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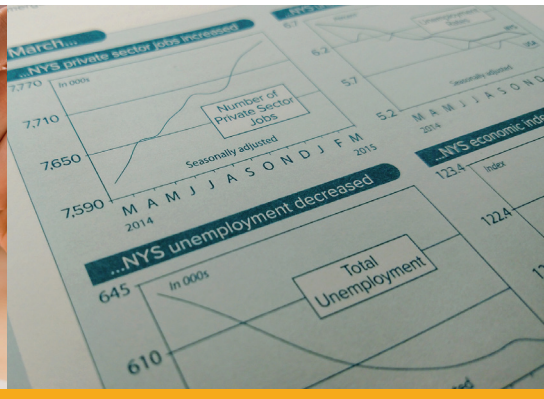

Significant Industries

A Report to the Workforce Development System

Western New York | 2015

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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.

Western New York Industries

Ten regional industries are designated as significant in this report. All of these 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 $42,764 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 four major industry groups: construction; professional and business services (which primarily sell to other businesses); educational services; and 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 *specialty trade contractors* (NAICS 238). Looking ahead over the next decade, the impending retirement of many baby boomers will contribute to job opportunities in these industries, especially among the skilled trades.

Leisure and Hospitality (Tourism)

The leisure and hospitality services sector has three representatives on the significant industries list. They are: *food services and drinking places* (NAICS 722); *accommodation* (NAICS 721); and *amusements, gambling and recreation industries* (NAICS 713). All three were among the top ten industries adding jobs in the region over the past five years. This trend will continue as major investments are taking place throughout the region like HarborCenter, Canalside and RiverWorks. Along with these entertainment venues, almost 20 new hotels will be opening over the next few years.

Manufacturing

Three manufacturing industries made the list. *Transportation equipment manufacturing* (NAICS Industry 336) and *machinery manufacturing* (NAICS Industry 333) have both rebounded from the recession adding a combined 1,800 jobs from 2009 to 2014. As with construction, the aging of the baby boomers will lead to a significant number of openings, particularly among skilled trade workers due to retirements. *Computer and electronic product manufacturing* (NAICS Industry 334) remained unchanged from 2009 to 2014; but the opening of the SolarCity photovoltaic panel facility will almost double the number of local jobs in *computer and electronic product manufacturing* over the next few years.

Health Care

Growth in health care industry employment is 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 the population continues to age. The health care sector consists of three main components. Each appears on the significant industry list.

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

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 Western New York labor market analyst, John Slenker, is available for consultation. He can be reached via email at John.Slenker@labor.ny.gov or by phone at (716) 851-2740.

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

Significant Industries, Western New York Region, 2015

NAICS Industry Code	Industry Name	Job Count		Net Change in Jobs, 2009-2014	% Change in Jobs, 2009-2014	Average Annual Wage, 2014	Projected % Change in Jobs, 2012-2022	Why Industry is Significant**
		2009*	**2014***					
	Total, all industries (all ownerships)	**613,100**	**622,500**	**9,300**	**1.5%**	**$42,764**	**7.5%**	**NA**
238	Specialty Trade Contractors	14,800	15,700	900	6.1%	$50,619	18.2%	G,P, W, J
333	Machinery Manufacturing	8,300	9,400	1,100	13.3%	$63,672	-3.2%	W, G, J
334	Computer and Electronic Manufacturing	3,400	3,400	0	0.0%	$55,962	-4.5%	W
336	Transportation Equipment Manufacturing	4,600	5,300	700	15.2%	$75,929	-19.4%	W, G
621	Ambulatory Health Care Services	27,500	29,400	1,900	6.9%	$50,838	24.3%	G, W, J, P
622	Hospitals	27,900	26,200	-1,700	-6.1%	$54,342	-1.4%	J, W
623	Nursing and Residential Care Facilities	26,500	25,300	-1,200	-4.5%	$27,623	17.8%	J, P
713	Amusements, gambling, and recreation	9,400	10,200	800	8.5%	$15,786	32.7%	J, G, P
721	Accommodation	5,100	6,100	1,000	19.6%	$18,283	8.6%	G,P
722	Food services and drinking places	46,300	52,000	5,700	12.3%	$15,646	20.2%	G,P,J

NA – Not Applicable
*Represents both private and public sector jobs

****Key:**

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

J: Industry employs a significant number of jobs (>8,000).

