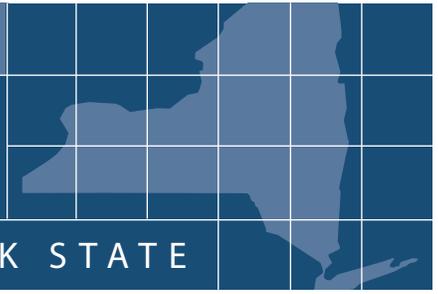


Employment

IN NEW YORK STATE



Andrew M. Cuomo, Governor
Mario J. Musolino, Acting Commissioner

At a Glance

In December 2014, New York's seasonally adjusted unemployment rate was 5.8%, down from November 2014's level of 5.9%. The U.S. unemployment rate was 5.6% in December 2014. New York State had 9,072,200 nonfarm jobs in December 2014, including 7,638,200 private sector jobs, after seasonal adjustment. The number of seasonally adjusted private sector jobs in the state increased by 0.4% in November-December 2014, while those in the nation increased by 0.2%. From December 2013 to December 2014, the number of private sector jobs increased by 1.5% in the state and 2.5% in the nation (not seasonally adjusted). New York's Index of Coincident Economic Indicators decreased at an annual rate of 0.8% in December 2014.

Change in Nonfarm Jobs

December 2013 - December 2014
(Data not seasonally adjusted, net change in thousands)

	Net	%
Total Nonfarm Jobs	105.2	1.2%
Private Sector	114.2	1.5%
Goods-producing	0.6	0.1%
Nat. res. & mining	0.1	2.0%
Construction	8.9	2.8%
Manufacturing	-8.4	-1.9%
Durable gds.	-4.3	-1.6%
Nondurable gds.	-4.1	-2.2%
Service-providing	104.6	1.3%
Trade, trans. & util.	7.4	0.5%
Wholesale trade	0.8	0.2%
Retail trade	5.4	0.6%
Trans., wrhs. & util.	1.2	0.4%
Information	-5.4	-2.1%
Financial activities	0.6	0.1%
Prof. & bus. svcs.	42.4	3.5%
Educ. & health svcs.	38.4	2.1%
Leisure & hospitality	25.1	3.1%
Other services	5.1	1.3%
Government	-9.0	-0.6%

Diverse Set of Industries Add Jobs During the Winter Months...

A Look at New York State's Winter Industries

What does this diverse set of industries — skiing facilities, bowling centers, fuel dealers and accounting and bookkeeping services — have in common? They are among the handful of industries that see their job counts spike and reach their peak employment levels during the winter months. In January, with snow piling up outside and the holiday shopping season over, you might not expect too many businesses to be hanging out the "Help Wanted" sign. However, some industries in New York State refuse to hibernate and actually blossom during the winter months.

Here, we look at four industries — some expected and others not — that reach their peak employment levels during the first quarter of the year. To measure the percentage spike in jobs during the winter months, we compare average monthly employment levels

during January-March with those during the April-December period. Our analysis is based on statewide jobs data (private sector) from the Quarterly Census of Employment and Wages (QCEW) from 2004-2013.

