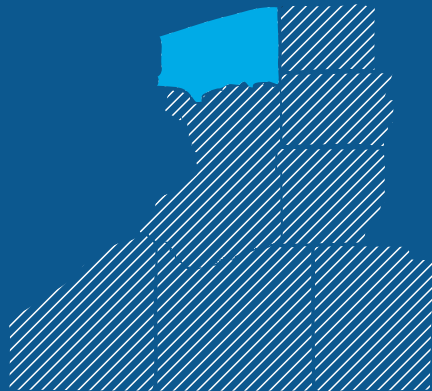


NIAGARA COUNTY



Situated north of Erie County on the U.S. border with Canada, Niagara County is part of the Buffalo-Niagara Falls MSA, along with Erie County. It is the region's second most populous county, with over 213,000 people, nearly 73,000 jobs and 4,800 firms. Large employers like General Motors, Delphi and Niagara University support the economic base, which has strengthened in recent years. Niagara County's unemployment rate dropped 3.1 percentage points since 2009, one of the largest declines reported regionwide. Nearly nine out of 10 private-sector workers in the county live in the Buffalo-Niagara Falls MSA, with over half residing in Niagara County. Small but notable proportions (one to three percent) travel to Niagara County from as far away as Monroe and Chautauqua Counties, contributing to the 22% of workers in the county reporting travel times to work of 30 minutes or more.

BY THE NUMBERS, 2014

Population

213,525

Number of Firms

4,755

Number of Jobs

72,750

Number of People in the Labor Force (2015)

101,600

% Employment in Public Sector

19%

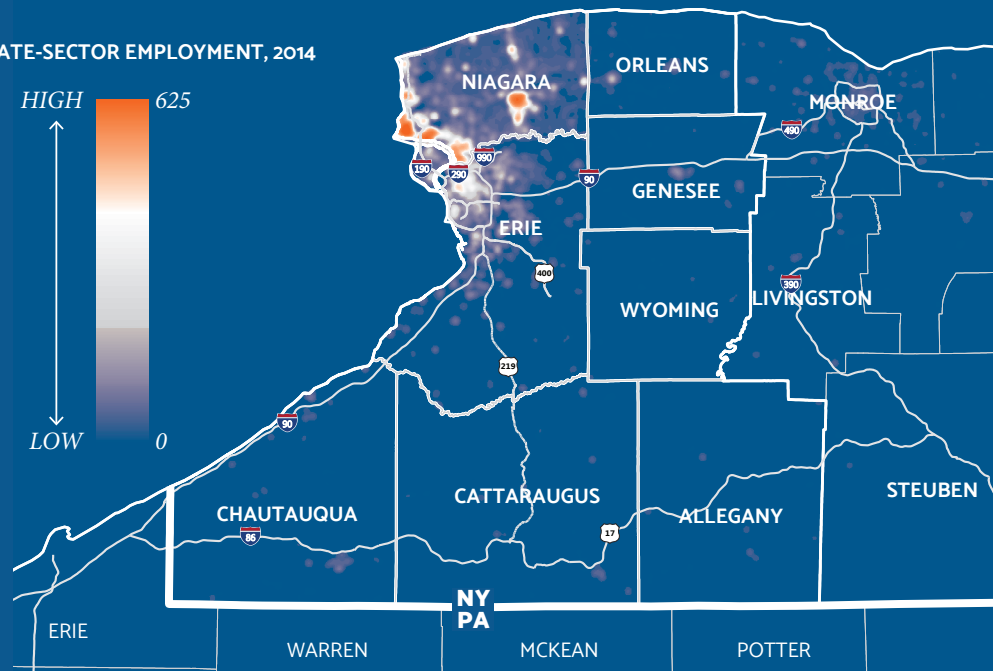
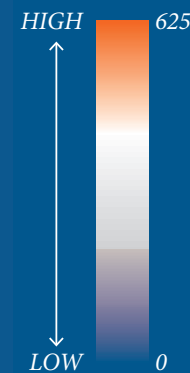
Average Private-Sector Wage

\$36,382

Source: See Data Sources & Notes for the various data sources.

Concentration of private-sector workers by location of residence, 2014

PRIVATE-SECTOR EMPLOYMENT, 2014



TOP 5 COUNTIES IN WHICH NIAGARA COUNTY WORKERS RESIDE

% of Niagara County workers commuting...

... from these counties

| | |
|-----|---------------------|
| 60% | Niagara County |
| 26% | Erie County |
| 3% | Monroe County |
| 2% | Orleans County |
| 1% | Chautauqua County |
| 8% | All Other Locations |

Source: U.S. Census Bureau, Longitudinal-Employer Household Dynamics Program, OnTheMap Application, 2014.

Postsecondary institutions in Niagara County granted over 2,500 degrees and certificates in 2014. Most were awarded by Niagara County Community College and Niagara University, a private four-year school just north of Niagara Falls. Business, Education, Health, Liberal Arts and Homeland Security are programs that attract and educate the largest number of students. These and other higher education programs help to support the county's industry specializations which include Health Care and Social Assistance, Agriculture, Forestry, Fishing and Hunting and Retail Trade.

Niagara County's workforce is comparable or better than regional and national benchmarks for its proportion of workers with some college or an associate's degree. Community-based trainers such as the Isaiah 61 Project and the YWCA of Niagara offer additional options for those seeking vocational training.

TOP 10 FIELDS OF STUDY

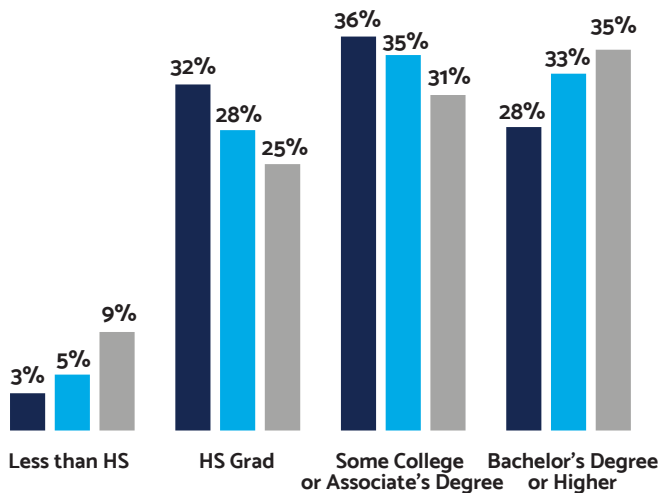
DEGREES AND CERTIFICATES AWARDED AT NIAGARA COUNTY COLLEGES, 2014



Source: National Center for Education Statistics; Integrated Postsecondary Education Data System, 2014.

EDUCATIONAL ATTAINMENT OF LABOR FORCE

NIAGARA COUNTY
BUFFALO NIAGARA
US

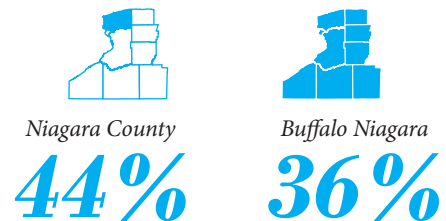


Source: American Community Survey, 1 and 5-year estimates, 2014.
NOTE: Percentages are based on the total number of workers in the labor force, ages 25-64.

INDUSTRY SPECIALIZATIONS FOR NIAGARA COUNTY

Utilities
Agriculture, Forestry, Fishing and Hunting
Retail Trade
Construction
Health Care and Social Assistance

These industry specializations as a % of total employment for...



Source: NYS DOL, QCEW, 2014. Excludes industries that comprise less than 0.5% of county's employment.