New York State Annual Performance Report for the
Workforce Information Grant
Program Year 2013 (PY 2013)

The New York State Department of Labor (NYSDOL), Division of Research and Statistics is recognized as the premier source of labor market information (LMI) in New York State. Not only are we responsible for producing a wide range of labor market data, but we also provide value added service in the form of customized, in-depth analysis and interpretation of this data to a variety of stakeholders. Our vision is "quality information for informed choice."

New York continues to inform the State Workforce Investment Board (SWIB) as they develop initiatives and policies in response to the needs of the state and local workforce investment system. We continue to provide real time access to labor market information on the Internet and through our regional labor market analysts.

Deliverables

I. Workforce Information Database (WIDb)

- Core data tables were updated.
- Current Employment Statistics (CES) and Local Area Unemployment Statistics (LAUS) program data were updated monthly and after benchmarking the series. State-produced estimates of jobs by industry for non-CES areas were also loaded monthly and after benchmarking.
- Occupational Employment Statistics (OES) data were loaded into the Workforce Information Database and made available via the NYSDOL web site.
- Quarterly and annual average data from the Quarterly Census of Employment and Wages (QCEW) program were updated.
- The InfoUSA employer database was updated. This database serves as the underpinning of the Business Directory tool on the NYSDOL web site.

II. Industry and Occupational Projections

New York State long-term industry and occupational projections for 2012-2022, statewide and regional short-term industry and occupational projections for 2013-2015, and regional short-term industry and occupational projections for 2012-2014 were completed. All were developed using the Projections Suite provided by the Projections Managing Partnership. The Occupational Employment Statistics program staffing patterns used for the projections were developed using the Estimates Delivery System. Projections are available on the web at: http://www.labor.ny.gov/stats/lsproj.shtm.

III. Annual Economic Analysis and Other Reports

Industry Clusters in New York's Economy: A Statewide and Regional Analysis
This report looks at 2013 statewide and regional data highlights for the State's 16 industry clusters as defined by New York State Empire State Development (ESD), the state's lead economic development agency. For the State as a whole and its ten labor market regions, clusters are ranked using five metrics: total employment; total wages; annual average wage; location quotient (measure of employment concentration); and regional exports (domestic or foreign). Cluster employment and wage data are from the Quarterly Census of Employment and Wages, while estimates of location quotients and regional exports come from Economic Modeling Specialists International (EMSI). This report can be found at: http://www.labor.ny.gov/stats/PDFs/State-regional-industry-clusters-report-2013.pdf.

Analysis of New York State's Food Manufacturing Industry: A Statewide and Regional Analysis
This report analyzes New York State's food manufacturing industry, North American Industry Classification System (NAICS 311), on a statewide and regional basis. Data from the Quarterly Census of Employment and Wages are used to examine industry trends at the four-digit NAICS industry level. Information from the Occupational Employment Statistics survey provides the latest staffing patterns. Finally, data from the Census Bureau's Quarterly Workforce Indicators program are utilized to provide more in-depth information about the characteristics of workers in New York State's food manufacturing industry. This report can be found at: http://www.labor.ny.gov/stats/pdfs/NYS-Food-Manufacturing-Industry.pdf.

The Air Transportation Industry in New York State
Over the past decade, the nation's air transportation industry, which includes both passenger and freight transportation, has faced a number of important challenges, such as the worst recession in 75 years and persistently high and volatile fuel prices. This report looks at employment trends in New York State's air transportation industry, which is centered in New York City, in the face of these challenges. Data from the Quarterly Census of Employment and Wages are utilized to analyze these trends. In addition, information from the Occupational Employment Statistics survey provides the latest industry staffing patterns. The NYSDOL occupational projections provide insights into the long-term outlook for the most common job titles in the air transportation industry. Our industry analysis includes the results of a study conducted by the Global Gateway Alliance and the Partnership for New York, JFK, LaGuardia, and Newark Liberty airports, which estimated the overall impact of these facilities on the New York metropolitan region. This report can be found at: http://www.labor.ny.gov/stats/pdfs/The-Air-Transportation-Industry-in-New-York-State.pdf.