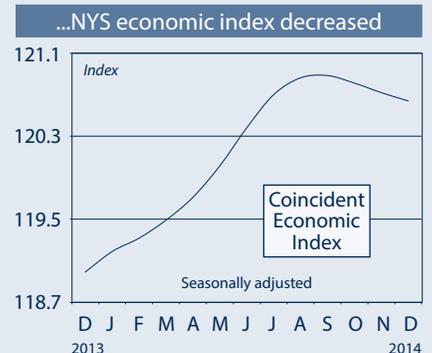
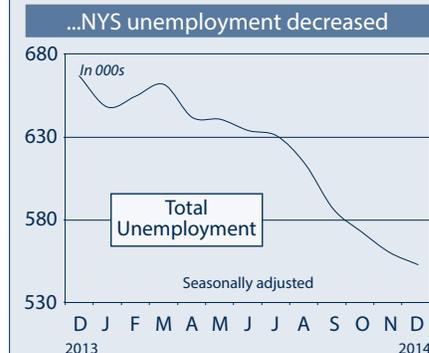
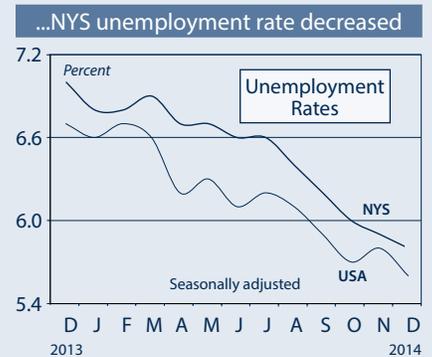
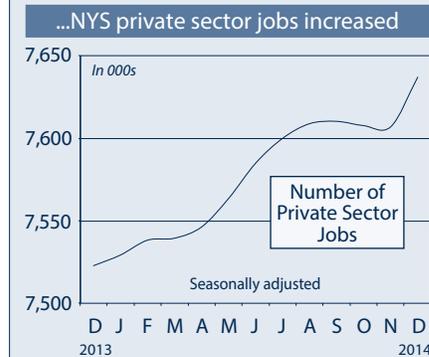
Winter Industries

The table on page 3 shows more details about New York State's winter industries, including:

- Average monthly employment levels during January-March and April-December (based on 2004-2013 private sector data)
- Net and percent change in jobs between the two periods
- Employment multipliers, based on estimates from Economic Modeling Specialists International (EMSI)

Continued on page 2

IN DECEMBER...



Focus on Western New York

Western New York Remaking Itself

by John Slenker, Labor Market Analyst, Western New York

Since the end of the last recession more than five years ago, the Western New York regional labor market has improved dramatically. For the five-year period ending December 2014, the region added more than 22,000 private sector jobs and saw its unemployment rate drop from 8.7% to 5.8%. During this time span, a number of transformative projects, such as HarborCenter and the Buffalo Niagara Medical Campus in downtown Buffalo, were initiated and are now helping to reshape the Western New York region.

Advanced Manufacturing Growing in Region

Several solar companies -- SolarCity, Solar Frontier and Soraa -- are opening factories in the Buffalo area. Western New York, once noted for its many steel factories, will soon be known as a semiconductor powerhouse due to these new companies.

In late 2013, California-based solar company Silevo announced plans to build a solar panel plant at the RiverBend campus in South Buffalo that will employ 475 workers. SolarCity subsequently purchased Silevo and said it would more than triple the number of solar jobs coming to Buffalo. SolarCity's new plant is the largest solar panel plant in the Western Hemisphere. It is being built on a former brownfield site, where Republic Steel used to operate. When the plant is in full production, employment at the site could exceed 3,000, which is greater than the steel plant at its peak.

Japan-based Solar Frontier also plans to open a plant in Buffalo, where it will produce solar

modules. The company is planning a phased expansion into New York State. Solar Frontier originally planned to bring as many as 250 R&D and manufacturing jobs to Western New York. The company, however, revised its plans and now expects its total job count to be "several times" the original number.

A third solar company, California-based Soraa, is also setting up shop in the region. Soraa specializes in the manufacture of high-efficiency LED lights. The company could bring as many as 375 new jobs to the region.

Companies in other industries are also bringing more high-tech jobs to the area. The Buffalo Niagara Medical Campus in downtown Buffalo keeps expanding. The growth of the medical school, bioinformatics center and Roswell Park has attracted some of the best scientists from around the world. IBM will be bringing 500 jobs to the Buffalo IT Innovation and Commercialization Hub. This site will help foster continued growth in genomics, nanoscale science and clean energy.

Quality of Life Improves

While Western New York continues to attract high-tech businesses, it has also become a more attractive place to live. New projects like the HarborCenter, Riverworks and Wonder Falls Resort are bringing entertainment, shopping and other amenities to the area. HarborCenter in downtown Buffalo is a mixed-use hockey and entertainment complex that connects to the First Niagara Center, home of the National Hockey League's (NHL) Buffalo Sabres. The



"Western New York, once noted for its many steel factories, will soon be known as a semiconductor powerhouse."

complex includes a Marriott hotel and retail and restaurant space. The facility makes Buffalo one of the premier training centers for hockey in North America. It has already hosted major tournaments and will host two world championships in 2015. In addition, it will host the NHL Combine, which brings the 100 top pro hockey prospects to one place for interviews and testing, in 2015 and 2016.

