

COMMUTATION TRENDS IN THE HUDSON VALLEY WITH COUNTY LEVEL DETAIL 2013-2015

MARIST COLLEGE

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<http://www.marist.edu/management/bureau>

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Note to Reader:

This report uses data obtained from the U.S. Census Bureau and the Bureau of Labor Statistics. All computations were done by the author. For specific series names or methodology contact the Bureau of Economic Research at Marist College.

Commutation Flows: Hudson Valley Summary

Consistent with trend, growth in the number of Hudson Valley residents who held a job continued to outpace growth in employment opportunities within the region. As a result, labor market efficiency — the relationship between the demand and supply of jobs within a given geographic region — continues to decline. On the year, efficiency fell from -131,543 in 2014 to -122,139 in 2015. Overall, as of 2015, 55.8 percent of all Hudson Valley residents who held a job commuted to work, while 27.2 percent of all commutation was intraregional.

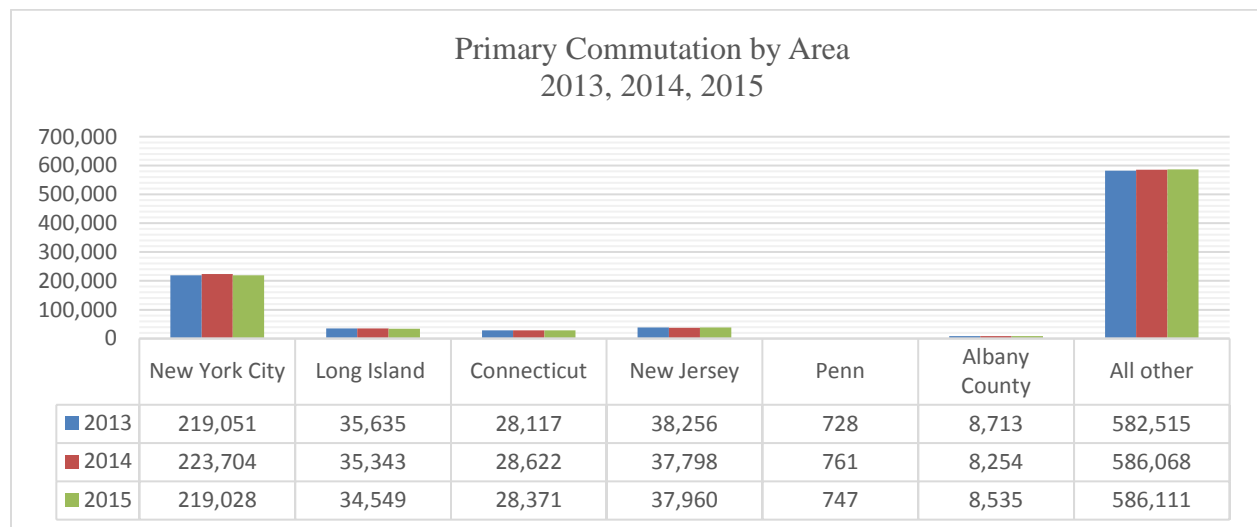
Hudson Valley Labor Market Efficiency			
	2013	2014	2015
<i>Net Outflow/Inflow</i>	-125,919	-131,543	-122,139
<i>Employed in the Hudson Valley</i>	787,096	789,007	793,162
<i>Living in the Hudson Valley</i>	913,015	920,550	915,301

All Primary Jobs Held in the Hudson Valley as a percentage of Total Jobs Held, All Primary Jobs Held in the Hudson Valley as a percentage of Total Commutation: 2015				
	All Hudson Valley as a percent of all Primary Jobs Held	Home County as a percent of all Primary Jobs Held	Other Hudson Valley counties as a percent of all Primary Jobs Held	Other Hudson Valley counties as a percent of Total Commutation
Dutchess	73.83%	47.51%	26.31%	50.13%
Orange	66.54%	47.04%	19.50%	36.83%
Putnam	60.63%	20.39%	40.24%	50.54%
Rockland	54.77%	41.50%	13.27%	22.68%
Sullivan	74.77%	46.59%	28.18%	52.76%
Ulster	75.07%	44.36%	30.72%	55.20%
Westchester	49.53%	45.50%	4.03%	7.40%
Hudson Valley	59.40%	44.21%	15.19%	27.23%

Employment within the Hudson Valley remains the norm, at 59.40 percent of all primary jobs held. Ulster County residents are the most dependent on intraregional employment at 75.07 percent of all primary jobs held. Westchester County is the least dependent at 49.53 percent. Commutation to New York City (NYC) remains significant at 42.89 percent of all commutation and 23.93 percent of all primary jobs held; New York County provided the most jobs at 136,626. Other important sources of commutation include Long Island, New Jersey, and Connecticut.