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

W: Industry pays above-average wages.

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.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	47-2061	Construction Laborers	11.5%	$29,509	8.7%
2	47-2111	Electricians	10.3%	$56,066	10.8%
3	47-2152	Plumbers, Pipefitters, and Steamfitters	7.8%	$62,853	11.9%
4	47-2031	Carpenters	4.6%	$36,768	12.3%
5	47-2141	Painters, Construction and Maintenance	4.4%	$45,079	11.5%
6	11-1021	General and Operations Managers	4.0%	$76,441	9.6%
7	47-1011	First-Line Supervisors of Construction Trades and Extraction Work	3.3%	$55,908	9.7%
8	43-9061	Office Clerks, General	3.2%	$22,062	1.5%
9	43-3031	Bookkeeping, Accounting, and Auditing Clerks	3.1%	$35,456	8.1%
10	47-2211	Sheet Metal Workers	3.1%	$57,866	12.3%

Machinery Manufacturing

(NAICS Industry 333)

Industry Description: Industries in the Machinery Manufacturing subsector 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. Processes, such as welding and assembling are used to join separate parts together. Although these processes are similar to those used in metal fabricating establishments, machinery manufacturing is different because it typically employs multiple metal forming processes in manufacturing the various parts of the machine. Moreover, complex assembly operations are an inherent part of the production process.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-2092	Team Assemblers	21.2%	$36,653	0.0%
2	51-4041	Machinists	7.3%	$43,946	10.6%
3	17-2141	Mechanical Engineers	4.5%	$64,301	-0.8%
4	51-1011	First-Line Supervisors of Production and Operating Workers	4.3%	$61,238	-1.6%
5	51-4121	Welders, Cutters, Solderers, and Brazers	4.0%	$40,001	7.1%
6	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	3.4%	$42,213	5.9%
7	49-9041	Industrial Machinery Mechanics	2.5%	$54,330	17.4%
8	41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	2.1%	$60,929	3.7%
9	17-3013	Mechanical Drafters	2.0%	$52,295	-6.3%
10	43-5071	Shipping, Receiving, and Traffic Clerks	2.0%	$37,245	0.9%

Computer and Electronic Product Manufacturing

(NAICS Industry 334)

Industry Description: Industries in the Computer and Electronic Product Manufacturing subsector group establishments that manufacture computers, computer peripherals, communications equipment, and similar electronic products, and establishments that manufacture components for such products. Their rapid growth suggests that they will become even more important to the economies of all three North American countries in the future, and in addition their manufacturing processes are fundamentally different from the manufacturing processes of other machinery and equipment. The design and use of integrated circuits and the application of highly specialized miniaturization technologies are common elements in the production technologies of the computer and electronic subsector. Convergence of technology motivates this NAICS subsector. Digitalization of sound recording, for example, causes both the medium (the compact disc) and the equipment to resemble the technologies for recording, storing, transmitting, and manipulating data. Communications technology and equipment have been converging with computer technology.

Ten Most Common Occupations

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	14.4%	$29,377	-1.9%
2	51-2092	Team Assemblers	10.8%	$25,228	0.0%
3	51-2023	Electromechanical Equipment Assemblers	6.0%	$42,018	-11.8%
4	51-4041	Machinists	5.7%	$38,115	10.6%
5	51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	3.6%	$32,131	5.9%
6	51-1011	First-Line Supervisors of Production and Operating Workers	3.3%	$57,276	-1.6%
7	51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	3.3%	$30,420	18.1%
8	17-2071	Electrical Engineers	3.0%	$74,791	3.3%
9	17-3023	Electrical and Electronics Engineering Technicians	2.7%	$38,680	2.1%
10	11-1021	General and Operations Managers	2.1%	$116,265	9.6%

Transportation Equipment Manufacturing

(NAICS Industry 336)

