

Office of the NEW YORK STATE
COMPTROLLER

Special Report: Finger Lakes Region Economic Profile



New York State Comptroller
THOMAS P. DiNAPOLI

AUGUST 2017

Executive Summary

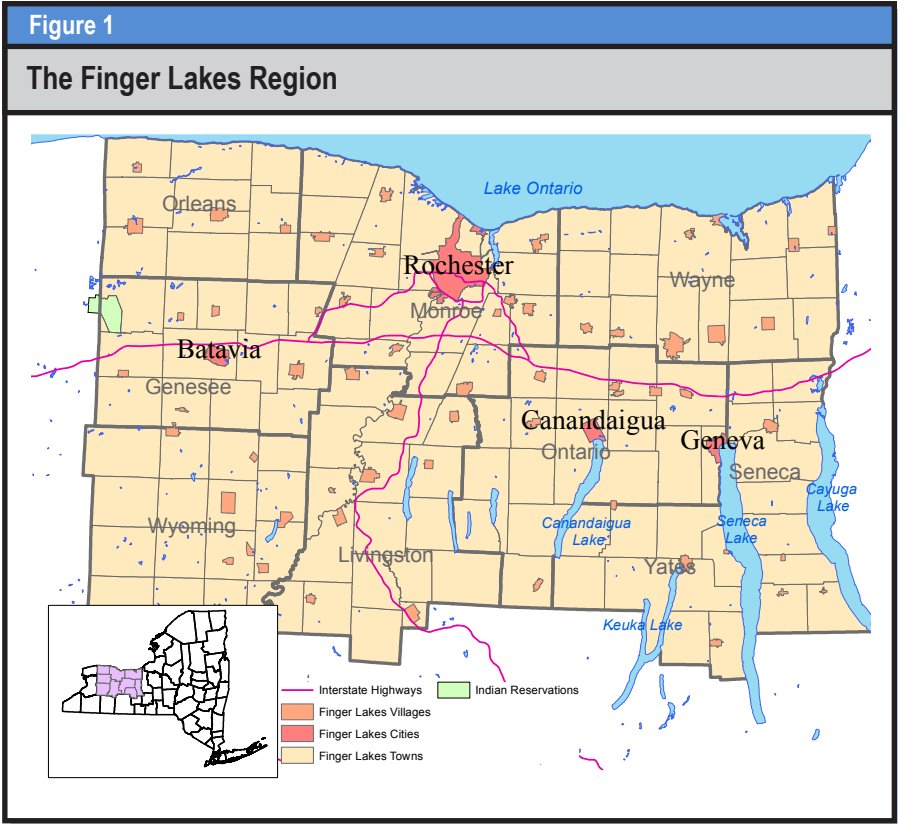
- The Finger Lakes Region of New York State includes nine counties: Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming and Yates. It is home to over 1.2 million people (6.1 percent of the State's population), mostly concentrated in Rochester and its suburbs.
- The economy of the Rochester metropolitan area has historically been largely high-tech industrial. International optics and imaging industry leaders Eastman Kodak, Bausch + Lomb and Xerox drove the City's growth through the 1980s. However, the significant downsizing of Kodak over the past 30 years and the reduction of the other two companies' presence in the City have created extraordinary economic challenges since that time.¹ Nonetheless, this industrial legacy has created opportunities for new businesses spurred by the skilled workforce and the region's physical infrastructure.
- Beyond the metro area, the economy is largely agricultural. Roughly 21 percent of the State's total farmland — producing milk, apples, grapes and wine — is in the Finger Lakes Region.² Tourism is another major economic driver, especially around the area's pristine, glacially created lakes.
- The Finger Lakes Region boasts several major higher education institutions that graduate individuals with skills in high-demand fields. However, retention of this skilled workforce has proven difficult.
- Another major challenge is the large number of unemployed and often unskilled laborers living in rural and urban pockets of persistent poverty.
- Countering these challenges, the Region benefits from relatively low housing costs, property taxes and unemployment rates, as well as relatively high wages in important sectors of the economy, most notably science, technology, engineering and math (STEM).
- Economic development efforts to attract and develop more high-tech manufacturing in the Rochester area have benefitted from the area's existing strengths. For example, public schools are coordinating with universities to educate local students in STEM areas.

Geography

The Finger Lakes Region covers 4,676 square miles and is named for the long, narrow lakes of its southeastern counties. It is bounded by Lake Ontario to the north and bisected from east to west by the New York State Thruway (Interstate 90, as shown in Figure 1).³

The City of Rochester and its urban and suburban neighborhoods dominate Monroe County, reaching south into Ontario County. Several smaller cities and villages are located throughout the Region, but much of the area remains rural.

The natural landscape, especially its ample water resources, has been conducive to the development of vineyards, dairy and specialty agriculture. Eco- and culinary tourism draw visitors to the area's scenic lakefronts and gorges and to its hundreds of wineries, breweries and related businesses. The Genesee River and Erie Canal historically provided an economic advantage for industry.⁴ Recent upgrades to recreation trails along both waterways celebrate this history.



Demographics

Population

The population of the Finger Lakes Region was 1,212,929 in 2016, with 62 percent residing in Monroe County.⁵ Rochester, with a population of nearly 209,000, is by far the Region's largest single municipality. (For county demographics discussed in this section, see Figure 3. For cities and selected towns, see appendix.)

Following significant growth from 1950 to 1970, the Region's overall population growth slowed dramatically, as shown in Figure 2. Still, the Region outperformed the State in population increases through 1990. Between 2010 and 2016, estimates indicate that the Region's population decreased by 0.4 percent, compared to a statewide increase of 1.8 percent.⁶

The Finger Lakes Region's population is generally much less diverse than the State's. Most of the counties are

between 87 and 96 percent white non-Hispanic, compared with 57 percent statewide. Monroe, at 72 percent, is the most diverse county, mostly due to Rochester, home to a significant concentration of Black, Hispanic and foreign-born individuals. This is also true of some of its surrounding towns. The Town of Brighton, for example, has a particularly high percentage of foreign-born and Asian residents (18.0 and 10.8 percent, respectively).