RiverWorks is a multi-purpose recreation and events center on the site of a former grain mill. It will contain two full-size hockey arenas, a beer garden, concert and event space along with a restaurant and bar. Wonder Falls Resort is transforming the former Rainbow Centre Mall in Niagara Falls into a family resort featuring an indoor water park, a 300-room hotel, a daredevil adventure center as well as retail and restaurant space.

Looking Ahead

Western New York's economy has experienced a solid recovery from the last recession. As we look ahead, advanced manufacturing -- in the form of three new solar companies -- will play a major role as the Western New York region continues to reinvent itself. ■

Winter Industries... from page 1

Ski Facilities

Let's start with the obvious one -- ski areas. Ski facilities (NAICS 71392) lead the pack with an employment spike of more than 450% during the first quarter (January-March) of the year. It's well known that New Yorkers love to ski, but did you know that New York State leads the nation in the number of active ski areas? According to the National Ski Areas Association, there are 37 states in the U.S. with active ski operations. During the 2013-14 ski season, New York led all states with 51 operating areas. The Empire State was followed by Michigan (44), Wisconsin (31) and Colorado (30).

In addition to its seasonal employment boost, the ski industry also makes an important contribution to the state in terms of its overall

economic impact. A study by Ski Areas of New York found that "the total direct and secondary output effects of the ski resort industry in the State of New York were \$782.1 million for the 12-month period covering the 2012-13 year."

Bowling

Another industry that thrives during New York's winters is bowling. In fact, bowling centers are big business in New York State. According to 2012 data from the U.S. Census Bureau, the Empire State is home to more bowling centers (285) than any other state in the nation. New York is followed by Wisconsin (253), Illinois (232), Ohio (247) and Michigan (246). The state's bowling centers (NAICS 71395) employed almost 4,000 workers in 2013 and paid out more than \$72.8 million in wages that year.

On average, employment at bowling centers in New York State climbs by more than 14% during the first quarter of the year. That is no surprise since bowling is a fun indoor activity for the whole family, from toddlers to teens, and helps to cure cabin fever during the winter. Winter is also the height of the league bowling season, which traditionally starts in September and ends in April or May. According to information from the New York State Bowling Proprietors Association, league bowling is also an important revenue source, accounting for 50-60% of earnings for many bowling centers.

Fuel Dealers

In 2013, employment at the state's more than 900 fuel dealers (NAICS 45431) topped 8,800,