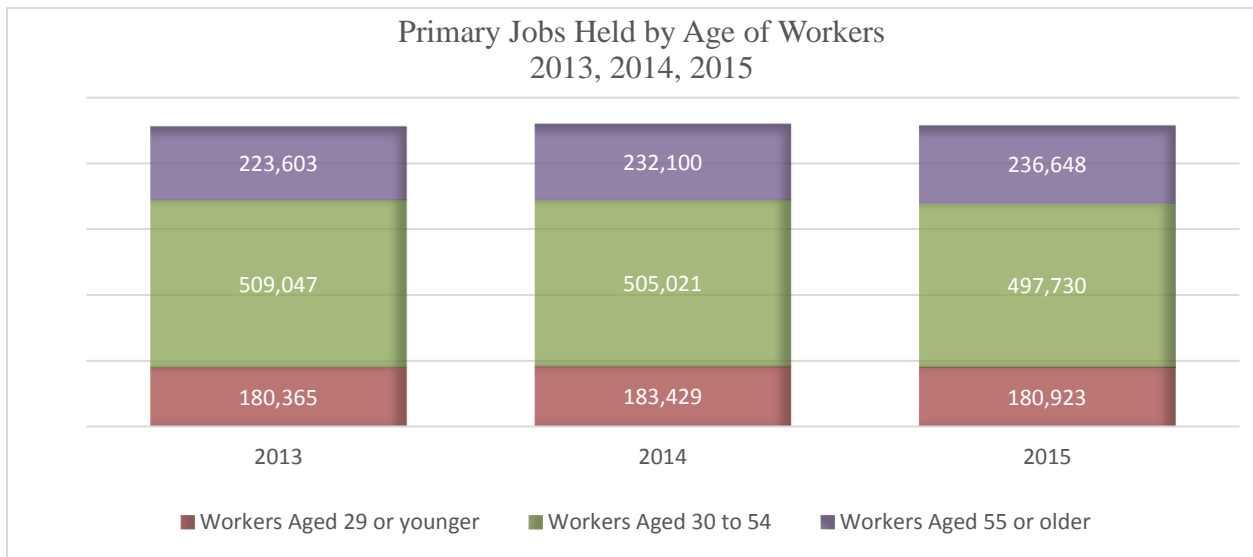
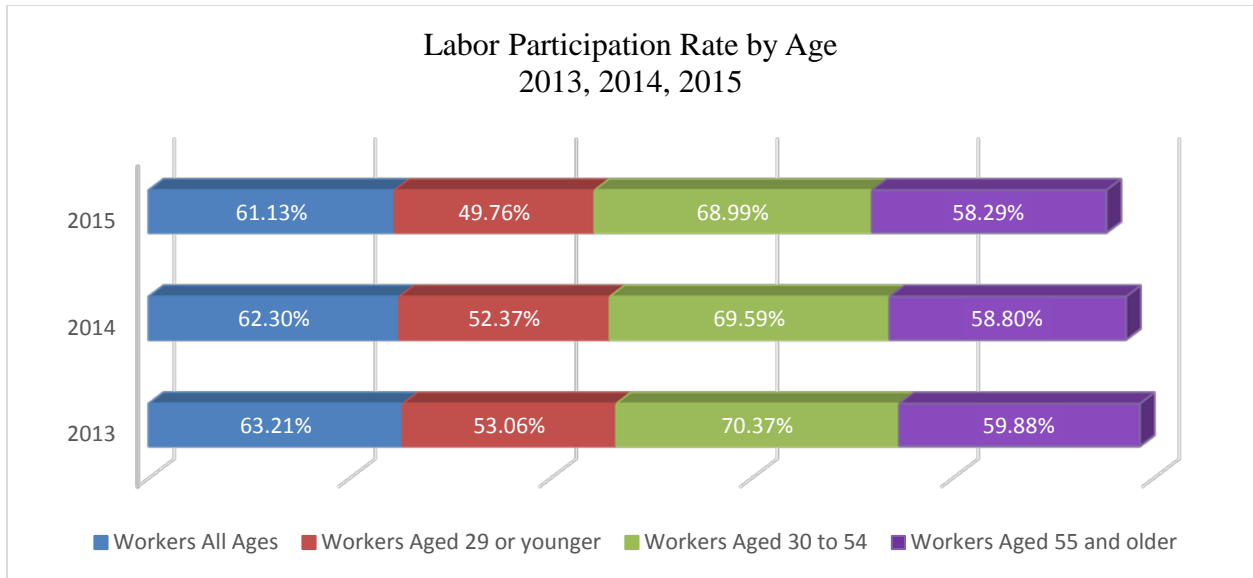


