

The Southern Finger Lakes: Forward as a Region

State of the Region Report



Prepared by:

resonance

Southern
Finger Lakes

Foreword

Dear Reader,

The Southern Finger Lakes is a region with a proud history of innovation, hard work, and problem-solving. It's a place where global companies were built, where small businesses continue to take root, and where quality of life has always been part of our competitive advantage. Those fundamentals still matter. But today, they are not enough on their own.

This State of the Region Report was commissioned to give us an honest, shared understanding of where the Southern Finger Lakes stands today—and what it will take to compete tomorrow. Developed in partnership with Resonance Consultancy, the report benchmarks our region against peers across New York State and North-Central Pennsylvania and examines performance through three lenses that directly affect business growth and economic opportunity: Prosperity, Livability, and Lovability.

The findings are encouraging and sobering in equal measure. They confirm what many employers and investors already experience firsthand: the Southern Finger Lakes still has strong assets—an innovative manufacturing base, an entrepreneurial spirit, access to transportation, affordable housing, and a place people genuinely love to visit. At the same time, the data makes clear that we are losing momentum where it matters most. Job growth has slowed, our labor force is shrinking, and talent retention is becoming harder. These trends are not abstract. They show up in hiring challenges, expansion decisions deferred, and missed opportunities.

This report is not meant to sit on a shelf. It is meant to be used.

At Three Rivers Development, we see this research as a call to align—and to act. Align across counties, sectors, and organizations. Act with intention around workforce

development, business growth, talent attraction, and regional positioning. No single organization or industry can solve these challenges alone. But together, we can make strategic choices that convert our strengths into sustained economic momentum.

The Southern Finger Lakes' next chapter will not be written by accident. It will be shaped by the decisions we make now—about investment, collaboration, and leadership. My hope is that this report serves as a common foundation for those decisions and sparks the conversations, partnerships, and actions needed to move our region forward.

I invite you to read this report not just as an assessment of where we are, but as an opportunity to help define where we are going—and how we get there.

Sincerely,



Kamala Keeley
President, Three Rivers Development



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Why This Report Now?

Why This Report Now?

The Southern Finger Lakes region is at an important inflection point.

The purpose of this report is to serve as an honest assessment of this region's competitive strengths, as well as the challenges it's facing.

Developed in partnership with Resonance Consultancy, it clearly defines where the Southern Finger Lakes stands today and how it compares to other multi-county regions. It serves as an objective tool to surface the right insights to better target investments, strengthen messaging, and align partners around shared priorities.

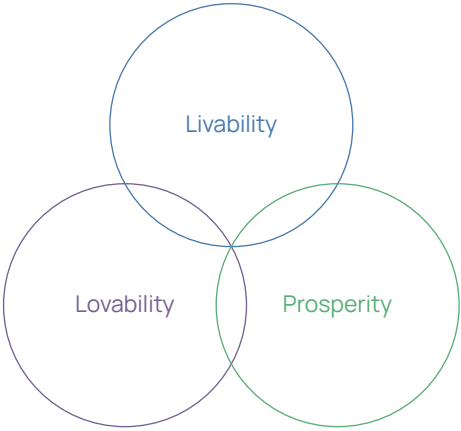
To accomplish this, our State of the Region Report looks at the Southern Finger Lakes through the lenses of Livability, Lovability, and Prosperity — the guiding pillars of Resonance's Place Power™ methodology. The three pillars are an accurate shorthand and distillation of the wide range of factors that have demonstrated moderate to strong correlations with attracting workers, investment, and/or visitors. This report leverages data from more than 90 competitiveness indicators across 41 categories to assess the competitive positioning of the Southern Finger Lakes.

Our findings highlight the many commendable strengths of the Southern Finger Lakes. This stunning region is a rare combination of vinicultural destination, innovation outpost, and scenic gem.

Yet, its strong fundamentals are increasingly challenged by an economy contracting faster than its peers.

This report is a chance to confirm our region's innate strengths — the beautiful scenery, booming wine country, accessible home market, and deep roots as a regional innovator. It is also a chance to quantify the challenges that face us today and chart a path forward towards our strongest regional story.

Funding for this report was provided through the NYSEG Economic Development Strategic Outreach Program and Three Rivers Development.



TO LEARN MORE ABOUT RESONANCE AND ITS PLACE POWER™ METHODOLOGY, PLEASE REFERENCE THE APPENDIX OF THIS REPORT.

02

Benchmarking & Methodology

Benchmarking & Methodology

Benchmarking: Giving Data Its Context

The goal of this report is to understand the competitive position of the Southern Finger Lakes as a region. To do that, our first step was to determine the comparable peer areas to assess our performance against. After all, it's hard to compete alone.

To select our peer regions, we employ a process that considers qualitative factors, like cultural perception and geography, as well as quantitative metrics, like population size and industry composition.

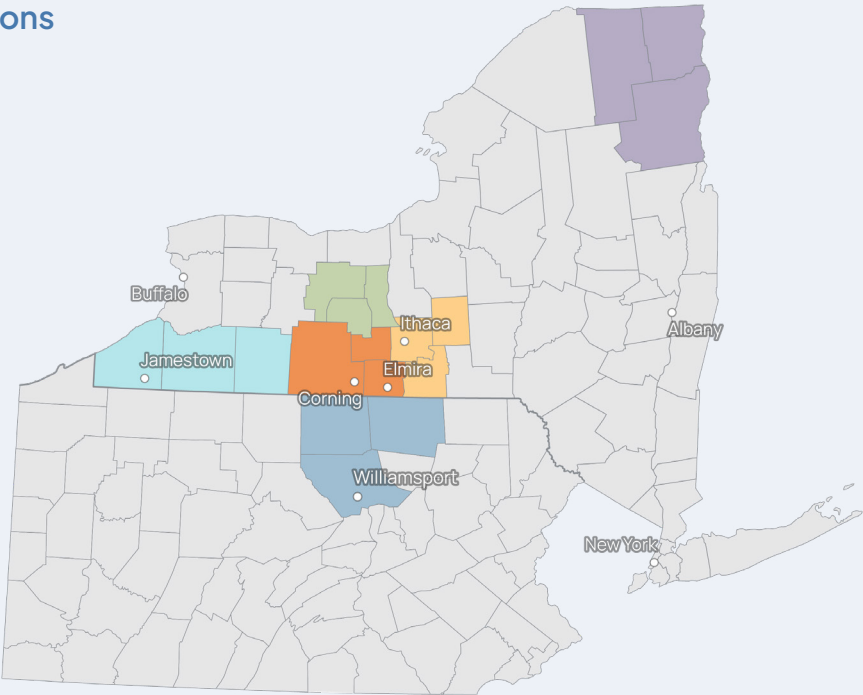
For this research, we identified five county regions across New York and North-Central Pennsylvania that served as our benchmarks: **Western Southern Tier**, **North-Central Pennsylvania**, **Ithaca & Central Southern Tier**, the **Central Finger Lakes**, and the **Adirondack North Country**.

Selected Benchmarked Peer Regions

PEER REGION/COUNTY	2024 POPULATION
Western Southern Tier	248,848
North-Central Pennsylvania	214,292
Ithaca & Central Southern Tier	198,647
Southern Finger Lakes	192,267
Central Finger Lakes	170,071
Adirondack North Country	162,162

Benchmarking Three-County Regions

- Adirondack North Country
- Central Finger Lakes
- Ithaca & Central Southern Tier
- Southern Finger Lakes
- Western Southern Tier
- North-Central Pennsylvania



Prosperity

Human capital is becoming a region’s most valuable resource when it comes to generating wealth and prosperity. For many regions — and as this report shows, for the Southern Finger Lakes — it is increasingly in short supply.

To evaluate the relative strength of human capital from one region to the next, Resonance not only measures both the educational attainment level of a region's population and the percentage of people participating in its labor force, but also the poverty rate and household income to assess how that money is going to work for the region's residents.

Wealth and prosperity are also evaluated by core statistics like business infrastructure, such as the region's airport's connectivity to other destinations, and the number and rank of the regional universities and technical colleges that fill the local talent pipeline.

PROSPERITY INDICATORS

Below is a high-level list of Prosperity indicators included in this assessment. This pillar evaluates the Southern Finger Lakes’ economic health, job opportunities, and innovation ecosystem. It’s crucial for understanding the region's ability to generate wealth and provide sustainable livelihoods for its residents. For the full list of indicators, please reference the appendices at the end of this report.

Labor Force Participation

This sub-category measures the labor force participation of a region by its current Labor Force Participation Rate (LFPR). It also takes into consideration the percentage change in labor force from 2019 – 2024, the 5-year average LFPR, and LFPR equity.

SOURCE: US BUREAU OF LABOR STATISTICS, US CENSUS BUREAU

Unemployment Rate

This sub-category measures the unemployment rate of a region.

SOURCE: US BUREAU OF LABOR STATISTICS

Poverty Rate

This sub-category measures the poverty rate of a region.

SOURCE: US CENSUS BUREAU

Workforce Sustainability

This sub-category measures the workforce sustainability of a region by the median age of its population in 2024, as well as the change in median age over time. It also measures the workforce sustainability of a region by the share of prime working-age talent pool (ages 25 – 44) in the population. Last, it takes into consideration the change in the prime working-age talent pool (25 – 44) from 2019 – 2024.

SOURCE: US CENSUS BUREAU, US BUREAU OF LABOR STATISTICS

Connectivity

This sub-category measures the connectivity of a region by the number of direct flights from its primary airport. It also takes into consideration the distance in miles to the nearest major economy.

SOURCE: FLIGHTSFROM.COM, TRAVELMATH.COM

Educational Attainment

This sub-category measures the educational attainment of a region by the percentage of the population 25 years and older with a bachelor's degree or higher.

SOURCE: US CENSUS BUREAU

Economic Vitality

This sub-category measures the economic vitality of a region by its Gross Regional Product (GRP) in thousands of dollars. It also takes into consideration the percentage change in real GRP from 2019 – 2024 and the average revenue per employee.

SOURCE: BUREAU OF ECONOMIC ANALYSIS; US CENSUS BUREAU

Population Growth

This sub-category measures the population growth of a region by the percentage change in population from 2019-2024.

SOURCE: US CENSUS BUREAU

Business Ecosystem

This sub-category measures the business ecosystem of a region by the number of new business applications per 10,000 people. It also takes into consideration the percentage change in new business applications from 2019-2024, the number of employer establishments per 1,000 people, and the percentage change in the number of employer establishments from 2019-2024.

SOURCE: US CENSUS BUREAU; BUREAU OF LABOR STATISTICS; STATSAMERICA

Consumption Potential

This sub-category measures the consumption potential of a region by per capita personal income.

SOURCE: STATSAMERICA

Job Market

This sub-category measures the job market of a region by the percentage change in the number of jobs from 2019-2024.

SOURCE: BUREAU OF LABOR STATISTICS

Innovation

This sub-category measures the innovation of a region by the percentage of employment in innovation industries. It also takes into consideration the percentage change in employment in innovation industries from 2019-2024.

SOURCE: BUREAU OF LABOR STATISTICS

Universities

This sub-category measures the universities of a region by the number of higher education institutions and total student body population. It also takes into consideration the average annual cost, starting salary of college graduates, and graduation rate of the primary universities in the region.

SOURCE: COLLEGE SCORECARD

Household Income

This sub-category measures the household income of a region by its median household income. It also takes into consideration the percentage change in median household income from 2019-2024.

SOURCE: US CENSUS BUREAU

Entrepreneurship

This sub-category measures the entrepreneurship of a region by the percentage of the population who work remotely. It also takes into consideration the percentage of the population that is self-employed.

SOURCE: US CENSUS BUREAU

Industry Diversification

This sub-category measures the industry diversification of a region by its Industry Diversity Index score. It also takes into consideration the percentage of employment in export-oriented industries.

SOURCE: BUREAU OF LABOR STATISTICS

Manufacturing & Warehousing

This sub-category measures the manufacturing and warehousing presence in a region by the percentage of employment in construction, manufacturing, and warehousing. It also takes into consideration the percentage change in employment in the industry from 2019-2024.

SOURCE: BUREAU OF LABOR STATISTICS

Livability

Livability benchmarks a region’s physical quality of place.

This includes everything from its access to the internet to its healthcare provision to citizens, to how walkable and bike-friendly it is for residents and tourists to navigate and explore. These are factors that not only attract (and keep) talent, but companies as well.

Livability also looks at natural attributes of a region, such as the number of sunny days annually, and the relative quality of the air residents and visitors breathe. Additionally, it considers the cost of living, from median house price to average rent for an apartment, as well as the mortgage and rent burden on residents. As the overall cost of living climbs, the cost of living in a region increasingly matters as much as the potential of earning a living there.

LIVABILITY INDICATORS

Below is a high-level list of Livability indicators included in this assessment. This pillar was included to assess the Southern Finger Lakes' quality of life factors, such as healthcare access, environmental quality, and urban infrastructure. It helps gauge how well the region meets residents' basic needs and supports their overall well-being. For the full list of indicators, please reference the appendices at the end of this report.

Walkability

This sub-category assesses the walkability of a region by the percentage of the population who walk to work. It also takes into consideration the EPA Walk Index rating of the region.

SOURCE: US CENSUS BUREAU, UNITED STATES ENVIRONMENTAL PROTECTION AGENCY

Bikeability

This sub-category includes metrics that assess a region’s bike infrastructure. Specifically, it measures the percentage of the population who bike to work, as well as street intersection density.

SOURCE: US CENSUS BUREAU

Public Transit

This sub-category measures the percentage of the population who take public transit to work. Additionally, it looks at the number of transit trips per week within a half mile, the population near public transit, and the number of jobs accessible within a 30-minute public transit trip.

SOURCE: US CENSUS BUREAU, ALLTRANSIT

Weather

This sub-category looks at the average amount of precipitation in a region relative to the average of all its peer groups, as well as the average July temperature, to assess the quality of a region's weather and climate.

SOURCE: NATIONAL CENTERS FOR ENVIRONMENTAL INFORMATION

Air Quality

This sub-category includes metrics that measure the average level of exposure to pollutants and the number of smoke hours impacting a region and the communities within it.

SOURCE: COUNTY HEALTH RANKINGS AND ROADMAPS

Parks & Gardens

This sub-category looks at the number of quality parks and gardens across a region, as well as the level of engagement with them from the populace.

SOURCE: GOOGLE

Housing Affordability

This sub-category looks at the homeownership rate of a region, as well as the average home value and median rent of a one-bedroom apartment. Additionally, it accounts for the share of residents in a region burdened by their mortgage or rental costs.

SOURCE: US CENSUS BUREAU; ZILLOW

Cost of Living Pressures

This sub-category measures the living wage of both a single person and a family within the region, as well as the discrepancy between those living wages and the median income of the region.

SOURCE: LIVING WAGE BY MIT; US CENSUS BUREAU

Health Outcomes

This sub-category measures the region's average life expectancy against its comparable peer regions.

SOURCE: COUNTY HEALTH RANKINGS

Health Access

This sub-category measures the number of primary care physicians per 1,000 residents, as well as the number of residents within the region who are medically uninsured.