New York's Motion Picture Industry: A Statewide and Regional Analysis
This report analyzes New York State's motion picture industry, which is the second largest of any state in the nation with slightly less than 56,000 workers in 2013. Not surprisingly, activity in the state's film and television industry is centered in New York City, where industry employment, from 2009-2013, grew more than eight times faster than in the nation as a whole. Using data from the Quarterly Census of Employment and Wages, the report looks at employment trends in New York's motion picture industry, where, over the past decade, a combination of tax incentives and efficient facilitation of media production has sparked a resurgence in the local motion picture industry. In addition to providing background information on production incentives, the report also examines innovative training and

education initiatives underway in the city's burgeoning motion picture industry; estimates of the industry's impact on the overall economy; and its overall economic outlook. This report can be found at: http://www.labor.ny.gov/stats/pdfs/New-York-Motion-Picture-Industry.pdf.

Careers in Science, Technology, Engineering and Math (STEM) Fact Sheets
STEM fact sheets are updated annually. They inform students about STEM occupations in their area and the State. Currently there are a growing number of firms looking to hire graduates with STEM-related skills. There are more job openings in the United States for trained scientists than there are people to fill them. This need for scientists is expected to grow in the coming years. The STEM fact sheets can be found at: http://www.labor.ny.gov/stats/stem_factsheets.shtm

Employment in New York State
This monthly newsletter reviews important state, regional and county labor market statistics. It includes two articles, one focused at the statewide level and the other at the regional level. The articles analyze recent labor market developments. Examples follow:
> Statewide analysis
>> July – How the Great Recession Affected America's Generations
>> August - How Many Self-Employed Workers in New York State? It Depends…
>> September – Advanced Manufacturing is Key Component of Advance Buffalo Project
>> October – Goodbye GED, Hello TASC
>> November – Booming Craft Beer Industry Boosts the NYS Economy
>> December – Labor Productivity: Why TVs Get Cheaper and Higher Education Doesn't
>> January – The Changing Landscape of Registered Nursing
>> February – Welcome to the Sharing Economy
>> March – New York State's Economic Expansion Continued in 2013
>> April – Sizing Up the Workforce: An Update
>> May – Asians and Pacific Islanders are Growing Part of NYS Economy
>> June – New Report: U.S. Manufacturing Sector is a "Rising Star"
> Regional Analysis
>> A Changing Regional Economic Identity (Southern Tier)
>> Hudson Valley Continues to Enjoy Job Growth (Hudson Valley)
>> A Tale of Two Sectors (private sector, public sector – Capital Region)
>> Strong Recovery in Region, but Results Uneven (Long Island Region)
>> NYC's Labor Market Enjoys Broad-based Job Growth (New York City)
>> Nano Utica is Coming (Mohawk Valley)
>> Agriculture and Food Processing Important to Region (Finger Lakes)
>> Analyzing the Needs of Local Employers (Central New York)
>> Will a Computer Take Your Job? (North Country)
>> Advance Buffalo Helping to Remedy Skilled Trades Shortage (Western New York)
>> Higher Education: An Economic Engine for the Southern Tier (Southern Tier)
>> Hudson Valley Enjoys Broad-Based Job Growth (Hudson Valley)

These analyses can be found at: http://www.labor.ny.gov/stats/enys_index.shtm.

The New York State Department of Labor Division of Research and Statistics products and reports are regularly updated and enhanced. They can be found at http://www.labor.ny.gov/stats/index.shtm.

- Published monthly regional lists of occupations in which above average hiring is expected. (http://www.labor.ny.gov/stats/reos.asp)

- Published monthly estimates of nonfarm jobs by industry for areas not funded by the Bureau of Labor Statistics (BLS). (http://www.labor.ny.gov/stats/lscesmin.shtm)

