

Labor Market Information



Presented by

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MTP Transition Support Group

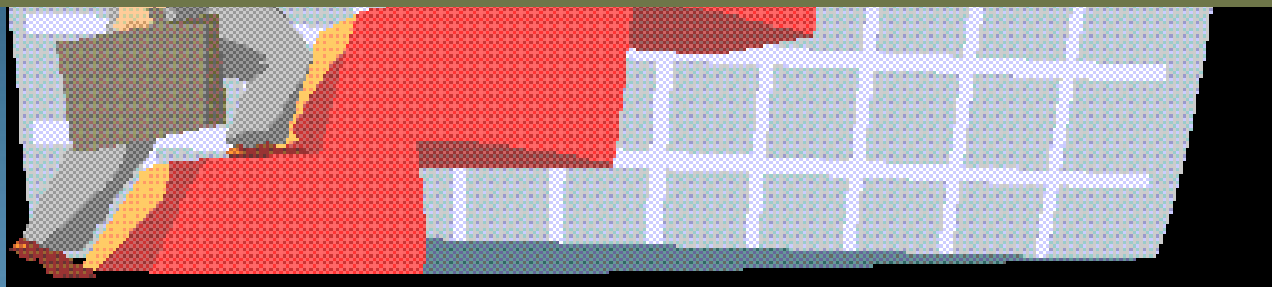
Coopers Plains, New York

May 17, 2010





A Look at the
Current Business Environment



Unemployment Rates

United States, New York State, Chemung County and Contiguous Counties

AREA	Apr 2010	Mar 2010	Apr 2009
United States	9.5%	10.2%	8.6%
New York State	8.2%	8.8%	7.7%
Chemung County	7.9%	8.7%	8.8%
Schuyler County	8.0%	9.8%	8.7%
Steuben County	9.4%	10.3%	9.7%
Tioga County	7.3%	8.7%	7.6%
Tompkins County	5.1%	5.5%	5.0%