SOURCE: COUNTY HEALTH RANKINGS

Education Quality

This sub-category measures high school graduation rates in the region.

SOURCE: COUNTY HEALTH RANKINGS

Transportation

This sub-category measures the average commute time to work in a given region. It also measures the distance to the largest major city in miles.

SOURCE: US CENSUS BUREAU; GOOGLE

Internet Infrastructure

This sub-category assesses the overall internet infrastructure of a region. For this report, we measured the percentage of the population with a 5G-NR 35/5 Mbps mobile broadband connection, as well as the percentage of the population with a fixed broadband speed greater than 250/25 Mbps.

SOURCE: FEDERAL COMMUNICATIONS COMMISSION



Lovability

Lovability speaks to the relative vibrancy and quality of place relative to its competitive set.

For almost a decade, Resonance research has shown that the more vibrant a region is in terms of its culture, sports, dining, and nightlife, the more visitors, young professionals, and large corporations it attracts. A region's lovability also inspires residents, businesses, and visitors to promote that region to the world more effectively and cost-efficiently than its marketers can ever hope to.

Resonance ranks a region's performance in each of these areas based on the number of visitation assets and experiences in the region, as well as the quantity of reviews in key user-generated digital channels, such as Google.

LOVABILITY INDICATORS

Below is a high-level list of Lovability indicators included in this assessment. The inclusion of this pillar aims to measure the Southern Finger Lakes' cultural vibrancy, recreational offerings, and overall appeal to residents and visitors alike. It reflects the region's ability to create emotional connections and a sense of place. For the full list of indicators, please reference the appendices at the end of this report.

Sights and Landmarks

This sub-category measures the number of quality sights and landmarks within a region, as well as the popularity of those assets based on Google reviews.

SOURCE: GOOGLE

Hospitality Businesses

This sub-category measures the number of quality leisure and hospitality establishments within a region, including restaurants, hotels, and resorts.

SOURCE: BUREAU OF LABOR STATISTICS

Lodging

This sub-category measures the number of hotel rooms in a region. Additionally, it looks at the 12-month hotel occupancy rate of the hotels across a region, allowing Resonance to assess seasonality. Last, it also measures the number of Airbnbs in a region.

SOURCE: GOOGLE

Museums

This sub-category measures the number of quality museums in a region, as well as the popularity of those museums based on Google reviews.

SOURCE: GOOGLE

Restaurants

This sub-category measures the number of quality restaurants in a region, as well as the popularity of those restaurants based on Google reviews.

SOURCE: GOOGLE

Wineries and Fermentation Venues

This sub-category measures the number of quality wineries and fermentation venues in a region, as well as the popularity of those assets based on Google reviews.

SOURCE: GOOGLE

Outdoor Activities

This sub-category aims to quantify the availability of quality outdoor activities across a region. This is assessed from several dimensions, including:

- Number of lake-based activities
- Popularity of lake-based activities
- Number of lake-based hiking & nature activities
- Popularity of land-based hiking & nature activities
- Number of campgrounds
- Popularity of campgrounds

SOURCE: GOOGLE

Nightlife

This sub-category measures the number of quality bars and clubs in a region, as well as the popularity of those bars and clubs based on Google reviews.

SOURCE: GOOGLE

Family-Friendly Activities

This sub-category measures the availability of family-friendly activities in a region, as well as the popularity of those activities based on Google reviews.

SOURCE: GOOGLE

Shopping

This sub-category measures the number of quality shopping experiences in a region (malls, markets, etc.), as well as the popularity of those experiences based on Google reviews.

SOURCE: GOOGLE

Theaters and Concerts

This sub-category measures the number of quality theaters and concerts in a region, as well as the popularity of those assets based on Google reviews.

SOURCE: GOOGLE



03

Our Findings
& Insights

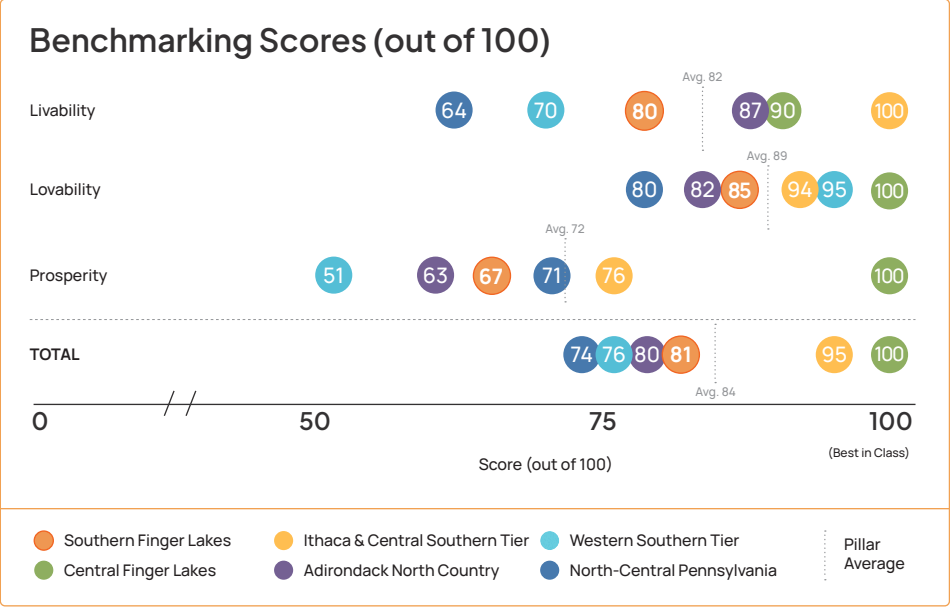
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Summary insights

Key Findings for the
Southern Finger Lakes

OVERALL REGIONAL SCORE: 81/100
OVERALL REGIONAL RANKING: 4/6

The benchmarking analysis of the Southern Finger Lakes reveals a region with strong livability fundamentals and highly productive lovability assets, with distinction given to its wine region. The findings also make clear the key economic pressures that are impacting the full region and highlight the real opportunities for growth and lasting economic resilience.



01
Innovative Roots,
but Fewer Innovators

The Southern Finger Lakes region demonstrates strengths in areas like manufacturing and innovation, but these have not translated into sustained economic growth. A contracting job market is pushing out the talent that has historically powered this region. Secondary sectors, a strong entrepreneurial base, and a well-connected airport are working for the region. Yet, compared to its peers, the Southern Finger Lakes faces greater challenges related to job growth, population retention, and overall economic momentum.

02
Livable Strengths Face
Trailing Outcomes

The Southern Finger Lakes has all the assets to be a truly great place to live, but these assets are not translating to the positive outcomes our region needs. This access-outcome gap is felt most in matters of healthcare, housing, and transit, where high scores for access and affordability are contrasted against low scores for transit usage, life expectancy, and actual affordability. Our findings reveal a close correlation between the economic challenges the region is facing and the livability challenges its residents encounter in their daily lives.

03
A Day-Trip Sensation
Seeking Overnights

The Southern Finger Lakes has a supply of visitation assets in line with its size as a region. Yet, its assets generate an outsized level of engagement, indicating that what the region does have is highly loved. Our findings indicate a region-defining strength in wineries, alongside higher-than-expected engagement in key categories, namely museums, shopping, and dining. However, our report also shows an under-activated lodging sector and region-wide challenges around converting day-trip visitors into overnight stays.

At a Glance

Prosperity

Key Prosperity insights reveal a region that, despite its deep innovative roots, is experiencing considerable economic headwinds. A contracting economy is pushing high-value talent out, and the region experienced the largest decline in labor force participation between 2019 and 2024, falling 7.1 percentage points over the period. Its population, too, is dropping faster than its peers. Looking ahead, growth in construction and logistics suggests opportunities to diversify, and a well-connected airport stands to become an unexpected advantage of the region.

Livability

Key Livability insights illustrate the impact of our prosperity challenges. Strong fundamentals — cheaper housing, leading healthcare access, and the top public transit access — aren't resulting in positive outcomes, indicating that larger socioeconomic pressures like reduced household spending power are diluting the value of key Livability strengths. Looking ahead, it's all about closing this gap and realizing the full potential of our foundations for life.

Lovability

Key Lovability insights back up our region's status as a well-loved wine region, showing larger-than-expected engagement with our visitor assets relative to our population size. However, underperformance in certain categories — notably Family-Friendly Activities — and low hotel occupancy rates suggest areas of necessary growth and potential inroads to greater economic prosperity. Looking ahead, our research suggests there may be an opportunity to activate our evening economy and create a powerful hospitality engine.

67/100

Prosperity Score, just behind the peer average of 72.

▼ 3.5%

Population decline in the region, representing a higher rate than our peers.

▼ 4.8%

Decline in the number of jobs in the region between 2019 and 2024, the largest among our peers.

80/100

Livability Score, just behind the peer average of 82.

#1

Public transit access. Despite this, just .08% of the region uses public transit for work.

#1

Healthcare access, yet our region scores near the bottom for healthcare outcomes.

85/100

Lovability Score, just behind the peer average of 89.

#2

The second most popular wine region, reflecting a defining strength with high supply and appropriately high demand.

51.2%

Hotel occupancy, representing an under-activated lodging industry.



PROSPERITY

What’s produced here? Check your pocket.

The visually striking and tough cover glass used on many smartphones was pioneered by Corning Incorporated, headquartered in the Southern Finger Lakes. That’s far from just a footnote. It’s a testament to this region’s immense capability and formidable economic strengths, namely a strong innovation foundation and the workforce to drive it.

However, that regional momentum now faces growing challenges.

Our Core Insight

Today, the Southern Finger Lakes trails its peers in Prosperity. Job losses are accelerating, population is declining faster than comparable communities across the state and nation, and the talent that has historically powered the region’s innovation economy is, increasingly, leaving the region.

That presents an urgent challenge. Yet, research reveals an opportunity, too: to turn strong fundamentals into economic momentum, retain the talent that we need to keep, and see the Southern Finger Lakes emerge confidently as an innovative, prosperous region.



Key Prosperity Findings

- 01 The region maintains strong economic foundations, ranking highly in innovation industries, connectivity, and industry diversification.
- 02 Job losses are contributing to population and workforce decline.
- 03 Limited talent pipeline and business scale constrain long-term growth.

The Importance of Prosperity

While Livability and Lovability are core to our holistic understanding of a region, Prosperity is critically important when benchmarking it against its peers. For this reason, our report starts here.

On its face, prosperity is a measure of a region’s economic health — whether or not a place is thriving. As much as that’s measured in numbers, its human dimension cannot be overstated. When places thrive, citizens thrive in tandem. Their businesses flourish. They find more opportunities to pursue their dreams, live comfortably, and work lucrative jobs.

Prosperous places tend to have an easier time keeping talent, too. Where better to put down roots, after all? Loyal, happy citizens tend to drive more vibrancy and, hopefully, catalyze infrastructure to make life easier and more enjoyable.

Prosperity, in this way, is both cause and effect. It’s a magnet for talent, who in turn bring the skills that power even more prosperity. Long-term, it’s an engine for a more livable, lovable region.

Our Prosperity Score

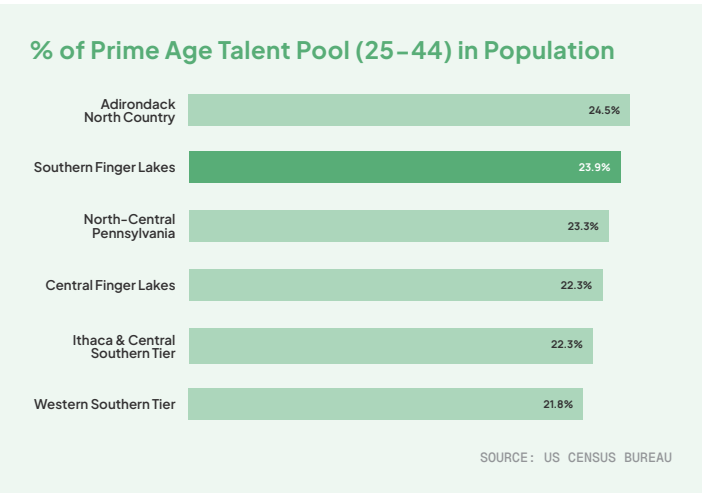
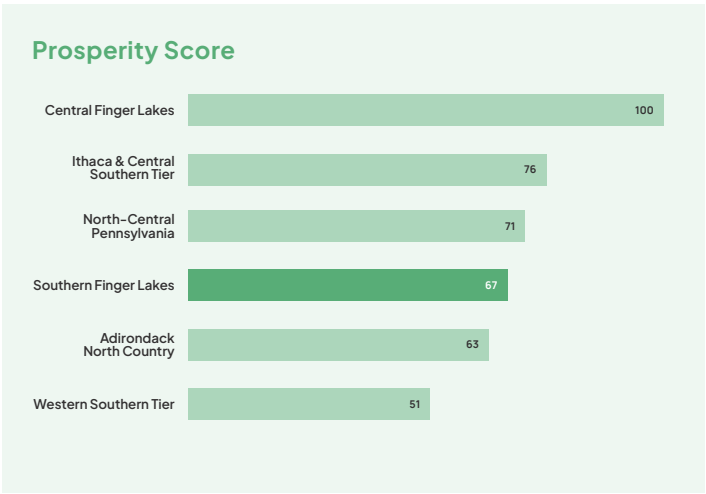
Among its peers, the Southern Finger Lakes ranks mid-pack for Prosperity, with an overall score of 67 out of 100, slightly below the overall average of its competitors. Its performance is constrained largely by job loss and population decline, but that shouldn’t betray its strengths. The fundamentals for lasting prosperity are (and have been) here.

Don’t forget: this region has long been a place where great things get built. Where else could Brooklyn glassmakers grow into material science innovators? And it was here that visionaries like aviator Glenn H. Curtiss took to the skies, defying gravity itself. Those inventive, hard-working roots still run deep.

Among our benchmarked regions, the Southern Finger Lakes sports the second-highest percentage of prime working-age talent in its population, at nearly 24%. Our region’s entrepreneurial streak endures to this day, reflected in higher-than-average business applications, even if the employer base is low. Organizations like Incubatorworks, in Elmira, are working today to accelerate this pace with resources, sessions, and workshops for the region’s small-business owners.

What’s more, education pathways are among the most affordable in our region, and a modest portion (27.2%) of adults older than 25 hold a bachelor’s degree or higher, placing the Southern Finger Lakes 4th among peer regions.

On paper, that’s many of the ingredients of a region primed to prosper. Yet, increasingly, the challenge is retaining the people who have, for generations, made it run.



THE PROSPERITY SCORE REFLECTS EACH REGION’S AGGREGATE PERFORMANCE ACROSS ALL PROSPERITY INDICATORS AND CATEGORIES. SCORES ARE CALCULATED RELATIVE TO THE AVERAGE OF THE PEER SET, AND THE BEST-PERFORMING REGION IS ASSIGNED A SCORE OF 100.

