacturing employment is an important aspect of the Southern Tier's economy, making up 17.4 percent of private sector jobs in 2003—a much higher percentage than Statewide (8.9 percent). However, just as manufacturing employment has been declining throughout the State, the number of manufacturing jobs in the region also fell, by 5.9 percent in 2003. Within the region, Binghamton lost more manufacturing jobs than other areas (see Graph 16), while the rate of job decline was highest in Schuyler and Steuben counties. Delaware County experienced a small increase in manufacturing employment in 2003.

⁷ The Southern Tier is comprised of the Binghamton MSA (Broome County and Tioga County), the Elmira MSA (Chemung County), and the counties of Chenango, Delaware, Otsego, Schuyler, Steuben, and Tompkins. The State Department of Labor does not report nonagricultural employment data for MSAs by county.

Graph 16
Change in Manufacturing Employment
Within the Southern Tier in 2003



Source: NYS Department of Labor

The Southern Tier's educational and health services sector is following the Statewide trend in overtaking manufacturing as an increasingly significant factor in the local economy. By 2003, the educational and health services sector's share of regional private jobs had increased to 28.1 percent, from 21.8 percent in 1990. In 2003, employment in this sector grew by 2.7 percent as 1,900 jobs were added. However, in Binghamton and Chenango counties, employment in this sector declined by 0.4 percent and 4.4 percent, respectively. This decline was offset by gains elsewhere, in particular a 4.1 percent gain in Tompkins County—where this sector accounts for 58.2 percent of all private sector jobs in 2003.

In addition to losses in manufacturing in 2003, the Southern Tier experienced job losses in the professional and business services sector (10.8 percent) and the information sector (8.6 percent). Within the region, the professional and business services sector had an employment decline of 25 percent in Steuben County, which represents the majority of the region's losses. In the past two years, employment in Steuben County's professional and business services sector has fallen by 41.7 percent. Information sector employment during 2003 fell by 16.4 percent in Binghamton, and this decline represents all of the jobs lost in the region. Within the Southern Tier, employment also declined in 2003 in the construction and mining sector (3.8 percent), the trade, transportation, and utilities sector (1.4 percent), and the leisure and hospitality sector (0.5 percent).

The only sectors with job growth in the Southern Tier were the other services sector (3.1 percent) and the financial activities sector (2 percent). While employment in the financial activities sector has declined Statewide in each of the past three years, the region demonstrated job growth in this sector—from 2000 to 2003, jobs in this sector grew by 5.1 percent. However, financial activities represented only 4.9 percent of the region’s private sector jobs in 2003. Similarly, the other services sector is also a small part of the regional economy, accounting for only 5 percent of private sector employment in 2003.

I. Finger Lakes

Employment in the Finger Lakes accounted for 6.7 percent of all jobs in the State in 2003, with the Rochester MSA accounting for 94.4 percent of the region's jobs.⁸ During 2003, total employment in the region declined, with job gains in Seneca, Wyoming, and Yates counties insufficient to offset the 1,800 jobs lost in Rochester.

Table 10
Average Annual Employment
Finger Lakes
(in thousands)

| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|----------------|--------------|--------------|-------------------|--------------|-------------------|
| Rochester MSA | 549.3 | 536.4 | -2.3% | 534.6 | -0.3% |
| Seneca County | 10.8 | 10.9 | 1.5% | 11.0 | 0.5% |
| Wyoming County | 13.3 | 13.6 | 2.6% | 13.7 | 0.7% |
| Yates County | 6.5 | 6.7 | 3.6% | 6.9 | 2.1% |
| Total | 579.8 | 567.6 | -2.1% | 566.1 | -0.3% |

