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**FOR
BUSINESS**





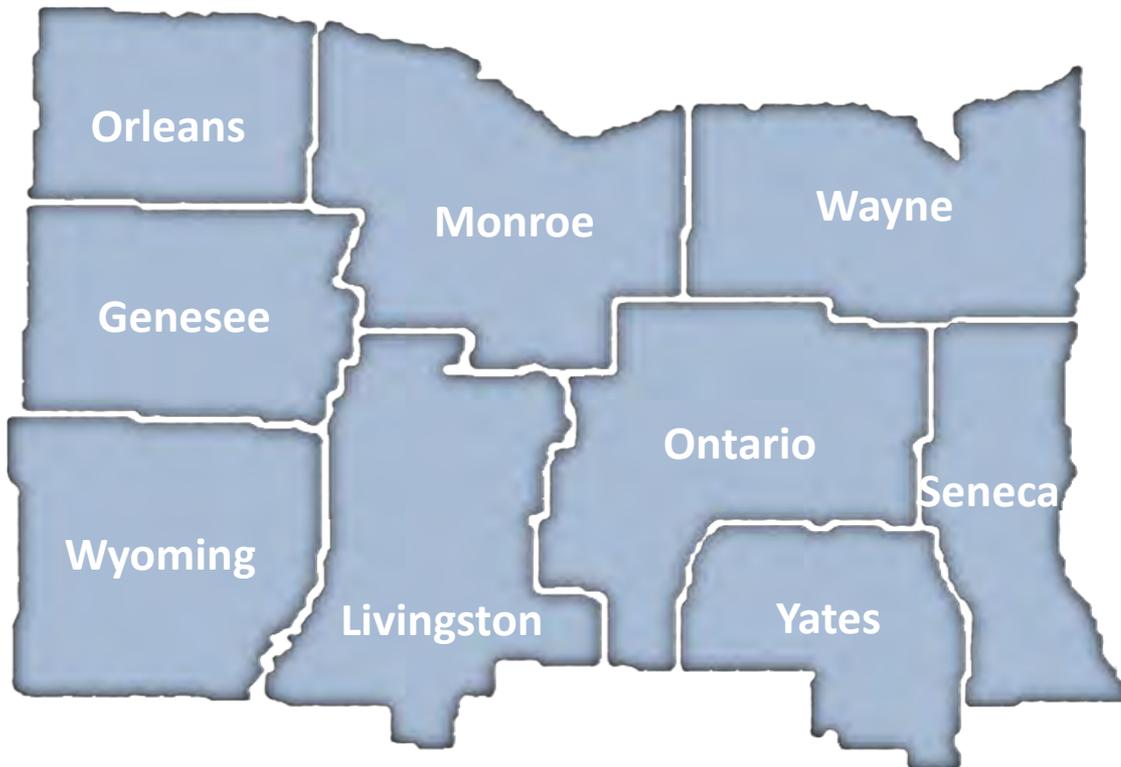
A New Vision for the
Finger Lakes
Economy