Source: NYS Department of Labor, Division of Research and Statistics

Note: Data Not Seasonally Adjusted

Unemployment Rate by Education Level

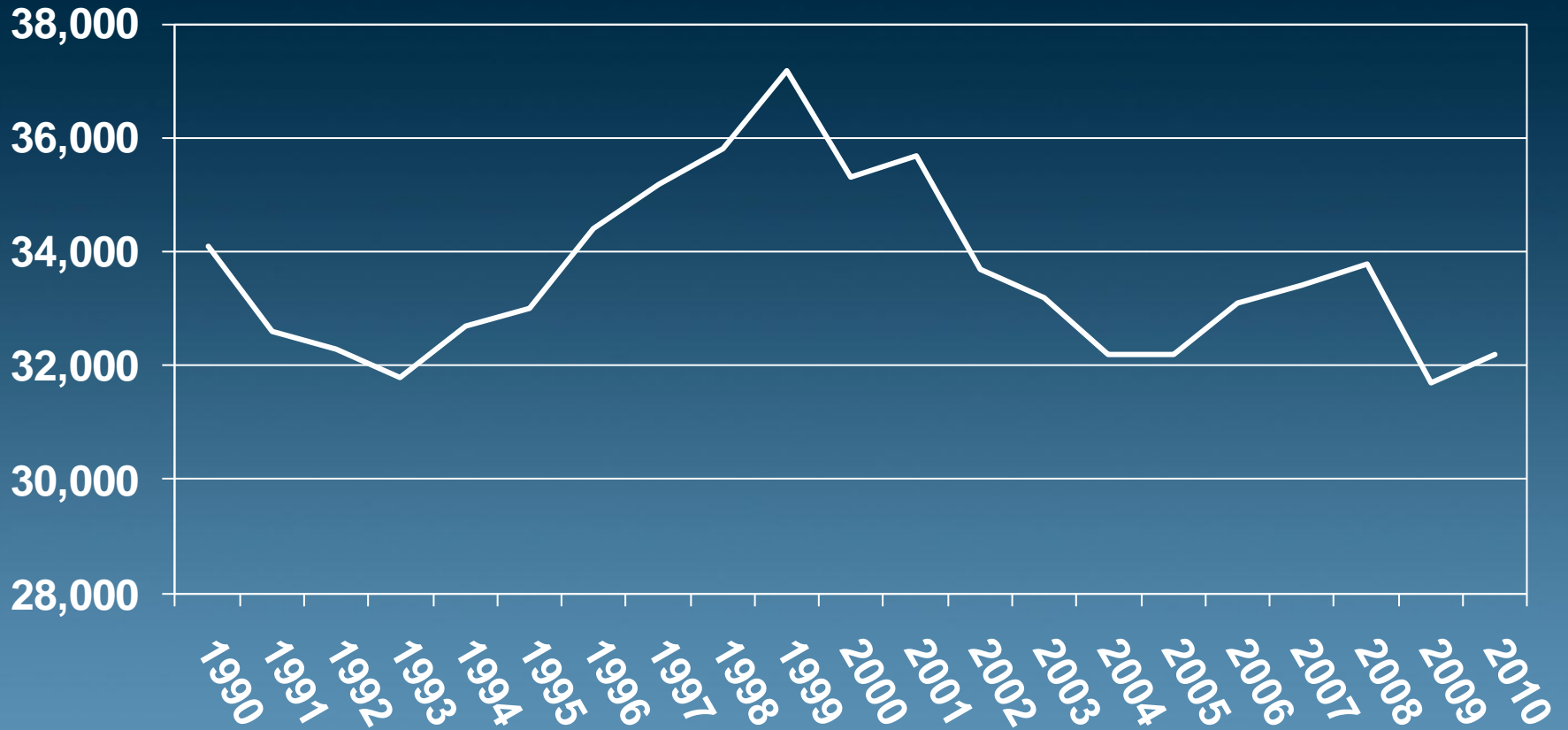
United States

CATEGORY	APR 2008	APR 2009	APR 2010
Less than a high school diploma	7.6%	14.6%	14.5%
High school graduates, no college	4.9%	9.3%	10.5%
Some college or associate degree	3.9%	7.4%	8.1%
Bachelor's degree and higher	2.0%	4.0%	4.4%

Source: Bureau of Labor Statistics, Current Population Survey

Note: Employment status of the civilian population 25 years and over by educational attainment

Private Sector Employment Chemung County 1990 – 2010 (April)