The Challenge: Population Decline

Our Finding

We are at an inflection point. The Southern Finger Lakes is losing the people it can least afford to lose, and at a faster rate than most of its peers. While we currently enjoy a strong population share of prime-age workers, our most productive economic group is increasingly seeking opportunity elsewhere.

▼ 3.5 %

Population change from 2019 to 2024, the 2nd fastest decline among peers.

▼ 1.6 %

Decline in prime working age residents (25 – 44), the second largest drop in the peer set.

▼ 0.25 %

Nationwide average decline for comparable counties. Our loss is steeper.

The gap between our reality and our potential is widening. Population trends are the biggest tell: The Southern Finger Lakes is losing residents at the second-fastest rate among our benchmarked regions.

On its own, that’s not an unheard-of story in Upstate New York. In fact, all but one of our benchmarked regions saw their populations shrink between 2019 and 2024. However, the Southern Finger Lakes’ population loss is significantly steeper than broader trends among similarly sized communities.

That proves true on the national scale, too. Research shows counties with populations under 125,000 declined by an average of 0.25% during that same period, while the statewide average among similar counties in New York was 0.1%, indicating our region is losing population faster than most comparable communities, home or away. It suggests this trend reflects more than normal demographic shifts.

Who is leaving matters, too.

The number of prime working-age residents declined by 1.6% across our region between 2019 and 2024, representing the second-largest decrease among our peers. These are not people aging out of the workforce. These are workers, entrepreneurs, and young families. For practically all regions, the importance of this population is existential. It is what a future is built around.

This all suggests that, while the Southern Finger Lakes maintains a relatively strong share of working-age residents today, it is struggling to retain or attract additional talent in this critical workforce cohort. Over time, that high population share may erode further – and those losses aren’t made back overnight.



Why Opportunity Matters

Our Finding

Our region is not lacking in a strong foundation. Its lasting prosperity is challenged by a contracting job market that is driving out the talent the region’s economic engine depends upon.

▼ 4.8 %

The decrease in the number of jobs from 2019 to 2024, the largest among peer regions.

▼ 6.8 %

Steuben County job loss, signaling the heaviest local burden.

▲ 3.2 %

Schuyler County job growth, the only county to see job number gains.

The Southern Finger Lakes experienced a 4.8% decline in the number of jobs between 2019 and 2024, representing the largest decrease among peer regions during this period. This number is nearly 2 percentage points greater than the statewide average. Granular data shows that most of these losses occurred after 2021, suggesting that, despite overlap with the COVID-19 outbreak, the losses can’t be entirely attributed to the pandemic.

A county-level view puts this trend in greater context. Our data shows job losses concentrated in Steuben and Chemung County, which saw a 6.8% and 3.8% drop in jobs, respectively, from 2019 to 2024. Schuyler, perhaps by virtue of being the epicenter of our region’s wine boom, saw 3.2% growth, the only county to see notable job gains. Labor force participation tracks in tandem, falling 7.1% region-wide, led by Steuben (-8.8%) and Chemung (-6.0%).

NOTE: Despite these declines, the gender participation gap remains relatively moderate at 3.4%, ranking 4th among peers, suggesting that broader workforce engagement — not gender disparities — is the primary challenge affecting participation.

But job loss is not only a question of volume. The kinds of jobs a region loses reveal just as much about its economic trajectory as the number. For the Southern Finger Lakes, the greatest losses are focused in manufacturing, an industry that has long anchored the region.

This sector shed nearly 1,500 jobs between 2019 and 2024, more than double the peer region average. The steeper drops in Steuben and Chemung Counties, both historically driven by manufacturing, start to make sense.

These are not peripheral losses. Manufacturing will remain central to the Southern Finger Lakes’ prosperity, but its contraction is one of the primary drivers of the broader employment and workforce challenges the region faces today.

Our region’s Gross Regional Product (GRP) quantifies this shift. From 2019 to 2024, real (inflation-adjusted) GRP grew just 1.5%, ranking near the bottom among peer regions. This modest growth is in stark contrast with stronger expansion elsewhere, including North-Central Pennsylvania (+18.8%), which has enjoyed a considerable oil and gas boom,

and the Central Finger Lakes (+7.1%), which has seen strong growth among its peers. The gap is meaningful, though the causes behind each region’s trajectory likely differ considerably.

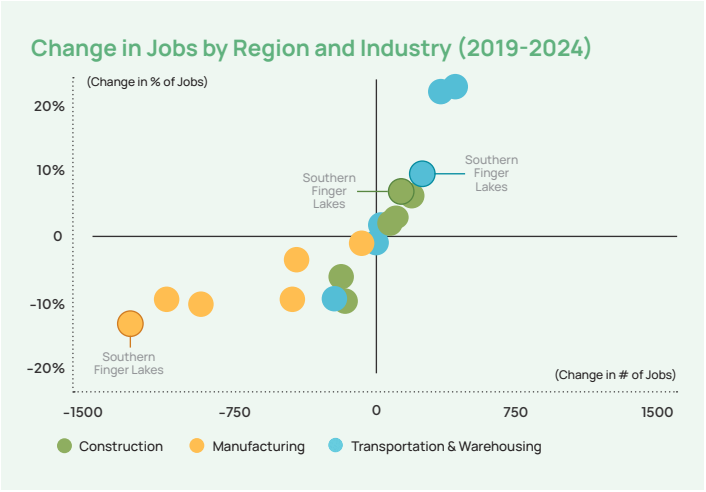
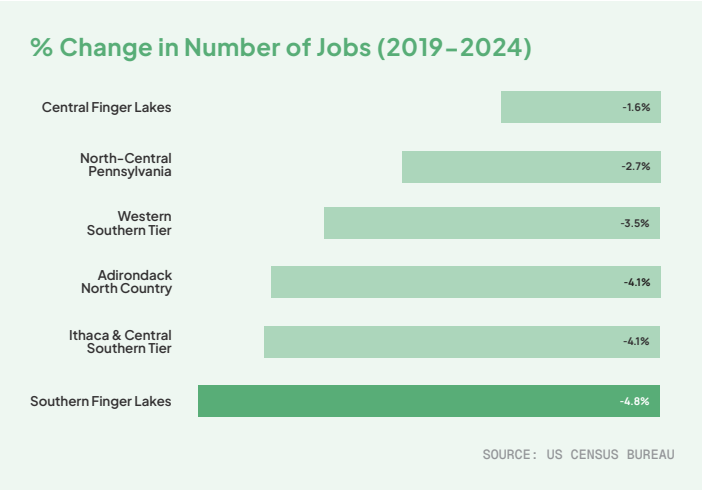
Future Thinking: Peer Inspiration

There’s no silver bullet for keeping jobs and talent within a region. Further planning and investigation will be required to identify how talent flows through the Southern Finger

Lakes and the types of opportunities that build and maintain a resilient labor ecosystem.

Looking at our peers may offer a good place to start this process. Initial impressions of the Central Finger Lakes indicate that it faces many similar economic challenges as the Southern Finger Lakes. Yet, it tends to outperform our region in key, decisive categories across this research.

Resonance recommends a deeper analysis into the industry composition, talent ecosystem, and migration patterns of the Central Finger Lakes and how it compares to those of the Southern Finger Lakes. By learning about its strengths, our teams may gain valuable insight to help chart a targeted roadmap for our own success.



Prosperity’s Human Impact

Our Finding

Median income in the Southern Finger Lakes is not outpacing the rising cost of living. Meanwhile, peer regions are seeing higher income growth, presenting a talent retention risk for the region.

\$65,122

The median household income in 2024, ranking 4th in our competitive set.

▼ 2.0 %

Growth in real median household income. By comparison, Central Finger Lakes increased 2.6%

15 %

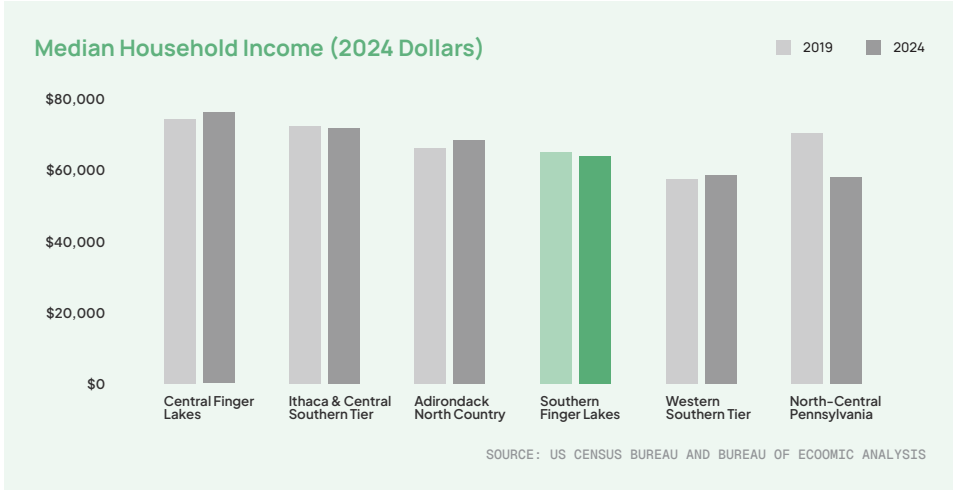
The region’s poverty rate, the 2nd-highest in the comp set

Invariably, macro-economic shifts have an impact at the home and earner level. Median household income in the Southern Finger Lakes reached \$65,122 in 2024, fourth among peer regions. However, when adjusted for inflation, real household income in the region actually declined by 2% between 2019 and 2024.

Meanwhile, several peer regions moved in opposite directions over the same period.

The Adirondack North Country saw real income grow by 3.5%, while the Central Finger Lakes saw 2.6% growth.

Residents of the Southern Finger Lakes region are finding their dollar isn’t going as far as it used to, while the cost of living stays steady. Over time, those trends can motivate talent to move to greener pastures and compound the effects of a narrower job market.



This is echoed in poverty data, too. Fifteen percent of our region’s population lives under the poverty line, the second highest in our peer set. With the average for similar-sized communities at 15.5%, it’s important to note that such a number doesn’t fall far from what’s expected for our size, and that the story varies by county. Notably, Chemung carries the heaviest burden at 16.3%, while Steuben and Schuyler sit somewhat lower at 13.8% and 14.8%, respectively.

Regardless of county, these income challenges likely reflect the region’s broader economic dynamics, where job losses and slower employment growth have constrained wage gains, limiting improvements in household prosperity.

Future Thinking: The Livability Lens

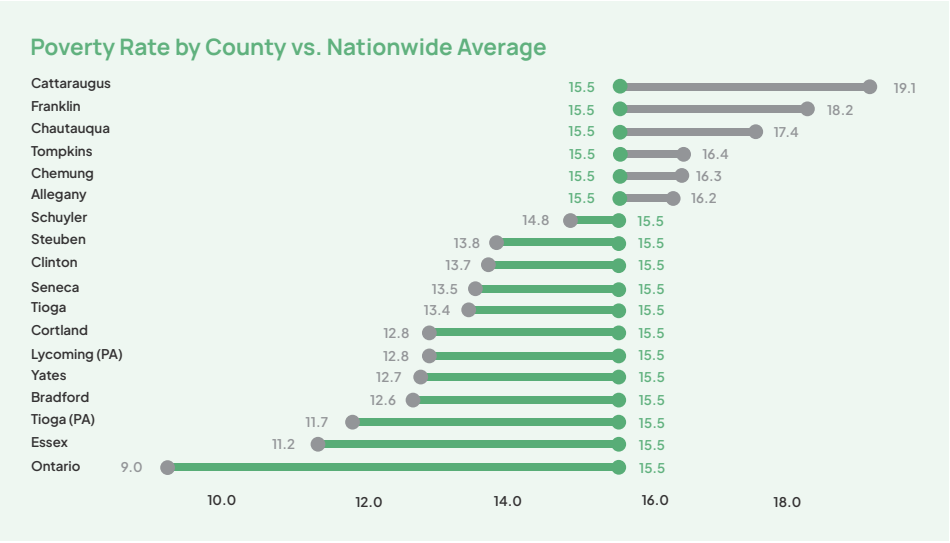
Our prosperity challenges are not abstractions. They are a reflection of the daily reality of our citizenry, and a core part of what makes getting and keeping talent increasingly difficult. Most importantly, they do not exist in a vacuum.

Beyond just enabling opportunity, the region will need to work together to ensure the other aspects that enable prosperity, like

a healthy transit system, access to healthcare, or availability of childcare, are considered, so its residents can fully participate in an active, productive economy.

Parts of our region are already taking decisive action: Chemung County has responded directly to these pressures with its first-ever Comprehensive Plan.

Launched in 2024 and adopted in 2025, it establishes a “community-based vision” for the county, placing economic growth, housing, and quality-of-life improvements at the center of a long-term, county-wide vision.



Trajectory & Resilience

Our Finding

Diversifying alongside our region’s strong economic foundations is necessary to build a lasting and resilient engine for prosperity.

What our research tells us is not that our region lacks productive industries or engines for prosperity. Rather, it highlights the vulnerability that comes with having such defining strengths. The Southern Finger Lakes region today remains vulnerable to sector-specific shifts. This means slowing momentum in our strongest industries is felt acutely across our region.

The path ahead is not about leaving behind the industrial roots of the Southern Finger Lakes. We must expand its strengths in the service of long-term resilience.

There are signals that this process is already underway. The Southern Finger Lakes ranks 2nd overall for industry diversification among peer regions, reflecting a relatively balanced economic structure, and suggesting many of our peers struggle with the same economic make-up challenges as us.

It should come as no surprise that export industries are a particular strength for the Southern Finger Lakes, as they define its economic identity. These industries, particularly advanced manufacturing and technology production (anchored by companies like Corning Incorporated),

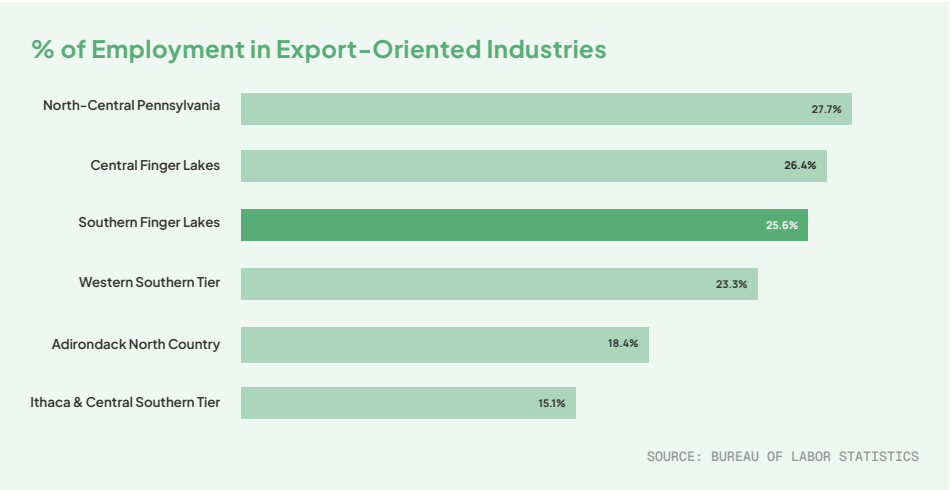
account for 25.6% of total employment, the third-highest share in the peer group.