**Regional Economic
Development Councils**
Putting New York Back to Work



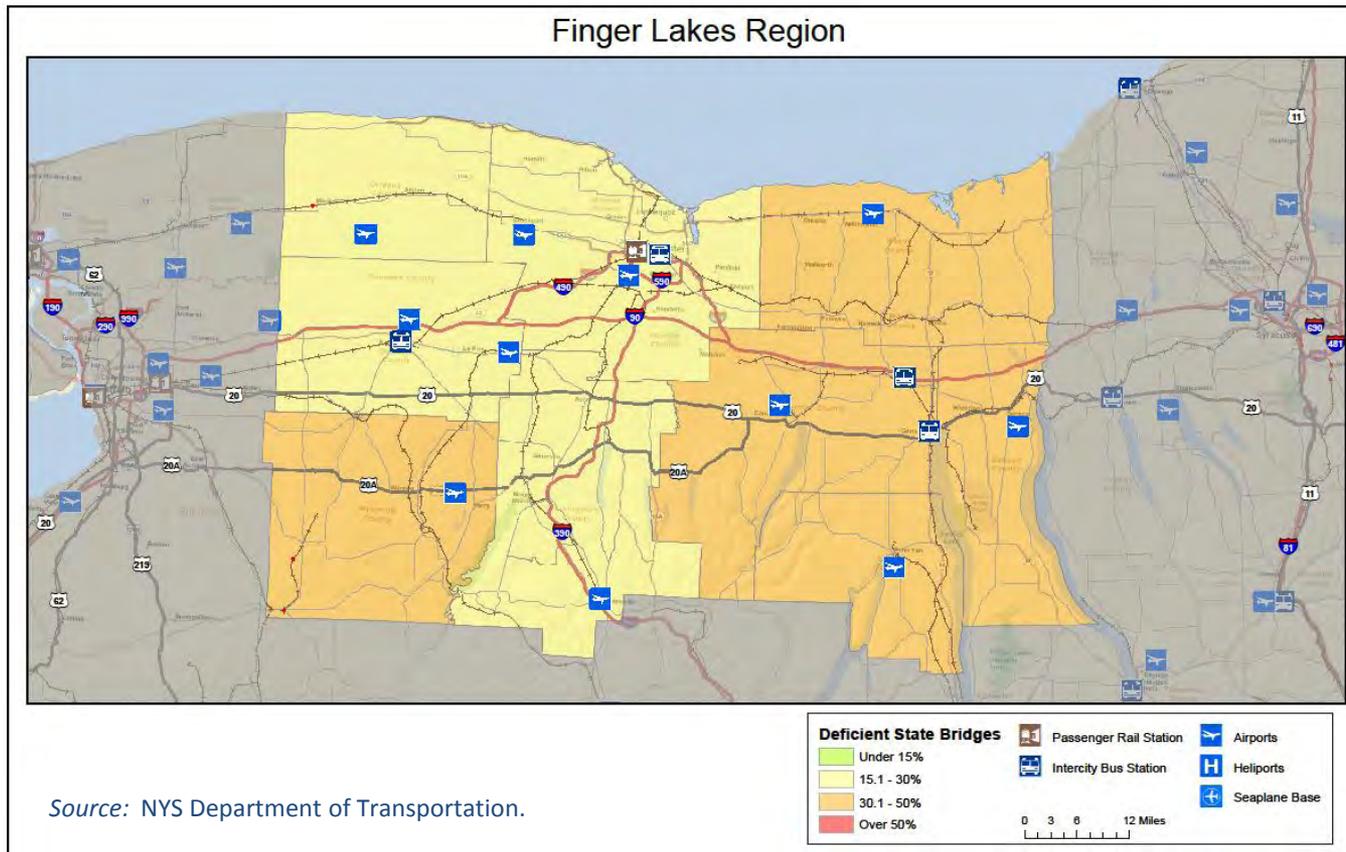
Governor Andrew M. Cuomo
Lieutenant Governor Robert J. Duffy

Changing Demographics



- The nine-county Finger Lakes Region grew 1.5% from 2000 to 2010, the 6th highest rate of growth of New York State's 10 regions.
- Three counties lost population: Genesee, Orleans, and Wyoming. Ontario and Seneca were the 4th and 7th fastest growing counties, growing 7.7% and 5.7% respectively. Others increased moderately or stayed the same: Livingston (1.7%), Monroe (1.2%), Yates (3.0%), and Wayne (0.0%)
- All four Finger Lakes cities declined in population: Rochester (-4.2%), Batavia (-4.9%), Canandaigua (-7.6%), and Geneva (-2.6%).
- The Finger Lakes regional ethnic composition is 80.0% white, 10.5% black, 5.7% Hispanic, and 2.3% Asian.