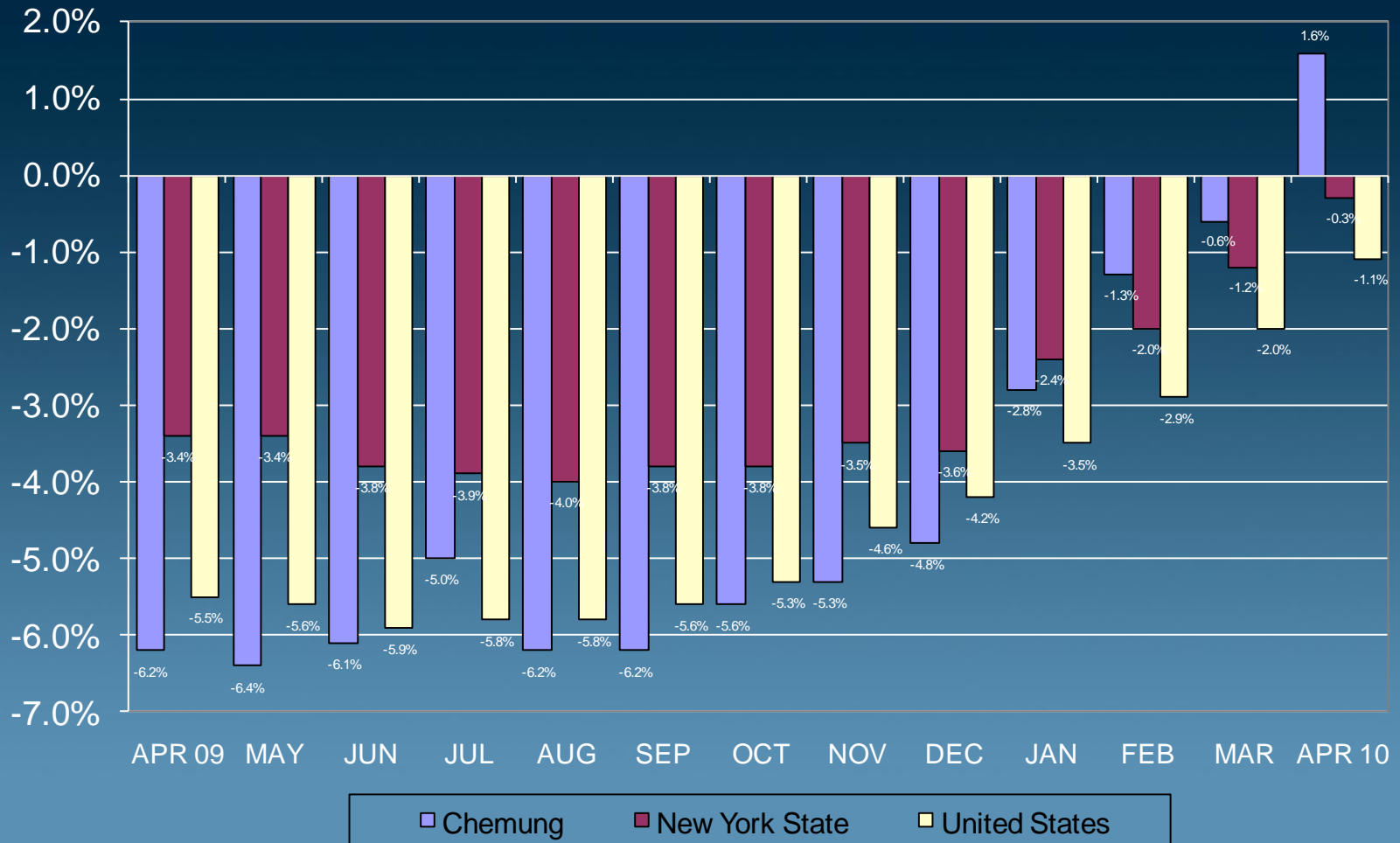
Non-Farm Employment Chemung County

INDUSTRY	APR 2010	MAR 2009	APR 2009	Over the Month Change		Over the Year Change	
				Net	Percent	Net	Percent
Total Non-farm	39,600	39,000	39,100	600	1.5%	500	1.3%
Total Private	32,200	31,600	31,700	600	1.9%	500	1.6%
Goods-producing	7,100	6,900	7,200	200	2.9%	-100	-1.4%
Natural Resources, Mining and Construction	1,400	1,300	1,400	100	7.7%	0	0.0%
Manufacturing	5,700	5,600	5,800	100	1.8%	-100	-1.7%
Service-Providing	32,500	32,100	31,900	400	1.2%	600	1.9%
Private Service-Providing	25,100	24,700	24,500	400	1.6%	600	2.4%
Trade, Transportation and Utilities	7,400	7,300	7,200	100	1.4%	200	2.8%
Information	400	400	500	0	0.0%	-100	-20.0%
Financial Activities	1,500	1,400	1,500	100	7.1%	0	0.0%
Professional and Business Services	2,600	2,500	2,300	100	4.0%	300	13.0%
Educational and Health Services	8,100	8,100	8,000	0	0.0%	100	1.3%
Leisure and Hospitality	3,300	3,200	3,200	100	3.1%	100	3.1%
Other Services	1,800	1,800	1,800	0	0.0%	0	0.0%
Government	7,400	7,400	7,400	0	0.0%	0	0.0%

Note: Details may not add to totals due to rounding

Annual Private Sector Job Change

United States, New York State and Chemung



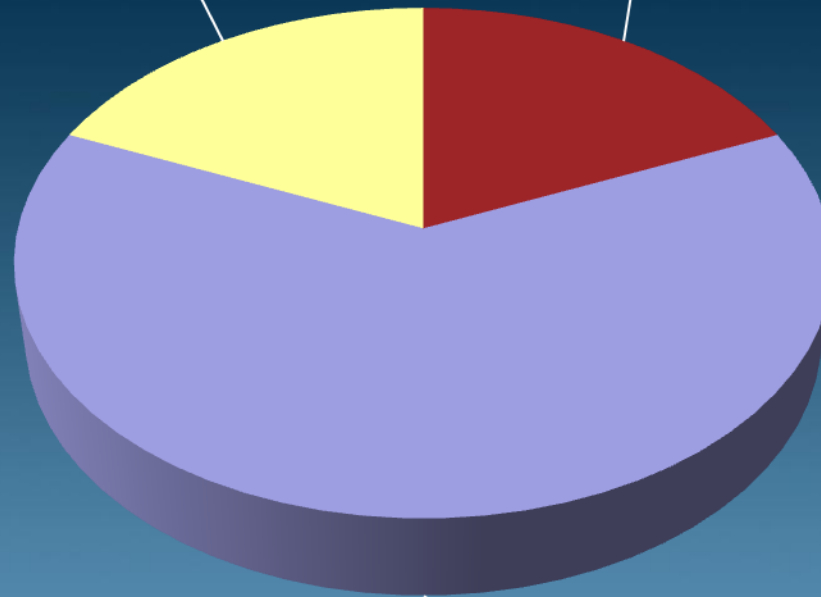
Employment Share by Industry Chemung, 2009