- Published monthly summaries of labor market conditions on the statewide and regional web pages.
  - Statewide (http://www.labor.ny.gov/stats/index.shtm)
  - Capital Region (http://www.labor.ny.gov/stats/cap/index.shtm)
  - Central NY Region (http://www.labor.ny.gov/stats/cen/cnyindex.asp)
  - Finger Lakes Region (http://www.labor.ny.gov/stats/fin/default.asp)
  - Hudson Valley Region (http://www.labor.ny.gov/stats/hud/default.asp)
  - Long Island Region (http://www.labor.ny.gov/stats/lon/index.shtm)
  - Mohawk Valley Region (http://www.labor.ny.gov/stats/moh/index.shtm)
  - New York City (http://www.labor.ny.gov/stats/nyc/index.shtm)
  - North Country Region (http://www.labor.ny.gov/stats/nor/index.shtm)
  - Southern Tier Region (http://www.labor.ny.gov/stats/sou/index.shtm)
  - Western NY Region (http://www.labor.ny.gov/stats/wny/index.shtm)

- Published monthly summaries of recent business expansions and contractions by region, culled from various media sources. (See regional web pages above.)

- Published the Upstate New York Labor Market Report. This monthly report highlights information on employment by industry (based on a survey of businesses) and on labor force/unemployment (based in part on a survey of households) for the 52-county Upstate New York area. The report is released in connection with the New York State Department of Labor's monthly labor market press release on jobs. (http://www.labor.ny.gov/stats/PDFs/UpstateNY_report.pdf)

- Published the Labor Market Highlights report. This monthly report highlights information presented in the New York State Department of Labor's monthly labor market press release which includes information on employment by industry (based on a survey of businesses) and on labor force/unemployment (based in part on a survey of households). This report is released in connection with the New York State Department of Labor's monthly labor market press release on jobs. (http://www.labor.ny.gov/stats/PDFs/NYS_highlights.pdf)

- Published the Economic Data card, print only. This monthly report presents three broad areas of information including: economic data (monthly nonagricultural employment, quarterly unemployment insurance covered weekly wages and Consumer Price Index percent change statistics); Unemployment Insurance (UI) statistics; and labor force statistics.

- Published Unemployed Job Seekers per Opening report. This monthly report highlights data for the U.S. Northeast region and the nation from the Bureau of Labor Statistics' latest Job Openings and Labor Turnover Survey (JOLTS). (Note: JOLTS data are available nationally and regionally, but not at the state level.) The ratio of unemployed job seekers to job openings is a useful labor market indicator. It is calculated by dividing the number of unemployed workers by the number of job openings. (http://www.labor.ny.gov/stats/job-seekers-per-opening.shtm)

- Published the monthly Coincident Economic Index. More formally known as the Index of Coincident Economic Indicators (ICEI). The model combines and weights four key indicators of statewide economic activity which have historically moved in conjunction with the state's business cycles:
    - private sector employment
    - unemployment rate
    - average weekly hours of manufacturing workers
    - sales tax collections

  The Index is the equivalent of a weather report for the state's economy. It is designed to provide reliable and timely information about current economic conditions in New York State. (http://www.labor.ny.gov/stats/icei.shtm)

- Published monthly spreadsheets on industry employment, hours & earnings and labor force data for New York City. (http://www.labor.ny.gov/stats/nyc/index.shtm)

- Maintained the online Business Directory tool. This tool helps career center staff and job seekers locate potential employers in their area. The latest version of InfoUSA's Employer Database was loaded and properly cited as the source. (http://www.labor.ny.gov/stats/bdirector.shtm)

IV. Customer Consultations and Request

Customer feedback was gathered from several sources in PY 2013; contact with customers during events and presentations, customer requests via email and phone, and from web site analytics of www.labor.ny.gov.

Customer Consultations
We have established an excellent working relationship with our State and local Workforce Investment Boards (WIBs) and the Governor's Regional Economic Development Councils (REDCs), and we continue our outreach to stakeholders.

State and Local Workforce Investment Boards
In New York State, the NYSDOL Division of Employment and Workforce Solutions (DEWS) serves as staff to the State Workforce Investment Board (SWIB) and administrator of federal Workforce Investment Act (WIA) funds and State funded workforce activities. Our central office staff and regional labor market analysts are in constant communication with the SWIB. We benefit from being located in the same building centrally and co-located with Career Centers and DEWS offices regionally. The local WIBs have regular conference calls with DEWS, the State WIB staff. Some of our regional labor market analysts serve on local WIB subcommittees and attend local WIB meetings. Through these lines of communication, WIBs have requested data and analysis in support of local strategic plans, regional projects, grant writing, and State initiatives. For example, staff provided:

- Data to the Workforce Needs subcommittee of the State WIB to plan future projects.
- Information on middle-skill jobs, including employment, wages, and projections.
- Employment data in travel & tourism related industries since 2000 to assist in preparing an overview of long-term growth in jobs.