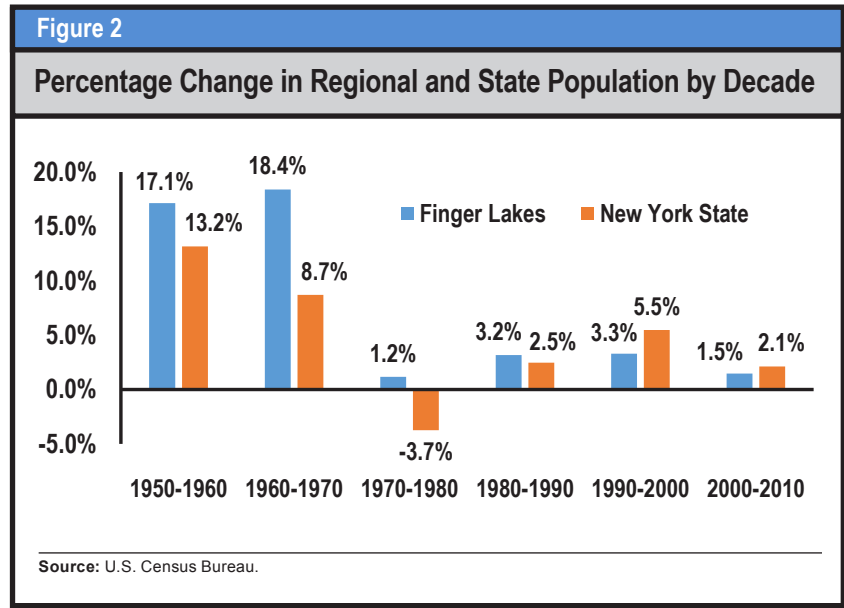


Figure 3

Demographic Indicators, Finger Lakes Region Counties

	New York State	Genesee	Livingston	Monroe	Ontario	Orleans	Seneca	Wayne	Wyoming	Yates
Population estimate, 2016*	19,745,289	58,482	64,257	747,727	109,828	41,346	34,777	90,798	40,791	24,923
Population, percentage change, 2000-2010**	2.1%	-0.5%	1.7%	1.2%	7.7%	-2.9%	5.7%	0.0%	-2.9%	3.0%
Population, percentage change, 2010-2016*	1.8%	-2.4%	-1.5%	0.4%	1.5%	-3.5%	-1.3%	-3.2%	-3.2%	-1.7%
Persons per square mile*	419	119	102	1,138	171	106	107	150	69	74
Persons under 14 years	17.8%	16.9%	15.4%	17.8%	17.2%	16.5%	16.7%	18.2%	16.2%	18.7%
Persons over 65 years	14.3%	16.9%	15.3%	15.0%	17.1%	15.7%	16.7%	16.0%	15.0%	17.8%
Median age	38.1	42.7	40.1	38.5	43.1	42.2	42.3	43.1	41.1	41.5
White persons	64.6%	92.2%	93.3%	76.0%	93.4%	89.5%	92.1%	93.1%	91.8%	97.2%
Black persons	15.6%	2.8%	2.4%	15.3%	2.5%	6.1%	4.5%	3.4%	5.7%	1.0%
Asian persons	8.0%	0.7%	1.4%	3.5%	1.2%	0.6%	0.7%	0.6%	0.4%	0.5%
Persons reporting two or more races	2.9%	1.9%	2.0%	2.7%	1.7%	1.8%	2.1%	1.6%	1.3%	0.9%
Persons of Hispanic or Latino origin	18.4%	3.0%	3.3%	7.9%	4.1%	4.5%	3.1%	4.0%	3.2%	2.0%
White persons not Hispanic	56.8%	90.9%	91.2%	71.6%	90.8%	86.8%	89.7%	90.4%	89.8%	95.5%
Foreign-born persons	22.5%	2.3%	3.3%	8.3%	3.7%	3.4%	2.1%	2.8%	1.7%	1.8%
Languages other than English spoken at home	30.4%	3.6%	6.1%	12.9%	7.0%	6.2%	5.9%	4.3%	4.3%	13.3%
Median household income	\$59,269	\$50,880	\$51,734	\$52,553	\$57,416	\$46,359	\$49,292	\$50,798	\$52,564	\$49,510
Bachelor's degree or higher	34.2%	20.0%	23.6%	36.2%	31.7%	15.4%	20.2%	20.6%	15.2%	23.7%
Owner-occupied housing units	47.7%	68.1%	64.7%	59.5%	65.2%	65.5%	60.7%	68.4%	65.8%	54.4%
Housing units in multi-unit structures	50.8%	20.0%	19.0%	30.4%	20.9%	18.3%	14.0%	16.5%	16.4%	10.2%
Vacancy rate of housing units	11.1%	6.6%	11.1%	7.3%	10.5%	13.4%	16.1%	11.9%	12.5%	29.0%
Median value of owner-occupied housing units	\$283,400	\$107,000	\$121,200	\$138,600	\$145,700	\$91,300	\$97,000	\$112,900	\$102,000	\$124,200
Owner costs exceeding 30% of income	38.2%	25.0%	25.1%	26.6%	24.4%	29.7%	24.0%	27.4%	21.7%	28.7%
Renters costs exceeding 30% of income	53.9%	49.4%	55.3%	56.1%	51.2%	55.8%	50.9%	52.1%	44.6%	50.4%
Child poverty rate (%)	22.2%	20.5%	18.8%	23.0%	13.5%	21.9%	15.9%	18.5%	17.1%	21.5%

Source: U.S. Census Bureau; All data are from the 2011-2015 American Community Survey, except as indicated.

* 2016 Population Estimates

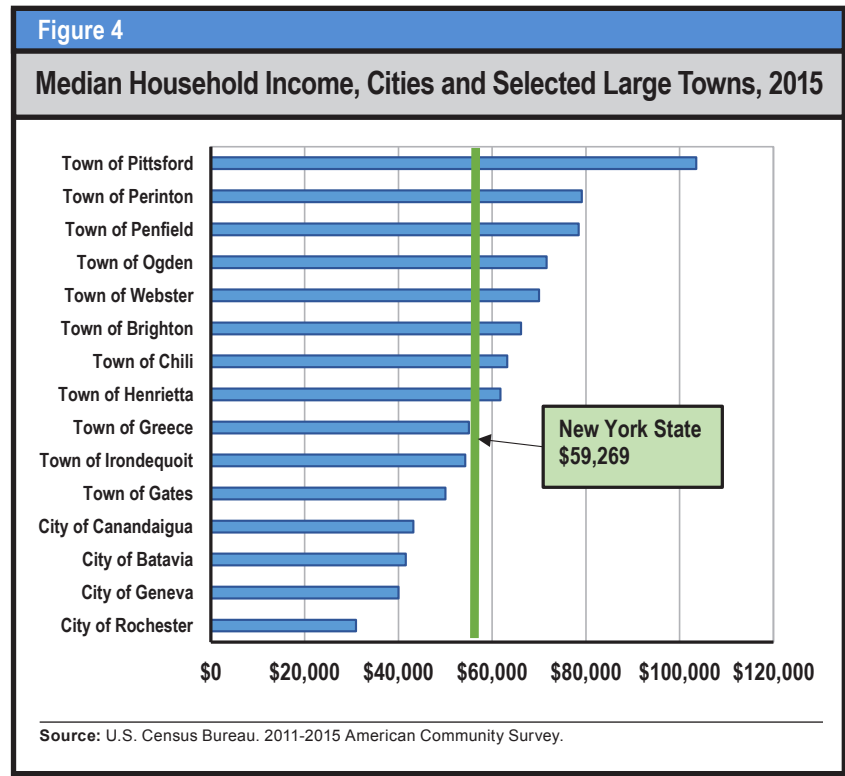
** 2000 and 2010 Census

Median Household Income

Median household income in each of the nine counties is below the State median. Ontario County (\$57,416) was the highest in 2015, while Orleans County (\$46,359) was the lowest. (See Figure 3.)