All Primary Jobs Held in New York City as a percentage of Total Jobs Held, All Primary Jobs Held in New York City as a percentage of Total Commutation: 2015				
	All Primary Jobs Held in NYC	Primary Jobs Held in NYC as a percent of all Primary Jobs Held	Primary Jobs Held in NYC as a percent of Total Commutation	
Dutchess	13,782	11.65%	22.19%	
Orange	23,755	15.83%	29.89%	
Putnam	9,182	21.09%	26.49%	
Rockland	28,585	22.37%	38.23%	
Sullivan	2,387	8.86%	16.59%	
Ulster	6,871	9.91%	17.82%	
Westchester	134,466	35.45%	65.04%	
Hudson Valley	219,028	23.93%	42.89%	



Individuals aged 30 to 54 constitute the most important working-age demographic in the region. This demographic has the highest labor-force participation rate — above 68.00 percent in 2015 — and accounts for more than 54.00 percent of all primary jobs held. The number of individuals aged 55 and older holding a primary job continues to advance, rising from 223,603 primary jobs held in 2013 to 236,648 in 2015. Inconsistent with this increase in the number of jobs held is labor market participation by individuals aged 55 and older, which declined from 59.88 percent of all eligible workers in 2013 to 58.29 percent in 2015. The youngest demographic, those aged 29 and younger, represented 19.77 percent of all primary jobholders in 2015, down slightly on the year. Labor force participation among these workers was also down on the year.



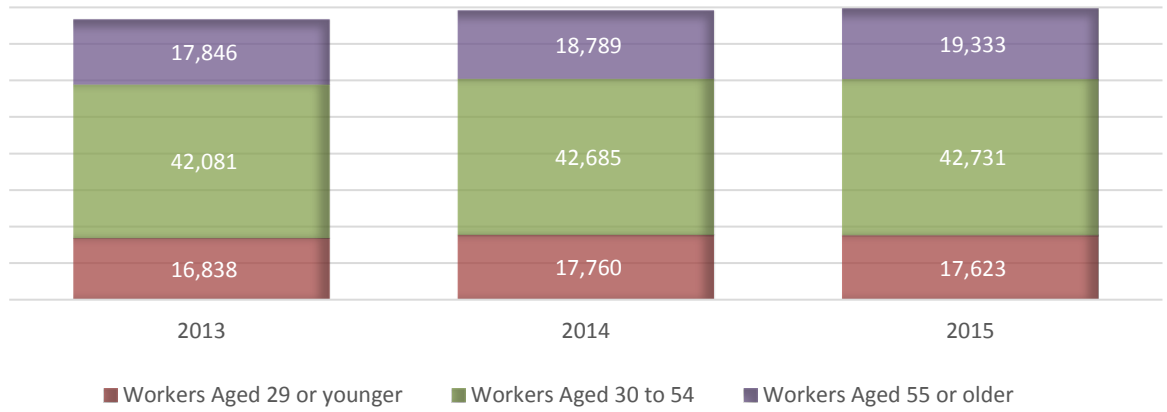


The increase in the number of jobholders aged 55 and older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2013 and 2015 those living in the Hudson Valley aged 55 to 69 increased to 38,792 individuals, while those aged 30 to 54 declined to 30,734 individuals. An important secondary issue is the continued impact of the Great Recession on retirement security.

In 2015, the maximum number of Hudson Valley residents who held more than one job was 79,687, up 453 on the year. The majority of multiple jobholders were aged 30 to 54, followed by workers aged 55 and older.