Industry Description: Industries in the Transportation Equipment Manufacturing subsector produce equipment for transporting people and goods. Transportation equipment is a type of machinery. An entire subsector is devoted to this activity because of the significance of its economic size in all three North American countries. Establishments in this subsector utilize production processes similar to those of other machinery manufacturing establishments - bending, forming, welding, machining, and assembling metal or plastic parts into components and finished products. However, the assembly of components and subassemblies and their further assembly into finished vehicles tends to be a more common production process in this subsector than in the Machinery Manufacturing subsector.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	51-2092	Team Assemblers	16.3%	$40,225	0.0%
2	51-4111	Tool and Die Makers	7.2%	$70,641	-3.3%
3	17-2112	Industrial Engineers	6.3%	$83,997	0.0%
4	17-2141	Mechanical Engineers	5.0%	$92,676	-0.8%
5	53-7051	Industrial Truck and Tractor Operators	3.5%	$55,464	-8.6%
6	47-2111	Electricians	3.3%	$70,541	10.8%
7	51-4041	Machinists	3.0%	$69,688	10.6%
8	51-1011	First-Line Supervisors of Production and Operating Workers	2.8%	$81,514	-1.6%
9	49-9071	Maintenance and Repair Workers, General	2.4%	$69,150	5.7%
10	49-9044	Millwrights	2.2%	$71,614	-7.7%

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 industry provide outpatient services, with the facilities and equipment not usually being the most significant part of the production process.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	43-4171	Receptionists and Information Clerks	8.0%	$30,120	8.2%
2	29-1141	Registered Nurses	7.8%	$62,110	7.9%
3	29-2061	Licensed Practical and Licensed Vocational Nurses	6.0%	$36,241	18.1%
4	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	5.7%	$31,023	9.0%
5	31-1011	Home Health Aides	4.8%	$21,277	27.6%
6	31-9091	Dental Assistants	3.7%	$36,823	14.4%
7	29-2021	Dental Hygienists	3.4%	$57,429	22.7%
8	43-6013	Medical Secretaries	3.3%	$30,728	27.7%
9	31-9092	Medical Assistants	3.3%	$33,304	18.7%
10	43-1011	First-Line Supervisors of Office and Administrative Support Workers	3.1%	$49,693	9.1%

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.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	29-1141	Registered Nurses	29.8%	$74,253	7.9%
2	31-1014	Nursing Assistants	9.0%	$30,965	9.3%
3	11-9111	Medical and Health Services Managers	2.7%	$92,387	8.5%
4	43-9061	Office Clerks, General	2.6%	$29,476	1.5%
5	29-2034	Radiologic Technologists and Technicians	2.4%	$59,231	9.2%
6	29-1069	Physicians and Surgeons, All Other	2.2%	$184,325	14.3%
7	29-2061	Licensed Practical and Licensed Vocational Nurses	2.2%	$43,673	18.1%
8	35-3041	Food Servers, Nonrestaurant	1.9%	$27,102	18.9%
9	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1.9%	$28,284	8.7%
10	43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1.8%	$41,590	9.0%

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.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	31-1014	Nursing Assistants	17.7%	$27,101	9.3%
2	39-9021	Personal Care Aides	13.9%	$23,216	28.0%
3	31-1011	Home Health Aides	12.6%	$22,825	27.6%
4	29-2061	Licensed Practical and Licensed Vocational Nurses	8.5%	$38,765	18.1%
5	29-1141	Registered Nurses	5.3%	$58,651	7.9%
6	37-2012	Maids and Housekeeping Cleaners	3.7%	$21,450	9.6%
7	35-3041	Food Servers, Nonrestaurant	3.2%	$20,505	18.9%
8	39-9032	Recreation Workers	1.7%	$23,220	11.5%
9	35-2012	Cooks, Institution and Cafeteria	1.5%	$24,572	9.8%
10	35-2021	Food Preparation Workers	1.5%	$20,530	8.0%

Amusement, Gambling, and Recreation Industries

(NAICS Industry 713)