Transportation Indicators



Infrastructure



Finger Lakes 2008 Clean Water and Sewer Infrastructure Needs Survey

County	Amount
Genesee	\$9,638,701
Livingston	\$77,150,463
Monroe	\$251,154,672
Ontario	\$57,451,411
Orleans	\$49,754,727
Seneca	\$854,589
Wayne	\$30,012,034
Wyoming	\$10,919,775
Yates	\$2,755,904
Total	\$492,692,276

Culture, Tourism and Quality of Life



Finger Lakes State Parks and Historic Sites 2009 Annual Attendance

Letchworth State Park	622, 147	Seneca Lake	186,237
Hamlin Beach	271,309	Sampson	173,894
Lakeside Beach	70,411	Chimney Bluffs	108,828
Darien Lakes	59,639	Ganondagan	35,003

***Total attendance at the region's 24 parks and historic sites:
2 million***

Source: NYS Office of Parks, Recreation & Historic Preservation.

Finger Lakes Economic Impact of Visitor Spending in 2009

County	Amount in Millions
Genesee	\$ 78.9
Livingston	\$ 36.9
Monroe	\$ 887.2
Ontario	\$ 164.6
Orleans	\$ 9.9
Seneca	\$ 41.5
Wayne	\$ 432.2
Wyoming	\$ 32.8
Yates	\$ 53.3

Median Sales Price of Existing Single-Family Homes

Fourth Quarter 2010 compared to Fourth Quarter 2008

County	4th Quarter 2010p	Percent Change 4Q 2008 to 4Q 2010
Genesee	\$100,250	10.2%
Livingston	\$118,500	27.8%
Monroe	\$126,450	10.0%
Ontario	\$126,900	5.8%
Orleans	\$80,450	-5.2%
Seneca	\$83,000	-12.6%
Wayne	\$109,900	9.9%
Wyoming	\$85,750	-1.4%
Yates	\$116,000	5.5%

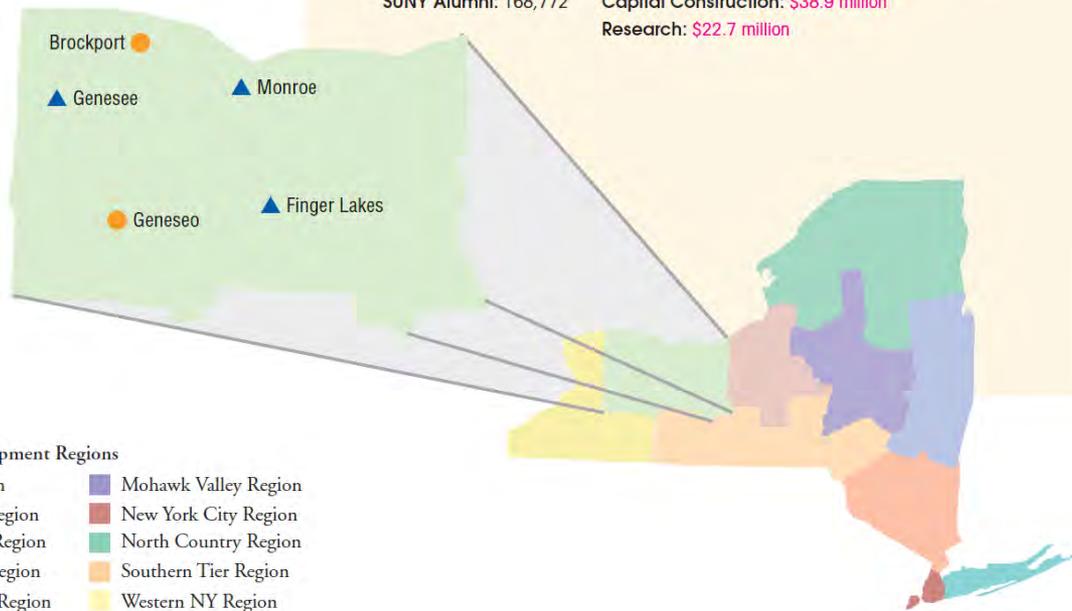
Source: NYS Homes & Community Renewal, NYS Association of Realtors