NYS – 17.8%
US – 17.2%

Government
19%

Goods Producing
18%

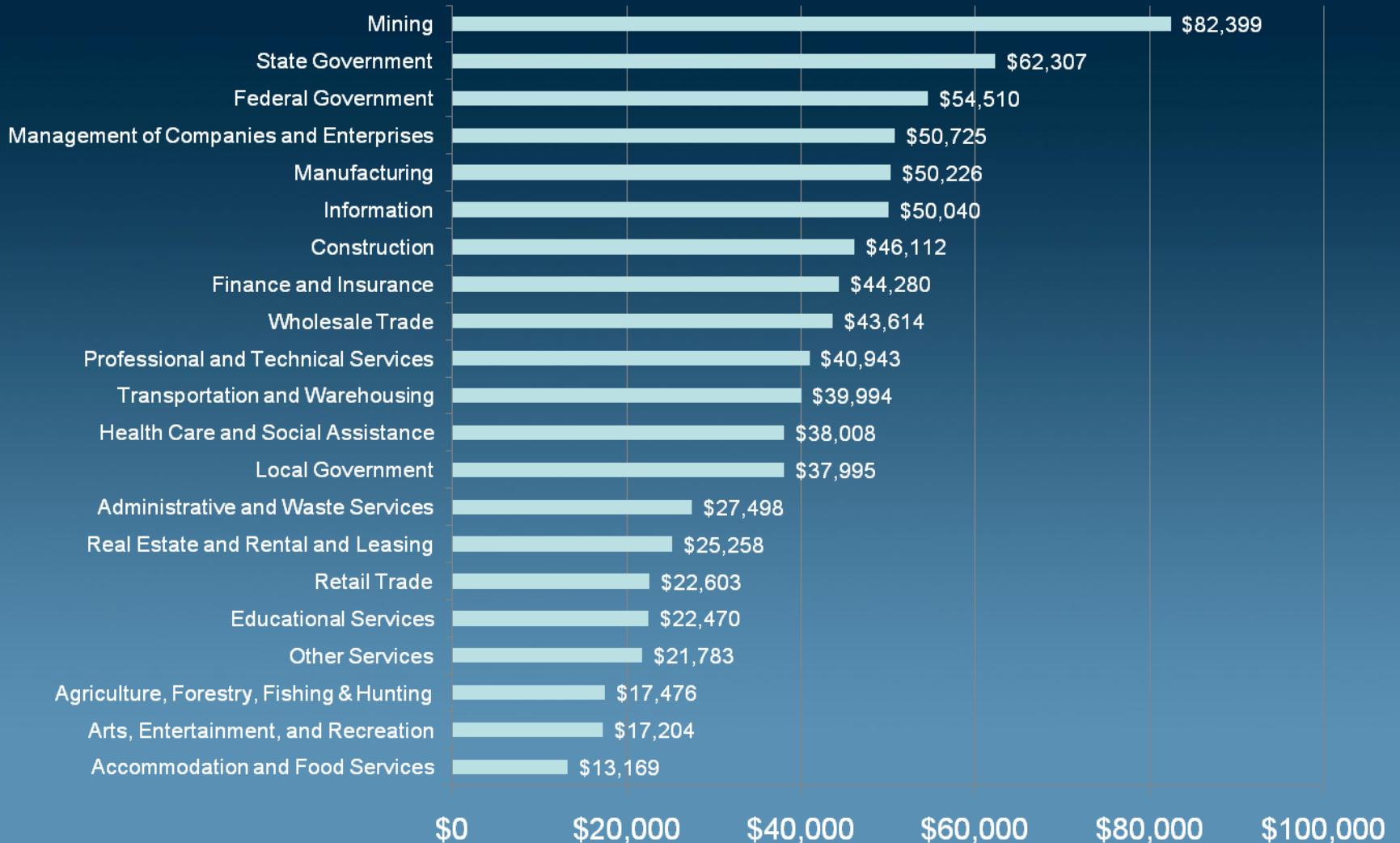
NYS – 9.4%
US – 14.2%



Private Service-
Providing
63%

NYS – 72.7%
US – 68.6%

Annual Wages by Industry Chemung, 2008



SHORT TERM - CHEMUNG COUNTY

TOP GROWING INDUSTRIES 2009 Qtr. 3 vs. 2008 Qtr. 3	Jobs Added	Quarterly Wages 2009 Qtr 3
Hospitals	+70	\$10,193
Miscellaneous Manufacturing	+30	\$10,100
Personal and Laundry Services	+20	\$4,866
Membership Organizations & Associations	+20	\$4,890
Heavy and Civil Engineering Construction	+10	\$10,448
Merchant Wholesalers, Nondurable Goods	+10	\$9,922
Electronic Markets and Agents/Brokers	+10	\$13,307
Sporting Goods/Hobby/Book/Music Stores	+10	\$4,349
Food Services and Drinking Places	+10	\$3,313
Repair and Maintenance	+10	\$7,469