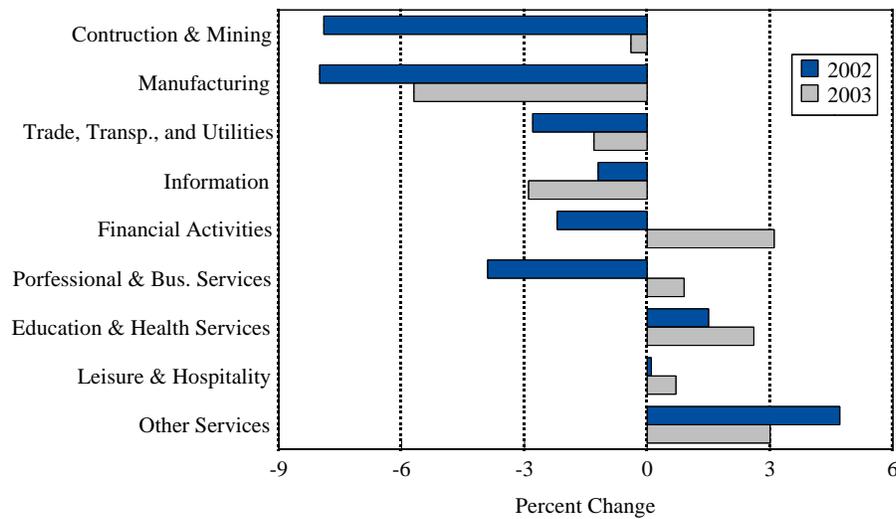
Source: NYS Department of Labor

While employment in the professional and business services sector declined in the State during 2003, the Finger Lakes experienced job growth of 0.9 percent in this sector during the year. Similarly, the region had job growth of 3.1 percent in the financial activities sector, compared with a 1.1 percent Statewide increase. In the educational and health services sector, employment grew by 2.6 percent, while employment was higher by 0.7 percent in the leisure and hospitality sector, and by 3 percent in the other services sector. In these three sectors, which comprised 53.4 percent of the region's private sector jobs, 4,800 jobs were added in 2003. Through the years, the educational and health services sector has grown to become the region's largest sector. Finally, unlike other regions of the State, government employment grew by 1 percent in Rochester.

The information sector was second only to manufacturing in its rate of decline in the region during 2003 (see Graph 17), with employment falling by 2.9 percent. Information was also the only sector that lost jobs at a higher rate in 2003 than in 2002.

⁸ The Finger Lakes region encompasses the Rochester MSA (Genesee County, Livingston County, Monroe County, Ontario County, Orleans County, and Wayne County), and the counties of Seneca, Wyoming, and Yates. The State Department of Labor does not report nonagricultural employment data for MSAs by county.

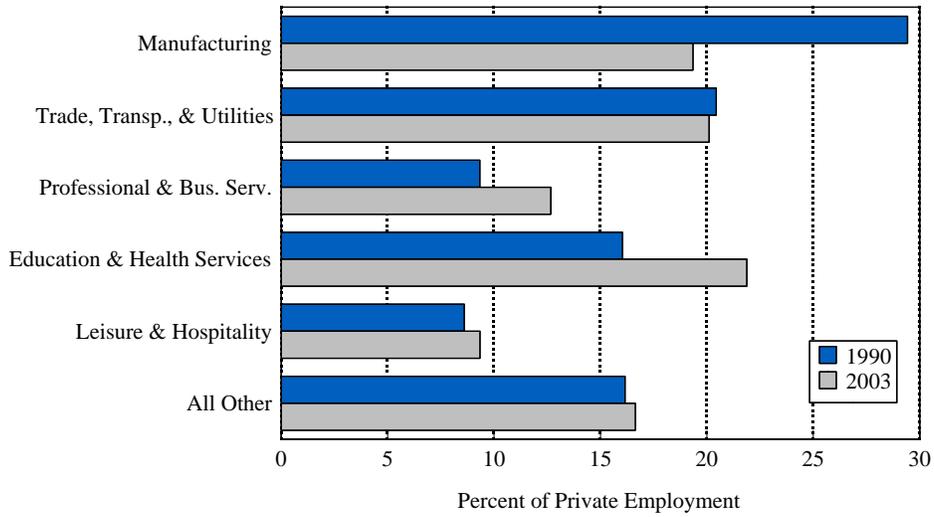
Graph 17
Changes in Private Industry in
the Finger Lakes



Source: NYS Department of Labor

While the Finger Lakes has experienced some positive job data in recent years, the region continues to lose manufacturing sector employment. In 1990, manufacturing was the region’s largest sector, accounting for 29.4 percent of all private sector jobs (see Graph 18). Between 1990 and 2003, 44,000 manufacturing jobs were lost, an average annual rate of decline of 2.3 percent. Manufacturing employment has largely been replaced by jobs in the educational and health services sector. Most of the manufacturing job losses have occurred in the Rochester MSA, particularly in the machinery manufacturing industry. During 2003, employment in that industry fell by 20.6 percent, which followed losses of 10.7 percent in 2001 and 14.8 percent in 2002. From 1990 through 2003, the number of machine manufacturing jobs in Rochester declined by 53.9 percent (18,500 jobs).

