

## EMPLOYMENT and WORKFORCE TRENDS

### Employment by Sector and Occupation

The table and chart below show employment trends by sector from 1990 to 2004. The broad trends indicated by this data for these 14 years include:

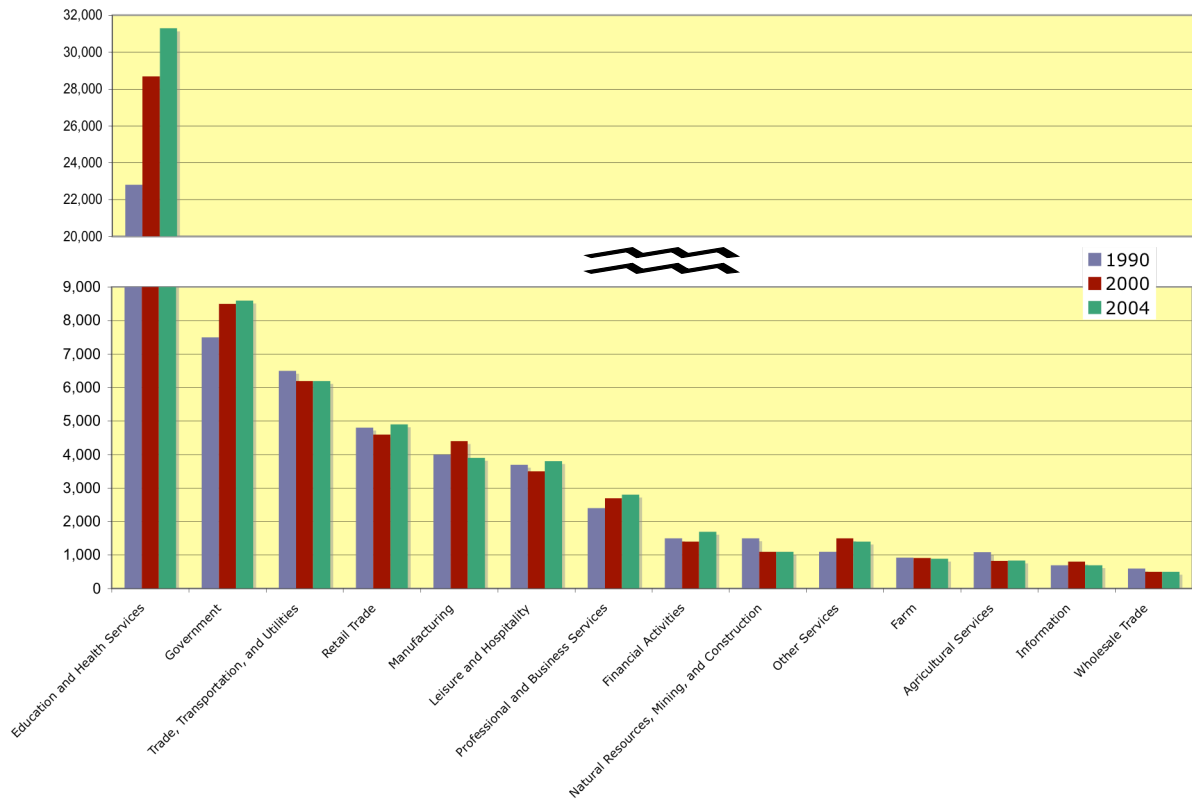
- Overall, there was an approximate 16% increase in employed persons in the County.
- High wage employment in the Manufacturing and Trade/Transport/Utilities sectors decreased by 2.5% and 4.6% respectively, along with the Mining/Construction sector that decreased by 27%.
- Education and Health Services grew faster than average with a 37% increase in jobs.
- The combined Other Services also grew faster than average, increasing by 27%.