Workforce and Education



SUNY's Impact on Finger Lakes Region

Campuses: 5	Degrees Since Inception: 250,682
Enrollment: 39,008	Total All Funds Expenditures: \$342.3 million
Employees: 6,577	Payroll: \$186.2 million
SUNY Alumni: 168,772	Capital Construction: \$38.9 million
	Research: \$22.7 million



Economic Development Regions

- | | |
|-----------------------|------------------------|
| ■ Capital Region | ■ Mohawk Valley Region |
| ■ Central NY Region | ■ New York City Region |
| ■ Finger Lakes Region | ■ North Country Region |
| ■ Long Island Region | ■ Southern Tier Region |
| ■ Mid-Hudson Region | ■ Western NY Region |

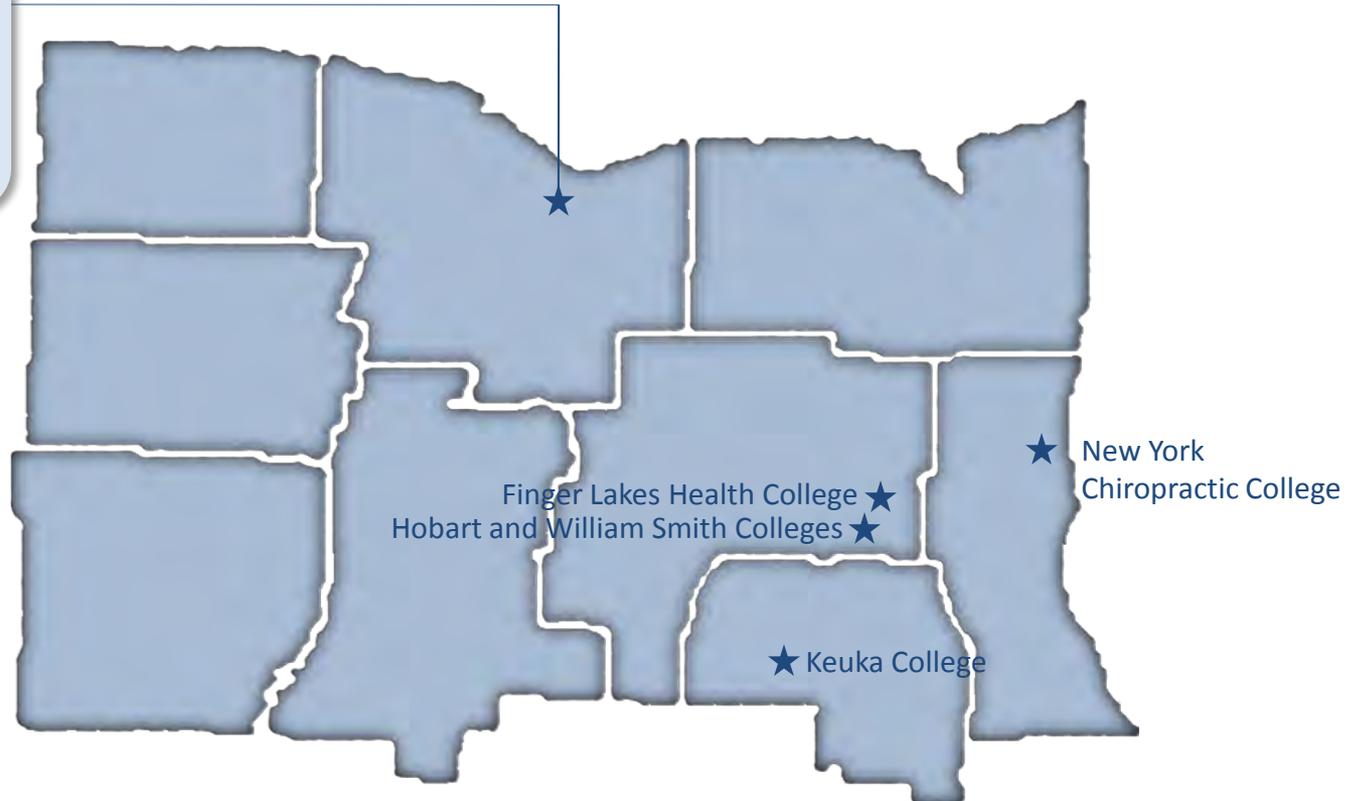
- | |
|--|
| ■ University Centers and Doctoral Degree Granting Institutions |
| ● University Colleges ★ Technology Colleges ▲ Community Colleges |