Continued on page 3

Unemployment Rates in New York State

Data Not Seasonally Adjusted

	DEC '13	DEC '14		DEC '13	DEC '14		DEC '13	DEC '14
New York State	6.6	5.7	Hudson Valley	5.5	4.7	Finger Lakes	6.1	5.4
Capital	5.6	4.8	Dutchess	5.8	4.6	Genesee	6.1	5.6
Albany	5.2	4.4	Orange	5.8	5.0	Livingston	6.4	5.9
Columbia	5.3	4.5	Putnam	4.8	4.1	Monroe	6.0	5.1
Greene	7.2	6.0	Rockland	4.9	4.3	Ontario	5.8	5.6
Rensselaer	5.6	4.9	Sullivan	7.9	6.7	Orleans	8.3	7.1
Saratoga	5.1	4.3	Ulster	6.5	5.4	Seneca	6.0	5.7
Schenectady	5.8	4.8	Westchester	5.2	4.6	Wayne	6.5	6.2
Warren	7.7	6.5	Mohawk Valley	7.0	6.2	Wyoming	7.4	6.5
Washington	6.5	5.4	Fulton	7.9	6.7	Yates	5.3	5.2
Central New York	6.5	5.7	Herkimer	7.6	7.9	Western New York	6.6	5.8
Cayuga	6.2	5.5	Montgomery	7.8	6.8	Allegany	6.5	5.9
Cortland	7.3	6.4	Oneida	6.6	5.6	Cattaraugus	7.1	6.2
Madison	7.1	6.5	Otsego	6.0	5.8	Chautauqua	7.2	6.4
Onondaga	6.0	5.1	Schoharie	7.4	6.3	Erie	6.4	5.5
Oswego	8.2	7.8	North Country	8.3	7.2	Niagara	7.3	6.4
Southern Tier	6.4	5.6	Clinton	7.4	6.1	Long Island	5.1	4.4
Broome	7.0	6.1	Essex	8.3	7.3	Nassau	4.8	4.1
Chemung	7.0	5.7	Franklin	8.0	6.9	Suffolk	5.4	4.6
Chenango	6.2	5.9	Hamilton	9.1	8.2	New York City	7.5	6.4
Delaware	6.7	6.3	Jefferson	9.1	7.7	Bronx	10.6	9.3
Schuyler	6.9	6.4	Lewis	8.9	8.3	Kings	8.2	6.8
Steuben	7.6	6.8	St. Lawrence	8.1	7.2	New York	6.2	5.2
Tioga	6.7	6.0				Queens	6.7	5.7
Tompkins	4.0	3.5				Richmond	6.7	5.8

Winter Industries... from page 2

Change in Average Employment Between 1st Quarter and 2nd-4th Quarters, New York State, 2004 - 2013

NAICS	Industry	Average Employment, 2004 - 2013		Change in Employment		Employment Multiplier
		1st Quarter (Jan.-Mar.)	2nd-4th Quarters (Apr.-Dec.)	Net	%	
71392	Skiing Facilities	4,246	770	3,476	451%	1.22
71395	Bowling Centers	4,569	3,992	578	14%	1.30
45431	Fuel Dealers	10,906	10,018	888	9%	2.02
54121	Accounting & Book-keeping Services	84,317	78,794	5,523	7%	2.07

Sources: Quarterly Census of Employment and Wages; EMSI

with total wages of more than \$520 million. Firms in this industry primarily sell heating oil and liquefied petroleum gas. This industry typically sees a seasonal employment increase of 9% during the first quarter as it helps to meet the needs of delivering heat to homes and businesses during New York's winters. This makes economic sense as U.S. home heating oil consumption is highly concentrated in the Northeast. About 80% of all homes in the nation that use heating oil are in the Northeast, according to the U.S. Energy Information Administration. Moreover, the New York State Energy Research and Development Authority

reports that more than one in four homes in New York State use oil as their main heating fuel.

Accounting and Bookkeeping Services

Accounting and bookkeeping services (NAICS 54121) is the largest of our four winter industries, with more than 80,000 employees in 2013. The largest employers in this industry are found in New York City, home of the nation's financial capital. The job count in accounting and bookkeeping services usually rises an average of 7% higher during the first quarter compared to the rest of the year. As many of us know firsthand, this spike in hiring has nothing to do with winter, but rather the peak of tax preparation season.

Of the four winter industries discussed here, the accounting and bookkeeping services industry has the largest employment multiplier at 2.07, according to estimates from EMSI. This means that for every new job added in that industry, an additional 1.07 jobs are gained across a wide spectrum of industries throughout the state's economy. This is welcome news since the statewide job count in accounting and bookkeeping services grew by 8,900, or 12.4%, between 2004 and 2013.

Summing Up

The winter industries discussed here are part of a broader set of seasonal industries. Analyzing their seasonal nature helps us to better understand the patterns observed in our monthly employment statistics. ■

by David Quickenton and Kevin Jack

Employment in New York State is published 12 times a year. To request a change of address, write to the address below and provide your old and new addresses.