Graph 18
Distribution of Private Sector Employment in the Finger Lakes in 1990 and 2003



Source: NYS Department of Labor

J. Western New York

Western New York has more jobs than other upstate regions and accounts for 7.8 percent of the Statewide job total.⁹ Most of these jobs (83.5 percent) are in the Buffalo MSA, so the region's employment trends tend to follow those in the MSA. During 2003, total employment in the region declined by 0.4 percent, and private employment declined by 0.8 percent, slightly higher than the State's decline. Government employment increased by 1.1 percent, which was among the highest rates in the State.

Table 11
Average Annual Employment
Western New York
(in thousands)

| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|--------------------|--------------|--------------|---------------------------|--------------|---------------------------|
| Buffalo MSA | 549.9 | 548.1 | -0.3% | 545.9 | -0.4% |
| Allegany County | 17.0 | 17.2 | 1.2% | 16.9 | -1.6% |
| Cattaraugus County | 34.4 | 34.0 | -1.2% | 34.6 | 1.7% |
| Chautauqua County | 58.5 | 57.4 | -1.9% | 56.6 | -1.4% |
| Total | 659.8 | 656.7 | -0.5% | 654.0 | -0.4% |

Source: NYS Department of Labor

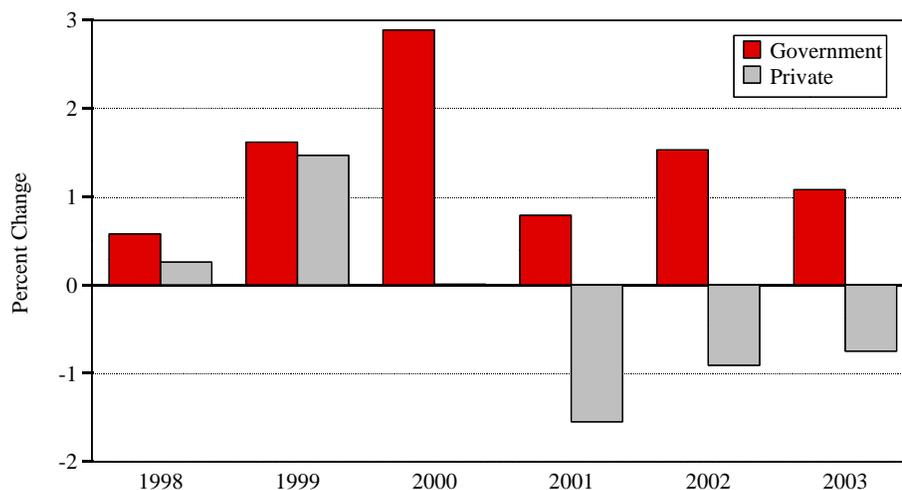
In recent years, Western New York has demonstrated a trend of government job growth that is more rapid than private sector job growth (see Graph 19). From 1997 through 2003, government employment increased annually, rising by 8.8 percent. During this period, the number of private sector jobs declined by 1.5 percent.

During 2003, employment growth in Western New York was adversely affected by a 1.4 percent decline in trade, transportation, and utilities, the area's largest sector. Although the rate of decline is not as great as in 2002, when employment fell by 2.4 percent, jobs were lost in the region at a higher rate than the Statewide average (0.4 percent). The job losses were primarily located in the Buffalo MSA, as smaller losses in Allegany County and Chautauqua County were offset by gains in Cattaraugus County. The Buffalo MSA lost jobs throughout this sector in

⁹ The Western New York region is comprised of the Buffalo MSA (Erie County and Niagara County), and the counties of Allegany, Cattaraugus, and Chautauqua. The State Department of Labor does not report nonagricultural employment data for MSAs by county.

2003, including in the lower-salaried retail trade subsector. Although several areas of the State showed job growth in retail trade, Statewide employment in this industry declined by 0.1 percent in 2003. In the Buffalo MSA, employment in retail trade fell by 1.5 percent in 2003, and in the higher-salaried transportation subsector, employment fell by 1.8 percent.