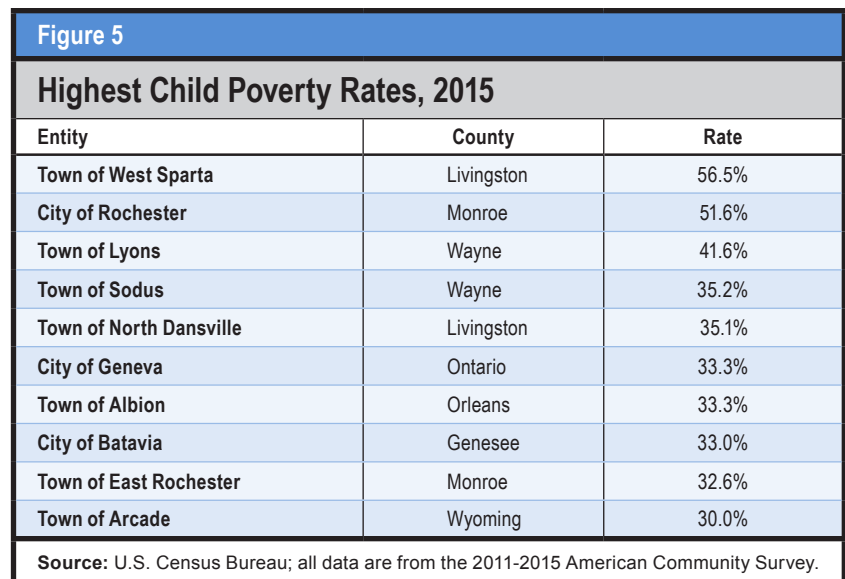
City median household incomes were lower than those of suburban towns. The City of Rochester has one of the lowest median household incomes (\$30,960) in the Region, while several towns exceeded the State median. (See Figure 4.)

Growth in median income has been relatively slow in recent years. Monroe County's grew 8.2 percent from 2007 to 2015 and Ontario County grew 5.8 percent, whereas the State's grew by 13.7 percent.⁷



Child Poverty

Although the child poverty rates for Finger Lakes counties are near or below the State rate (22.2 percent), rates in some areas are much higher. Pockets of concentrated poverty are of particular concern in Rochester, where more than half of all children are living in poverty. Rates are high in many rural areas as well. (See Figure 5.)



Education

Higher Education

The Region's colleges and universities include the Rochester Institute of Technology (RIT), the University of Rochester, Hobart and William Smith Colleges, St. John Fisher College, Keuka College, Nazareth College, Roberts Wesleyan College, the State University of New York campuses in Brockport and Geneseo, and three county community colleges. About 19,000 students graduate from these institutions every year.⁸

Regional economic development entities have noted that, on a net basis, students tend to leave the Region after graduation.⁹ Even so, the 36.2 percent of adults with at least a bachelor's degree in Monroe County exceeds the State average (34.2 percent), and Ontario County's 31.7 percent approaches it. The concentration of college graduates in the remaining counties is much lower, ranging from 15.2 percent to 23.7 percent.

K-12 Education

The 70 public school districts of the Finger Lakes Region educated 175,810 students in the 2014-15 school year (SY).¹⁰ As a whole, regional schools are comparable to the State on measures such as graduation rates. In that year, 84.3 percent of the Region's students graduated within four years, compared with 85.5 percent statewide.¹¹

The disparities in wealth and performance between the Rochester City School District and many of its surrounding suburban districts are vast. The District's students were much poorer, with about 88.2 percent qualifying for free or reduced price lunches, compared with 43.5 percent regionwide. Its graduation rate was 51 percent in that same year.¹² A 2017 OSC audit showed that the District had significant issues with financial management, including payroll and procurement.¹³

Local Government

Entities

In addition to Rochester, the Finger Lakes Region has three other cities: Batavia, Canandaigua and Geneva. It also contains 126 towns, 70 school districts and 60 villages, as well as 74 fire districts and about 1,200 town, county and other special districts. (See Figure 6.)

Figure 6	
Local Governments and Districts	
Municipalities	
Counties	9
Cities	4
Towns	126
Villages	60
Special Purpose Local Governments	
School Districts	70
Fire Districts	74
Districts	
Town Special Districts	1,189
County Special Districts	12
Soil and Water Conservation Districts	9
Consolidated Health Districts	2
<small>Source: Office of the State Comptroller (OSC), December 2016. Village count includes Village of Macedon, which was dissolved on March 31, 2017.</small>	

Taxes

Property taxes, measured as the amount that the average homeowner pays annually, are relatively low in the Finger Lakes by New York State standards. For example, the estimated median property tax bill in Genesee County was \$4,133 in 2015 – half of the estimated median statewide bill (\$8,173). (See Figure 7.)

