



Significant Industries

A Report to the Workforce Development System

Finger Lakes | 2015

Preface

One of the major objectives of the workforce development system is to encourage local workforce investment boards (LWIBs) to plan strategically and focus their resources on priority industries (and eventually on priority occupations within those industries).

To assist in this effort, the New York State Department of Labor's Division of Research and Statistics decided to concentrate this report on industries identified as "significant industries." Industries presented here are classified according to their North American Industry Classification System (NAICS) code.

This report lists significant industries based on various criteria. We hope the Workforce Investment Board, as well as others involved in the workforce system, may find it helpful in allocating their limited resources.

Significant industries were identified on the basis of job counts, wage levels, job growth (both net and percent) over the 2009-2014 period and expected job growth based on industry employment projections through 2022. Priority industries that may have been designated by economic development or workforce development officials were also considered.

Significant Industries

Eleven industries are designated as significant in this report. Eight of these industries managed to increase their local employment levels between 2009 and 2014. In addition, 10 of the 11 industries employed at least 10,000 during 2014. Nine of these industries offered above average wages.

All significant industries shared one or more of the following characteristics: rapid growth (percentage basis); large growth (absolute basis); high wages (average annual wage above the regional average of \$45,100 in 2014); or strong expected growth through 2022. The specific reason(s) why each industry was designated as significant are presented in the last column of the first table.

A broad-based set of industries were identified for this report. They cover six major industry groups: construction; manufacturing; professional and business services: educational services; health care; and social assistance.

Industry Analysis

In the following analysis, industries are presented in ascending NAICS industry code order. For additional information regarding the NAICS industry classification system, visit http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2012.

Construction

Skilled trade occupations comprise much of the employment within the *specialty trade* contractors (NAICS 238) industry. Employment levels increased from 2009 to 2014, recovering

all the jobs lost to the recession. Looking ahead over the next decade, the impending retirement of many baby boomers will contribute to job opportunities, especially among the skilled trades.

Manufacturing

Food manufacturing (NAICS 311), machinery manufacturing (NAICS 333) and computer and electronic product manufacturing (NAICS 334) make the list of significant industries in the region. They provide a relatively large number (27,800) of high-paying jobs in the region. The average annual wage in computer and electronic product manufacturing (\$78,500) was nearly 75 percent above the all-industry average wage (\$45,100) in 2014. The most common occupations in these industries include assemblers, inspectors, testers, and engineers.

Professional and Business Services

The professional and business services sector has two representatives on the significant industries list. They are *professional, scientific, and technical services* (NAICS 541) and *management of companies and enterprises* (NAICS 551). Although there are marked differences between these industries, they share one common trait -- they tend to sell to other businesses rather than consumers.

Professional, scientific, and technical services gained jobs between 2009 and 2014. Additionally, this industry is expected to grow much more rapidly as the economy expands in the coming years. Management of companies and enterprises declined slightly between 2009 and 2014. However, this sector is projected to grow at a faster rate than the total for all industries between 2012 and 2022. Professional, scientific, and technical services (\$64,100) and management of companies and enterprises (\$94,400) both pay above-average annual wages.

Educational Services

With more than 71,000 jobs between the public and private sectors, *educational services* (NAICS 611) has, by far, the most employment of any significant industry. This sector added jobs (+0.8%) between 2009 and 2014. Leading job titles include teacher assistant, elementary school teacher, and secondary school teacher. The industry's 2014 average annual wage, (\$48,400), was higher than the all-industry average annual wage.

Health Care

Growth in health care industry employment is, like educational services, also driven more by demographics than by overall economic conditions. Almost all health care occupations are expected to be in demand over the next decade as New York State's population continues to age. The health care sector consists of three main components:

- Ambulatory health care services (NAICS 621)
- Hospitals (NAICS 622)
- Nursing and residential care facilities (NAICS 623)

The average annual wages at *hospitals* (\$51,700) and ambulatory health care services (\$48,100) exceeded the regional average annual wage (\$45,100). Meanwhile nursing and residential care

facilities (\$31,400) paid wages well below the all-industry average. This is largely a reflection of the mix of occupations in each health care industry. For example, in *nursing and residential care facilities*, the three most common occupations are relatively low-paying. They include nursing assistants, home health aides, and personal care aides.