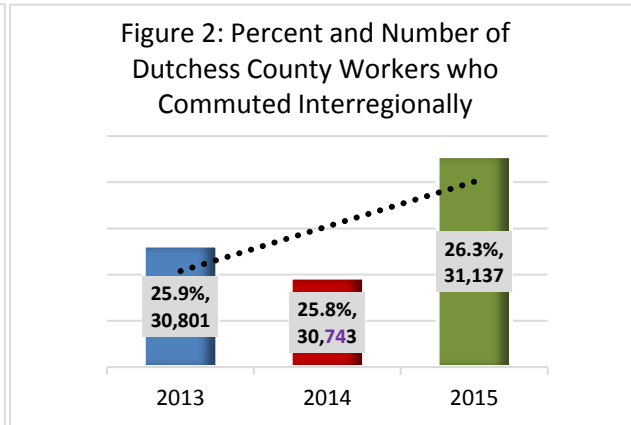
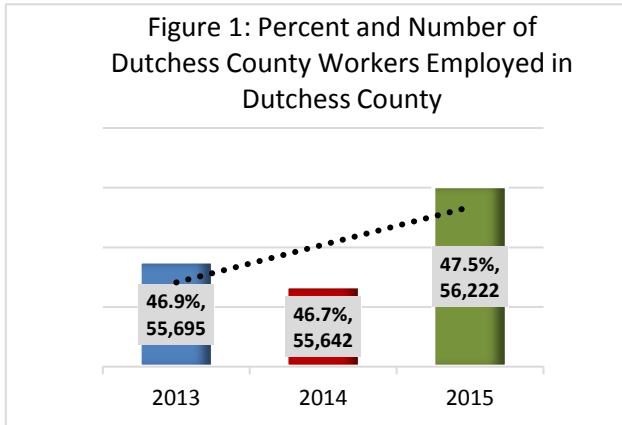
Maximum Number of Persons Holding More Than One Job
2013, 2014, 2015



Dutchess County Commutation Flows

Consistent with trend, the number of Dutchess County residents who held a job continued to outpace the employment opportunities within the county. On the year, labor market efficiency declined from -19,862 in 2014 to -19,966 in 2015 (see Chart 1). Year-over-year, the

	2013	2014	2015
Net Outflow/Inflow	-18,489	-19,862	-19,966
Employed in Dutchess	100,314	99,355	98,366
Living in Dutchess	118,803	119,217	118,332



number of residents who worked in the county was little changed, increasing from 55,642 (46.7 percent) of all employed residents in 2014 to 56,222 (47.5 percent) in 2015 (see Figure 1). The number of residents employed outside the county fell 1,465 on the year, from 63,575 in 2014 to 62,110 in 2015.

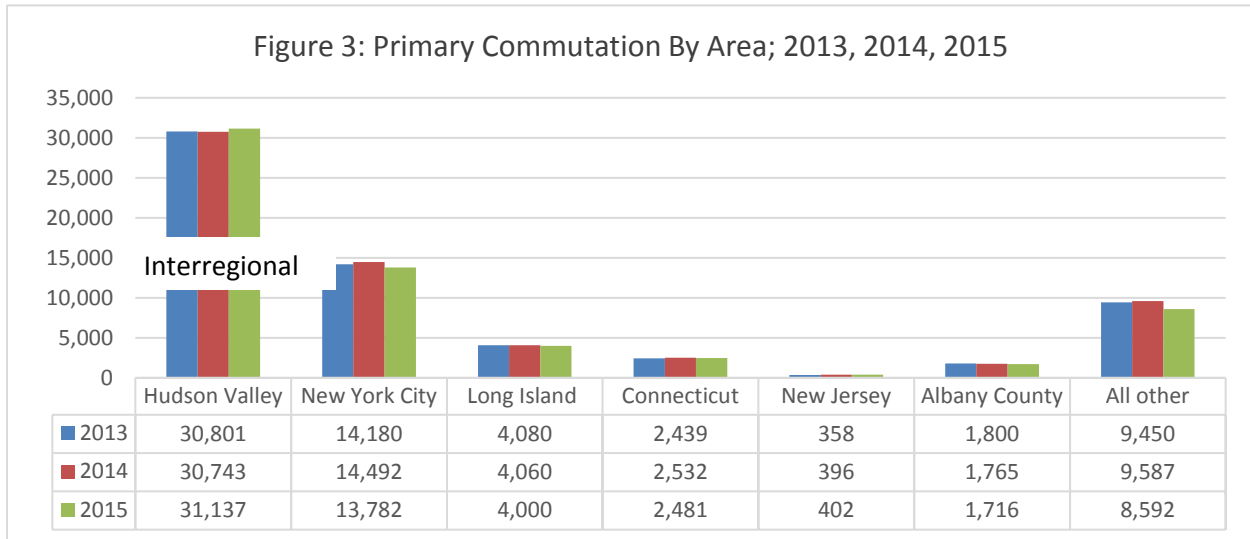
Interregional employment accounted for 31,137 (26.3 percent) of all primary jobs held and 50.1 percent of all commutation (see Figure 2). Within the region, the most important source of commuter employment