### Tompkins County Employment Trends by Sector 1990-2004

	1990	2000	2004	Total % Chg 1990-2004	Ave Annual % Chg 1990-2000	Ave Annual % Chg 2000-2004	Average Salary 2003
<b>Education and Health Services</b>	22,800	28,700	31,300	37.3%	2.6%	2.3%	\$45,249 (Education) \$28,855 (Health/Social)
<b>Government</b>	7,500	8,500	8,600	14.7%	1.3%	0.3%	\$34,342
<b>Trade, Transport, and Utilities</b>	6,500	6,200	6,200	-4.6%	-0.5%	0.0%	\$28,105 (Trade/Trans) \$73,547 (Utilities)
<b>Retail Trade</b>	4,800	4,600	4,900	2.1%	-0.4%	1.6%	\$19,338
<b>Manufacturing</b>	4,000	4,400	3,900	-2.5%	1.0%	-2.8%	\$45,358
<b>Leisure and Hospitality</b>	3,700	3,500	3,800	2.7%	-0.5%	2.1%	\$13,172 (Arts/Entertain) \$12,100 (Accom/Food)
<b>Professional and Business Services</b>	2,400	2,700	2,800	16.7%	1.3%	0.9%	\$45,291 (Prof/Tech) \$43,353 (Management) \$26,395 (Admin/Waste)
<b>Financial Activities</b>	1,500	1,400	1,700	13.3%	-0.7%	5.4%	\$41,631 (Fin/Insurance) \$25,944 (Real Estate)
<b>Other Services</b>	1,100	1,100	1,400	-26.7%	-2.7%	0.0%	\$22,157
<b>Nat. Resources, Mining, and Construction</b>	1,500	1,500	1,100	27.3%	3.6%	-1.7%	\$48,783 (Mining) \$32,002 (Construction)
<b>Farm</b>	920	910	890	-3.3%	-0.1%	-0.5%	\$22,157
<b>Agricultural Services</b>	1,090	830	840	-22.9%	-2.4%	0.3%	\$14,500
<b>Information</b>	700	800	700	0.0%	1.4%	-3.1%	\$40,558
<b>Wholesale Trade</b>	600	500	500	-16.7%	-1.7%	0.0%	\$33,407
<b>TOTAL</b>	57,100	65,640	66,900	16.1%	1.1%	1.1%	

Source: NYS DOL Current Employment by Sector (CES), Woods and Poole (Agricultural Services and Farm). Other services include repair and maintenance, personal services, and not-for-profit jobs.

### Change in Tompkins County Employment by Sector 1990-2004



Source: Data from Tompkins County Employment Trends by Sector 1990-2004 table

The tables below show the current distribution of employment by occupation and compares this to New York and the US. Table 2C shows the NYS Department of Labor projections for job creation in the Southern Tier region.

- Tompkins County has 38% professional workers, which is 89% higher than the national average of 20.2%. The City is even higher with 45% professional workers. NYS expects strong growth in the professional sector.
- NYS expects the highest increases in job creation to be in Computers and Mathematical, Community and Social Services, and Healthcare Support.
- Production, transportation, and materials moving occupations are proportionately underrepresented in Tompkins County with 7.5% of employment, compared to 11.7% for New York and 14.6% nationally. The NYS DOL expects continued slow growth of these occupations in the region, and for production, a decline.

### 2000 Percent Distribution of Employed Persons by Occupation

Occupation (Employed 16+)	City of Ithaca	Tompkins County	New York	US
<b>Management, professional, and related occupations</b>	<b>53.8</b>	<b>50.2</b>	<b>36.7</b>	<b>33.6</b>
Management, business, and financial operations occupations	8.8	12.1	13.5	13.5
Professional and related occupations	45.0	38.1	23.2	20.2
<b>Service occupations</b>	<b>15.5</b>	<b>14.6</b>	<b>16.6</b>	<b>14.9</b>
Healthcare support occupations	1.1	1.5	3.0	2.0
Protective service occupations	0.8	1.0	2.8	2.0
Food preparation and serving related occupations	8.6	6.3	4.5	4.8
Building and grounds cleaning and maintenance occupations	1.7	2.7	3.4	3.3
Personal care and service occupations	3.4	3.1	2.9	2.8
<b>Sales and office occupations</b>	<b>24.2</b>	<b>21.5</b>	<b>27.1</b>	<b>26.7</b>
Sales and related occupations	7.5	7.5	10.8	11.2
Office and administrative support occupations	16.7	14.1	16.3	15.4
<b>Farming, fishing, and forestry occupations</b>	<b>0.5</b>	<b>0.7</b>	<b>0.3</b>	<b>0.7</b>
<b>Construction, extraction, and maintenance occupations</b>	<b>2.1</b>	<b>5.4</b>	<b>7.6</b>	<b>9.4</b>
Construction and extraction occupations	1.3	3.1	4.3	5.5
Installation, maintenance, and repair occupations	0.8	2.3	3.2	3.9
<b>Production, transportation, and material moving occupations</b>	<b>3.9</b>	<b>7.5</b>	<b>11.7</b>	<b>14.6</b>
Production occupations	2.3	4.2	6.4	8.5
Transportation and material moving occupations	1.6	3.3	5.3	6.1