Social Assistance

Job opportunities in social assistance should be numerous through 2022 because of turnover and rapid job growth. In fact, some of the fastest growing occupations in the region are concentrated in social assistance, such as: home health aides; personal and home care aides; and social and human service assistants. The average wages in social assistance (\$24,000), are lower than the all-industry average because of the large number of part-time and low-paying service jobs.

For Further Information

It is hoped that the members of the workforce system find the information in this report useful. The New York State Department of Labor's Finger Lakes regional labor market analyst, Tammy Marino, is available for consultation. She may be reached via email at Tammy.Marino@labor.ny.gov or by phone at (585) 258-8870.

The statewide report entitled "Significant Industries in New York: A Report to the Workforce Development System" may be found at http://www.labor.ny.gov/stats/Significant-Industries.shtm.

Significant Industries, Finger Lakes Region, 2015

NAICS Industry	Industry Name	Job Co	ount	Net Change	% Change in	Average Annual Wage,	Projected % Change in	Why Industry
Code	muusu y Name	2009*	2014*	in Jobs, 2009-2014	Jobs, 2009-2014	2014	Jobs, 2012-2022	Significant**
	Total, all industries (all ownerships)	533,300	544,200	10,900	2.0%	\$45,100	7.0%	NA
238	Specialty Trade Contractors	11,600	12,600	1,000	8.6%	\$50,600	13.1%	G, J, W, P
311	Food Manufacturing	5,600	5,700	100	1.8%	\$47,600	29.1%	W, P
333	Machinery Manufacturing	13,400	11,800	-1,600	-11.9%	\$77,400	-11.2%	J, W
334	Computer and Electronic Product Manufacturing	9,000	10,300	1,300	14.4%	\$78,500	-4.7%	G, J, W
541	Professional, Scientific and Technical Services	22,900	26,500	3,600	15.7%	\$64,100	17.5%	G, J, W, P
551	Management of Companies and Enterprises	12,200	11,900	-300	-2.5%	\$94,400	15.4%	J, W, P
611	Educational Services	70,700	71,300	600	0.8%	\$48,400	5.4%	J, W
621	Ambulatory Health Care Services	19,400	21,100	1,700	8.8%	\$48,100	19.7%	G, J, W, P
622	Hospitals	28,300	30,400	2,100	7.4%	\$51,700	7.2%	G, J, W, P
623	Nursing and Residential Care Facilities	22,800	23,000	200	0.9%	\$31,400	21.1%	J, P
624	Social Assistance	14,500	13,600	-900	-6.2%	\$24,000	16.0%	J, P

NA – Not Applicable

**Key:

G: Industry experienced above-average job growth; can be net or percentage growth.

J: Industry employs a significant number of jobs (>10,000).

P: Above-average growth projected for 2012-2022.

W: Industry pays above-average wages.

^{*}Represents both private and public sector jobs

Specialty Trade Contractors

(NAICS Industry 238)

Industry Description: Workers in this industry perform specific activities (e.g., pouring concrete, site preparation, plumbing, painting, and electrical work) involved in building construction or other activities. They are typically not responsible for the entire project. The work performed may include new work, additions, alterations, maintenance, and repairs. Much of the production work is done by subcontractors. Specialty trade contractors usually perform most of their work at the construction site, although they may have shops where they perform prefabrication and other work.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	47-2111	Electricians	9.1%	\$65,297	9.3%
2	47-2152	Plumbers, Pipefitters, and Steamfitters	8.2%	\$60,000	12.0%
3	47-2061	Construction Laborers	7.6%	\$29,489	6.5%
4	11-1021	General and Operations Managers	5.0%	\$83,316	8.5%
5	47-2031	Carpenters	4.8%	\$39,340	9.9%
6	47-2141	Painters, Construction and Maintenance	4.0%	\$36,379	12.6%
7	49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	3.6%	\$40,968	12.0%
8	47-2181	Roofers	3.4%	\$36,084	0.0%
9	47-2211	Sheet Metal Workers	3.1%	\$55,409	8.5%
10	43-3031	Bookkeeping, Accounting, and Auditing Clerks	2.5%	\$37,294	8.8%