Regional Economic Development Councils (REDCs)
In 2011 Governor Cuomo created ten Regional Councils, to encourage the development of long-term strategic plans for economic growth in their regions. These councils are public-private partnerships made up of local experts and stakeholders from business, academia, local government, and non-governmental organizations. Some of our labor market analysts serve on REDC subcommittees, and all analysts prepare labor market information in support of REDC projects and planning. The REDC regional *2013 Progress Highlights* reports contain acknowledgements of several of our analyst's contributions along with several data citations.

<u>Outreach to Stakeholders</u>

Labor market analysts engaged in 187 training sessions with job seekers, students, counselors, businesses, researchers, economic developers, and WIA administrators. They participated in 233 service sessions such as job fairs, local WIB meetings, and rapid response events. Participating face-to-face provides continuous feedback about our current products, and insight into the unmet needs of our customers so we may improve and develop new products.

Regional and central office staff continued to support workforce partner initiatives with labor market information. We partnered and assisted stakeholders such as:
- Business associations and chambers of commerce
- Transportation councils
- Secondary and post-secondary education institutions and associations
- Health industry (including educators, medical centers and insurance carriers)
- Investment and financial services firms
- Manufacturers
- Public and private economic development organizations
- Career Centers and job seekers
- Non-profit and community based organizations
- NYS Data Center Affiliates
- Realtors and real estate companies
- Science, Technology, Engineering, and Math (STEM) Councils
- Federal, state and local government agencies

Customer Requests

A database of customers contacting the LMI system is maintained, both in the central office and in the 10 regional offices. Below is a summary of the customer request database for PY 2013.

By Data Type	%
Local Area Unemployment Statistics (LAUS)	21.2%
Current Employment Statistics (CES)/ Jobs	20.3%
Applicants/Openings Data	15.5%
Unemployment Insurance Claims/Beneficiaries	9.6%
Other	9.2%
Census/American Community Survey Data	6.5%
Quarterly Census of Employment and Wages (QCEW)	5.6%
Occupational Projections/Employment	5.1%
Wages by Occupation	4.3%
Business Expansions/Contractions	1.4%
Career Information/CareerZone	1.2%

By Customer Type	%
General Public	**52.9%**
Media	15.2%
WIB/Career Center	11.6%
Non-Profit	5.8%
Business	5.7%
Other	5.5%
Economic Developer	4.5%
Educator: Post-Secondary	1.7%
Employee/Job Seeker	1.1%
Educator: K-12	0.9%
Student	0.6%
Training Providers	0.2%
Department of Labor	**37.0%**
Division of Employment and Workforce Solutions	17.4%
Other Department of Labor Staff	15.3%
Unemployment Insurance Division	2.3%
Executive Suite	1.8%
Communication's Office	0.2%
Government	**10.1%**
Other Federal/State/Local Government Agencies	9.9%
Governor's Office	0.2%

Google Analytics

Google Analytics is a free service allowing web site owners to track visitors. This information can be used to guide web site enhancements. Web metrics for the PY 2013 were reviewed and some of the findings were:

- Viewership was almost equally split between new visitors (56%) and returning visitors (44%).
- The most frequently visited page was "Occupational Wages".
  (http://www.labor.ny.gov/stats/lswage2.asp).
- More than one out of five visits (24%) were from a mobile device.
- Facebook was the top referring social site.
- Internet Explorer was the most popular browser (38%), followed by Chrome (25%), Safari (20%), and Firefox (11%).
- Ninety-seven percent of the visits were from the United States; 75% were from New York State and 40% originated in New York City.
- Most visits were from users of an English language browser.