Industry Description: Industries in the Amusement, Gambling, and Recreation Industries subsector (1) operate facilities where patrons can primarily engage in sports, recreation, amusement, or gambling activities and/or (2) provide other amusement and recreation services, such as supplying and servicing amusement devices in places of business operated by others; operating sports teams, clubs, or leagues engaged in playing games for recreational purposes; and guiding tours without using transportation equipment. The industry groups in this subsector highlight particular types of activities: amusement parks and arcades, gambling industries, and other amusement and recreation industries. The groups, however, are not all inclusive of the activity. The Gambling Industries industry group does not provide for full coverage of gambling activities. For example, casino hotels are classified in Subsector 721, Accommodation; and horse and dog racing tracks are classified in Industry Group 7112, Spectator Sports.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	6.8%	$22,752	8.7%
2	39-3091	Amusement and Recreation Attendants	6.6%	$18,945	10.2%
3	39-9031	Fitness Trainers and Aerobics Instructors	6.6%	$41,016	8.8%
4	35-3031	Waiters and Waitresses	5.1%	$21,342	15.7%
5	49-9071	Maintenance and Repair Workers, General	4.0%	$27,561	5.7%
6	35-3011	Bartenders	3.6%	$19,593	20.7%
7	35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	3.6%	$18,809	5.4%
8	37-3011	Landscaping and Groundskeeping Workers	3.3%	$21,878	8.7%
9	43-4051	Customer Service Representatives	2.6%	$28,569	9.2%
10	11-1021	General and Operations Managers	1.6%	$73,444	9.6%

Accommodation

(NAICS Industry 721)

Industry Description: Industries in the Accommodation subsector provide lodging or short-term accommodations for travelers, vacationers, and others. There is a wide range of establishments in these industries. Some provide lodging only; while others provide meals, laundry services, and recreational facilities, as well as lodging. Lodging establishments are classified in this subsector even if the provision of complementary services generates more revenue. The types of complementary services provided vary from establishment to establishment.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	37-2012	Maids and Housekeeping Cleaners	23.0%	$18,967	9.6%
2	43-4081	Hotel, Motel, and Resort Desk Clerks	12.4%	$19,040	12.8%
3	35-3031	Waiters and Waitresses	8.7%	$19,452	15.7%
4	35-2014	Cooks, Restaurant	3.6%	$23,503	26.3%
5	49-9071	Maintenance and Repair Workers, General	3.0%	$26,959	5.7%
6	35-9021	Dishwashers	2.7%	$18,763	15.1%
7	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	2.6%	$19,716	8.7%
8	43-1011	First-Line Supervisors of Office and Administrative Support Workers	2.6%	$31,099	9.1%
9	37-1011	First-Line Supervisors of Housekeeping and Janitorial Workers	2.3%	$33,019	8.8%
10	35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	2.0%	$18,661	22.8%

Food Services and Drinking Places

(NAICS Industry 722)

Industry Description: Industries in the Food Services and Drinking Places subsector prepare meals, snacks, and beverages to customer order for immediate on-premises and off-premises consumption. There is a wide range of establishments in these industries. Some provide food and drink only; while others provide various combinations of seating space, waiter/waitress services and incidental amenities, such as limited entertainment. The industries in the subsector are grouped based on the type and level of services provided. The industry groups are special food services, such as food service contractors, caterers, and mobile food services; drinking places; and restaurants and other eating places.

Ten Most Common Occupations

Rank	SOC Code	Occupational Title	% Share of Industry Workforce	Median Occupational Wage	Projected Employment Change (%), 2012-2022
1	35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	21.8%	$18,773	22.8%
2	35-3031	Waiters and Waitresses	19.7%	$19,091	15.7%
3	35-2014	Cooks, Restaurant	7.9%	$23,795	26.3%
4	35-3011	Bartenders	6.3%	$18,936	20.7%
5	35-2011	Cooks, Fast Food	5.9%	$20,069	9.9%
6	35-1012	First-Line Supervisors of Food Preparation and Serving Workers	5.4%	$29,138	22.1%
7	35-9021	Dishwashers	5.3%	$19,384	15.1%
8	35-2021	Food Preparation Workers	4.2%	$20,061	8.0%
9	35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	3.5%	$19,301	5.4%
10	35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	2.8%	$19,077	16.8%

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