Workforce and Education

Finger Lakes Private, Not-for-Profit Colleges and Universities

Rochester

Nazareth College
Roberts Wesleyan College
Rochester Institute of Technology
St. John Fisher College
University of Rochester





Workforce and Education

Finger Lakes Labor Market

Local Area Unemployment Statistics

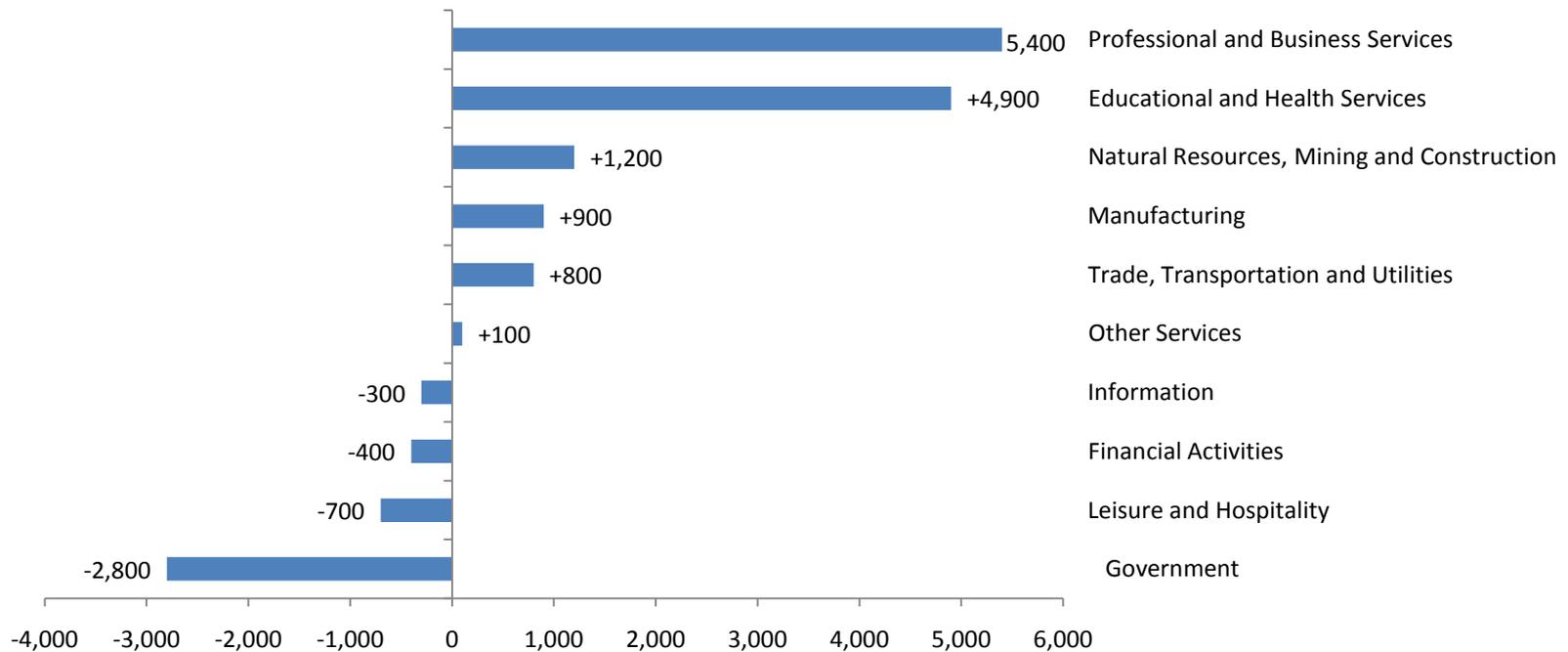
Finger Lakes	May 2011	April 2011	May 2010
Labor Force	612,200	607,000	609,900
Unemployment	43,600	43,900	47,300
Local Unemployment Rate	7.1%	7.2%	7.8%
NY State Unemployment Rate	7.8%	7.6%	8.3%
U.S. Unemployment Rate	8.7%	8.7%	9.3%