The sales tax rate is 8 percent in most of the Region (with the exception of Ontario County at 7.5 percent). This is somewhat lower than the 8.45 percent average rate for the State as a whole, which includes higher tax areas in New York City and the downstate counties.¹⁴

Figure 7			
Sales Tax Rates, 2016 and Effective Property Tax Rates and Median Bills, 2015			
County	Sales Tax Rate	Effective Property Tax	
		Rate per \$1,000 Full Value	Median Bill
Genesee	8.00%	\$38.63	\$4,133
Livingston	8.00%	\$36.53	\$4,428
Monroe	8.00%	\$40.62	\$5,629
Ontario	7.50%	\$29.26	\$4,263
Orleans	8.00%	\$41.54	\$3,792
Seneca	8.00%	\$32.93	\$3,195
Wayne	8.00%	\$37.72	\$4,259
Wyoming	8.00%	\$35.33	\$3,604
Yates	8.00%	\$25.19	\$3,129
Statewide	8.45%	\$28.84	\$8,173
<small>Notes: County sales tax rates are a combination of the State's 4 percent rate and the local rate of 3.5 or 4 percent imposed by each county. Statewide sales tax rate is the weighted average of all counties and cities, including New York City. The effective property tax does not include New York City. Source: OSC; New York State Department of Taxation and Finance; U.S. Census Bureau, ACS; and The Sales Tax Clearinghouse.</small>			

The State has begun distributing 20 percent of gaming tax revenues from the newly opened del Lago Resort and Casino in Seneca County with nearby municipalities. As hosts, the Town of Tyre and Seneca County split 10 percent. Wayne County and four Southern Tier counties share another 10 percent, based on population. In the first quarter of 2017, this amounted to approximately \$389,000 each for the Town of Tyre and Seneca County, and about \$42,000 for Wayne County.¹⁵

Tax Exemptions in Finger Lakes Cities

Municipalities with large amounts of tax-exempt property usually have higher tax rates because owners of taxable properties must help pay for services provided to all properties, including those that are tax-exempt. This is a particularly vexing issue for many cities, including Rochester, Canandaigua and Batavia, where about one-third of total property value is tax exempt. Even more challenging, nearly two-thirds of the property in the City of Geneva (Ontario County) is owned by colleges, other not-for-profit institutions and government facilities, ranking it in the top five cities in the State on this measure.¹⁶



Fiscal Stress

OSC’s Fiscal Stress Monitoring System currently identifies only two local governments and five school districts in the region as being in fiscal stress, defined as having challenges in maintaining budgetary solvency.¹⁷ Monroe County has been in the highest level of stress (“Significant”) for several years; the rest are all in the lowest level (“Susceptible”).

Figure 8

Fiscal Stress in the Finger Lakes Region

Municipality	County	Designation
Local Governments		
Monroe County	Monroe	Significant
Town of Manchester	Ontario	Susceptible
School Districts		
Gates-Chili Central School District	Monroe	Susceptible
Geneseo Central School District	Livingston	Susceptible
Manchester-Shortsville Central School District	Ontario	Susceptible
Clyde-Savannah Central School District	Wayne	Susceptible
Marion Central School District	Wayne	Susceptible

Source: Scores cited here are for fiscal year ending 2015 for municipalities and fiscal year 2015-16 for school districts. For more on the Fiscal Stress Monitoring System and latest scores for local governments, please see www.osc.state.ny.us/localgov/fiscalmonitoring/index.htm.

The System also examines various environmental factors that influence local revenue-raising capability and demand for services, such as changes in property values, population trends, unemployment, graduation and poverty rates. None of the stressed entities had high environmental stress scores.

Reorganization

Three Finger Lakes villages have dissolved in the past seven years, after having taken advantage of grants that support the study and implementation of local government “reorganization.”¹⁸ They included the villages of Lyons (2015) and Macedon (2017) in Wayne County and Seneca Falls (2010) in Seneca County—the largest New York village to dissolve to date.¹⁹

Yates County also recently undertook a study along with neighboring Schuyler County (in the Southern Tier Region), exploring options for sharing, consolidating or completely merging services in infrastructure, public safety, municipal operations, economic development and governance.²⁰ By 2014, the two counties had decided not to merge, but they formed a joint Department of Weights and Measures with Chemung County.²¹

Economy and Labor Market

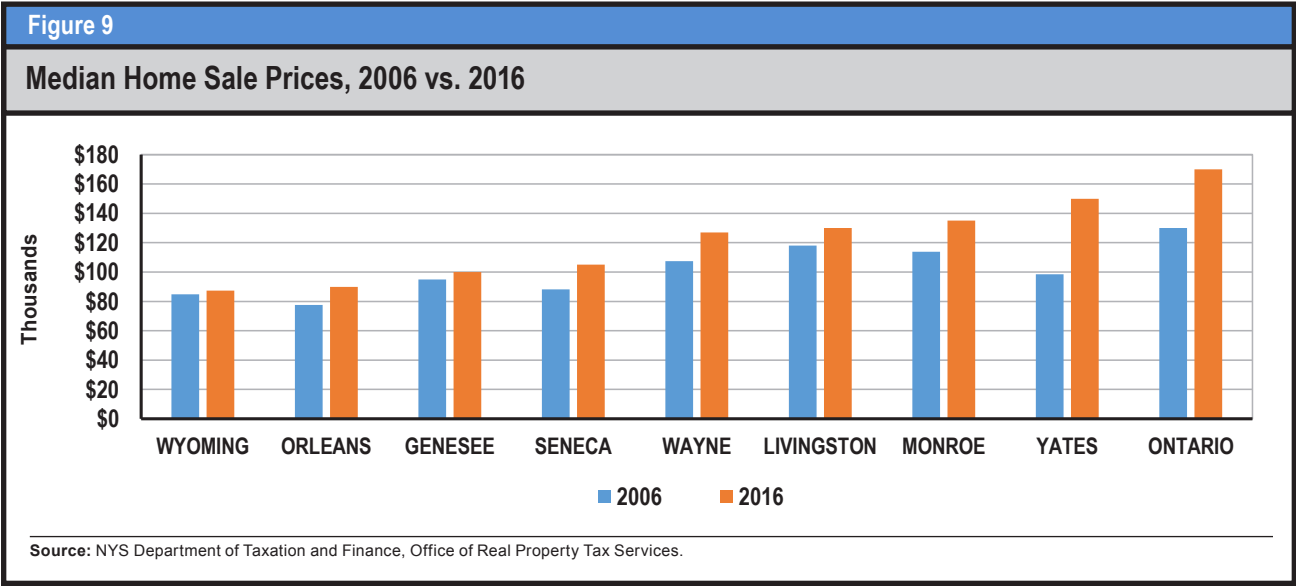
Housing Market

Affordability

In 2016, median home sales prices in the Finger Lakes counties ranged from \$87,408 in rural Wyoming County to \$170,000 in largely suburban Ontario County.²² (See Figure 9.) This is much lower than the 2015 statewide residential median price of \$213,000 outside of New York City, but is similar to other upstate counties.²³ Over the past decade, all of the Region’s counties have seen some price growth. Yates County prices grew the fastest, rising 52 percent to \$149,900 in 2016, owing in part to sales of high-priced homes near Keuka Lake.

Despite this recent growth, housing remains affordable in the Finger Lakes Region, especially for people who own their own homes. Only 22 to 30 percent of homeowners are spending more than 30 percent of their income on housing, compared with 38 percent statewide.²⁴ Perhaps for this reason, homeownership rates are relatively high in the Region, ranging between 60 and 68 percent in every county but Yates, compared with 48 percent for the State as a whole.