Graph 19
Annual Changes in Government and Private
Employment in Western New York



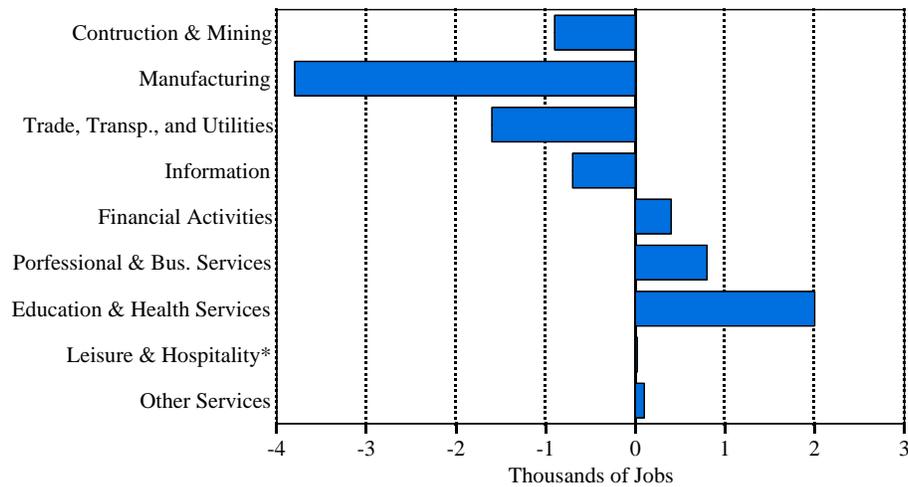
Source: NYS Department of Labor

Western New York continues to follow the trend of declining manufacturing employment. Although these jobs declined by 4.3 percent in 2003, the rate of decline was lower than it was in 2002 (7.1 percent), and lower than the 2003 rate of decline for the State (5.8 percent). Within the region, the Buffalo MSA had the highest rate of job loss in manufacturing, with a decline of 4.8 percent. Similarly, employment in the information sector declined by 6.1 percent, and jobs in the construction and mining sector were lower by 3.6 percent. These declines are consistent with trends upstate and in the State overall. Average salaries for the construction and mining sector are similar to the Statewide average salary for all jobs, while those in the information sector are higher than the Statewide average.

In Western New York, employment in each of the remaining sectors increased during 2003 (see Graph 20). The financial activities sector and professional and business services sector both increased, compared to Statewide employment declines

for these sectors. In the leisure and hospitality sector and the other services sector, the rates of job growth were lower than the Statewide averages.

Graph 20
Jobs Gained and Lost in
Western New York in 2003



*The average annual growth in jobs in leisure and hospitality was less than 100.

Source: NYS Department of Labor

The educational and health services sector had the highest rate of job growth in the region at 1.8 percent, although this was lower than the State's growth rate. Western New York has historically had lower rates of growth in this sector than in the State and in most regions within the State. Also, the sector comprised 18.8 percent of the region's private sector jobs in 2003, which is the lowest percentage of all the different regions within the State. Weak growth in this sector, which has shown strong growth elsewhere, is a major factor contributing to Western New York's recent lag behind the State in private sector job growth.

K. North Country

The North Country accounted for only 1.9 percent of all jobs in the State during 2003 (this region was second only to the Mohawk Valley in supplying the fewest jobs among all the State's regions).¹⁰ Total employment in the North Country declined during 2003 but the rate of decline was lower than the State's 0.7 percent decline. While other regions in the State had lower employment declines in 2003 than in 2002, total employment in the North Country declined at a higher rate in 2003 than in the previous year.

Table 12
Average Annual Employment
North Country
(in thousands)

| | 2001 | 2002 | Percent Change | 2003 | Percent Change |
|---------------------|--------------|--------------|-------------------|--------------|-------------------|
| Clinton County | 36.1 | 36.0 | -0.3% | 36.0 | 0.1% |
| Essex County | 16.0 | 15.8 | -1.5% | 15.2 | -3.4% |
| Franklin County | 18.6 | 18.6 | 0.4% | 18.7 | 0.4% |
| Jefferson County | 40.1 | 40.1 | 0.0% | 40.4 | 0.6% |
| Lewis County | 6.6 | 6.5 | -0.9% | 6.4 | -2.0% |
| St. Lawrence County | 42.3 | 42.3 | 0.0% | 41.9 | -0.9% |
| Total | 159.6 | 159.3 | -0.2% | 158.6 | -0.4% |