MORE THAN ONE HALF OF ALL DUTCHESS COUNTY RESIDENTS WHO HELD A JOB COMMUTED TO WORK.

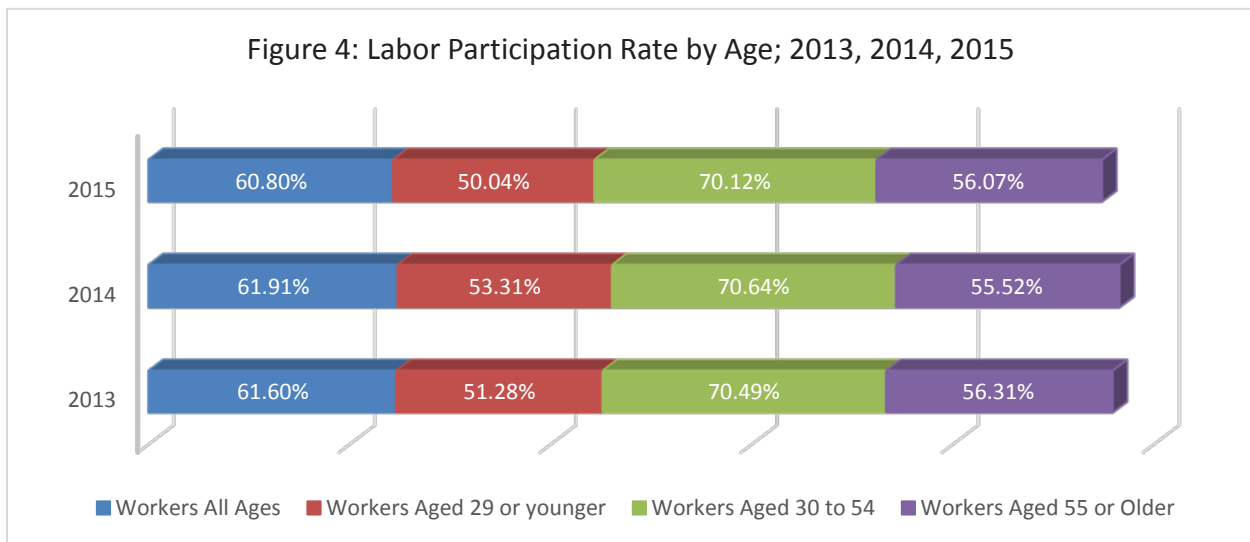
was Westchester County at 21.8 percent of total commutation and 11.5 percent of all primary jobs held; Orange County was a distant second at 10.0 percent of all commutation and 5.3 percent of all primary jobs held. Outside the region, New York City (NYC) continued to be the most important source of commuter employment at 22.2 percent of all commutation (13,782 jobs) and 11.6 percent of all primary jobs held. New York County provided the most jobs at



8,559, down 570 primary jobs on the year. Commutation to the Long Island region provided 4,000 jobs in 2015, little changed on the year (see Figure 3).