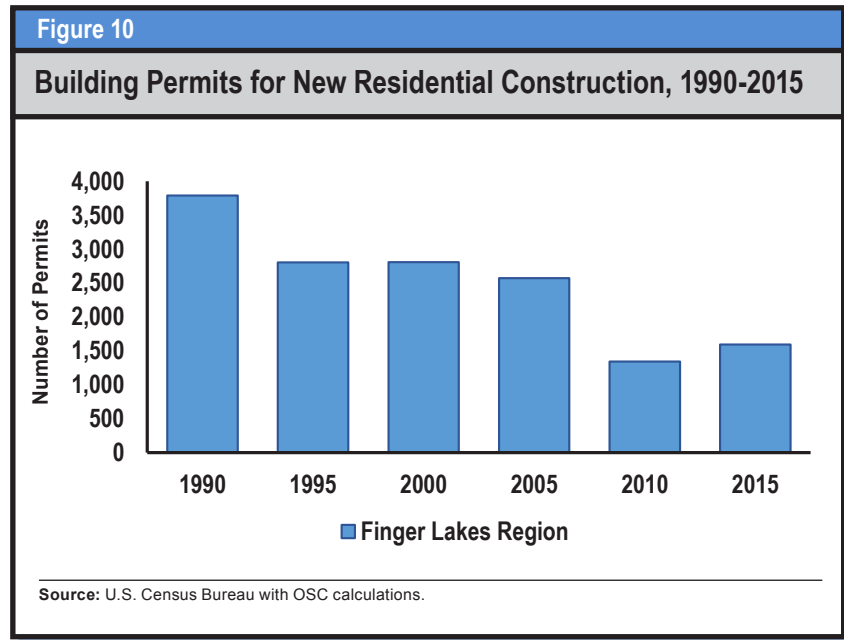
The percentage of renters whose housing costs exceed 30 percent of their income is much higher, sometimes exceeding the 54 percent seen among renters statewide. In Rochester, where less than a third of homes are owner-occupied, this is true of 63 percent of renters. (See appendix.)



Health of the Housing Market

The number of building permits for new residential construction issued regionwide (a measure of the health of the housing market) rose 18.5 percent between 2010 and 2015 (See Figure 10).²⁵ However, the longer-term trend has been downward over the past two decades, with a steeper decline just after the recession.

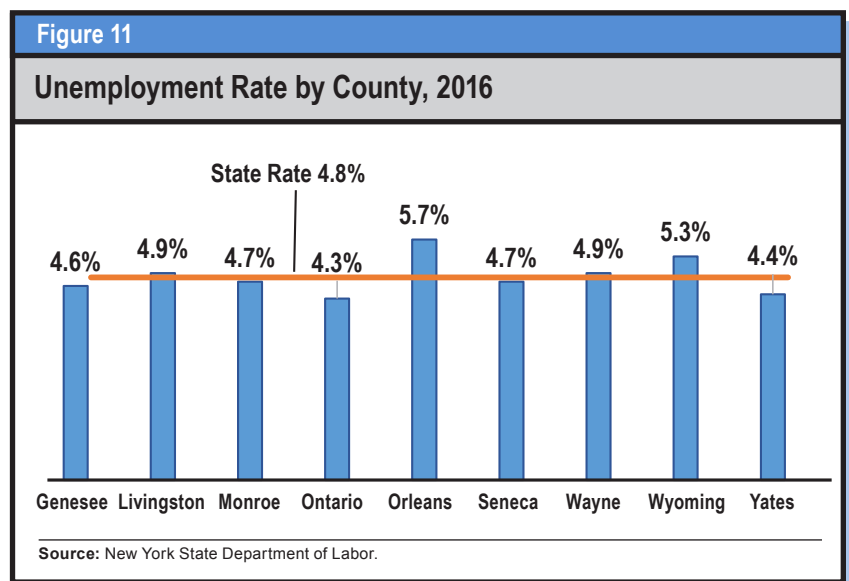
Vacancy rates in the Region range from 6.6 percent in Genesee County to 29 in Yates County, but rates in most counties are comparable to the statewide rate of 11.1 percent.



Rochester's 12.3 percent rate is only slightly above-average, but when cities have clusters of vacancies they can be more problematic than a similar percentage in rural areas. In response, the Rochester Land Bank Corporation acquires vacant properties and rehabilitates them for sale, funds demolitions and subsidizes new house construction.²⁶ For fiscal year 2015-16, the Land Bank reported that it had acquired 12 properties for rehabilitation, completed development on 47 others, demolished 17, and closed with buyers on two of six newly constructed houses.²⁷ In 2017, the Land Bank plans to leverage a \$1.5 million award from the State to continue this work.²⁸

Unemployment Rates

Annual Regional unemployment rates have improved in recent years, decreasing from 8 percent in 2012 to 4.7 percent in 2016; in July 2017, the Region's rate was 4.9 percent. As Figure 11 shows, Ontario and Yates counties had the lowest rates in 2016, and even Monroe was below the State rate. However, Rochester had an unemployment rate of 6.5 percent.²⁹ The highest countywide unemployment rate in 2016 was in Orleans County.



Major Industries

Eastman Kodak, Bausch + Lomb, and Xerox were the powerhouses driving the Rochester economy since the late 1800s. Kodak alone employed over 60,000 area residents at its peak in the 1980s, but its decline over the following two decades was precipitous, culminating in bankruptcy in 2012.³⁰ Today, Kodak employs around 2,000 people in the Rochester area, and is no longer among the City's top employers.³¹ The City took another blow in 2013, when Bausch + Lomb's headquarters moved and the company laid off over 400 of about 1,700 local employees, and again in 2017 when Xerox (employing about 3,900 in the area) announced it would cut nearly 200 jobs.³² On a positive note, what remains of physical infrastructure and human capital is fostering growth for new companies and has been a boon for creative development. For example, the Eastman Business Park (formerly Kodak Park) is now home to 67 product development and manufacturing companies employing over 6,500 people, including a medical marijuana manufacturing site.³³ Rochester ranks 13th among metropolitan regions nationwide for the number of patents issued per million residents, with the largest subcategory of patents granted for optics research.³⁴

Seven of the ten largest employers in the Region are located in Monroe County, including Carestream Health, Rochester General Hospital, Rochester Institute of Technology, Sutherland Global Services, Unity Hospital of Rochester, University of Rochester Medical Center and Xerox. The three other largest employers operate in locations throughout the Region: Tops Friendly Markets, Wegmans Food Markets and Wal-Mart Stores, Inc.³⁵

Large employers in other area counties include Arc, a not-for-profit provider of human services and vocational rehabilitation, and the New York State Department of Corrections and Community Supervision. Major correctional facilities operate in Livingston, Orleans and Wyoming counties, each of which employs hundreds of people.³⁶ Livingston County is also home to the State University of New York at Geneseo, which has over 900 employees.