New York State Department of Labor
Division of Research & Statistics, Pubs. Unit
Building 12, State Office Campus
Albany, NY 12240

Deputy Director	Bohdan M. Wynnyk
Editor	Kevin Jack
Director of Communications	Chris White
Graphic Design	Jeff Mosher
Editorial Advisor	Lesley Paporone



REGIONAL ANALYSTS' CORNER

CAPITAL

James Ross — 518-462-7600

From December 2013 to December 2014, the Capital Region's private sector job count grew by 8,600, or 2.1 percent, to 425,800. Job gains were largest in natural resources, mining and construction (+2,700), educational and health services (+2,600), leisure and hospitality (+2,200), professional and business services (+1,300) and manufacturing (+800). Losses were centered in financial activities (-800).

CENTRAL NY

Karen Knapik-Scalzo — 315-479-3391

For the 12-month period ending December 2014, the private sector job count in the Syracuse metro area declined by 1,700, or 0.7 percent, to 259,000. Job growth was concentrated in leisure and hospitality (+1,300) and natural resources, mining and construction (+400). The largest job losses occurred in educational and health services (-1,600), professional and business services (-700), manufacturing (-600) and trade, transportation and utilities (-600).

FINGER LAKES

Tammy Marino — 585-258-8870

Private sector jobs in the Rochester metro area increased over the year by 3,600, or 0.8 percent, to 443,200 in December 2014. Gains were concentrated in professional and business services (+4,700), educational and health services (+1,500), financial activities (+800) and construction (+600). Job losses were greatest in manufacturing (-1,500), leisure and hospitality (-1,400) and trade, transportation and utilities (-1,300).

HUDSON VALLEY

John Nelson — 914-997-8798

For the 12-month period ending December 2014, private sector jobs in the Hudson Valley increased by 5,700, or 0.8 percent, to 760,400. Job gains were strongest in leisure and hospitality (+3,500), educational and health services (+2,700) and natural resources, mining and construction (+2,100). Losses were centered in financial activities (-1,000), trade, transportation, and utilities (-1,000) and manufacturing (-800).

LONG ISLAND

Shital Patel — 516-934-8533

Private sector employment on Long Island increased over the year by 14,900, or 1.4 percent, to 1,114,900 in December 2014. Gains in employment were led by educational and health services (+7,700), trade, transportation and utilities (+3,200), leisure and hospitality (+2,900), natural resources, mining and construction (+2,700) and professional and business services (+2,400). Losses were greatest in financial activities (-3,400) and manufacturing (-1,300).

MOHAWK VALLEY

Mark Barbano — 315-793-2282

For the 12-month period ending December 2014, the private sector job count in the Mohawk Valley decreased by 500, or 0.3 percent, to 147,800. Job gains were centered in other services (+400). Losses were greatest in trade, transportation and utilities (-400), financial activities (-200) and manufacturing (-200).

NEW YORK CITY

James Brown — 212-775-3330

Private sector employment in New York City rose by 95,900, or 2.7 percent, to 3,602,600 for the 12-month period ending December 2014. Gains were largest in professional and business services (+30,700), educational and health services (+29,800), leisure and hospitality (+19,500), trade, transportation and utilities (+9,100), other services (+7,600) and financial activities (+4,100). Losses were largest in information (-5,600) and manufacturing (-1,600).

NORTH COUNTRY

Alan Beideck — 518-523-7157

For the 12-month period ending December 2014, private sector employment in the North Country rose by 1,200, or 1.1 percent, to 113,900. Gains were largest in manufacturing (+300), trade, transportation and utilities (+300), natural resources, mining and construction (+200) and professional and business services (+200).

SOUTHERN TIER

Christian Harris — 607-741-4485

Private sector employment in the Southern Tier rose over the year by 1,200, or 0.5 percent, to 237,500 in December 2014. Job gains were largest in natural resources, mining and construction (+700), educational and health services (+600), professional and business services (+400), leisure and hospitality (+200) and other services (+200). Losses were centered in manufacturing (-700).

WESTERN NY

John Slenker — 716-851-2742

Over the past year, private sector jobs in the Buffalo-Niagara Falls metro area increased by 5,600, or 1.2 percent, to 466,400 in December 2014. Job gains were centered in financial activities (+1,300), educational and health services (+1,200), leisure and hospitality (+900), natural resources, mining and construction (+500), professional and business services (+500) and trade, transportation and utilities (+500).