That’s a critical cohort. Supporting our differentiating manufacturing industries will be essential to strengthening economic growth and stabilizing the region’s workforce.

Secondary industries show modest growth and suggest paths toward diversification. The region added 250 transportation and warehousing jobs from 2019 to 2024, a 10% increase that beats the peer region average.

It’s a natural complement to our strengths in exports. As our region’s manufacturing and innovation sectors produce more goods for outside markets, a logistics advantage becomes more and more valuable.

The construction sector grew as well, adding 160 new jobs in the same period, nearly the highest among our peers. Neither sector gain is large enough to offset manufacturing losses on its own, but both represent areas where the region is moving in a positive direction and future foundations are being built.



Future Thinking: An Aero Advantage

Regional connectivity is an underappreciated, if not unexpected, strength of the Southern Finger Lakes. As far as rural regions go, this is among the more accessible, ranked second in our research.

Elmira-Corning Regional Airport offers five direct flight routes, the second highest among peer regions. Today, this includes Delta service connecting travelers to the national and global network through its Detroit hub, along with Allegiant routes to popular Florida vacation destinations. It’s a strong foundation for growth. Looking ahead, adding new carriers and new connections to other global hubs will meaningfully bolster the region’s air connectivity.

Meanwhile, New York City is a four-hour drive away — a manageable journey to the nation’s largest urban center. This sort of accessibility opens doors to investment, invites business travel, and keeps the region on the radar of outside partners and employers.

This unique aspect of our region, when paired with a historically innovative economic fabric, could be an asset when it comes to diversifying this region’s business footprint. Realizing that potential requires actively marketing the region’s accessibility alongside its economic strengths, particularly to innovation-sector employers in adjacent markets.



PROSPERITY

In Summary: Prosperity

Our Prosperity data paints a picture of a region under pressure. Pressure, however, does not define trajectory.

The Southern Finger Lakes region possesses the structural ingredients to reverse these trends, ease pressure, and power prosperity. As this research shows, that's already happening in some important ways. What comes next depends on how deliberately those strengths are put to work.

This is a question that extends well beyond economics alone. In our next sections, we'll see how our region's path to prosperity is closely tied to how **livable** and **lovable** this place is for the people it needs to keep, and the visitors it seeks to attract.



Paths Forward

NEAR-TERM

Talent Flows and Wage Gap Analysis

Develop a study to look at if and how wages, job availability, and career pathways contribute to talent loss and help pinpoint which industries and occupations are driving lower median wages and contributing to talent loss.

MID-TERM

Custom Cluster Analysis

Move beyond standard industry groupings to define how the region's economy actually functions—identifying emerging and adjacent clusters, where growth is already occurring, and where there is potential to scale and improve wage outcomes.

LONG-TERM

Comprehensive Economic Positioning Strategy

Develop a data- and strategy-backed positioning to attract talent and investment, strengthen entrepreneurship and business growth pathways, and give the whole region a single path ahead.

Livability



LIVABILITY

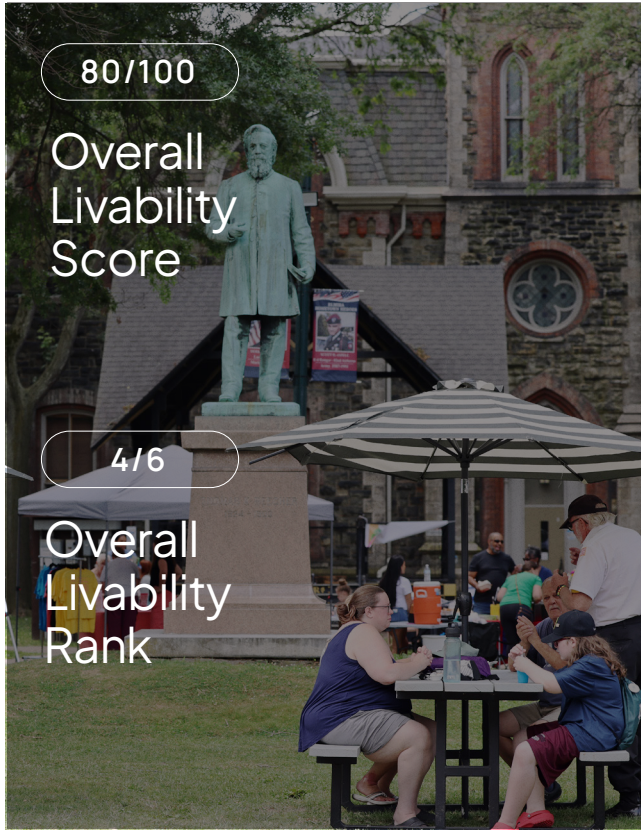
Stunning landscapes, affordable homes, and air to breathe deeply.

The Southern Finger Lakes is one of the most naturally gifted regions in the Northeast. Clean air. Access to eleven Finger Lakes. Strong healthcare. And home prices that beat neighboring markets handily. That’s a powerful starting point for the region — but outcomes are yet to follow.

Our Core Insight

Today, our region makes a compelling livability proposition, possessing key assets for superior living. Those assets are not yet translating to a consistently high quality of life.

Key economic challenges (See our Prosperity Insights section) are eroding the beneficial impact of this region’s unique livability strengths. Our research reveals a region distinguished by its well-loved outdoors, class-leading healthcare access, and home prices that beat nearby counties. Economic pressure may be stifling potential. But the potential is ours to activate.



Key Livability Findings

- 01 Strong livability foundation, supported by assets such as affordable housing, great air quality, popular parks, and high public transit access.
- 02 Despite strong access to healthcare, transit, and affordable housing, the region is not yet translating strengths into positive outcomes.
- 03 Regional performance is uneven, with Chemung County lowering overall outcomes due to weaker indicators, such as life expectancy.

The Importance of Livability

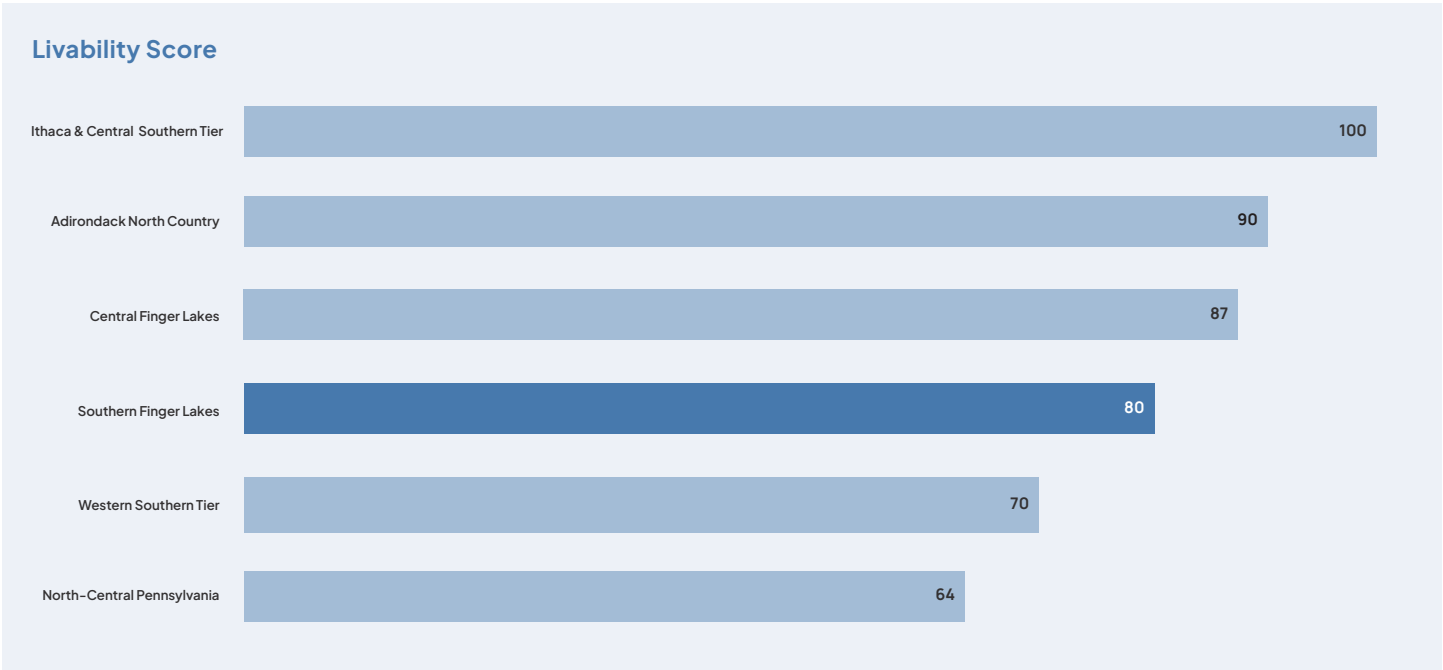
A healthy job market is essential to a region’s success, but a good job alone won’t keep someone loyal to a place.

True loyalty to anywhere — a street, a city, a region — is easier when it is easy, joyful, and fulfilling to live there. A region’s livability performance can make it easy for residents to stay in a region, or it can push them out to somewhere else. As such, it’s a key consideration when we evaluate a region’s ability not just to attract people but also to keep them there. (And keep them happy.)

Our Livability Score

The Southern Finger Lakes ranked 4th in Livability among its peer set, falling just slightly below the benchmarked average.

That number should be taken in the context of benchmarking; it reflects how we place among our peers. What it does not imply is a “below-average” standard of living. On the contrary, our research shows that the Southern Finger Lakes region is, by most measures, a great place to live, blessed with natural gifts and affordability alike.



THE LIVABILITY SCORE REFLECTS EACH REGION’S AGGREGATE PERFORMANCE ACROSS ALL LIVABILITY INDICATORS AND CATEGORIES. SCORES ARE CALCULATED RELATIVE TO THE AVERAGE OF THE PEER SET, AND THE BEST-PERFORMING REGION IS ASSIGNED A SCORE OF 100.

Livable by Nature

Our Finding

The environment plays a critical role in our (and every) livability story. Good weather, a supply of well-loved parks, and clean air lay a strong, nature-backed livability foundation for the Southern Finger Lakes.

#2 Weather

Some of the best weather among our benchmarked regions, with low average precipitation.

#2 Community Parks

Parks stand apart, propelled forward by Schuyler and Steuben counties.

#3 Air Quality

Low levels of particulate air pollution support overall health and livability.

Today, as climate change shapes our understanding of the world — and globally, we become more aware of the value and fragility of nature — people and businesses are taking notice of the environmental aspects of a place when deciding where to live. By that measure, the Southern Finger Lakes has the makings of an impressive livability advantage.

Few regions encapsulate the often-underestimated beauty of upstate New York better. Here, you'll find pastoral wine country, where vines find purchase on rolling hills. Quaint towns and shaded forests make way for a grand landscape defined by sweeping lake views, dramatic gorges, and hundreds of waterfalls. The highly ranked weather doesn't hurt the allure in the least and makes the 180+ miles of hiking trails ever more tempting.

Perhaps unsurprisingly, the Southern Finger Lakes region ranks second overall for parks and gardens among its peers, and first for overall park popularity.

Schuyler is a particular standout, ranking second among all counties surveyed for the popularity of its parks. Much credit goes to the nearby Watkins Glen, which draws in more than a million annual visitors with the promise of stunning waterfalls and winding trails. Steuben County also performs above average, with popular assets, like Stony Brook State Park, contributing to the region's strong appeal.

Air quality is a fundamental livability factor as well, with clear impacts on public health, longevity, and quality of life metrics. Research consistently shows that better air quality reduces the risk for respiratory illness, increases property values, and enhances the appeal of a place for citizens and talent alike.

Thankfully, the Southern Finger Lakes proves a good region to breathe deeply. Environmental quality is high, with low levels of particulate air pollution, offering an everyday livability win with potential long-term benefits for overall regional health.

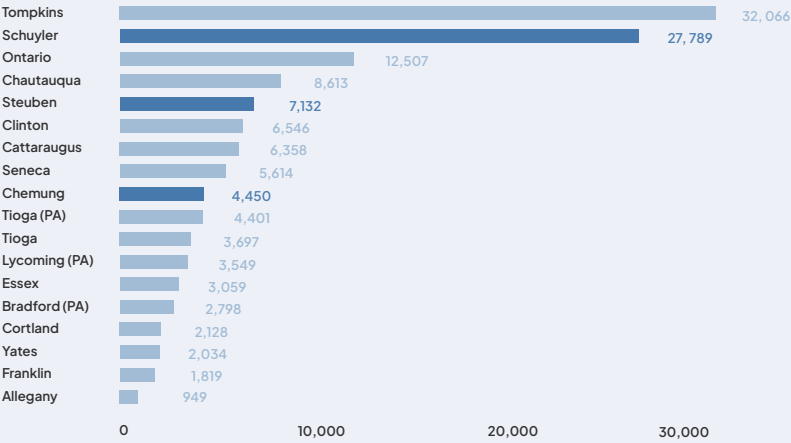
Future Thinking: Outdoor Recreation

High park popularity indicates that, beyond just having beautiful outdoor venues, people are actively engaging with these spaces as part of their daily lives.

Outdoor recreation is a known strong suit of Upstate New York as a whole, and our research suggests a potentially outsized outdoor recreation scene within the Southern Finger Lakes. This could represent a livability and lovability differentiator in waiting for the region. Leaning into that side of our story, and doing further research to gauge the size and potential economic impact of outdoor recreation as a sector, could unlock new opportunities for commerce and lifestyle across the region.

Active initiatives give this idea credence. Progress on the proposed Chemung River Greenway, which would connect Corning and Elmira with 20+ miles of walk-and-bike trails, could serve as a “pilot program” to assess the scale and extensibility of this popularity.

Popularity of Parks and Gardens by County



SOURCE: GOOGLE

Foundations for Life

Our Finding

If seeking a high quality of life at a reasonable cost, the Southern Finger Lakes makes a compelling case.

Many aspects factor into a truly livable region, but few matter more than citizens having access to housing they can actually afford. When housing is a manageable expense, people have more disposable income for other key costs, can participate in local economies, and are less likely to move. In short, they live better and stay longer.

Affordable homes are also a siren song to first-time home buyers and families looking for a lower cost of living. According to the

US Census's "Why People Move" report, housing is the number one reason people relocate, whether they're seeking a better place to live or something more affordable. Often, those two are the same.

It's here that our region flexes a core livability strength. Compared to our peers, the Southern Finger Lakes excel in matters of housing affordability. Zillow listings for homes in the region averaged \$162,000, the second lowest in our report, apart from the Western Southern Tier.

That number is more than \$100,000 dollars lower than the average home price in the Central Finger Lakes, the highest average cost in our rankings. What's more, homeownership rates in our region are middle of the pack among our peers but nationally strong, at 71.7%.

