



Cornell University

How Competitive is the Southern Tier?

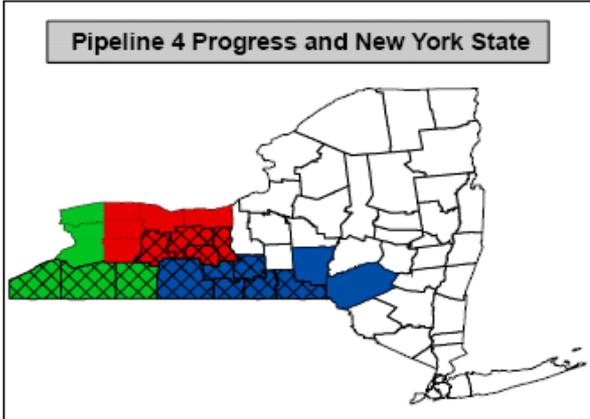
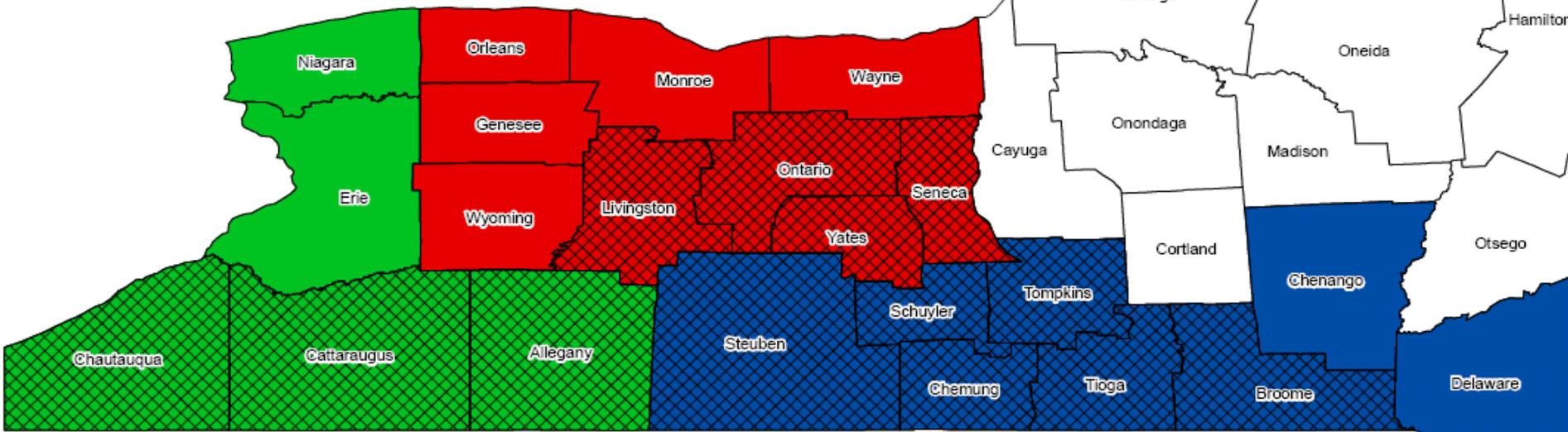
An Industry Analysis

Warren A. Brown, Ph.D.