Figure 12 shows 2015 employment numbers and average wages in the Finger Lakes by industrial sector.³⁷ Total employment was 548,751, with an average annual wage of \$47,154. Preliminary numbers show employment rose to 553,706 in 2016.³⁸ The New York State Department of Labor (DOL) expects employment to continue to grow moderately in the next decade.³⁹

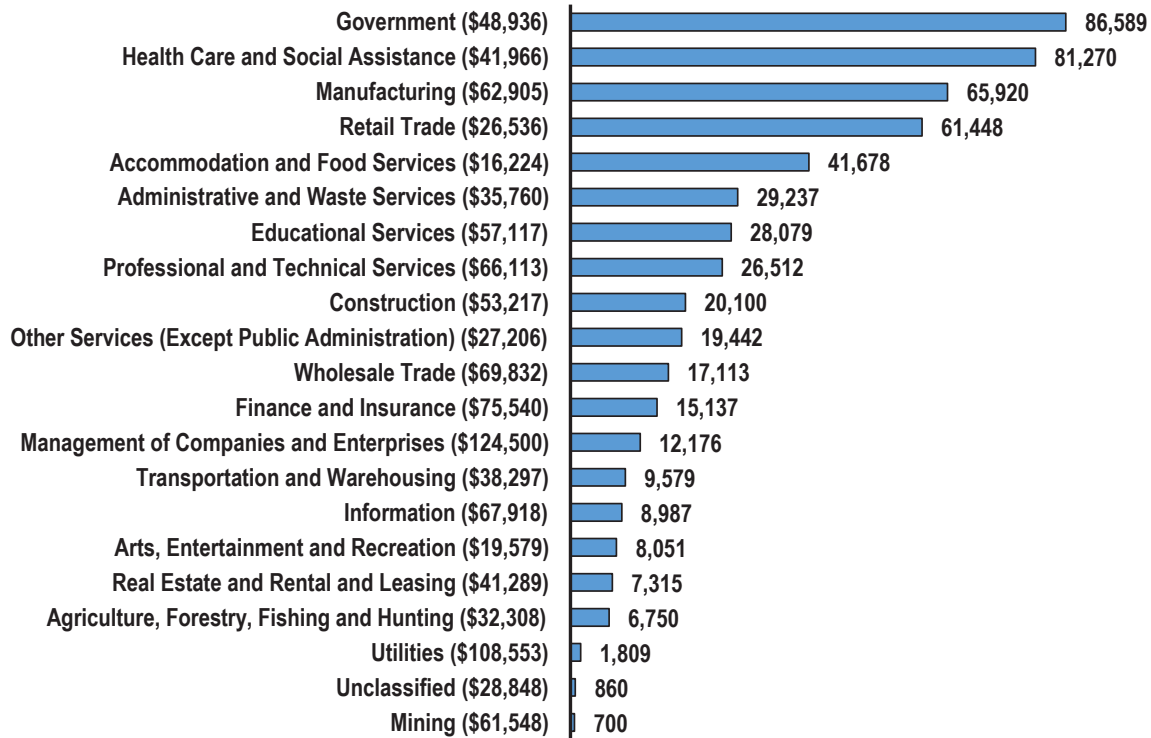
The largest employment sector is government, with over 86,500 employees or 16 percent of total employment. This sector includes public school teachers and administrators, paid firefighters, police and corrections officers, and the employees of the four-year State University of New York colleges in Brockport and Geneseo and three community colleges.⁴⁰

The health care and social assistance sector is almost as large as the government sector, employing over 81,000 people in 2015. The typical wage in this sector is less than the overall average (\$47,154), since low-wage positions such as personal care aides outnumber highly paid professionals.⁴¹

On the whole, manufacturing has declined and that trend is expected to continue.⁴² But manufacturing employment, at 12 percent of the total for all industries, is still a substantial source of jobs in the Region, and pays relatively high wages. The manufacturing sector includes many industries, and expansion in the food manufacturing sector, especially in wineries and breweries, has added about 700 employees (46 percent growth) between 2011 and mid-2016.⁴³

Figure 12

Industry Sectors in the Finger Lakes Region by Number of Employees (548,751) and Average Wages (\$47,154), 2015.



Source: New York State Department of Labor, Quarterly Census of Employment and Wages.

Just as important, beverage manufacturers cause spin-offs to other sectors, spurring demand for locally grown grapes, barley and hops. The Region's wine and beer account for more than 50 percent of New York State exports of these products.⁴⁴ Continued employment growth in this industry is projected for the next five years, and the Finger Lakes Regional Economic Development Council has identified the agricultural and food manufacturing clusters as top priorities.⁴⁵

Another major source of job growth comes from sectors serving the tourism and vacation industry, including: retail trade, accommodations and food services, and the arts, entertainment and recreation. However, these sectors tend to pay lower wages relative to some others.

The professional and technical services and management sectors are expected to continue expanding.⁴⁶ These highly paid sectors (see Figure 12) include law and accounting firms and software developers, which tend to sell their services to other businesses.

Economic Development

Upstate Revitalization Initiative

In 2015, the Finger Lakes Region was awarded \$500 million, anticipated to be available over the next five years, under the State's Upstate Revitalization Initiative (URI), a New York State program that is intended to provide for the development of regional long-term strategic plans for economic growth.⁴⁷ The Finger Lakes Forward URI Plan will focus on three industry sectors — photonics, agriculture, and clean manufacturing and technology.⁴⁸ In 2017, the Governor announced the Luminare NY, a business competition awarding funds to 10 to 15 start-up businesses in the photonics industry in the Rochester area.