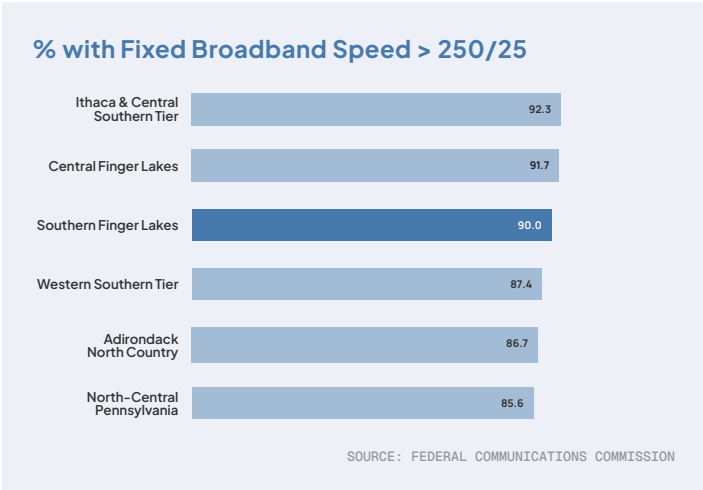
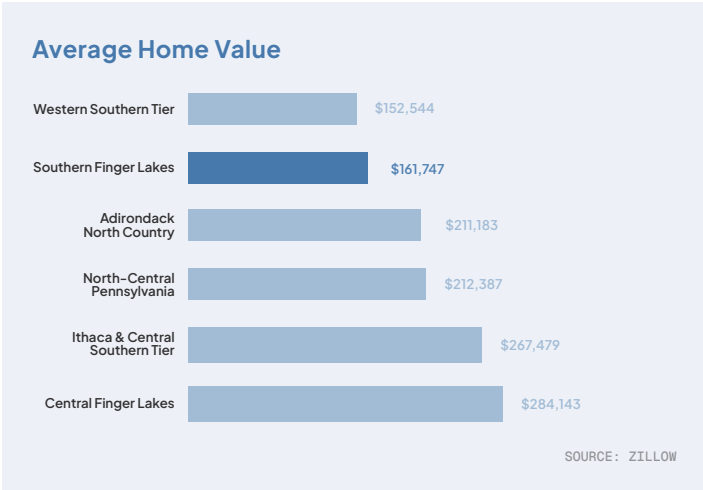
These homes are well-connected. Access to high-speed internet, increasingly a necessity for modern life, is solid across our region, with 90% of residents on a broadband connection. This is relatively in line with our peers,

statewide tides are lifting all ships. New York's ConnectALL Municipal Infrastructure Program is expected to invest millions into fiber service across the state's underserved regions, which means this number may tick up even further.

Future Thinking: Marketing Our Edge

For a region actively trying to attract and retain talent, affordable housing is a powerful advantage that many of our peers can't offer. As professionals, remote workers, and young families potentially find themselves priced out of cities like Ithaca and Rochester, a natural opportunity emerges for the Southern Finger Lakes: to emerge as an affordable, well-connected, close-to-nature region where real innovation happens.

At the same time, a growth mindset must be complemented by a concerted effort to protect the attainability of our region's housing supply. Thoughtful, proactive planning should ensure that growth does not diminish the affordability advantage that spurred it in the first place, so the benefits are there for newcomers and long-time residents alike.



The Challenge: The Access–Outcome Gap

Our Finding

Broader economic and socioeconomic factors are eroding the value of our most impactful livability strengths, including the activation of our highly accessible healthcare system and the relative affordability of our home market.

Our research reveals a region with no shortage of assets to create a quality standard of living. It also reveals a gap between those assets and the outcomes one would expect. What residents really experience today doesn’t live up to the quality of our livability foundation.

Healthcare Access

Few places is this gap more evident than in healthcare access, which looks at whether residents in our region can get the healthcare they need, when they need it. By all measures, this “yes” is resounding across the Southern Finger Lakes. Our region ranks first overall for healthcare access, with relatively low uninsured rates and a strong availability of physicians.

Among rural communities, this is a particular win. Rural health challenges are well documented, but no less worth stating. CDC research indicates rural communities tend to have a higher risk of heart disease, cancer, stroke, and accidental injury. Meanwhile, rural hospital closures in the US numbered 154 since 2010. Getting to and from these medical facilities tends to be disproportionately more difficult in rural areas than in urban ones.

With this accounted for, our health system emerges as a distinct livability differentiator for our region. When people have access to quality healthcare, regions see less chronic illness, reduced financial precarity related to sudden medical expenses, and an overall higher quality of life, for a longer time.

Yet, this isn’t playing out across our region. Healthcare outcomes are near the lowest among our peers, and life expectancy in our region is below the New York state average.

This disparity is not distributed evenly. Chemung County, despite having the highest physician availability in the region, records the lowest life expectancy.

When healthcare infrastructure is available but unused, it suggests a broader socioeconomic story. In a study on rural health, the American College of Physicians notes that upstream factors, like access to nutritious foods or housing insecurity, play a key role in ultimate health outcomes.

The Resonance team advises future research into how the conditions in the Southern Finger Lakes, like a contracting job market, reduced spending power, and elevated poverty, connect with this outcome discrepancy.

Affordability in Context

The value of our region’s affordable home market is being impacted by these same economic challenges. Affordability is ultimately a matter of price and income. It’s also relative. If someone cannot afford a home, it is expensive to them — even if it is, in a broad sense, affordable.

Accordingly, when regional incomes trail the living wage, an affordable housing advantage loses its edge.

This is especially true for single earners in the Southern Finger Lakes, whose average income falls short of a living wage by roughly \$5,000. This trend is particularly pronounced in Steuben County, where this shortfall is more than \$8,400 on average.

Future Thinking: The Prosperity Connection

What this access-outcome gap illuminates is the connected nature of Prosperity and Livability. The economic strengths of a region

(and, by extension, the earning power of its residents) can be directly correlated to the lived experience within it. Addressing one may ultimately be a matter of addressing both, though exactly which levers to pull and when would require more nuanced investigation.

What’s more, as the region seeks to preserve its innovation and manufacturing roots, a strong medical sector may also provide compelling new inroads to high-quality jobs. Leaning into the potential

Regions with the Lowest Discrepancy between Living Wage and Actual Wages – 1 Person				
RANK	REGION	LIVING WAGE 1 PERSON	MEDIAN INCOME NON-FAMILY HHS	DISCREPANCY
1	Central Finger Lakes	\$47,938	\$47,107	-\$831
2	Adirondack North Country	\$45,774	\$42,968	-\$2,806
3	Southern Finger Lakes	\$45,532	\$40,514	-\$5,018
4	North-Central Pennsylvania	\$43,801	\$38,047	-\$5,754
5	Ithaca & Central Southern Tier	\$49,612	\$43,259	-\$6,353
6	Western Southern Tier	\$42,186	\$34,534	-\$7,652

draw of this sector, while also marketing our housing affordability as a recruitment tool, could convert a latent strength into a competitive, talent-building edge.

Learning From Mobility

Livability and mobility — that is, the process of getting around — are innately connected. Freedom of movement, diversity of methods of transportation, and easy access to transit allow people to get to work, participate in their communities, and see the places they call home. By and large, an easy place to get around is an easier place to live and thrive.

On paper, the Southern Finger Lakes region arrives with real mobility strengths, especially in matters of public transit. Though commuting times within the region are squarely middle of the pack, no region benchmarked offers public transit access at the level that the Southern Finger Lakes does. It has the highest share of its population living near transit of any peer region, at nearly 14%. That number more than triples the next-closest contender.

Yet only 0.8% of workers use public transit to commute. In comparison, North-Central Pennsylvania, with just 0.6% of its population near transit, sees 0.9% of its workers commuting via public transit.

When public transit infrastructure is accessible but unused, it suggests

the public transit is not going where it's needed most. With around 6,900 jobs (9.3% of the total) in the Southern Finger Lakes accessible via a 30-minute transit ride, the system connects residents to a relatively narrow slice of regional employment. It suggests a disconnect between where transit leads and where commuters need to go.

Walkability and bikeability are an evolving story as well. The region ranked lowest for biking commuter participation at 0.1% of the population, and second lowest for walking at 3.3%. This likely represents a connectivity problem rather than a reluctance to participate. Monitoring the impact of recent bike lane investments will clarify the forces at play.

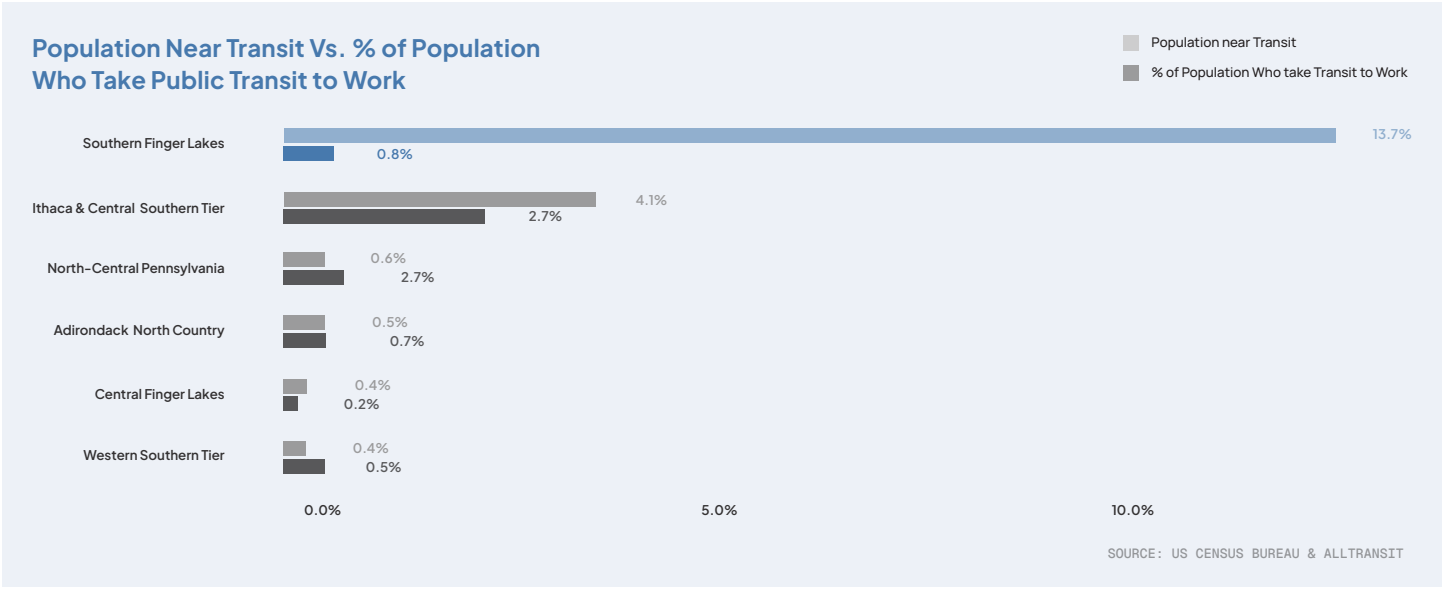
Future Thinking: A Connectivity Advantage

Physical connectivity is an essential part of a healthy, thriving region. Shorter travel times, greater access to goods, and cultural vibrance all benefit from a well-connected region, meaning the incentive is threefold: Livability, Lovability, and Prosperity.

As the region seeks to improve its appeal to residents, visitors, and businesses alike, mapping travel corridors and underserved commuter routes could open opportunities for stronger transit and, as a result, greater usage. Meanwhile, bike lane improvements, underway at the time of writing, should be

closely monitored as well to understand the level of adoption and strategically plan future growth.

Expanding and interconnecting these modes of transport — car, transit, bike, and foot — can improve travel flexibility, reduce reliance on cars, and give people time back by shrinking their commutes. Plus, an economy anchored in exports can only benefit from these improvements, honing this region's logistics edge by creating a modern, resilient transportation ecosystem.



LIVABILITY

In Summary: Livability

Livability is not defined alone. It is shaped by the economic reality of our region. When promising jobs are in short supply, incomes stagnate and opportunities for better jobs are fewer and far between. Access narrows for early- and mid-career workers. Savings don't get made. Soon, residents become motivated to move. Retention, in this way, is where prosperity and livability meet.

Much as we saw in our Prosperity data, the fundamentals of livability are here. What remains is closing the gap between providing those benefits and enabling residents to fully thrive.

In our next and final section, we'll see how Livability and Prosperity alike are shaped by something harder to quantify but no less important: how deeply people love this place, and how Lovability can be a formidable engine ahead.



Paths Forward

NEAR-TERM

Resident Sentiment & Leaver Research

Design and execute a mixed-method study leveraging focus groups and proactive outreach to surface the lived experience and identify the specific friction points driving departure decisions.

MID-TERM

Residential Talent Attraction Campaign

Develop a marketing campaign that highlights a concrete differentiator: affordable housing in a compelling region. Target professionals, remote workers, and young families in adjacent markets who are being priced out, and create a new showcase for our region's strengths.

LONG-TERM

Livability Investment Prioritization Framework

Build a framework to help county leaders and stakeholders align on which livability investments, whether housing, childcare, transit, or amenities, offer the highest return for talent retention, ensuring future resources drive positive outcomes.

Lovability



LOVABILITY

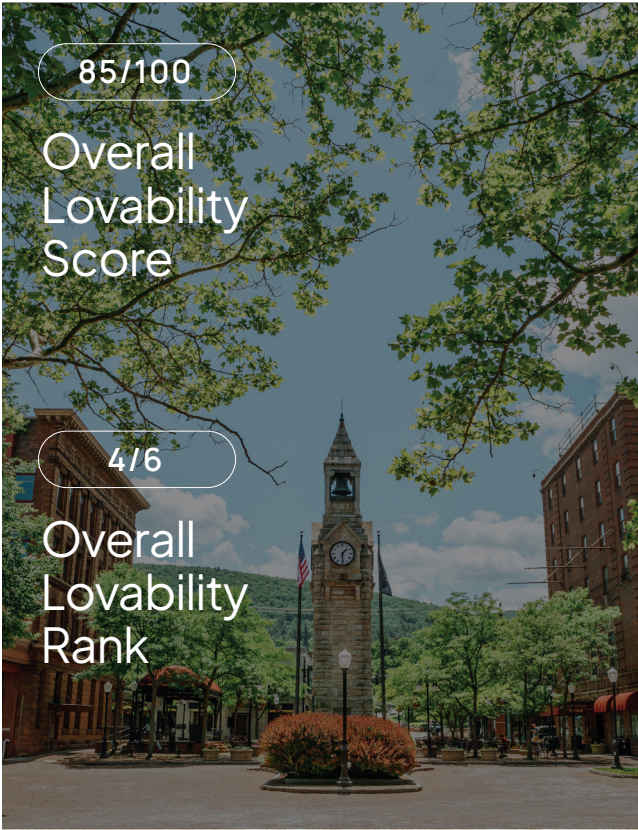
Cheers to you, Southern Finger Lakes.

If Prosperity represents the challenge, and Livability the strong foundation, then Lovability is the engine of the Southern Finger Lakes. This is a region that is easy to love, and while it doesn't top this report's Lovability rankings, it arrives with strengths that are deeply felt, seen, and tasted. Vineyards dot the lakeside. Museums inspire. Even the shopping is good. And people take notice.