SHORT TERM - CHEMUNG COUNTY

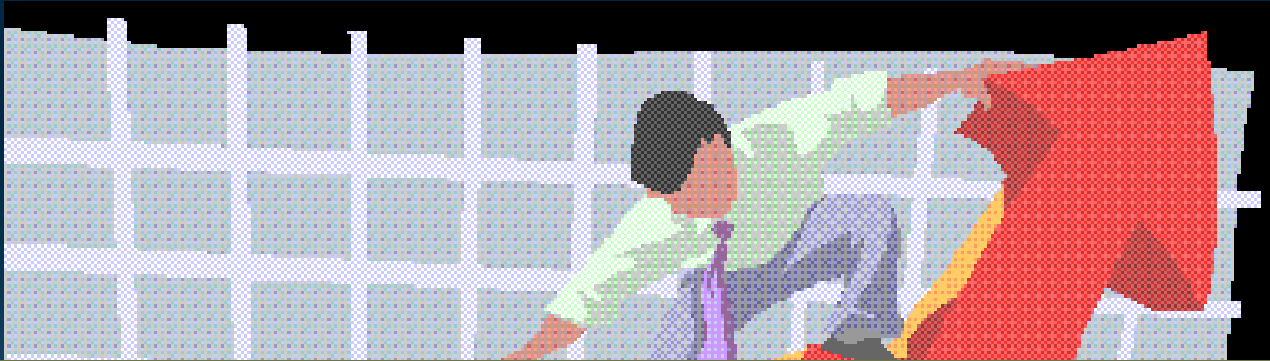
TOP DECLINING INDUSTRIES 2009 Qtr. 3 vs. 2009 Qtr. 3	Jobs Lost	Quarterly Wages 2009 Qtr 3
Administrative and Support Services	-480	\$7,543
Machinery Manufacturing	-250	\$11,554
Computer and Electronic Product Mfg	-220	\$12,859
Electronics and Appliance Stores	-140	\$5,834
Construction of Buildings	-110	\$10,998
Fabricated Metal Product Manufacturing	-110	\$11,326
Nonmetallic Mineral Product Mfg	-100	\$14,018
Social Assistance	-90	\$5,624
Motor Vehicle and Parts Dealers	-60	\$10,334
Professional and Technical Services	-60	\$10,120

LONG TERM - CHEMUNG COUNTY

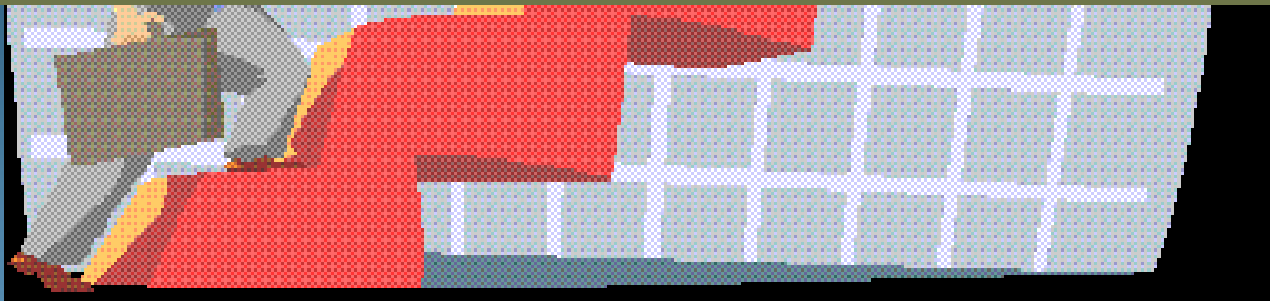
TOP GROWING INDUSTRIES 2009 Qtr. 3 vs. 2004 Qtr. 3	Jobs Added	Quarterly Wages 2009 Qtr 3
Health Care and Social Assistance	+280	\$9,734
Ambulatory Health Care Services	-60	\$14,790
Nursing and Residential Care Facilities	+120	\$5,903
Social Assistance	+120	\$5624
Construction	+120	\$11,865
Construction of Buildings	-120	\$10,998
Heavy and Civil Engineering Construction	0	\$10,448
Specialty Trade Contractors	+240	\$12,315
Management of Companies and Enterprises	+60	\$11,193
Other Services	+60	\$5,516
Personal and Laundry Services	-30	\$4,866
Private Households	-10	\$4,226
Repair and Maintenance	+40	\$7,469
Membership Organizations & Associations	+50	\$4,890