Science, Technology, Engineering and Mathematics (STEM) in the Finger Lakes

- From 2010 to 2015, the Finger Lakes Region saw stronger growth than most other parts of the State in STEM employment.⁵¹
- In the Rochester metropolitan area, STEM jobs make up 7.2 percent of total jobs, ranking it 22nd in the nation for the percentage of workers in this field.
- The area's average annual pay for STEM employees was \$80,700, 74 percent higher than the comparable wage for non-STEM job titles.⁵²

Some other economic development initiatives, such as the planned redevelopment of the Canal Ponds business park in Greece, remain uncertain due to issues surrounding the SUNY Polytechnic Institute.⁴⁹

Presently, more than 100 companies support over 15,000 regional jobs in the optics, photonics and imaging (OPI) industry cluster. OPI includes a broad range of markets and technologies such as precision optics, lasers, imaging systems, displays, solid state lighting (such as LED), and photovoltaics (solar-derived electricity), and includes components for semiconductor manufacturing equipment, defense systems, and biomedical equipment. In 2015, the U.S. Department of Defense selected Rochester as the site of the American Institute for Manufacturing Integrated Photonics (AIM Photonics). The State has committed \$250 million over five years to this project, which is to be combined with other federal and private funds. The facility will be constructed in Rochester's Eastman Business Park, and is expected to be completed in April 2018.⁵⁰

Agriculture and food production is another area being developed. The Region's 1.5 million acres of farmland (roughly 21 percent of the State's total) yields milk, apples, grapes and wine. Major local food and beverage producers like LiDestri, Wegmans and Constellation Brands create jobs and attract investment in all nine counties in the Region. Investments are targeted for organic food production, and developing small food operations (such as cooperative packaging plants).

Infrastructure

The Finger Lakes Region is working to promote “next generation” clean manufacturing and technologies (for example, life sciences, energy, sustainable manufacturing, nanotechnology and semiconductors) by investing in creating, expanding and preserving industrial and technology parks. The Eastman Business Park and the downtown Rochester Innovation Zone are expected to promote urban businesses and attract new residents to live downtown. The Town of Alabama is home to the Science, Technology and Advanced Manufacturing Park (STAMP), a 1,250-acre campus for next generation manufacturing. A silicon wafer manufacturer is investing about \$700 million over two phases and creating 1,000 jobs at this Genesee County site.⁵³

Further, the State is supporting transportation infrastructure, with a new \$30 million Amtrak station and transportation hub in Rochester scheduled for completion in 2017, and \$39.8 million for the Greater Rochester International Airport’s redesign.⁵⁴

IDAs and Economic Development

The Region’s 11 Industrial Development Agencies (IDAs) promote economic development in the Finger Lakes, offering financial assistance, including tax exemptions and financing, to create or retain jobs. There are IDAs in each of the nine counties and in the City of Geneva and the Village of Fairport. In 2015, these IDAs reported supporting 746 projects, over 400 of which were in Monroe County.⁵⁵

Other recent examples of economic growth include retail development around the upscale Eastview Mall in Ontario County, and development around Canandaigua Lake, especially in the City of Canandaigua. The City of Geneva in Ontario County was awarded a \$10 million downtown revitalization grant and is planning to highlight its distinctive Seneca lakefront. Projects include upgrading street infrastructure for better City-lake connectivity, investing in a City marina and a solar-powered residential/vacation-rental community, and promoting other mixed-use and cultural endeavors.⁵⁶

Poverty Reduction Initiative

Poverty is recognized as limiting economic growth in the Region, prompting public and private responses.⁵⁷ The Rochester-Monroe Anti-Poverty Initiative, supported in part by a \$500,000 2016 IBM Smarter Cities Challenge award, aims to reduce poverty 50 percent by 2031 through community-based programs that ready children for high school, college, and careers, and provide job mentoring and skills development for hard-to-place adults.⁵⁸ The Anti-Poverty Initiative and the Finger Lakes Regional Economic Development Council have formalized the importance of these goals by requiring that any organization applying for funds under the State’s URI plan identify how its project will mitigate the impact of poverty.⁵⁹

Adapting to a Changing Environment

Climate change may cause a shift in Finger Lakes weather patterns and water levels.⁶⁰ The Region's agricultural economy is especially vulnerable, as the intensity of both drought and floods are related to temperature and rainfall variability, and livestock can be sensitive to the same factors. Extreme weather can also lead to costly property damage and threaten public health and safety, affecting drinking water supplies and contamination levels.

In the spring and summer of 2017, Lake Ontario communities (including suburban Rochester and Orleans and Wayne counties) experienced flooding caused by exceptionally heavy rainfall, wind-driven water, and already high Lake and river water levels along the international border. The State declared a state of emergency and offered \$45 million for repairs, with \$15 million allotments targeted to residents, businesses and municipalities with damaged infrastructure.⁶¹

In response to this event and climate change more generally, several counties in the Region have created All-Hazard Mitigation Plans, which document, rank and strategize for an array of natural and human-caused hazards for the county and municipalities.⁶² In 2016, Rochester drafted a Climate Action Plan, complementing a 2013 Municipal Operations Climate Action Plan; both outline the effort to reduce greenhouse gases emissions in the City.⁶³ Rochester also achieved Climate Smart Community and Clean Energy Community designations in 2017, which required completion of a set of high-impact energy-reduction actions and/or actions to increase community resiliency to hazards.⁶⁴



Looking Ahead

Community stakeholders in the Finger Lakes Region have set some ambitious goals: growing jobs, increasing regional wealth and driving private investment while deliberately working to reduce poverty. Local leaders should continue their work to identify public and private investment opportunities, especially in the areas that leverage existing regional strengths.

Sustained focus in these areas can help the Finger Lakes Region achieve its education and worker training goals, increase access to capital for entrepreneurs and small businesses, and retain talent through support for research at higher education institutions. At the same time, multi-million dollar investments of public and private funds for development activity require transparency, strict oversight and result measurement.

Efforts to address the challenges of poverty throughout the Region should also continue. Local leaders have already demonstrated support for policies that connect the needs of diverse stakeholder groups.

Municipal leaders in communities with high levels of tax-exempt property may need to be particularly innovative as they look for new ways to recoup at least some portion of the costs of services, or otherwise offset the exemptions. Though somewhat controversial, the City of Geneva has recently studied the possibility of selling city-owned lakefront property to developers in order to generate revenue, lower property taxes, and stimulate the local economy.⁶⁵

While the Finger Lakes Region faces challenges, it has many advantages that can promote growth. The Region's institutional research, manufacturing and transportation infrastructure, educated population and geographic resources are all attributes that have long supported this economy and will serve as a strong foundation for the future.