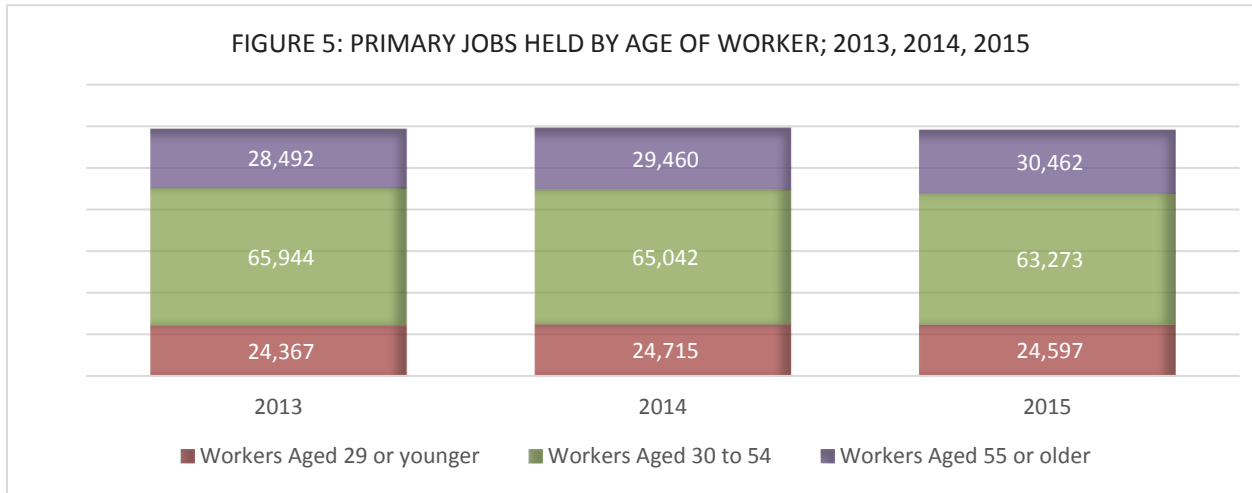
Individuals aged 30 to 54 constitute the most important working-age demographic in Dutchess County. This demographic has the highest labor force participation rate — above 70.00



percent in 2015 — and accounts for 53.47 percent (63,273) of all primary jobs held, a 2.7 percent decline on the year. The number of individuals aged 55 or older holding a primary job continues to advance, rising from 29,460 primary jobs held in 2014 to 30,462 in 2015. Consistent with this increase, labor market participation by individuals aged 55 or older posted a slight increase, rising from 55.52 percent of all eligible workers in 2014 to 56.07 percent in 2015. The youngest demographic, those aged 29 or younger, represented 20.79 percent of all primary jobholders in 2015, minimally changed on the year. Labor force participation for this age group was down on

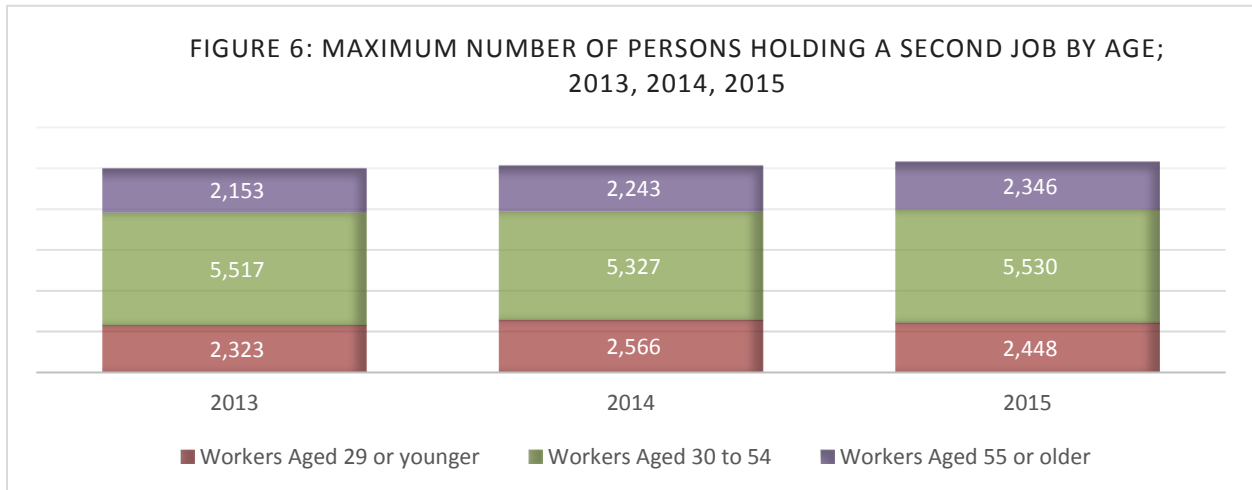


the year, falling from 53.31 percent in 2014 to 50.04 percent in 2015 (see Figures 4 and 5).



The increase in the number of jobholders aged 55 or older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2013 and 2015, the number of Dutchess County residents aged 55 to 69 increased by 3,155 while the number of persons aged 30 to 54 declined by 3,652. An important secondary issue is the continued impact of the Great Recession on retirement security.