Program on Applied Demographics

Cornell University

The Pipeline 4 Progress Region and The Empire State Development Regions

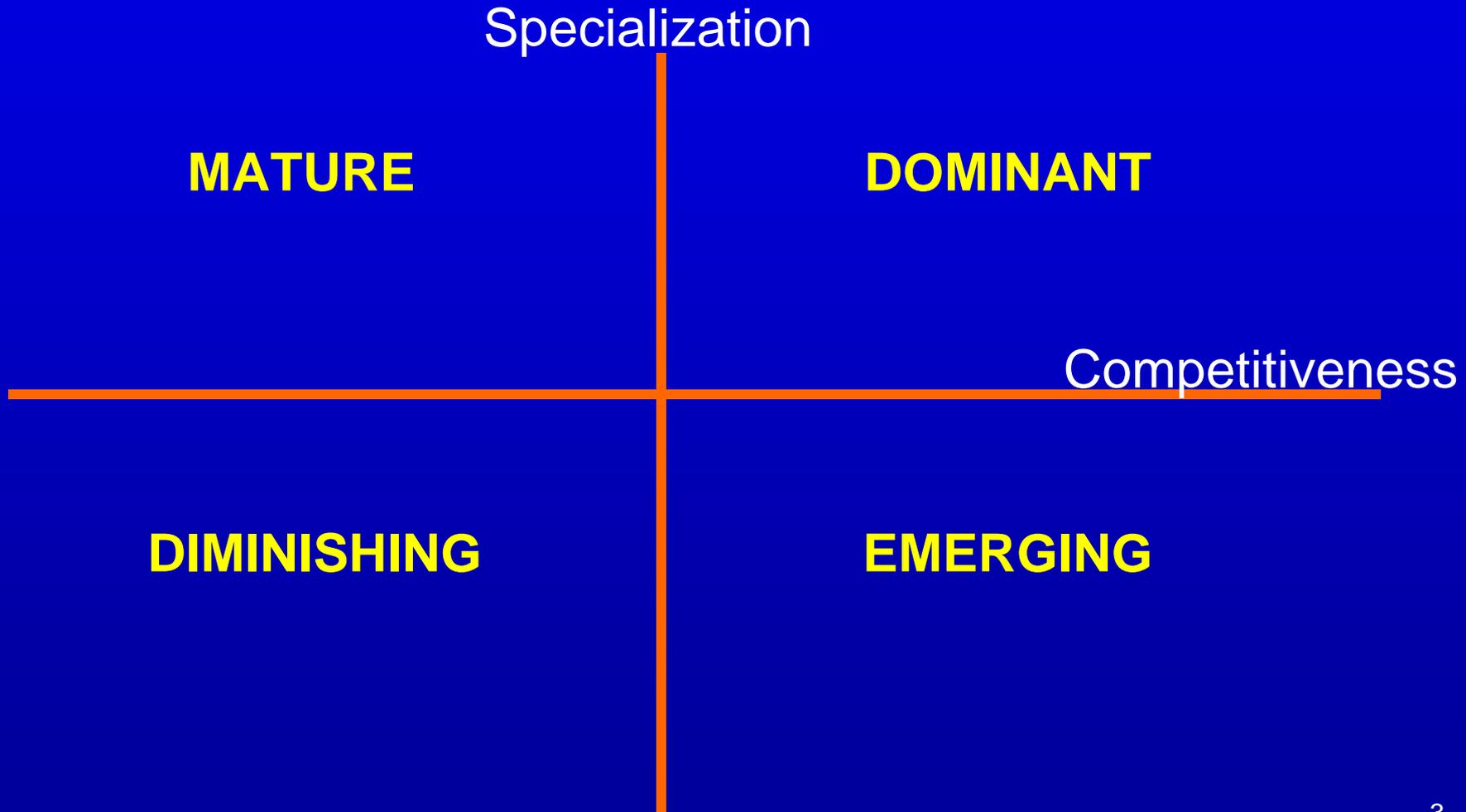


Pipeline 4 Progress Counties	
Allegany	Schuyler
Broome	Seneca
Cattaraugus	Steuben
Chatauqua	Tioga
Chemung	Tompkins
Livingston	Yates
Ontario	