Our Core Insight

Despite a relatively small supply of Lovability assets, the Southern Finger Lakes generates outsized engagement in several areas. What's left: capturing those overnight stays.

It's a reason for celebration, and a reason to plan ahead. Our research reveals a Lovability story defined by doing more with less. Yet, strong popularity in certain cultural and leisure amenities was offset by comparatively low overnight tourism activity, reflected in lower hotel occupancy rates.



Key Lovability Findings

- 01 The Southern Finger Lakes demonstrates strong engagement across several visitation assets relative to its size, notably around wine, dining, museums, and shopping.
- 02 Other visitation assets contribute less to the region's overall destination appeal, notably Family-Friendly Activities.
- 03 Despite strong performance across several visitation assets, the region records the lowest hotel occupancy rate among peer regions, suggesting an opportunity to better convert visitor interest into longer stays.

The Importance of Lovability

Lovability is a measure of a region's appeal to visitors and residents alike. There's no single picture of Lovability; places capture affection in all sorts of ways. They might thrill us, challenge us, or awaken our senses.

However they do it, lovable places consistently win out in matters of tourism and resident retention. They are talked about more often, recommended more enthusiastically, and lauded with more fervor. That makes for more overnight visitors and, inevitably, a few who stay in a region for the long haul. (Consistently, we see that lovability is core to making home feel like home.)

All of this is a boon to the prosperity of a region, from short-term tourism spending to long-term resident investment. Businesses benefit from setting up shop in lovable places, seeing it as a deal-sweetener for talent. All of this is to say: lovability is relevant to everyone and everything in a region.

Our Lovability Score

Among our peers, the Southern Finger Lakes ranked 4th in Lovability, with an overall score of 85, finishing slightly below the average of 89.

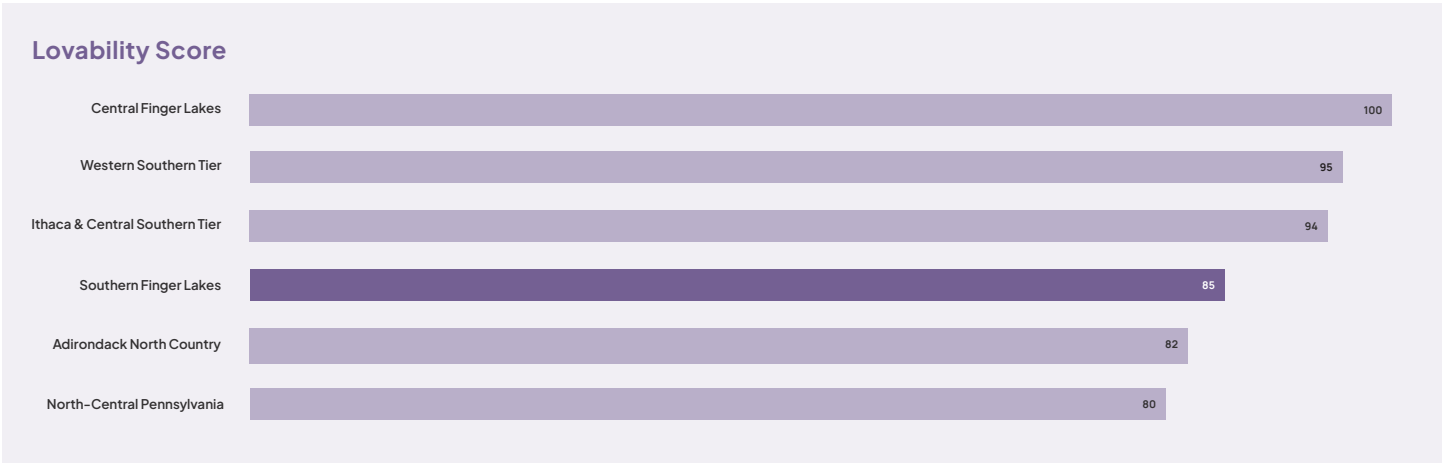
Overall, our benchmarking here paints a tighter race than our other categories, suggesting that lovability may be an overall strength of our peer set. Our place at the middle of the pack signals that the Southern Finger Lakes, when compared to its peers, has strong, lovable features — and room to grow them.

How We Measure Lovability

Our research evaluates lovability based on **supply** and **engagement**. Supply measures the number of high-quality assets present in the region that build its lovability, such as a restaurant, theater, winery, or bar. Engagement, on the other hand, measures the level at which residents and visitors interact with those assets, quantified through the volume of Google reviews for each.

Population is an important consideration with this approach, since supply and review activity tend to scale with population. More populous regions tend to have a larger quantity of lovable assets and more people to review them.

This provides us a useful baseline for interpreting Livability performance: the Southern Finger Lakes is the 4th-largest region in our competitive set, meaning we would expect supply and engagement for each asset category to rank between approximately 3rd and 5th. Deviations from that pattern help us identify strengths and opportunities for growth.



THE LOVABILITY SCORE REFLECTS EACH REGION'S AGGREGATE PERFORMANCE ACROSS ALL LIVABILITY INDICATORS AND CATEGORIES. SCORES ARE CALCULATED RELATIVE TO THE AVERAGE OF THE PEER SET, AND THE BEST-PERFORMING REGION IS ASSIGNED A SCORE OF 100.

Our Results: Supply, Meet Demand

Our Finding

Engagement beats supply of lovability assets in our region, indicating that the Southern Finger Lakes earns greater-than-expected affection from visitors and residents alike.

Broadly speaking, the supply of lovable assets in the Southern Finger Lakes is aligned with what one would expect for its population size. Museums, Shopping, Family-Friendly Activities, Theaters, and Bars sub-categories all landed within 3rd and 5th place, representing an appropriate supply for each asset type given our size relative to our peers.

Our region's high-supply outlier confirms what locals already know: the Southern

Finger Lakes boasts a stand-out supply of wineries relative to our size, bested only by the Central Finger Lakes (a region lifted largely by Seneca). It matches our region's important role in upstate viniculture and confirms the presence of established wine tourism infrastructure.

However, a 6th-place ranking for Restaurants suggests that, while our region indexes heavily on by-the-glass craft, it has fewer restaurants than expected for its size.

Engagement, however, is less expected, and where the real story begins.

Most visitation categories in the Southern Finger Lakes see engagement beyond that of its supply, suggesting an exciting truth: we are generating exceptional impact with what assets we have.

This pattern also suggests that the region attracts outsized engagement from visitors relative to its size, reinforcing its role as a destination market rather than one driven solely by local demand.

Assets that don't exceed expectations tend to remain within the expected range, with the exception of the Family-Friendly sub-category, which tracks with its low supply. As we'll explore in this section, these represent compelling areas of growth and opportunity.

Our Regional Strength: Bottles and Vines

Our Finding

The concentration of high-quality fermentation venues in our region is a true differentiator. Schuyler County is a full-fledged vinicultural destination and our region's core lovability generator.

52 High-Quality Wineries across the region.

#2 Highest winery popularity among peers.

If there is any single thing that defines the Southern Finger Lakes' lovability story, it's wine.

That will come as no surprise to anyone who has followed the Seneca Lake Wine Trail or explored the shores of Keuka Lake. Glass by glass, this region outperforms, ranked second for both the supply of wineries and fermentation venues and the engagement they create. That rare

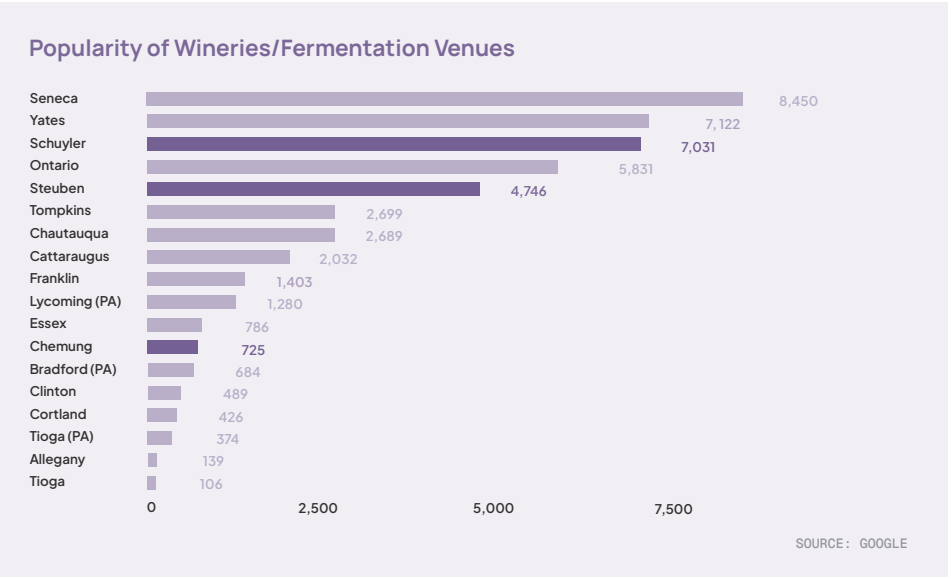
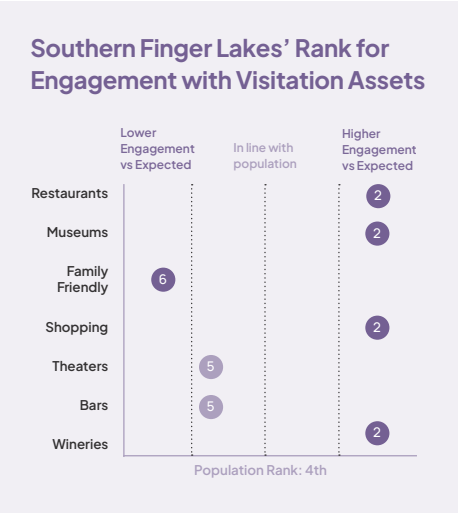
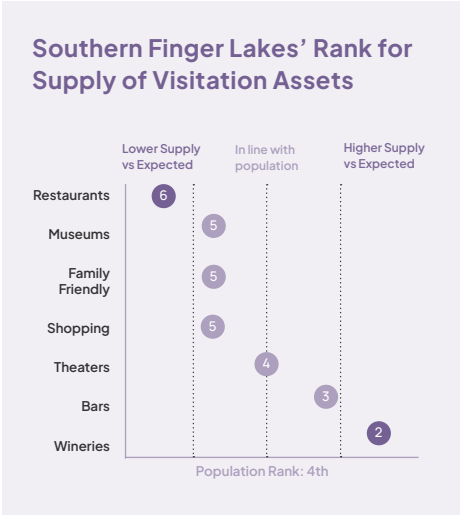
combination signals a clear differentiator and a strength to lean on: think Finger Lakes wine, think Southern Finger Lakes.

A county-level view reveals our vinicultural dynamo: Schuyler County. A potent roster of wineries calls Schuyler home, including Damiani Wine Cellars, Lakewood Vineyards, and Magnus Ridge. Our research attributes over 7,000 winery reviews to the county alone, indicating that the shores of Seneca Lake enjoy status as a regional destination and the center of gravity for the lovability identity of the Southern Finger Lakes.

Untapped Dining Potential

Perhaps counterintuitively, restaurants have not followed in the footsteps of the region's prodigal vintners. Yet, there is a clear appetite, literal and figurative, for more.

While the Southern Finger Lakes ranked last in its peer group for restaurant supply, its outperformance in engagement, to the tune of over 150,000 Google Reviews, sends a clear signal: the demand for dining in our region is stronger than most others benchmarked, and the dining scene is punching above its weight.



Engagement is vastly concentrated in Steuben and Chemung Counties, where larger population centers support our most active dining scenes. Here, Schuyler’s engagement ranks significantly lower, though its high winery engagement suggests guests are visiting specifically for wine or dining at wineries.

Future Thinking: A Culinary Destination

Lovability engagement tells us just as much about regional strengths as it does consumer tendencies — what they want, seek, and ultimately make the trip here for. Broadly, our research paints a picture of a customer base hungry (literally) for what the Southern Finger Lakes has to offer. A vinicultural advantage could serve as a foundation for a destination platform centered on food and drink.

As such, expanding the region’s dining supply, particularly in areas that already draw visitors for wine, outdoor recreation, and cultural attractions, presents a clear lovability opportunity. This includes but is not limited to brick-and-mortar establishments.

There’s inspiration in the counties around us today. Salt City Market, a multi-vendor food market in Syracuse, is highly rated and well loved by its city, and suggests just one way in to grow restaurant density and opportunity. Meanwhile, Livingston County’s FLX Food Fest — a chef-led dining festival held this April — shows how a single major event may help build regional reputation.

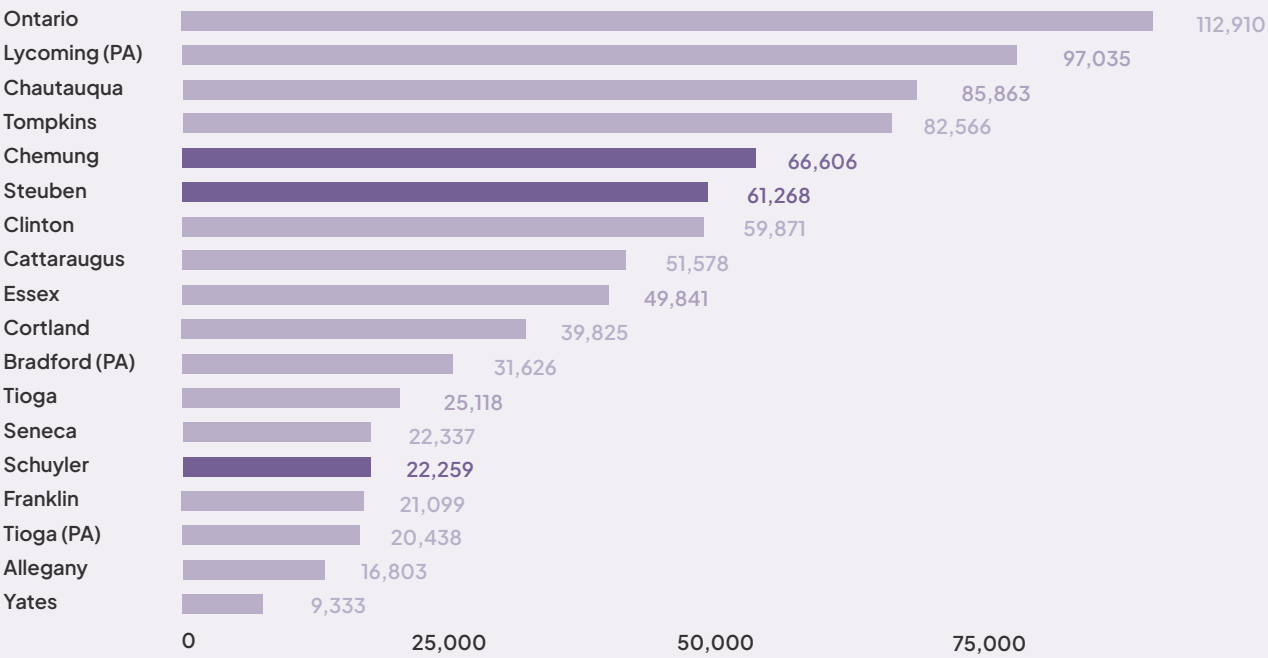
Key next steps will be understanding the more nuanced dynamics that underpin the region’s dining scene, namely customer interest, the talent environment, and sharing between restaurants and wineries to ensure the growth of one strength does not dull the luster of another.