In 2015, the maximum number of county residents who held more than one job was 10,324, up slightly on the year. The majority of multiple jobholders were aged 30 to 54, followed by workers aged 29 or younger (see Figure 6).

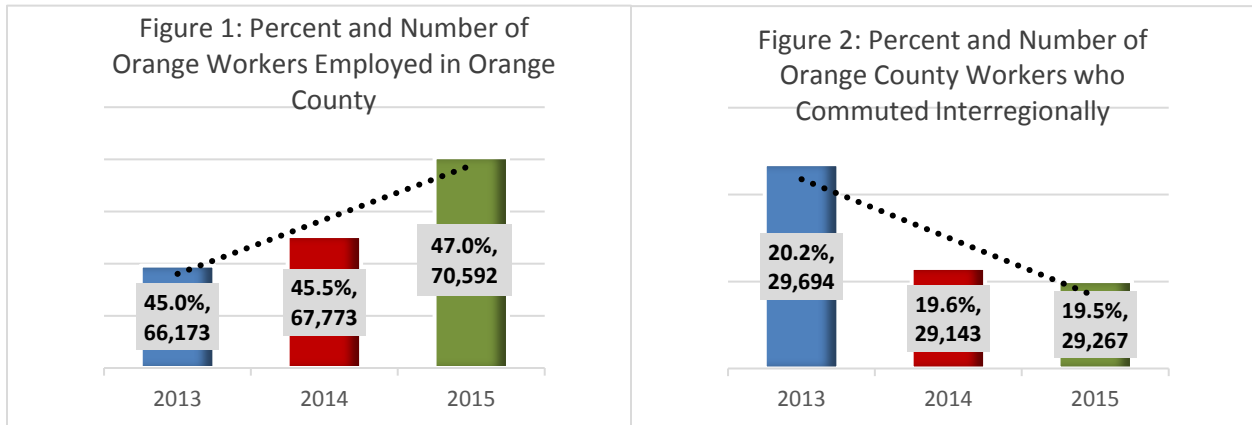


Orange County Commutation Flows

Consistent with the near-term trend, the number of Orange County residents who held a job continued to outpace employment opportunities within the county, although the gap is closing. On the year, labor market efficiency improved, advancing from -29,496 in 2014 to -28,338 in 2015 (see Chart 1).

Chart 1: Orange County: Labor Market Efficiency

	2013	2014	2015
Net Outflow/Inflow	-29,372	-29,496	-28,338
Employed in Orange	117,805	119,357	121,727
Living in Orange	147,177	148,853	150,065



Year-over-year, the number of Orange County residents who worked in the county rose slightly from 67,773 (45.5 percent) in 2014 to 70,592 (47.0 percent) in 2015 (see Figure 1), while commutation declined from 81,080 in 2014 to 79,473 in 2015.

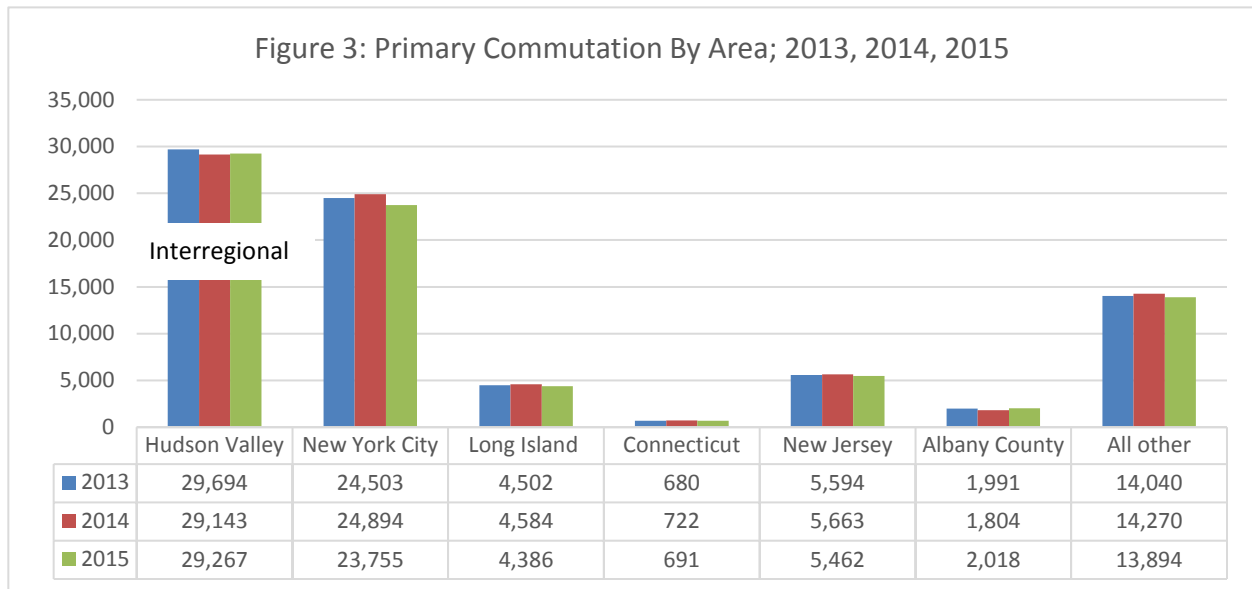
Interregional commutation accounted for 29,267 (19.5 percent) of all primary jobs held and 36.8 percent of all commutation (see Figure 2).