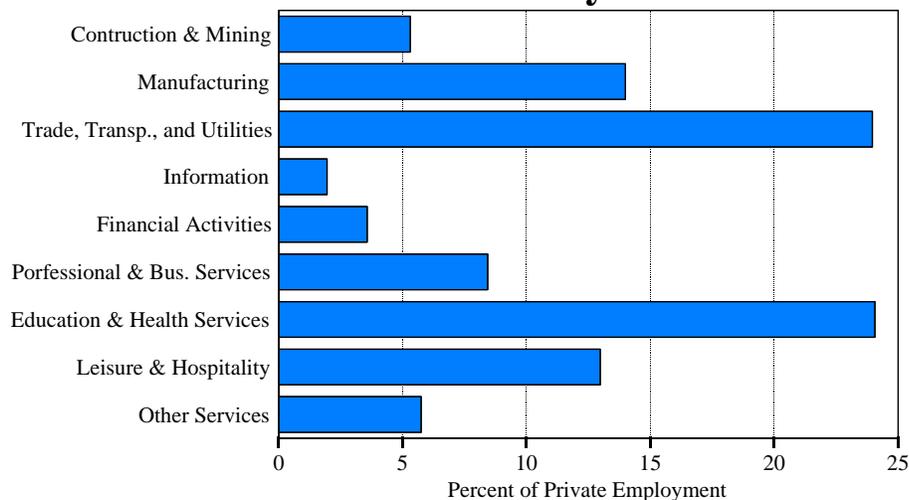
Source: NYS Department of Labor

Government employment is an important aspect of the regional economy, and accounted for 29.5 percent of the region's jobs in 2003—the highest rate among the different regions of the State. In fact, government employment accounts for more than 30 percent of all jobs in Essex, Jefferson, and Lewis counties. In 2003, government employment declined by 1.3 percent in the region, which equaled the decline in the Southern Tier and exceeded the decline in other regions.

Nearly half of the private sector jobs in the North Country are in the trade, transportation, and utilities sector and in the educational and health services sector (see Graph 21). Employment in trade, transportation, and utilities declined by 0.5 percent in 2003, although this rate was lower than the 2.8 percent decline in 2002.

¹⁰ The North Country is the only region in the State which does not contain an MSA. The region is comprised of six counties—Clinton, Essex, Franklin, Jefferson, Lewis, and St. Lawrence.

Graph 21
Distribution of Private Sector Employment
in the North Country in 2003



Source: NYS Department of Labor

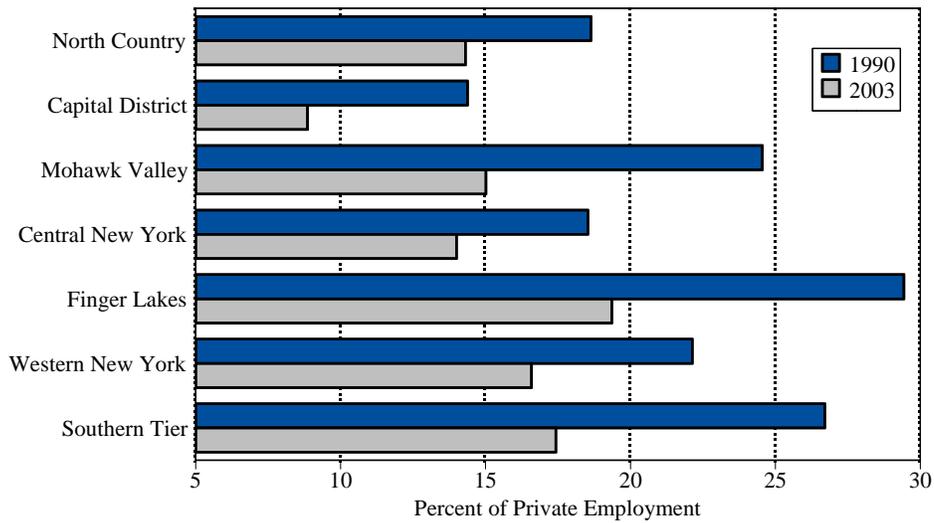
The manufacturing sector is not as large a sector in the North Country as it is in other upstate regions. In 2003, manufacturing employment accounted for 14.3 percent of the region’s private employment—only the Capital District and Central New York had smaller shares (see Graph 22). In 2003, manufacturing employment in the region declined by 1.4 percent, the lowest rate of decline of all regions within the State. Within the North Country, Franklin County had the largest loss in employment in the manufacturing sector in 2003, with a decline of 5.7 percent.