Source: US Census 2000

**Projected Trends of Employment by Occupation for the Southern Tier 2002-2012**

	Employment		Change		Annual Average Openings		
	2002	2012	Total	Percent	Total	Growth	Replace- ment
<b>Total, All occupations</b>	347,920	377,160	29,240	8.4%	11,270	2,920	8,350
<b>Education, Training and Library</b>	42,040	48,540	6,500	15.5%	1,690	650	1,040
<b>Healthcare Practitioners and Technical</b>	15,990	18,190	2,200	13.8%	530	220	310
<b>Sales and Related Industries</b>	31,170	33,300	2,130	6.8%	1,270	210	1,060
<b>Healthcare Support</b>	10,290	12,410	2,120	20.6%	360	210	150
<b>Personal Care and Service</b>	11,530	13,650	2,120	18.4%	490	210	280
<b>Food Preparation and Serving</b>	24,880	26,660	1,780	7.2%	1,150	180	970
<b>Management</b>	15,190	16,590	1,400	9.2%	420	140	280
<b>Construction and Extraction</b>	13,880	15,280	1,400	10.1%	390	140	250
<b>Buildings and Grounds Cleaning and Maintenance</b>	12,890	14,280	1,390	10.8%	400	140	260
<b>Community and Social Services</b>	5,930	7,260	1,330	22.4%	240	130	110
<b>Installation, Maintenance, and Repair</b>	12,590	13,910	1,320	10.5%	420	130	290
<b>Computer and Mathematical</b>	7,350	8,640	1,290	17.6%	230	130	100
<b>Business and Financial Operations</b>	10,480	11,640	1,160	11.1%	310	120	190
<b>Transportation and Material Moving</b>	20,540	21,480	940	4.6%	540	90	450
<b>Office and Administrative Support</b>	56,000	56,680	680	1.2%	1,350	70	1,280
<b>Protective Service</b>	5,780	6,440	660	11.4%	240	70	170
<b>Arts, Design, Entertainment, Sports and Media</b>	4,820	5,340	520	10.8%	140	50	90
<b>Life, Physical, and Social Science</b>	3,010	3,440	430	14.3%	110	40	70
<b>Farming, Fishing, and Forestry</b>	4,190	4,620	430	10.3%	150	40	110
<b>Legal</b>	2,490	2,730	240	9.6%	50	20	30
<b>Architecture and Engineering</b>	8,210	8,420	210	2.6%	200	20	180
<b>Production</b>	28,710	27,660	-1,050	-3.7%	690	0	690

Source: NYS DOL

(Southern Tier includes Broome, Chemung, Chenango, Delaware, Otsego, Schuyler, Steuben, Tioga and Tompkins counties)

## Workers' Wages and Earnings

The table below and the accompanying chart show the changes in workers' real earnings over the thirty-year period from 1970-2000. These average earnings suggest trends but do not delineate the causes of changes. For instance, the Service sector average earnings dipped in 1980. This probably reflects the statistical correction made by DOL to include student workers. Government earnings increased significantly, but these statistics do not indicate whether this is due to: increasing public school teacher wages (which is likely since they are a large portion of government employees), out-sourcing of lower wage jobs, or other factors. Similarly, the significant drop in Wholesale and Retail Trade earnings may reflect lower hourly wages, more part-time workers whose lower annual earnings reflect fewer hours worked, or some combination of factors.