LONG TERM - CHEMUNG COUNTY

TOP DECLINING INDUSTRIES 2009 Qtr. 3 vs. 2004 Qtr. 3	Jobs Lost	Quarterly Wages 2009 Qtr 3
Manufacturing	-730	\$11,632
Computer and Electronic Product Mfg	-910	\$12,859
Fabricated Metal Product Manufacturing	-390	\$11,326
Printing and Related Support Activities	-120	\$8,975
Retail Trade	-320	\$5,667
Motor Vehicle and Parts Dealers	-200	\$10,334
Building Material & Garden Supply Stores	-160	\$6,924
Food and Beverage Stores	-130	\$4,765
Information	-240	\$12,544
Publishing Industries	-80	\$13,926
Telecommunications	-80	\$16,837
Broadcasting (except Internet)	-30	\$7,566
Wholesale Trade	-120	\$10,417
Merchant Wholesalers, Nondurable Goods	-90	\$9,922
Merchant Wholesalers, Durable Goods	-20	\$10,544
Electronic Markets and Agents/Brokers	-10	\$13,307



Switching Gears:
Demographic Trends



Total Population Trend

AREA	ACS Estimate* 2005-2007	Census 2000	Percent Change
United States	298,757,310	281,421,906	+6.2%
New York State	19,280,753	18,976,457	+1.6%
Broome	196,212	200,536	-2.2%
Chemung	88,199	91,070	-3.2%
Chenango	51,141	51,401	-0.5%
Delaware	46,555	48,055	-3.1%
Otsego	62,561	61,676	+1.4%
Steuben	97,109	98,726	-1.6%
Tioga	50,588	51,784	-2.3%
Tompkins	100,590	96,501	+4.2%

Source: U.S. Census Bureau

* American Community Survey 3-year estimates

An Aging Population Base

(Median Age in Years)

AREA	ACS Estimate* 2005-2007	Census 2000	Net Change
United States	36.4	35.3	+1.1
New York State	37.4	35.9	+1.5
Broome	39.2	38.2	+1.0
Chemung	39.0	37.9	+1.1
Chenango	40.4	38.4	+2.0
Delaware	42.7	41.4	+1.3
Steuben	40.0	38.2	+1.8
Tioga	40.2	38.0	+2.2
Tompkins	28.4	28.6	-0.2