Note: Data not seasonally adjusted.

Source: NYS Department of Labor.

Finger Lakes Labor Market

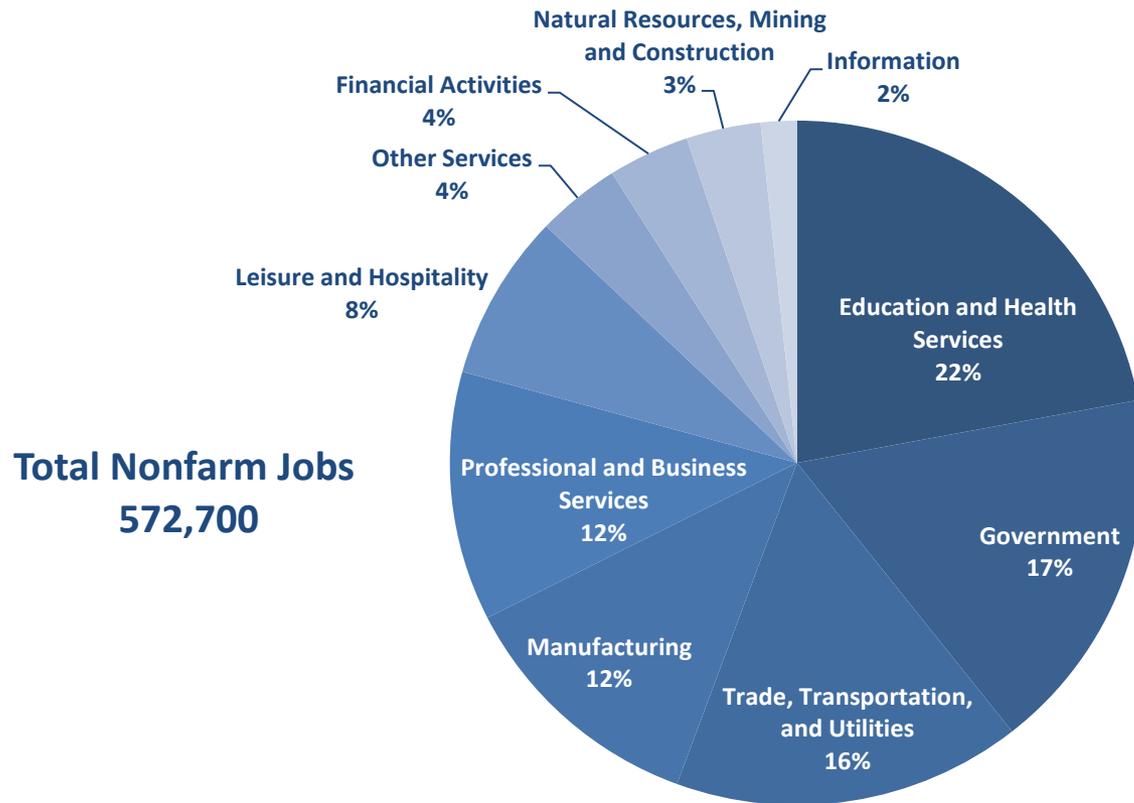
Change in Jobs, May 2010 to May 2011



Source: NYS Department of Labor.