V. Activities Undertaken to Meet Customer Needs

The NYSDOL Division of Research and Statistics has ten regional offices which served local Career Center partners, local WIBs, and stakeholders extensively. Examples of activities undertaken by regional analysts and central office staff:

- Served on local WIB subcommittees. Analysts attended 147 local WIB meetings across the state, and assisted in the preparation of various local WIB grant proposals to NYSDOL and the U.S. Department of Labor.
- Made 187 presentations on various LMI topics to a variety of customers explaining the sources and use of various datasets.
- Provided an extensive array of economic and demographic data analysis to the NYSDOL Division of Employment and Workforce Solutions (DEWS) which serves as staff to the State Workforce Investment Board (SWIB). Examples included:
  - Mined and analyzed One-Stop Operating System (OSOS) data, and New York Job Bank's job order information.
  - Gathered and mapped youth poverty, unemployment, and characteristic data by legislative district for the NY Youth Works Program.
  - Provided key labor market information such as listings of employers by industry for their rapid response presentations, and job fairs.
  - Provided listings of firms that previously hired during a quarter for outreach by the DEWS Business Services Team.
- Continued to support workforce partner initiatives with labor market information. For example:
  - Job market for specific occupations
  - Unemployment rates
  - Wage Data
  - Employment by industry information
  - Average wage data by county
- Provided the NYSDOL Commissioner and Executive staff with monthly regional labor market briefings containing BLS, Census, and OSOS data, as well as current labor market developments identified by our network of regional analysts.
- To answer customer demand, we completed an enhanced long-term occupational projections product designed for New York State and the 10 labor market regions. This product contains employment projections data, wages, education and training information and job prospects.
- We continue to support the Governor's NY Open Data initiative in response to the public's demand for transparency in government. Several Bureau of Labor Statistics datasets are currently on Open New York (https://data.ny.gov/). This initiative has generated requests for more data and varied data presentations.

VI. New Tools and Resources

Occupational Projections
Created a data product that augments statewide and regional long-term occupational employment projection data with wages, typical education/training needed for entry and employment prospect descriptor information. http://www.labor.ny.gov/stats/Regional-long-term-occupational-projections-2010-2020-Expanded-Wage-update.xls

Web Presentation
In response to the vendor's customer consultation report, we will enhance our web presentation to include an application which allows our customers to create customized reports. We are awaiting installation of the application on the appropriate servers by the New York State Office of Information Technology Services.

VII. Efforts to Create and Support Partnerships and Collaborations

NY Youth Works
Staff supported the Governors NY Youth Works Program which encourages businesses to hire unemployed disadvantaged youth. Staff updated an interactive Google Map which verifies youth applicant eligibility, and used GIS software to verify multiple youth applicants.

COREstat
Supported and provided data to an interagency and nonprofit coalition targeting residents who reside in areas of high unemployment and poverty. The coalition seeks to provide specialized employment assistance to those in need.

Long-Term Unemployed
Staff supported the Governors Unemployment Strikeforce to connect job seekers with available positions in areas with the highest unemployment rates. In partnership with New York State Empire State Development and other partners, staff gathered and compared demographic data of the long-term unemployed versus the general population; compared available job listings versus the jobs the long-term unemployed were seeking; and analyzed commutation patterns of the employed by county. These data were geocoded and mapped by census tract and community district

Minimum Wage
Staff contributed to an internal research document comparing NYS minimum wage to the U.S. and other states; comparing NYS minimum wage increases to changes in the cost of living; and analyzing characteristics of minimum and low wage workers from the American Community Survey (ACS) and Current Population Survey (CPS) surveys. This compilation is updated periodically, and at least annually.

Start-Up NY (SUNY Tax-free Areas to Revitalize and Transform Upstate NY)
In collaboration with New York State Empire State Development, staff provided industry and census data and maps by census tract to support the Governor's Start-Up NY initiative. The initiative creates tax free communities for new and expanding businesses on State University of New York (SUNY) campuses and other university communities across the state.

Local Employment Dynamics (LED)
Continued to transmit and review the required datasets for participation in the LED Program. New York also participates in the OnTheMap application.

VIII. Activities to Leverage LMI-WI Funding

None to report.

IX. Recommendations to ETA for Changes and Improvements to WIGS Requirements

None to report.