Food Manufacturing (NAICS Industry 311)

Industry Description: This subsector comprises establishments primarily engaged in producing food for human or animal consumption.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-9111	Packaging and Filling Machine Operators and Tenders	11.1%	\$32,282	2.2%
2	51-3093	Food Cooking Machine Operators and Tenders	7.3%	\$32,017	24.3%
3	51-3092	Food Batchmakers	6.8%	\$27,361	11.4%
4	53-7051	Industrial Truck and Tractor Operators	4.9%	\$35,150	0.0%
5	53-7064	Packers and Packagers, Hand	4.9%	\$24,749	3.2%
6	51-1011	First-Line Supervisors of Production and Operating Workers	4.4%	\$48,995	-0.4%
7	49-9071	Maintenance and Repair Workers, General	4.0%	\$46,671	7.6%
8	49-9041	Industrial Machinery Mechanics	2.6%	\$45,937	19.5%
9	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	2.3%	\$32,455	-0.4%
10	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2.1%	\$24,820	10.2%

Machinery Manufacturing (NAICS Industry 333)

Industry Description: Firms in this industry create end products that apply mechanical force, for example, the application of gears and levers, to perform work. Some important processes for the manufacture of machinery are forging, stamping, bending, forming, and machining that are used to shape individual pieces of metal.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-2092	Team Assemblers	7.1%	\$27,207	2.2%
2	17-2141	Mechanical Engineers	5.2%	\$82,478	-3.5%
3	51-4041	Machinists	4.9%	\$41,363	5.3%
4	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	3.9%	\$48,951	-0.4%
5	53-7062	Laborers and Freight, Stock, and Material Movers, Hand	3.5%	\$55,607	6.0%
6	51-1011	First-Line Supervisors of Production and Operating Workers	3.3%	\$65,695	-0.4%
7	13-1023	Purchasing Agents, Except Wholesale, Retail, and Farm Products	2.7%	\$73,448	-1.4%
8	51-4111	Tool and Die Makers	2.5%	\$47,946	-3.9%
9	51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	2.4%	\$33,293	10.9%
10	43-5071	Shipping, Receiving, and Traffic Clerks	2.1%	\$31,973	0.0%

Computer and Electronic Product Manufacturing (NAICS Industry 334)

Industry Description: Firms in this industry manufacture computers, computer peripherals, communications equipment, and similar electronic products. This group also includes establishments that manufacture components for these products.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-2022	Electrical and Electronic Equipment Assemblers	12.9%	\$29,402	-4.7%
2	17-2071	Electrical Engineers	9.1%	\$89,225	3.3%
3	15-1133	Software Developers, Systems Software	5.6%	\$94,365	6.8%
4	17-3023	Electrical and Electronic Engineering Technicians	4.7%	\$48,384	0.9%
5	51-2092	Team Assemblers	3.5%	\$25,086	2.2%
6	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	3.4%	\$38,171	-0.4%
7	17-2072	Electronics Engineers, Except Computer	3.3%	\$101,241	-5.3%
8	15-1132	Software Developers, Applications	3.1%	\$80,227	11.2%
9	13-1023	Purchasing Agents, Except Wholesale, Retail, and Farm Products	2.1%	\$64,336	-1.4%
10	17-2112	Industrial Engineers	2.1%	\$74,435	0.0%

Professional, Scientific and Technical Services (NAICS Industry 541)