The following trends, all in constant dollars adjusted for inflation, are indicated:

- Transportation and public utility workers in Tompkins County have maintained the highest wages and seen a 12% increase in average annual earnings; their average earnings were above \$59,000 in 2000.
- While mining sector earnings have decreased by 19% since 1980, they still remain relatively high in 2000 compared to other sectors.
- Manufacturing earnings have increased by 23% since 1980, and are the third highest wages in 2000.
- Average annual Government earnings have increased a significant 19%.
- The Services sector saw a slight 4% dip in earnings and remain in the middle for earnings.
- FIRE sector workers saw their earnings decline between 1970 and 1980, but have since experienced a sharp upturn resulting in a net increase of 70% over this thirty-year period.
- Agriculture earnings have dropped about 41% over the thirty-year period.
- Retail trade workers' earnings have dropped by 37% with average annual earnings below \$17,000.

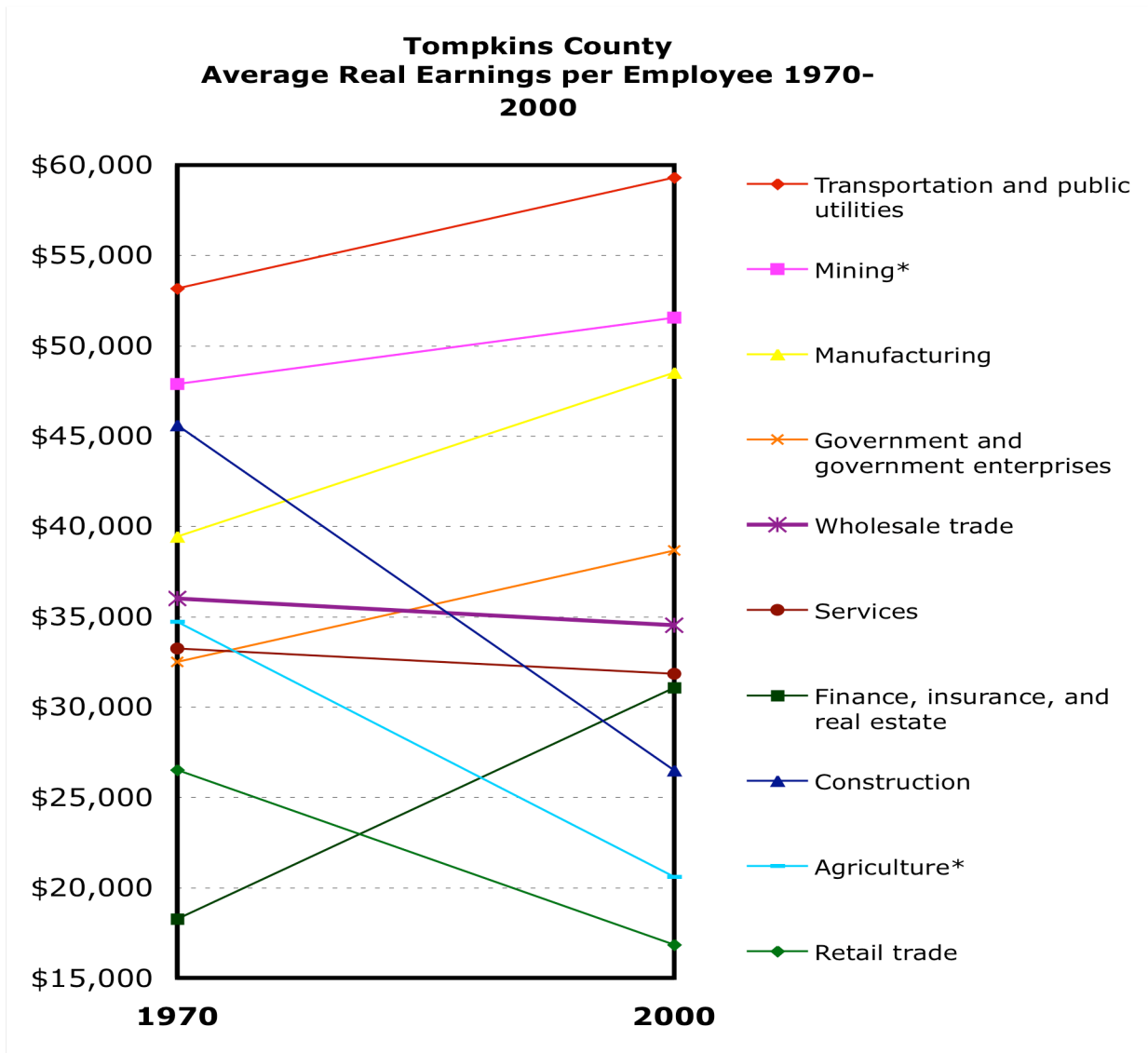
### Tompkins County Average Annual Real Earnings per Employee by Sector 1970-2000