Beyond the Vines, It’s Quality Over Quantity

Our Finding

High engagement is not just for food and wine. In many matters of lovability, the Southern Finger Lakes consistently ranks higher for engagement than for supply.

Popularity of Restaurants by County

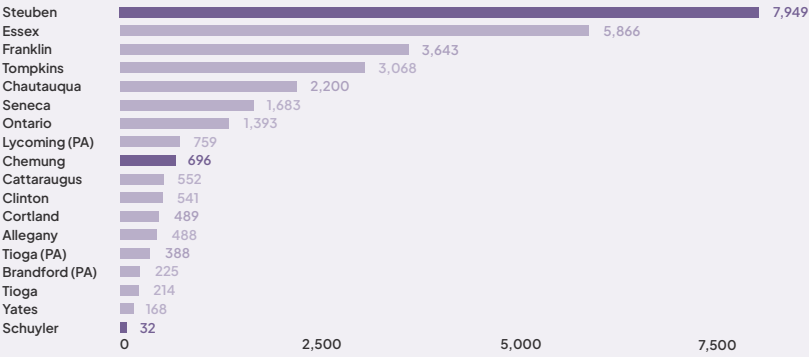


SOURCE: GOOGLE

Museums

At 40 highly rated institutions, the Southern Finger Lakes has a modest museum supply compared to its peers. Its 2nd-place engagement is almost entirely propelled by Steuben County, home to the Corning Museum of Glass, which is among the preeminent museums in New York State, let alone our benchmarked regions. It’s a reminder of what a single world-class institution can do for a region’s cultural profile, and a case study in how a whole category can be lifted with the right iconic asset.

Popularity of Museums by County

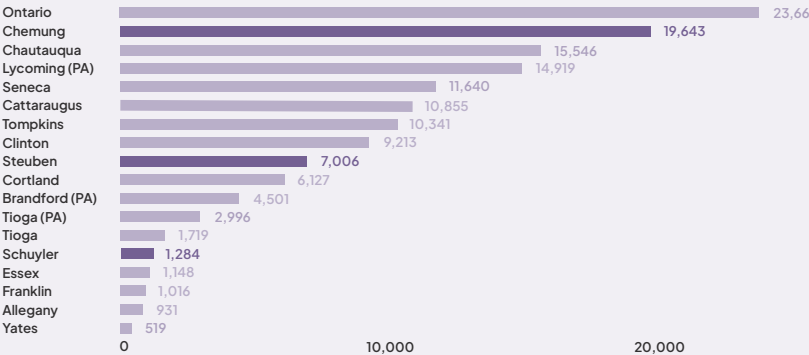


SOURCE: GOOGLE

Shopping

Much as it does for museums, our region ranks 5th for high-quality shopping supply destinations, and 2nd for visitor engagement. This indicates that the retail infrastructure we do have is well-loved, and that demand is in no short supply. Much of this engagement is centered in Chemung County, where the Arnot Mall earns the second-highest volume of shopping reviews among our benchmarked regions.

Popularity of Shopping Experiences by County

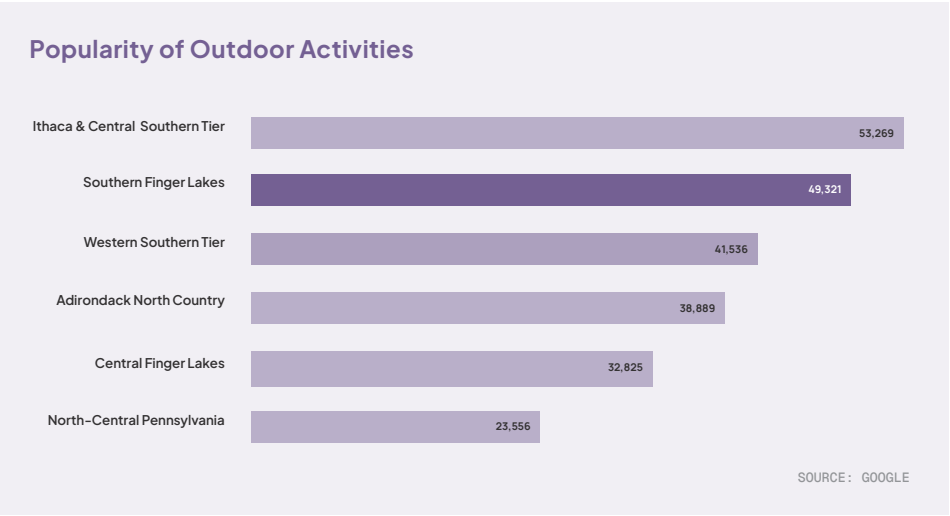


SOURCE: GOOGLE

Outdoor Recreation

In the Livability section of this report, our research noted the high popularity of parks among residents of the Southern Finger Lakes, along with the region’s quality weather, many trails, and nearby natural attractions. Our lovability data further reinforces the powerful benefits these assets have. The region ranks fourth in the number of outdoor assets — think state parks, lakes, rivers, gorges, and trail networks — but second in visitor engagement, with nearly 50,000 Google reviews. Again, demand beats supply.

And there will be more to love soon: Watkins Glen State Park plans to open a replacement to its Sentry Bridge this summer, and improvements on the Catharine Valley Trail should further connect the park with surrounding towns. Given the high importance the environment also plays in our livability story, these investments have the potential to pay out two-fold.



The Challenge: Turning Days to Nights

Our Finding

Our region’s 12-month hotel occupancy rate is the lowest in the peer set, at just 51.2%. Significant lodging capacity is going untapped and under-activated.

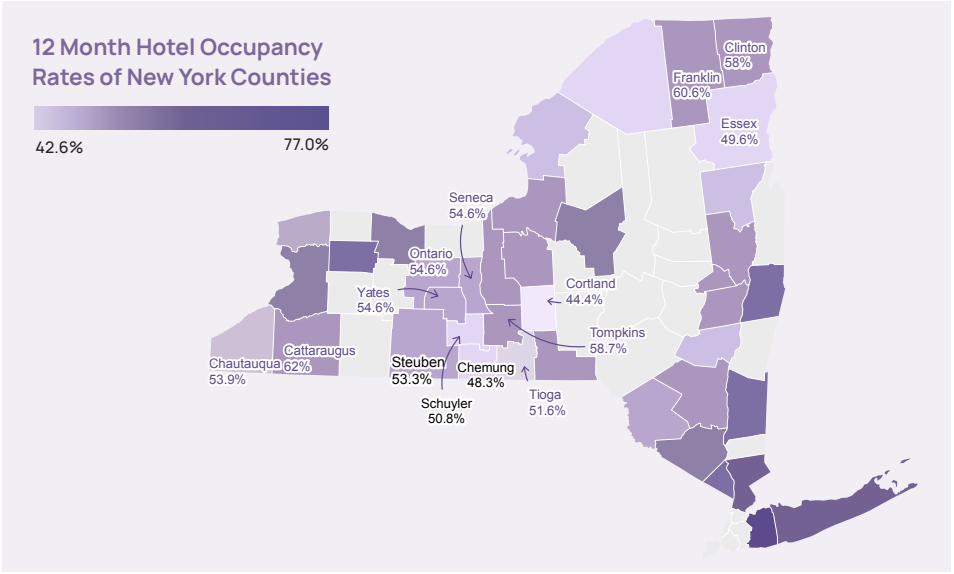


The Southern Finger Lakes has 3,450 hotel rooms, third among peer regions. With such enthusiastic engagement, one might expect them to be enthusiastically booked up. But this is not proving true across the region.

Of course, an occupancy rate alone is not the full story. There are different reasons a region like ours may find its lodging industry underutilized. In our case, this number taken alongside high engagement suggests our

region is a popular day-trip destination — people come, enjoy, and head home.

This rate could also indicate strong seasonality in our visitor base, where high-season performance is ultimately offset by a slower low season. A county-level view also indicates lodging occupancy isn’t uniform across our counties, with Chemung at a sub-50 percent occupancy rate.



Charming the Weekender

The economic impact of overnight guests can be significantly larger than that of your in-and-out visitor. Not only do they spend money on hotels and short-term rentals, but they also eat out, explore local stores, and bring commerce to counties that need it.

Increasing the number of overnight stays in the Southern Finger Lakes is ultimately tied to how people spend their time here today. When we consider our lovability strengths, our place as a day-trip destination doesn’t seem so far-fetched. Wine tastings, the Corning Museum, or a hike on the trails — these activities occupy the prime hours of the day, but send people home the same evening.

Bar and nightlife data appear to back up this notion. Despite a healthy supply of high-quality bars and clubs, engagement is low: 5th for popularity, alongside a 5th-place ranking for overall nightlife as well. When put up against a booming wine and dining scene, it suggests the presence of an evening economy with room to grow. The more compelling we get after dark, the more reason to rent a room for the night.



92% of parents

reported plans to travel with their kids in the next year.

THE FAMILY TRAVEL ASSOCIATION'S (FTA)

Future Thinking: Family Travel

Our underperformance in family-friendly attractions may be compounding this effect. The Southern Finger Lakes ranks last in the peer group for both the supply and engagement of family-friendly assets, such as zoos, amusement venues, arcades, mini golf, and movie theaters.

While a direct connection between these assets and overnight stays would need to be made, we do know family travel is on the rise. A Family Travel Association study found that

families are spending more on domestic travel as of 2025, and 92% of parents had plans to travel with their kids in 2026.

The Southern Finger Lakes today lacks the assets to attract these travelers compared to its peers. Further investment into attractions relevant to them, or marketing our current offering with messaging that appeals to their experience, could unlock new hospitality opportunities for the region.

LOVABILITY

In Summary: Lovability

The role of Lovability in the future of the Southern Finger Lakes will be significant. The demand for this region's strengths far exceeds regional expectations, outlining the makings of an upstate pocket power. What's more, this region's identity is advantageously associated with an idyllic story told in wine, trails, and culture. That hard-earned reputation is ours to own.

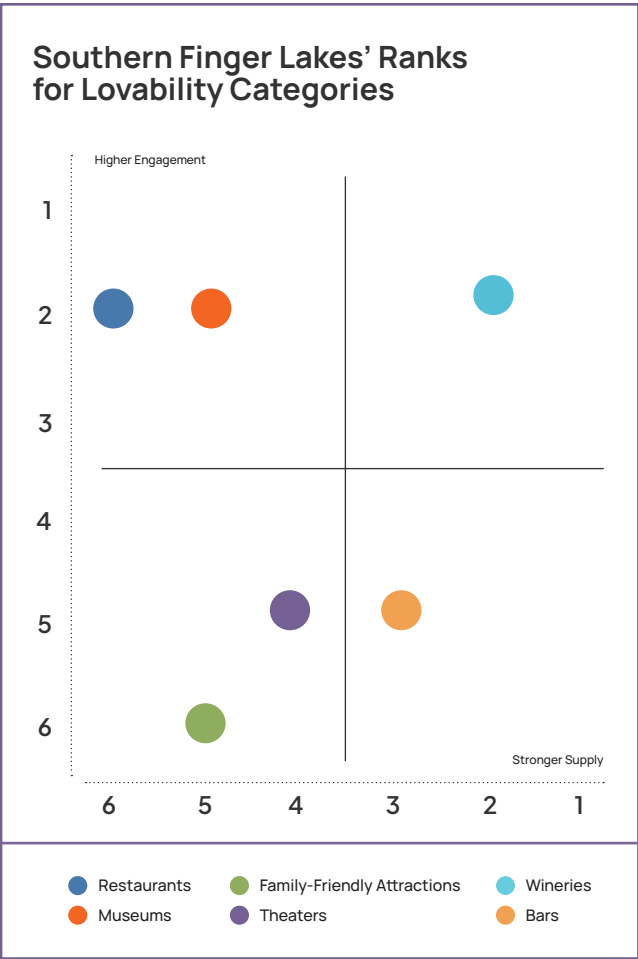
Our research reveals these strengths, alongside key areas to invest in and expand.

Standing between the region and stronger lovability performance is the matter of turning a day-trip region into a weekend-worthy destination. That effort matters beyond

tourism alone. Enhancing lovability has direct, positive impacts on livability and prosperity in a region.

Increased overnight stays bring more visitor spending to the communities that need it most. Tourism fills the streets with new faces, which increases the vibrancy of a region, making it more attractive to the talent that powers it. It gives businesses more reasons to choose the Southern Finger Lakes instead of another competitor region.

Fully activated, lovability can be an economic engine for our region, and a catalyst for a resilient, livable future.



Paths Forward

NEAR-TERM

Destination Alignment & Industry Research

Conduct structured interviews with Chemung and Steuben DMOs and the Finger Lakes Tourism Alliance, alongside an industry partner survey, to map existing priorities, identify gaps in regional coordination, and align stakeholders around shared lovability opportunities.

MID-TERM

Overnight & Short-Term Lodging Market Analysis

Analyze the region's hotel and short-term rental economy together to understand the true health of the overnight market and identify the highest-leverage opportunities to convert day-trip visitors into overnight stays.

LONG-TERM

Five-Year Overnight Lodging Strategy

Informed by market, lodging, and sector analysis, develop a long-term framework to guide regional and tourism leaders on the hospitality investments that will preserve our region's strengths while bolstering its overnight economy.

04

Conclusion & Final Insights

Conclusion & Final Insights

The Southern Finger Lakes is a place people love, with the foundations to work better for the people who live there.

That tension can be felt across our research as an access-outcome gap: Healthcare access doesn't translate to greater health; homes that are affordable on paper, but not in the average budget; our historic innovation economy has fewer innovators than before.

These are symptoms of a common challenge: an economy that is contracting faster than its peers. This is a regional reality that must be confronted, planned around, and strategized against. Solving this challenge will not be easy, but it's in the service of a region with many of the makings of success.

For all the headwinds our report reveals, it also reveals a range of strengths unique to this region and this region alone: a landscape worth the visit itself; health, transit, and housing ready to be activated; a deep history of innovation and power-players that still call the region home.

The next steps for the Southern Finger Lakes will not be reinvention. Through teamwork, planning, and collaboration, its next chapter can be defined by enablement. Working together to enable people to thrive, businesses to succeed, and our lovable core to shine even brighter. The task is, at its simplest, to enable this great region's full potential.

As this happens, we must share the benefits evenly across our counties, remedying inequalities and building a region uniformly defined by a strong quality of life, thriving economy, and a spirit that the state (and world) will come to love and admire.



05

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Appendix A

About Resonance,
Our Region Performance
Partner

To benchmark the competitiveness of the Southern Finger Lakes, Three Rivers Development partnered with Vancouver- and New York-based Resonance Consultancy, a leading adviser to metropolitan regions around the world that has worked extensively with cities and communities across the United States and Canada.