Industry Description: Establishments in this industry group are engaged in processes where human capital is the major input. Firms make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client. The distinguishing feature of this industry group is that firms within it are almost wholly dependent on worker skills. Thus, firms here are selling expertise. Examples include legal, accounting, architectural, advertising, scientific Research and Development, and other professional services.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	13-2011	Accountants and Auditors	9.4%	\$66,598	16.7%
2	15-1132	Software Developers, Applications	4.5%	\$85,565	11.2%
3	23-2011	Paralegals and Legal Assistants	3.7%	\$39,240	14.0%
4	23-1011	Lawyers	3.6%	\$92,952	5.6%
5	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3.4%	\$37,090	9.0%
6	43-4051	Customer Service Representatives	3.1%	\$26,118	10.4%
7	15-1151	Computer User Support Specialists	2.8%	\$54,742	12.8%
8	43-3031	Bookkeeping, Accounting, and Auditing Clerks	2.6%	\$39,203	8.8%
9	15-1121	Computer Systems Analysts	2.5%	\$90,851	19.4%
10	11-1021	General and Operations Managers	2.5%	\$136,728	8.5%

Management of Companies and Enterprises (NAICS Industry 551)

Industry Description: This industry group includes three main types of establishments: (1) those that hold the securities of (or other equity interests in) companies and enterprises; (2) those that administer, oversee, and manage other establishments of the company or enterprise but do not hold the securities of these establishments; and (3) those that both administer, oversee, and manage other establishments of the company or enterprise and hold the securities of (or other equity interests in) these establishments. Those establishments that administer, oversee, and manage normally undertake the strategic or organizational planning and decision-making role of the company or enterprise.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
		Secretaries and Administrative Assistants, Except			
1	43-6014	Legal, Medical, and Executive	6.2%	\$34,202	9.0%
2	13-2011	Accountants and Auditors	4.4%	\$62,109	16.7%
		First-Line Supervisors of Office and Administrative			
3	43-1011	Support Workers	3.9%	\$57,937	9.1%
4	43-4051	Customer Service Representatives	3.6%	\$34,180	10.4%
5	13-2051	Financial Analysts	2.9%	\$78,328	11.0%
6	43-3031	Bookkeeping, Accounting, and Auditing Clerks	2.8%	\$37,200	8.8%
7	13-1161	Market Research Analysts and Marketing Specialists	2.7%	\$78,229	25.4%
8	15-1151	Computer User Support Specialists	2.6%	\$46,069	12.8%
9	11-1021	General and Operations Managers	2.4%	\$183,389	8.5%
10	11-3021	Computer and Information Systems Managers	2.4%	\$94,511	9.4%

Educational Services (NAICS Industry 611)

Industry Description: Industries in this group provide instruction and training in a wide variety of subjects. The instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. This group is structured according to level and type of educational services.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	25-9041	Teacher Assistants	8.9%	\$23,647	3.9%
2	25-2031	Secondary School Teachers, Except Special and Career/Technical Education	7.6%	\$57,242	0.7%
3	25-2021	Elementary School Teachers, Except Special Education	6.9%	\$57,394	1.3%
4	25-3098	Substitute Teachers	5.6%	\$28,688	0.9%
5	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	3.3%	\$26,725	10.2%
6	25-2022	Middle School Teachers, Except Special and Career/Technical Education	3.3%	\$57,760	1.2%
7	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3.3%	\$34,237	9.0%
8	43-9061	Office Clerks, General	2.8%	\$31,274	2.3%
9	25-2054	Special Education Teachers, Secondary School	1.9%	\$60,690	0.0%
10	25-2052	Special Education Teachers, Kindergarten and Elementary School	1.9%	\$58,805	1.4%

Ambulatory Health Care Services (NAICS Industry 621)

Industry Description: Ambulatory Health Care Services establishments provide health care services directly or indirectly to ambulatory patients and do not usually provide inpatient services. Health practitioners in this group provide outpatient services, with the facilities and equipment not usually being the most significant part of the production process.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
		Secretaries and Administrative Assistants, Except			
1	43-6014	Legal, Medical and Executive	7.8%	\$30,815	9.0%
2	29-1141	Registered Nurses	7.4%	\$56,985	9.9%
3	43-4171	Receptionists and Information Clerks	6.4%	\$30,811	6.3%
4	29-2021	Dental Hygienists	5.4%	\$62,590	15.2%
5	29-2041	Emergency Medical Technicians and Paramedics	4.7%	\$33,319	23.1%
6	43-6013	Medical Secretaries	4.7%	\$30,123	29.2%
7	31-1011	Home Health Aides	4.4%	\$23,347	24.9%
8	31-9091	Dental Assistants	4.1%	\$34,272	9.0%
9	29-2061	Licensed Practical and Licensed Vocational Nurses	3.3%	\$37,532	15.2%
10	29-1069	Physicians and Surgeons, All Other	3.1%	\$193,613	12.4%