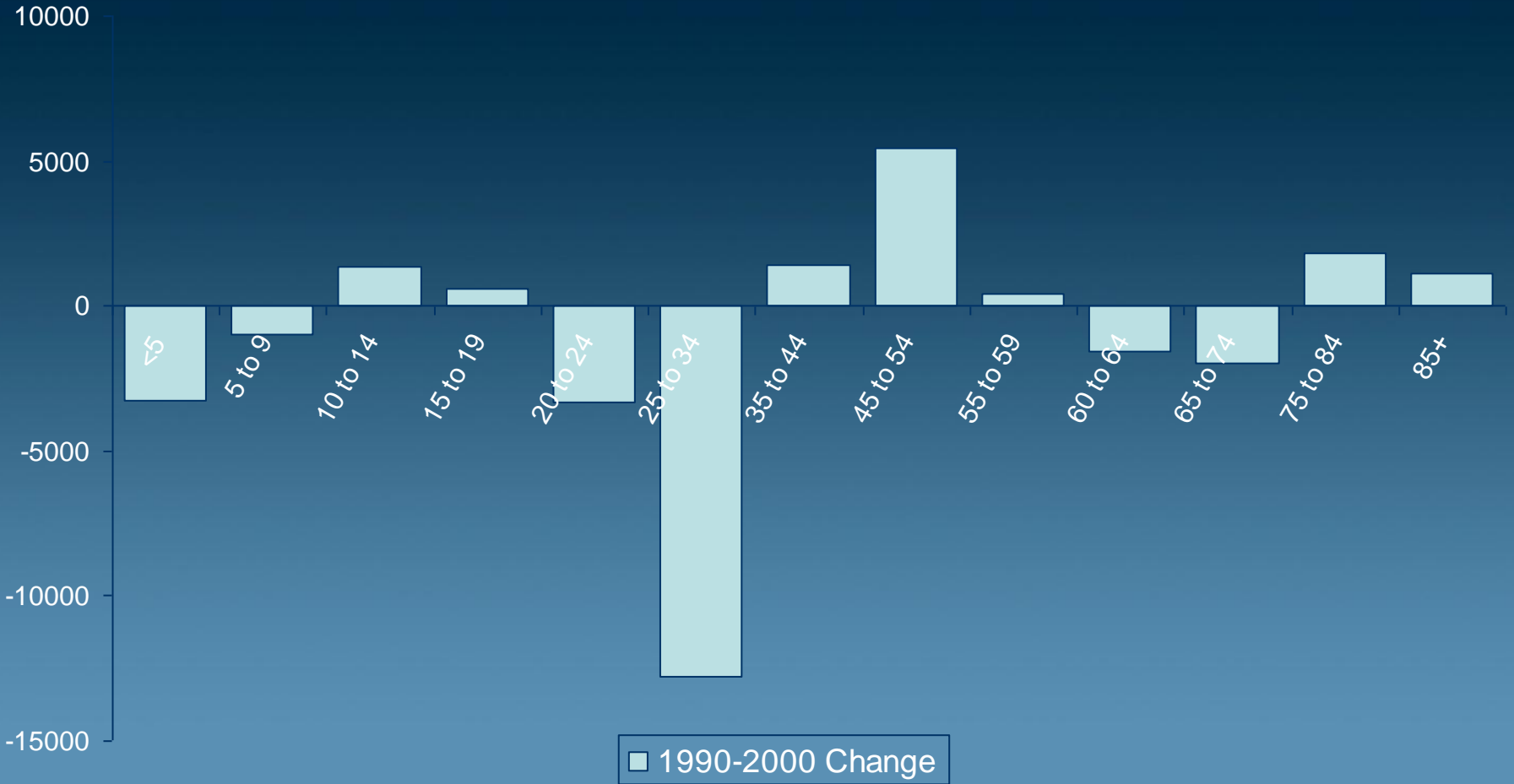
Source: U.S. Census Bureau

* American Community Survey 3-year estimates

Change in Population by Age

Southern Tier Region

Who will work those jobs?



Workforce Ethnicity

Percent Minority of the Civilian Labor Force

United States	22.1%
New York State	28.9%
Broome	7.0%
Chemung	5.4%
Chenango	1.8%
Delaware	3.0%
Schuyler	2.2%
Steuben	3.2%
Tioga	2.5%
Tompkins	12.6%

Local percentages are below national and statewide averages.

Demographics by Educational Attainment

Educational Attainment	United States	New York State	Chemung	Steuben
Less than High School	13.5%	13.6%	11.4%	11.0%
12th grade, no diploma	2.0%	2.3%	1.9%	1.6%
High school graduate, GED, or alternative	29.6%	29.0%	37.8%	38.1%
Some college, less than 1 year	6.2%	4.5%	6.9%	6.8%
Some college, 1 or more years, no degree	13.9%	10.9%	10.3%	10.4%
Associate's degree	7.4%	8.1%	10.7%	13.1%
Bachelor's degree	17.3%	18.1%	11.5%	9.5%
Master's degree	7.0%	9.6%	6.6%	7.3%
Professional school degree	1.9%	2.7%	2.2%	1.1%
Doctorate degree	1.1%	1.3%	0.7%	1.0%

2000 Commutation Patterns

CHEMUNG COUNTY

County Residents At Work	2000	% of Total	Persons Working in County	2000	% of Total
Total County Residents at Work	38,451	100.0%	Total Persons Working in the County	41,618	100.0%
Worked in New York State	37,452	97.4%	Lived in New York State	38,236	91.9%
Worked in County	31,178	81.1%	Lived in County	31,178	74.9%
Worked outside County	6,274	16.3%	Lived Outside County	7,058	17.0%
Steuben	3,419	8.9%	Steuben	3,532	8.5%
Tompkins	970	2.5%	Schuyler	1,389	3.3%
Schuyler	505	1.3%	Tioga	905	2.2%
Tioga	450	1.2%	Tompkins	442	1.1%
Broome	273	0.7%	Broome	193	0.5%
Onondaga	101	0.3%	Seneca	101	0.2%
Seneca	86	0.2%	Yates	75	0.2%
Livingston	84	0.2%	Monroe	60	0.1%
Monroe	60	0.2%	Queens	43	0.1%
Cayuga	57	0.1%	Allegany	39	0.1%
Other	269	0.7%	Other	279	0.7%
Worked outside of New York State	999	2.6%	Lived outside of New York State	3,382	8.1%
Total outcommutation	7,273	18.9%	Total incommutation	10,440	25.1%
(county residents working outside county)			(county nonresidents working in county)		

Net Incommutation: 3,167

2000 Migration Patterns

CHEMUNG COUNTY

Persons Moving to the County	2000	% of Total	Persons Moving from the County	2000	% of Total
Total Immigration	11,534	100.0%	Total Outmigration	13,090	100.0%
From Outside New York State	4,987	43.2%	To Outside of New York State	7,312	55.9%
Pennsylvania	1,440	12.5%	Pennsylvania	1,788	13.7%
Florida	372	3.2%	Florida	1,219	9.3%
North Carolina	309	2.7%	North Carolina	921	7.0%
California	236	2.0%	Virginia	303	2.3%
Virginia	230	2.0%	South Carolina	273	2.1%
Other	2,400	20.8%	Other	2,808	21.5%
From within New York State	6,547	56.8%	To within New York State	5,778	44.1%
Steuben County	1,356	11.8%	Steuben County	1,138	8.7%
Cattaraugus County	1,156	10.0%	Monroe County	605	4.6%
Schuyler County	623	5.4%	Schuyler County	536	4.1%
Tioga County	425	3.7%	Tioga County	506	3.9%
Broome County	310	2.7%	Broome County	377	2.9%
Other	2,677	23.2%	Other	2,616	20.0%

Net Outmigration: 1,556

Source: US Census Bureau, 2000 US Census. Adapted for use by the New York State Department of Labor, Division of Research and Statistics.