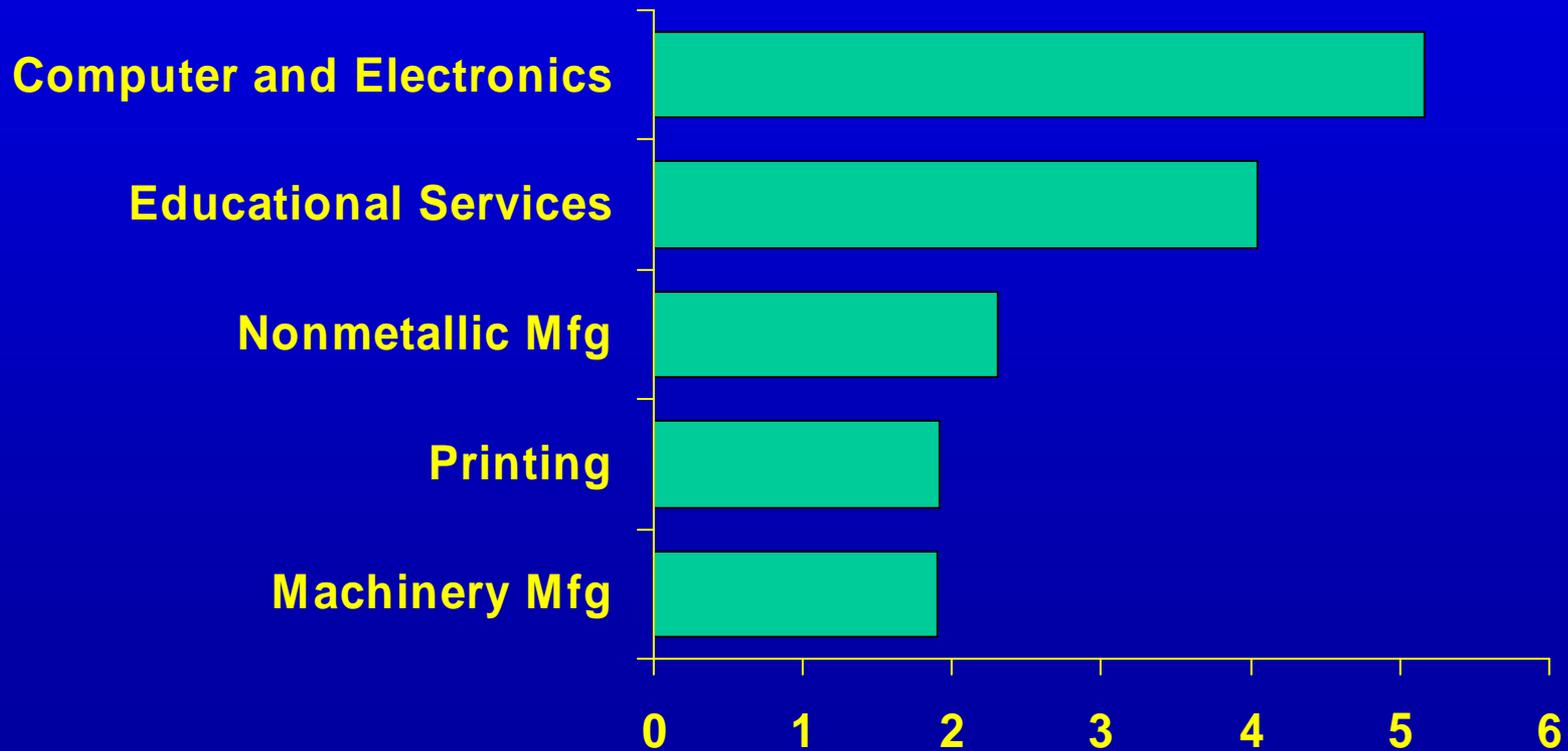
Legend	
	County Boundaries
	Pipeline 4 Progress Counties
	Empire State Development - Southern Tier Region
	Empire State Development - Finger Lakes Region
	Empire State Development - Western Region

Map created by Andrew Rumbach (Cornell University) on March 13th, 2008
 Data Sources: New York State GIS Clearinghouse, Cornell University
 Projection: NAD 1983 Stateplane New York West FIPS 3103 Feet