Finger Lakes Labor Market

Distribution of Nonfarm Jobs, May 2011



Source: NYS Department of Labor.



Industry Structure and Concentration

Growth in Finger Lakes Industry Sectors

	Jobs in 2010	Growth since 2006	Average weekly wage 2010	Projected growth, 2008 to 2018
Specialty Trade Contractors	11,438	-2.2%	\$915	-4.7%
Machinery Manufacturing	12,391	-22.0%	\$1,379	-12.0%
Computer and Electronic Product Mfg	9,091	11.5%	\$1,287	-14.6%
General Merchandise Stores	10,808	10.7%	\$363	4.8%
Professional and Technical Services	22,911	-4.2%	\$1,098	11.5%
Management of Companies and Enterprises	12,127	2.5%	\$1,640	5.7%
Educational Services	71,036	3.8%	\$878	7.6%
Ambulatory Health Care Services	19,920	10.0%	\$858	26.6%
Hospitals	28,258	6.8%	\$911	3.3%
Nursing and Residential Care Facilities	23,207	6.4%	\$602	24.8%
Social Assistance	14,638	10.5%	\$461	24.9%

Source: NYS Department of Labor.

Major Projects



Major Economic Development Projects

Eastman Business Park

- 25 companies now occupy the Park
- Shove-ready sites and available buildings
- Readily available infrastructure – sewer, water, power, rail
- Technology collaboration opportunities

Midtown Rising

- Demolish & redevelop 1.5 million square feet of blighted office and retail space in Rochester
- \$55 million in state funding, additional city funding
- Will create six or seven new development sites
- Two development projects: PAETEC headquarters and Christa Morgan mixed-use project

Axcess Ontario

- 217-mile dark fiber ring in Ontario County
- Existing and new businesses are expanding because of access created by this broadband system

Genesee Valley Agri-Business Park

- New business park in Genesee County targeting food processing
- Alpina Foods, a South American yogurt company, has committed to expanding here
- Park will have all infrastructure and access to agriculture resources of the region

Major Projects

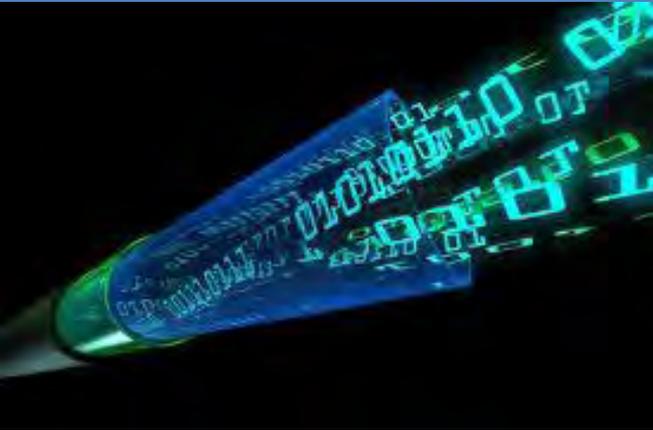


Key Regional Assets

The Finger Lakes Region is named for the geographically unique and much-treasured bodies of water found in the southern counties. The Region has nine counties and is anchored by the City of Rochester, the third largest city in NYS. It has the logistical advantage of being located within a day's travel of ten of the largest cities in North America, including both American and Canadian markets. Business and quality of life advantages make the Region an endearing place to live.

- Acclaimed high "Intellectual Density Quotient"
- Leading technology companies and resources, entrepreneurship
- 19 colleges and universities, including advanced health care facilities
- Leader in agricultural production and food processing, including wineries, fruit, dairy, and cash crops.
- Attractive quality of life with many tourism attractions, recreational opportunities and cultural attributes

Major Projects



Regional Issues/Challenges

- Infrastructure improvements needed – water, sewer, broadband.
- Urban and suburban central business district revitalization
- Retain workforce, including young professionals
- Promote more technology commercialization and entrepreneurship
- Stem the loss of area manufacturing
- Advance research capabilities



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