Hospitals (NAICS Industry 622)

Industry Description: Hospitals provide medical, diagnostic, and treatment services that include physician, nursing, and other health services to inpatients and the specialized accommodation services required by inpatients. Hospitals may also provide outpatient services as a secondary activity.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	29-1141	Registered Nurses	24.6%	\$62,649	9.9%
2	31-1014	Nursing Assistants	8.9%	\$26,519	12.0%
3	29-2061	Licensed Practical and Licensed Vocational Nurses	3.0%	\$39,895	15.2%
4	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical and Executive	2.9%	\$30,044	9.0%
5	43-4111	Interviewers, Except Eligibility and Loan	2.7%	\$28,835	0.0%
6	29-1069	Physicians and Surgeons, All Other	2.7%	\$57,728	12.4%
7	11-9111	Medical and Health Services Managers	2.6%	\$88,391	10.5%
8	29-2011	Medical and Clinical Laboratory Technologists	2.3%	\$57,907	8.9%
9	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2.3%	\$23,442	10.2%
10	29-1171	Nurse Practitioners	2.2%	\$89,978	18.5%

Nursing and Residential Care Facilities (NAICS Industry 623)

Industry Description: Nursing and Residential Care Facilities provide residential care combined with either nursing, supervisory, or other types of care as required by the residents. Here, the facilities are a significant part of the production process and the care provided is a mix of health and social services with the health services being largely some level of nursing services.

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	31-1014	Nursing Assistants	15.2%	\$26,551	12.0%
2	31-1011	Home Health Aides	13.3%	\$22,264	24.9%
3	39-9021	Personal Care Aides	10.6%	\$22,203	24.6%
4	29-2061	Licensed Practical and Licensed Vocational Nurses	7.4%	\$38,220	15.2%
5	29-1141	Registered Nurses	4.2%	\$61,164	9.9%
6	35-3041	Food Servers, Nonrestaurant	3.3%	\$19,677	23.3%
7	37-2012	Maids and Housekeeping Cleaners	3.1%	\$21,239	10.3%
8	21-1093	Social and Human Service Assistants	2.5%	\$25,083	11.0%
9	35-2012	Cooks, Institution and Cafeteria	1.9%	\$25,294	12.5%
10	39-9032	Recreation Workers	1.8%	\$24,791	12.0%

Social Assistance (NAICS Industry 624)

Industry Description: The social assistance industry group is made up of four component industries. The largest, individual and family services, includes adoption services, public assistance offices, senior citizen centers, and probation offices, among many other services. The second largest is child day care services (child care centers, nursery schools, and preschool centers). Other smaller industries are vocational rehabilitation services (sheltered workshops and employment training) and community food and housing, and emergency and other relief services (food banks, homeless shelters, disaster relief services).

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	39-9021	Personal Care Aides	17.3%	\$21,079	24.6%
2	25-9041	Teacher Assistants	8.0%	\$19,799	3.9%
3	25-2011	Preschool Teachers, Except Special Education	7.3%	\$23,704	10.4%
4	39-9011	Childcare Workers	6.6%	\$19,202	11.0%
5	21-1093	Social and Human Service Assistants	6.3%	\$28,277	11.0%
6	21-1021	Child, Family, and School Social Workers	3.3%	\$33,416	9.4%
7	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical and Executive	2.5%	\$29,445	9.0%
8	21-1015	Rehabilitation Counselors	2.3%	\$30,415	11.0%
9	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1.8%	\$24,470	10.2%
10	39-1021	First-Line Supervisors of Personal Service Workers	1.5%	\$35,297	12.2%

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