Note: Current county of residence is based on where the person was living on April 1st, 2000; Previous county of residence is based on where the person was living 5 years earlier.



What Does the Future Hold?



Long Term Trends in Today's Economy

- Shift from manufacturing to service-based economy
 - Manufacturing: 1990 – 24.0% → 2009 – 17.8%
 - Service-Providing: 1990 – 74.2% → 2009 – 78.9%
- Operating in a global economy
- Tremendous advances in technology
- Corporate downsizing, right sizing
- Consolidation
- Contracting out for services



NOT enough new workers are entering the labor force to replace retiring baby boomers, especially in:

- Health Care
- Teaching (Budget Volatility)
- STEM Occupations
(Science, Technology, Engineering, Math)

STEM Occupations are Growing



SCIENCE (chemist, astronomer, physicist)

TECHNOLOGY (computer programmer/analyst)

ENGINEERING (civil, agricultural, biomedical)

MATHEMATICS (actuary, statistician)

STEM Occupations



- Require the ability to think **logically**.
- The median annual salary of individuals working in STEM careers is \$62,090, **nearly twice** the median of all workers in the Southern Tier Region.
- **Starting salaries are higher** for STEM workers than for workers in many other disciplines.
- **Demand** for STEM workers is increasing.

Regional Occupational Projections 2006 - 2016

FINGER LAKES REGION

- Over the 2006-2016 decade, total employment in the Finger Lakes is projected to increase by 18,740 jobs, or 3.0 percent.

SOUTHERN TIER REGION

- Over the 2006-2016 decade, total employment in the Southern Tier Region is projected to increase by 10,350 jobs, or 3.4 percent.

WESTERN NEW YORK REGION

- Over the 2006-2016 decade, total employment in the Western New York is projected to increase by 3,420 jobs, or 0.5 percent.

Southern Tier Region

FASTEST GROWING OCCUPATIONS, 2006- 2016

Network Systems and Data Communications Analysts

Personal and Home Care Aides

Computer Software Engineers, Applications

Home Health Aides

Computer Software Engineers, Systems Software

Industrial Engineers

Registered Nurses

Customer Service Representatives

Social and Human Service Assistants

Receptionists and Information Clerks

*Medical and computer-related occupations
dominate the list of projected fastest-growing jobs.*

Southern Tier Region

OCCUPATIONS WITH THE MOST EXPECTED OPENINGS, 2006- 2016

Retail Salespersons

Waiters and Waitresses

Registered Nurses

Janitors and Cleaners, Except Maids and Housekeeping Cleaners

Child Care Workers

Food Preparation Workers

Customer Service Representatives

Office Clerks, General

Elementary School Teachers, Except Special Education

Secondary School Teachers, Except Special and Vocational Education

*Dominated by occupations with high replacement need –
mainly due to high turnover or aging workforce*

National Occupational Projections 2008 - 2018

- **Total Employment is expected to increase by 10.1 percent**
- **Projections show an aging and more racially and ethnically diverse labor force**
- **More than half of the new jobs will be in professional and related occupations and service occupations**
- **Occupations where a postsecondary degree or award is usually required are expected to account for one-third of total job openings**
- **Job Openings from replacement need are projected to be more than double the number of openings due to economic growth**

United States

FASTEST GROWING OCCUPATIONS, 2008- 2018

Biomedical engineers

Network systems and data communications analysts

Home health aides

Personal and home care aides

Financial examiners

Medical scientists, except epidemiologists

Physician assistants

Skin care specialists

Biochemists and biophysicists

Athletic trainers

United States

OCCUPATIONS WITH THE MOST EXPECTED OPENINGS, 2008- 2018

Registered nurses

Home health aides

Customer service representatives

Combined food preparation and serving workers, including fast food

Personal and home care aides

Retail salespersons

Office clerks, general

Accountants and auditors

Nursing aides, orderlies, and attendants

Postsecondary teachers

Your Local Workforce New York Center

Corning Career Center
Chemung/Schuyler/Steuben Workforce Development
20 Denison Parkway West, Suite 102
Corning, New York 14830

Bath Career Center
Chemung/Schuyler/Steuben Workforce Development
117 East Steuben Street
Bath, New York 14810

Hornell Career Center
Chemung/Schuyler/Steuben Workforce Development
107 Broadway
Hornell, New York 14843