	1970	1980	1990	2000
<b>Transportation and public utilities</b>	\$53,167	\$48,650	\$50,657	\$59,309
<b>Mining*</b>	\$47,879	\$63,425	\$52,350	\$51,567
<b>Manufacturing</b>	\$39,423	\$35,753	\$47,173	\$48,520
<b>Government and government enterprises</b>	\$32,501	\$33,025	\$36,383	\$38,655
<b>Wholesale trade</b>	\$36,012	\$30,308	\$37,345	\$34,519
<b>Services</b>	\$33,231	\$25,773	\$29,487	\$31,832
<b>Finance, insurance, and real estate</b>	\$18,266	\$14,512	\$23,394	\$31,078
<b>Construction</b>	\$45,593	\$33,059	\$36,394	\$26,480
<b>Agriculture*</b>	\$34,706	\$33,420	\$30,520	\$20,603
<b>Retail trade</b>	\$26,511	\$18,484	\$18,200	\$16,831

\*1995 data not available, so 1994 data used instead

All figures in constant 2000\$

Source: US Bureau of Economic Analysis Regional Economic Accounts (Person Income and Employment)



Source: See Tompkins County Average Annual Real Earnings per Employee by Sector 1970-2000 table

One other wage trend has been the increased “export” of wages from Tompkins County to people working in Tompkins County but living elsewhere. Between 1990 and 2000, outflow of wages increased from 9% to 12% as a percentage of total wages earned in the County. This trend appears to have continued in the 2000s. In 2003, REIS reported that of \$2.6 billion in wages earned, but \$350M of those wages, or 13.6%, flowed out of the county. (The \$350M is determined by taking the amount of wages earned by out-commuters less the amount of wages earned by in-commuters. Since more people commute into Tompkins County for work than those who live in the county and commute out, Tompkins experienced a net less of wages based on residency.)

### In-Commutation to Tompkins County 1990 to 2000

	No. of persons In-Commuting 1990	No. of persons In-Commuting 2000
Broome	261	383
Cayuga	1372	1814
Chemung	856	970
Chenango	61	68
Cortland	1755	2605
Onondaga	222	500
Schuyler	1642	1608
Seneca	1163	1289
Steuben	69	83
Tioga	2536	2846
Other Counties	891	1176
Outside NYS	553	371
<b>TOTAL</b>	<b>11381</b>	<b>13713</b>
<b>Out-Commuters</b>	<b>3741</b>	<b>4075</b>
<b>Net In-commuters</b>	<b>7640</b>	<b>9638</b>

Source: US Census 2000 (Expanded table can be found at [http://www.co.tompkins.ny.us/planning/census/TCjtw90-00\\_pct\\_change1.pdf](http://www.co.tompkins.ny.us/planning/census/TCjtw90-00_pct_change1.pdf))

## Employment and Firm Size Trends

According to the US Department of Commerce County Business Patterns, between 1998 and 2003, the number of firms in Tompkins County increased 3% from 2,122 to 2,187. Employed persons during this time period increased by 12% from 39,804 employed persons to 44,410. (Note: The Department of Commerce does not count all firms. Dun & Bradstreet counted over 3,000 firms in 1997, compared to the Department of Commerce's 2,090 in 1995.)

In 2002, close to 2% of the firms in Tompkins County employed over 100 persons, about 12% of firms employed between 20 and 100 persons, and about 87% of firms employed less than 20 persons. About 58% of employment is found in the over-100 employee firms; about 21% of employment is found each in mid-size firms and the under-20 employee firms. This is comparable to the distribution of firm size and employment for New York State and the US.