Industry Analysis

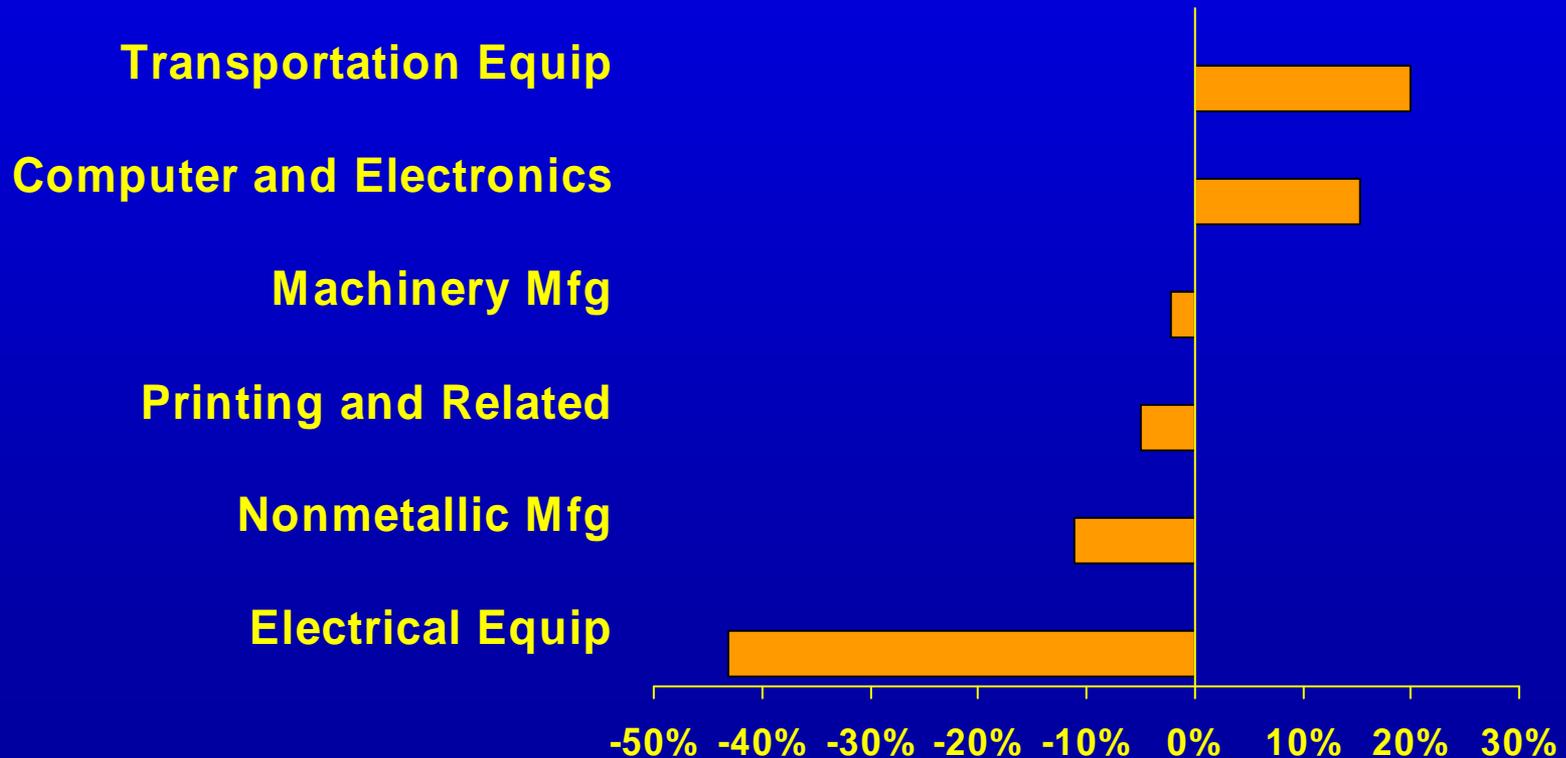


Specialization in Southern Tier



SoTier's Competitive Position

Change in Share of National Employment



Southern Tier's Competitors

Comparable Regions in the U.S.

Regions Specialized In Transportation Equipment Mfg

- 67 Regions in United States
- 2003 – 2006 Rank in Terms of:
 - Growth in Number of Jobs
 - Rate of Growth

Who Are The Competitors?

Transportation Equipment Mfg

The Top Five Regions in Growth in Jobs:

- Seattle-Tacoma-Bellevue, WA (+8,816)
- Elkhart-Goshen, IN (+6,909)
- Wichita, KS (+3,587)
- Tuscaloosa, AL (+2,622)
- Nashville, TN (+2,546)

Who Are The Competitors?

Transportation Equipment Mfg

The Top Five Regions in Rate of Growth:

- Tuscaloosa, AL (+79.7%)
- Columbus, IN (+52.6%)
- Danville, IL (+49.7%)
- Terre Haute, IN (+41.9%)
- Ames, IA (+41.0%)

Where New York Falls

Transportation Equipment Mfg

Growth in Jobs:

- Southern Tier ranks 11th (+852)
- Western, NY ranks 64th (-3,062)

Rate of Growth:

- Southern Tier ranks 12th (+19.9%)
- Western, NY ranks 57th (-24.2%)

Regions Specialized In Computer and Electronic Products Mfg

- 52 Regions in United States
- 2003 – 2006 Rank in Terms of:
 - Growth in Number of Jobs
 - Rate of Growth

Who Are The Competitors?

Computer and Electronic Products Mfg

The Top Five Regions in Growth in Jobs:

- Portland, OR-WA (+2,605)
- Sacramento, CA (+1,608)
- Minneapolis-St. Paul, MN-WI (+1,462)
- Southern Tier, NY (+1,355)
- Palm Bay-Melbourne-Titusville, FL (+1,109)

Who Are The Competitors?

Computer and Electronic Products Mfg

The Top Five Regions in Rate of Growth:

- San Germán-Cabo Rojo, PR (+63.8%)
- Santa Barbara, CA (+32.3%)
- Holland-Grand Haven, MI (+26.1%)
- Logan, UT-ID (+19.7%)
- Ocala, FL (+19.0%)

Where New York Falls

Computer and Electronic Products Mfg

Growth in Jobs:

- Southern Tier ranks 4th (+1,355)
- Central ranks 13th (+233)
- Finger Lakes ranks 23rd (-13)
- Long Island ranks 40th (-954)
- Hudson Valley ranks 47th (-2,519)

Where New York Falls

Computer and Electronic Products Mfg

Rate of Growth:

- Southern Tier ranks 8th (+16.8%)
- Central ranks 17th (+8.4%)
- Finger Lakes 23rd (3.7%)
- Long Island 30th (-2.0%)
- Hudson Valley 37th (-8.3%)

What to Learn From Competitors?

- Which ones are really competitors?
- What are they doing with respect to:
 - Supply of skilled labor
 - Cost of energy
 - Taxes
 - Regulations
 - Other Assets?