Resonance's diverse, multidisciplinary team of analysts, futurists, urbanists, economists, and strategists has completed more than 200 research, strategy, and planning projects for destinations, cities, districts, and developments in more than 50 countries around the world. As leading advisers in sustainable urban development, economic development, and tourism development for regions and cities, Resonance has conducted extensive research on the rise of regions, the key trends propelling their growth, and the factors that shape people's perception of places as desirable places to live, visit, and invest.

Resonance's proprietary approach to benchmarking places and their World's Best Cities, America's Best Cities, Europe's Best Cities, and Asia-Pacific's Best Cities reports are covered by thousands of media outlets around the world, and their data and analysis is used by companies and government agencies to help design, develop, and promote the best locations around the globe.

Bloomberg calls Resonance's Best Cities reports: "The most comprehensive study of its kind; it identifies cities that are most desirable for locals, visitors and businesspeople alike,

rather than simply looking at livability or tourism appeal." Thousands of global urban leaders and media outlets—from Paris Mayor Anne Hidalgo to London Mayor Sadiq Khan, to Time Out and National Geographic—trust and cite Resonance's rankings and data annually.

Some of Resonance's most notable projects include creating a tourism master plan for the City of Los Angeles in advance of the 2028 Olympic Games to help the city grow from welcoming 50 million visitors annually to more than 70 million. In Europe, Resonance has also led an unprecedented effort by Brussels' regional government to bring tourism, talent attraction, foreign direct investment and private corporations together around a unified brand and narrative.

In all of their work, Resonance's research analysts and strategists provide market analysis, consumer research, and performance benchmarking to inform economic development strategies and destination stewardship plans for countries, cities, and regions like ours.

Ten years ago, Resonance started an ambitious project to identify the factors most highly correlated with business formation, talent attraction, and visitor expenditure in the planet's metro regions.

To date, Resonance has analyzed more than 400 global cities and urban regions (principal centers of metropolitan areas with populations of more than 500,000). Resonance not only benchmarks hundreds of data points from traditional performance and statistical sources such as the U.S. Bureau of Labor Statistics, but it also mines user-generated data from online sources such as Google, Tripadvisor, and Instagram to measure quality of place when it comes to experiential factors.

This blend of data led to the creation of Resonance's proprietary Place Power™ Score, which is applied in their annual Best Cities rankings, which are read and referenced by millions of people around the world.

How does Resonance choose the metrics to effectively measure a metro region's performance relative to its competitors?

While many factors shape our perception of metro regions as desirable places to live, work, or visit, Resonance's proprietary Place Power™ Score rankings are focused on the shared factors that demonstrate moderate to strong correlations with the performance of metro regions when it comes to attracting workers, visitors, and businesses.

Appendix B

Our Methodology

The following tables show the underlying metrics for the Southern Finger Lakes region and the corresponding weight of each metric within each category. While each category is weighted evenly when aggregated up to the pillar level (Livability, Lovability, and Prosperity), the metrics underlying each category may not be weighted evenly. For example, when a category is comprised of metrics relating to both current situation (i.e. labor force participation rate) and momentum (5-year % change in labor force participation rate), metrics pertaining to current situation are given more weight. Certain metrics are measured in terms of the number of quality assets (parks, restaurants, etc.), where quality refers to the number of such assets rated four stars or higher on Google Maps. Similarly, those metrics are also scored based on Popularity, which refers to the volume of Google reviews for those assets.

Livability Indicators and Weights

WALKABILITY INDICATORS	RAW DATA	WEIGHT	RANK
% of Population Who Walk to Work	3 . 3%	50%	5
National Walk Index	7 . 2 (HIGHER IS BETTER)	50%	5
Walkability			6
SOURCES: U.S. CENSUS BUREAU AND THE ENVIRONMENTAL PROTECTION AGENCY			

BIKEABILITY: INDICATORS	RAW DATA	WEIGHT	RANK
% of Population Who Bike to Work	0 . 1%	50%	6
Street Intersection Density	35 . 8	50%	4
Bikeability			6
SOURCES: US CENSUS BUREAU			

TRANSPORTATION: INDICATORS	RAW DATA	WEIGHT	RANK
Average Commute Time to Work	21 . 5	50%	4
Distance to Largest Major City (Miles)	131 . 4	50%	4
Transportation			3
SOURCES: US CENSUS BUREAU AND GOOGLE			

PUBLIC TRANSIT: INDICATORS	RAW DATA	WEIGHT	RANK
% of Population Who Take Public Transit to Work	0 . 8%	50%	3
Transit Trips per Week within Half Mile	300	20%	3
Jobs Accessible Within 30 Minute Trip	6 , 859	20%	4
% of Population Near Transit	13 . 7%	10%	1
Public Transit			3
SOURCES: US CENSUS BUREAU AND ALLTRANSIT			

WEATHER: INDICATORS	RAW DATA	WEIGHT	RANK
Average Amount of Precipitation Relative to Avg.	- 3 . 0	50%	2
Average July temperature	72 . 1	50%	4
Weather			2
SOURCE: NATIONAL CENTERS FOR ENVIRONMENTAL INFORMATION			

AIR QUALITY: INDICATORS	RAW DATA	WEIGHT	RANK
Air Pollution	6 . 4	100%	3
Air Quality			3
SOURCE: COUNTRY HEALTH RANKINGS AND ROADMAPS			

PARKS AND GARDENS: INDICATORS	RAW DATA	WEIGHT	RANK
Quality Parks and Gardens	198	25%	5
Popularity of Parks and Gardens	39 , 371	75%	1
Parks and Gardens			2
SOURCE: GOOGLE			

HOUSING AFFORDABILITY: INDICATORS	RAW DATA	WEIGHT	RANK
Homeownership Rate	71 . 7%	25%	4
Average Home Value	\$161 , 747	25%	2
Median Rent- 1 Bedroom	\$733	25%	3
% of Home-Burdened Households	24 . 4%	25%	5
Housing Affordability			2
SOURCES: US CENSUS BUREAU AND ZILLOW			

Appendix B

HEALTH ACCESS: INDICATORS	RAW DATA	WEIGHT	RANK
Primary Care Physicians per 1,000 Residents	0.7	25%	2
Uninsured	5.1%	75%	2
Health Access			1

SOURCE: COUNTRY HEALTH RANKINGS

COST OF LIVING PRESSURES: INDICATORS	RAW DATA	WEIGHT	RANK
Living Wage/Salary- 1 Person	\$45,532	25%	3
Living Wage/Salary- Family	\$92,927	25%	3
Discrepancy between Median Income and Living Wage/Salary- 1 Person	-\$5,018	25%	3
Discrepancy between Median Income and Living Wage/Salary- Family	\$7,451	25%	4
Cost of Living Pressures			5

SOURCES: LIVING WAGE BY MIT AND US CENSUS BUREAU

HEALTH OUTCOMES: INDICATORS	RAW DATA	WEIGHT	RANK
Life Expectancy	75.8	100%	5
Health Outcomes			5

SOURCE: COUNTRY HEALTH RANKING

EDUCATION QUALITY: INDICATORS	RAW DATA	WEIGHT	RANK
High School Graduation Rate	87.6%	100%	4
Education Quality			4

SOURCE: COUNTRY HEALTH RANKINGS

INTERNET INFRASTRUCTURE: INDICATORS	RAW DATA	WEIGHT	RANK
% with 5G-NR 35/5 Mbps Mobile Broadband Connection	63.1%	25%	3
% with Fixed Broadband Speed > 250/25	90.0%	75%	3
Internet Infrastructure			3

SOURCE: FEDERAL COMMUNICATIONS COMMISSION

Lovability Indicators and Weights

HOSPITALITY BUSINESSES: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Leisure & Hospitality Establishments	547	100%	4
Hospitality Businesses			4

SOURCE: BUREAU OF LABOR STATISTICS

LODGING: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Hotel Rooms	3,450	33%	3
12 Month Hotel Occupancy Rate	51.2%	33%	6
Number of Airbnbs	389	33%	5
Lodging			5

SOURCE: COSTAR AND RABB

RESTAURANTS: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Quality Restaurants	217	25%	6
Popularity of Restaurants	150,133	75%	2
Restaurants			4

SOURCE: GOOGLE

NIGHTLIFE: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Quality Bars and Clubs	73	25%	3
Popularity of Bars and Clubs	13,923	75%	5
Nightlife			5

SOURCE: GOOGLE

WINERIES & FERMENTATION VENUES: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Quality Wineries/Fermentation Venues	52	25%	2
Popularity of Wineries/Fermentation Venues	12,502	75%	2
Wineries & Fermentation Venues			2

SOURCE: GOOGLE

Appendix B

OUTDOOR ACTIVITIES: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Outdoor Activities	574	25%	4
Popularity of Outdoor Activities	49,321	75%	2
Outdoor Activities			2

SOURCE: GOOGLE

MUSEUMS: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Quality Museums	38	25%	5
Popularity of Museums	8,677	75%	2
Museums			2

SOURCE: GOOGLE

THEATERS AND CONCERTS: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Quality Theaters and Concerts	38	25%	4
Popularity of Theaters and Concerts	2,360	75%	5
Theaters and Concerts			5

SOURCE: GOOGLE

SHOPPING: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Quality Shopping Experiences	55	25%	5
Popularity of Shopping Experiences	27,933	75%	2
Shopping			4

SOURCE: GOOGLE

SIGHTS AND LANDMARKS: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Sights and Landmarks	56	25%	4
Popularity of Sights and Landmarks	1,291	75%	6
Sights and Landmarks			6

SOURCE: GOOGLE

FAMILY-FRIENDLY: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Quality Family Friendly Attractions	29	25%	5
Popularity of Family Friendly Attractions	5,908	75%	6
Family Friendly Attractions			6

SOURCE: GOOGLE

Prosperity Indicators and Weights

LABOR FORCE PARTICIPATION RATE: INDICATORS	RAW DATA	WEIGHT	RANK
Labor Force Participation Rate	53.2%	30%	4
2019-2024 % Change in Labor Force	-7.1%	20%	6
5-Year Average Labor Force Participation Rate	54.3%	30%	4
Labor Force Participation Rate Equity	3.4%	20%	4
Labor Force Participation Rate			4

SOURCE: US BUREAU OF LABOR STATISTICS AND US CENSUS BUREAU

ECONOMIC VITALITY: INDICATORS	RAW DATA	WEIGHT	RANK
Gross Regional Product (Thousands of Dollars)	\$11,270,529	40%	5
2019-2024 % Change in GRP	24.9%	20%	4
Average Revenue per Employee	\$262,126	40%	3
Economic Vitality			4

SOURCE: BUREAU OF ECONOMIC ANALYSIS-US DEPARTMENT OF COMMERCE

WORKFORCE SUSTAINABILITY: INDICATORS	RAW DATA	WEIGHT	RANK
Median Age in 2024	43.2%	38%	4
Change in Median Age	0.3%	13%	4
Share of Prime Age Talent Pool (25-44) in Population	23.9%	38%	2
Change in Prime Working Age Talent Pool (25-44) from 2019-2024	-1.6%	13%	5
Workforce Sustainability			3

SOURCE: US CENSUS BUREAU

Appendix B

UNEMPLOYMENT RATE: INDICATORS	RAW DATA	WEIGHT	RANK
Unemployment Rate	4.9%	100%	4
Unemployment Rate			4

SOURCE: US BUREAU OF LABOR STATISTICS

HOUSEHOLD INCOME: INDICATORS	RAW DATA	WEIGHT	RANK
Median Household Income	\$65,122	75%	4
2019-2024 % Change in Median Household Income (2024 Dollars)	20.4%	25%	5
Household Income			4

SOURCE: US CENSUS BUREAU

CONSUMPTION POTENTIAL: INDICATORS	RAW DATA	WEIGHT	RANK
Per Capita Personal Income	\$54,896	100%	3
Consumption Potential			3

SOURCE: STATS AMERICA

POVERTY RATE: INDICATORS	RAW DATA	WEIGHT	RANK
Poverty Rate	15.0%	100%	5
Poverty Rate			5

SOURCE: US CENSUS BUREAU

CONNECTIVITY: INDICATORS	RAW DATA	WEIGHT	RANK
Number of Direct Flights from Primary Airport	5	75%	2
Distance to Nearest Major Economy (Miles)	97.5	25%	3
Connectivity			2

SOURCE: FLIGHTS FROM AND TRAVELMATH

JOB MARKET: INDICATORS	RAW DATA	WEIGHT	RANK
2019-2024 % Change in Number of Jobs	-4.8%	100%	6
Job Market			6

SOURCE: US BUREAU OF LABOR STATISTICS

POPULATION GROWTH: INDICATORS	RAW DATA	WEIGHT	RANK
2019-2024 % Change in Population	-3.5%	100%	5
Population Growth			5

SOURCE: US CENSUS BUREAU

UNIVERSITIES: INDICATORS	RAW DATA	WEIGHT	RANK
Student Body Population	2,002	50%	6
Average Annual Cost of Primary Universities in Region	\$14,163	15%	1
Starting Salary of College Grads in Primary Universities in Region	\$44,709	30%	6
Graduation Rate of Primary Universities in Region	48.5%	5%	6
Universities			6

SOURCE: COLLEGE SCORECARD:

EDUCATIONAL ATTAINMENT: INDICATORS	RAW DATA	WEIGHT	RANK
% of Population 25+ Years with Bachelor's or Higher	27.2%	100%	4
Educational Attainment			4

SOURCE: US CENSUS BUREAU

Appendix B

BUSINESS ECOSYSTEM: INDICATORS	RAW DATA	WEIGHT	RANK
New Business Applications per 10K	70.7	38%	2
2019-2024 % Change in New Business Applications	55.5%	13%	1
Number of Employer Establishments per 1,000 People	23.7	38%	6
2019-2024 % Change in Number of Employer Establishments	2.1%	13%	3
Business Ecosystem			3

SOURCE: US CENSUS BUREAU, BUREAU OF LABOR STATISTICS, AND STATS AMERICA

ENTREPRENEURSHIP: INDICATORS	RAW DATA	WEIGHT	RANK
% of Population Self-Employed	6.3%	75%	4
% of Population Who Works Remote	8.6%	25%	3
Entrepreneurship			5

SOURCE: US CENSUS BUREAU

INDUSTRY DIVERSIFICATION: INDICATORS	RAW DATA	WEIGHT	RANK
Industry Diversity Index (Top 5 Industries)	43.2%	25%	6
% of Employment in Export-Oriented Industries	37.9%	75%	1
Industry Diversification			1

SOURCE: US BUREAU OF LABOR STATISTICS

MANUFACTURING AND WAREHOUSING: INDICATORS	RAW DATA	WEIGHT	RANK
% of Employment in Construction, Manufacturing, and Warehousing	20.0%	75%	3
2019-2024 % Change in Employment in Industry	-6.8%	25%	5
Manufacturing and Warehousing			3

SOURCES: US BUREAU OF LABOR STATISTICS



Prepared by:

resonance

Southern 
Finger Lakes