### 2002 Distribution of Firms and Employment by Firm Size

	US		NYS		Tompkins		Tompkins
	% Firms	% Employees	% Firms	% Employees	% Firms	% Employees	Approx # Firms
<b>1-19</b>	86.1%	18.3%	88.1%	19.6%	86.7%	20.7%	1880
<b>20-99</b>	11.6%	17.7%	9.8%	17.4%	11.5%	21.2%	250
<b>&gt;100</b>	2.3%	64.0%	2.1%	63.0%	1.8%	58.1%	38

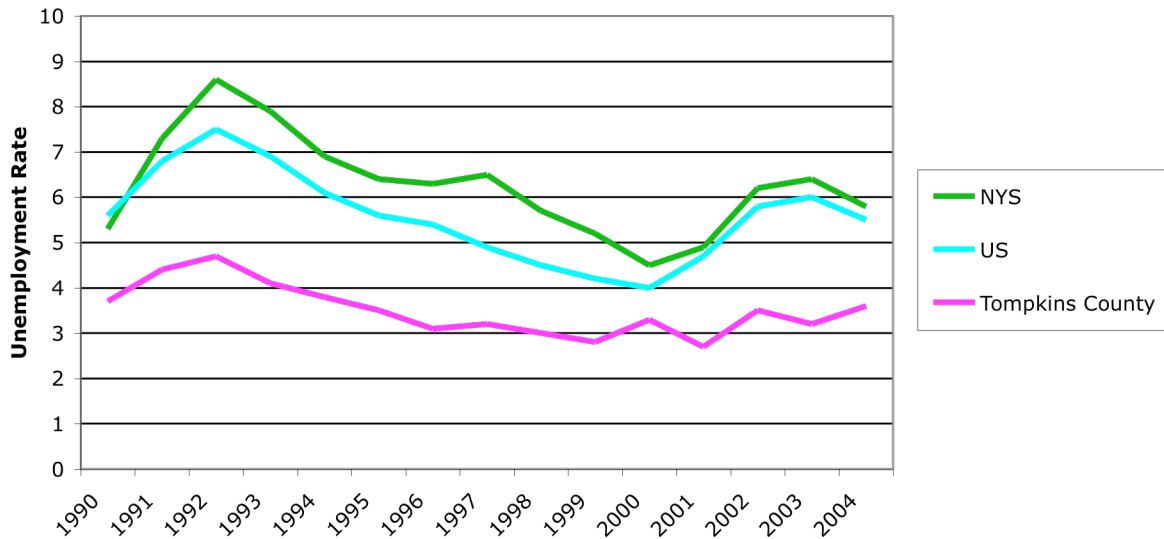
Source: US Department of Commerce County Business Patterns for US and NYS data; NYS DOL for Tompkins data

## Unemployment Trends

Between 1990 and 2004, Tompkins County consistently had one of the lowest unemployment rates in the State, as much as 4 points below the State rate, and usually 2 to 3 points below the national rate. In 1990, the County's average annual unemployment rate was 3.7%. This climbed to a ten year high of 4.7% in 1992, and declined to 2.8% in 1999, compared to New York's rate of 5.2%, and the US's rate of 4.2% during that same year.

Many people consider the County's unemployment rate artificially low. Elia Kacapyr (a professor of Economics at Ithaca College who created an index to track the County's economic activity) comments that the area's unusually high level of employment in the Service sectors means that many of the "employed" workforce are in part-time or seasonal positions. There is also a question as to how much part-time employment of student workers pushes the "employed" side of the equation upward. These factors may lower the unemployment rate by one percent. However, the County's unemployment rate has been buffered by the dominance of the Education Services sector that provides relatively stable employment while other businesses experienced periodic fluctuations.

### 1990-2004 Unemployment Rates - County, State, US



Source: US Bureau of Labor Statistics

### 1990-2004 Unemployment Rates for US, NYS, and Tompkins County

Year	Tompkins County	NYS	US
1990	3.7	5.3	5.6
1991	4.4	7.3	6.8
1992	4.7	8.6	7.5
1993	4.1	7.9	6.9
1994	3.8	6.9	6.1
1995	3.5	6.4	5.6
1996	3.1	6.3	5.4
1997	3.2	6.5	4.9
1998	3.0	5.7	4.5
1999	2.8	5.2	4.2
2000	3.3	4.5	4.0
2001	2.7	4.9	4.7
2002	3.5	6.2	5.8
2003	3.2	6.4	6.0
2004	3.6	5.8	5.5