Appendix: City and Town Demographics

Demographic Indicators, Finger Lakes Cities				
	Batavia	Canandaigua	Geneva	Rochester
Population estimate, 2016*	14,801	10,369	12,988	208,880
Population, percent change, 2000-2010**	-4.9%	-6.4%	-2.6%	-4.2%
Population, percent change, 2010-2016*	-3.6%	-1.8%	-1.7%	-0.8%
Persons per square mile*	2,846	2,259	3,085	5,838
Persons under 14 years	17.8%	16.4%	15.2%	20.4%
Persons over 65 years	18.1%	19.3%	13.1%	9.8%
Median age	39.0	40.5	27.7	31.0
White persons	87.2%	95.8%	78.0%	45.1%
Black persons	7.1%	0.9%	11.7%	41.1%
Asian persons	0.9%	1.3%	2.9%	3.7%
Persons reporting two or more races	3.4%	1.2%	2.9%	4.5%
Persons of Hispanic or Latino origin	3.7%	1.4%	13.8%	17.4%
White persons not Hispanic	85.4%	94.9%	70.2%	36.5%
Foreign-born persons	2.8%	2.9%	6.3%	9.0%
Languages other than English spoken at home	4.0%	5.0%	16.5%	19.8%
Median household income	\$41,584	\$43,185	\$40,000	\$30,960
Bachelor's degree or higher	23.6%	35.0%	26.5%	23.8%
Owner-occupied housing units	49.2%	48.3%	46.4%	32.3%
Housing units in multi-unit structures	40.8%	44.5%	38.7%	50.2%
Vacancy rate of housing units	7.2%	9.7%	7.2%	12.3%
Median value of owner-occupied housing units	\$94,100	\$155,800	\$90,700	\$76,200
Owner costs exceeding 30% of income	16.4%	24.3%	21.3%	32.8%
Renters costs exceeding 30% of income	51.6%	47.8%	47.8%	62.5%
Child poverty rate (%)	33.0%	18.6%	33.3%	51.6%

Source: U.S. Census Bureau; All data are from the 2011-2015 American Community Survey, except as indicated.
 * 2016 Population Estimates
 ** 2000 and 2010 Census

Demographic Indicators, Finger Lakes Towns with Populations over 20,000

	Town of Brighton	Town of Chili	Town of Gates	Town of Greece	Town of Henrietta	Town of Irondequoit	Town of Ogdén	Town of Penfield	Town of Perinton	Town of Pittsford	Town of Webster
Population estimate, 2016*	36,598	28,794	28,691	96,175	43,690	50,556	20,264	37,329	46,713	29,463	44,743
Population, percent change, 2000-2010**	2.9%	3.6%	-3.0%	2.1%	9.1%	-1.3%	7.4%	4.6%	0.8%	8.0%	12.4%
Population, percent change, 2010-2016*	0.0%	0.4%	0.7%	0.3%	1.9%	-1.9%	1.7%	2.9%	0.5%	0.0%	4.8%
Persons per square mile*	2,373	729	1,889	2,024	1,236	3,370	555	1,003	1,366	1,271	1,334
Persons under 14 years	14.4%	18.1%	14.9%	16.1%	14.9%	16.3%	16.3%	18.6%	16.8%	17.7%	19.8%
Persons over 65 years	18.6%	15.2%	19.9%	18.1%	13.4%	18.9%	13.1%	18.9%	18.3%	18.8%	17.5%
Median age	38.9	40	42.9	43.4	33.9	43.7	40.8	44.8	45.2	43.1	42.7
White persons	79.4%	86.5%	82.4%	87.9%	78.4%	85.0%	94.5%	91.9%	93.5%	87.7%	93.1%
Black persons	6.2%	9.2%	10.5%	6.7%	9.0%	9.3%	2.1%	1.8%	1.1%	2.5%	1.4%
Asian persons	10.8%	1.4%	3.6%	2.0%	7.3%	1.6%	1.2%	2.9%	3.2%	7.5%	3.3%
Persons reporting two or more races	2.8%	2.0%	2.0%	1.3%	3.1%	2.2%	1.4%	2.7%	1.8%	1.7%	1.8%
Persons of Hispanic or Latino origin	4.1%	4.3%	6.2%	5.1%	4.8%	7.3%	4.3%	3.6%	2.1%	2.5%	2.1%
White persons not Hispanic	76.3%	83.7%	78.4%	84.7%	74.8%	80.8%	90.8%	90.0%	92.0%	86.1%	91.5%
Foreign-born persons	18.0%	5.5%	10.5%	6.6%	11.4%	7.5%	6.1%	7.0%	6.4%	10.3%	8.9%
Languages other than English spoken at home	19.0%	8.2%	15.1%	9.4%	13.9%	12.5%	9.8%	8.4%	6.2%	12.0%	9.8%
Median household income	\$66,149	\$63,203	\$50,022	\$55,061	\$61,762	\$54,275	\$71,596	\$78,469	\$79,105	\$103,546	\$69,987
Bachelor's degree or higher	61.9%	36.3%	22.7%	28.3%	36.8%	34.8%	36.6%	51.2%	54.9%	73.1%	43.2%
Owner-occupied housing units	56.1%	78.0%	73.3%	73.3%	71.0%	78.3%	78.9%	81.8%	77.9%	86.5%	77.9%
Housing units in multi-unit structures	42.4%	19.2%	20.3%	22.8%	24.2%	18.7%	18.9%	16.8%	19.3%	12.8%	18.1%
Median value of owner-occupied housing units	\$170,300	\$136,300	\$115,200	\$128,400	\$139,400	\$117,500	\$150,700	\$179,800	\$192,600	\$262,200	\$175,200
Owner costs exceeding 30% of income	23.3%	21.9%	32.3%	27.2%	26.3%	29.5%	21.4%	22.4%	23.1%	26.2%	23.7%
Renters costs exceeding 30% of income	45.9%	59.1%	52.1%	52.2%	51.6%	49.8%	37.8%	41.8%	46.0%	39.0%	50.2%
Child poverty rate (%)	7.1%	7.5%	16.4%	13.6%	11.8%	12.5%	4.7%	4.0%	7.8%	2.7%	10.4%
Child poverty rate (%)	33.0%	18.6%	33.0%	18.6%	33.0%	18.6%	33.0%	18.6%	18.6%	33.3%	51.6%

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Division of Local Government and School Accountability

Central Office

Directory

Andrew A. SanFilippo, Executive Deputy Comptroller

(Area code for the following is 518 unless otherwise specified)

Executive474-4037

Gabriel F. Deyo, Deputy Comptroller

Tracey Hitchen Boyd, Assistant Comptroller

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**Mailing Address
for all of the above:**

**Office of the New York State Comptroller,
110 State Street, Albany, New York 12236
email: localgov@osc.state.ny.us**

Division of Local Government and School Accountability

Regional Office

Directory

Andrew A. SanFilippo, Executive Deputy Comptroller

Gabriel F. Deyo, Deputy Comptroller (518) 474-4037

Tracey Hitchen Boyd, Assistant Comptroller

Cole H. Hickland, Director • **Jack Dougherty**, Director
Direct Services (518) 474-5480

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