Although the construction and mining sector is relatively small, it had the largest rate of decline in employment (8.9 percent) compared to any other sector in the North Country during 2003. Employment in the other services sector also declined sharply in 2003, falling by 5.1 percent. However, all of the job losses were in Essex County, where employment in this sector declined by 46.3 percent in 2003. Combined, the construction and mining sector and the other services sector totaled 11.3 percent of private sector jobs in 2003.

During 2003, employment increased in the educational and health services sector (2.7 percent), the leisure and hospitality sector (2.5 percent), the professional and business services sector (2.1 percent), and the financial activities sector (0.6 percent). Employment in leisure and hospitality has remained consistent throughout the years in terms of both the number of jobs and its share of private sector

employment. From 1990 to 2003, the number of jobs in the sector has only declined from 14,900 to 14,800. Similarly, since 1990 employment in the sector has remained at between 12.8 percent and 14 percent of the region's private sector jobs—accounting for 13.3 percent in 2003. However, in Essex County this sector makes up more than one quarter of the county's private sector jobs.

Graph 22
Manufacturing Employment as a Percent of Upstate Private Employment



Source: NYS Department of Labor

Appendix

Listing of Sectors, Subsectors, and Industries

Natural Resources and Mining

Construction

- Construction of Buildings
- Specialty Trade Contractors

Manufacturing

Durable Goods

- Primary Metal Manufacturing
- Fabricated Metal Product Manufacturing
- Machinery Manufacturing

- Computer and Electronic Product Manufacturing
- Transportation Equipment Manufacturing
- Furniture and Related Product Manufacturing

Non-Durable Goods

- Food Manufacturing
- Apparel Manufacturing
- Paper Manufacturing
- Printing and Related Support Activities
- Chemical Manufacturing
- Plastics and Rubber Products Manufacturing

Trade, Transportation, and Utilities

Wholesale Trade

- Merchant Wholesalers, Durable Goods
- Merchant Wholesalers, Nondurable Goods

Retail Trade

- Motor Vehicle and Parts Dealers
- Furniture and Home Furnishings Stores
- Electronics and Appliance Stores
- Building Material and Garden Equipment
- Food and Beverage Stores
- Health and Personal Care Stores
- Gasoline Stations
- Clothing and Clothing Accessories Stores
- Sporting Goods, Hobby, Book, and Music Stores
- General Merchandise Stores
- Miscellaneous Store Retailers
- Nonstore Retailers

Transportation, Warehousing, and Utilities

Utilities

Transportation and Warehousing

- Air Transportation
- Truck Transportation
- Transit and Ground Passenger Transportation
- Support Activities for Transportation
- Couriers and Messengers

Information

- Publishing Industries (except Internet)
- Motion Picture and Sound Recording
- Broadcasting (except Internet)
- Telecommunications

Financial Activities

Finance and Insurance

- Credit Intermediation and Related Activities
- Securities, Commodity Contracts, and Other Financial Investments & Related Activities
- Insurance Carriers and Related Activities

Real Estate and Rental and Leasing

Professional and Business Services

Professional, Scientific, and Technical Services

Management of Companies and Enterprises

Admin. & Supp. and Waste Mgmt. & Remed. Svcs.

Educational and Health Services

Educational Services

Health Care and Social Assistance

- Ambulatory Health Care Services
- Hospitals
- Nursing and Residential Care Facilities
- Social Assistance

Leisure and Hospitality

Arts, Entertainment, and Recreation

- Museums, Historical Sites, and Similar Institutions
- Amusement, Gambling, and Recreation Industries

Accommodation and Food Services

- Accommodation
- Food Services and Drinking Places

Other Services

- Repair and Maintenance
- Personal and Laundry Services
- Religious, Grantmaking, Civic, Professional and Similar Organizations

Government

- Federal Government
- State Government
- Local Government

Source: North American Industrial Classification System, Executive Office of the President, Office of Management and Budget

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