MORE THAN ONE HALF OF ALL ORANGE COUNTY RESIDENTS WHO HELD A JOB COMMUTED TO WORK.

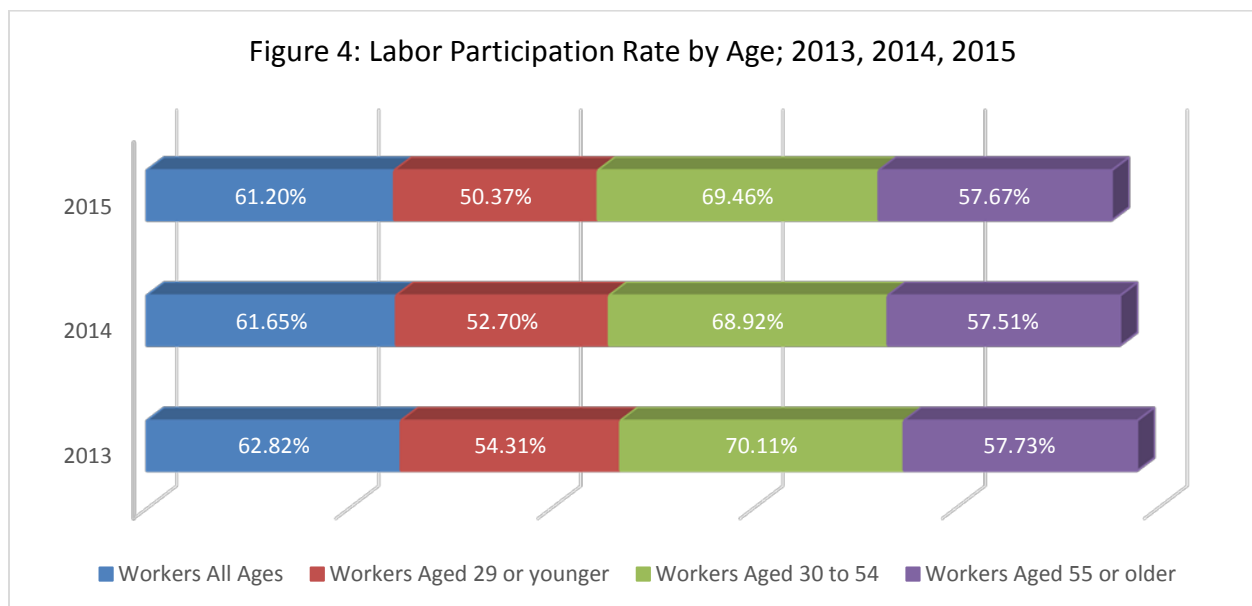
The most important sources of interregional employment were Westchester and Rockland counties. Westchester accounted for 10.42 percent (8,284) of total commutation and 5.52 percent of all primary jobs held; Rockland accounted for 10.39 percent (8,260) of all commutation and 5.50 percent of all primary jobs held. Outside the region, New York City (NYC) continued to be the most significant source of commuter employment at 29.9 percent of commutation and 15.8 percent of all primary jobs held. As is typically the case, New York County provided the most jobs in 2015 at 14,741, down from



15,483 in 2014. Commutation to the Long Island region was a distant second at 5.5 percent (4,386) of all commutation and 2.9 percent of all primary jobs held (see Figure 3).



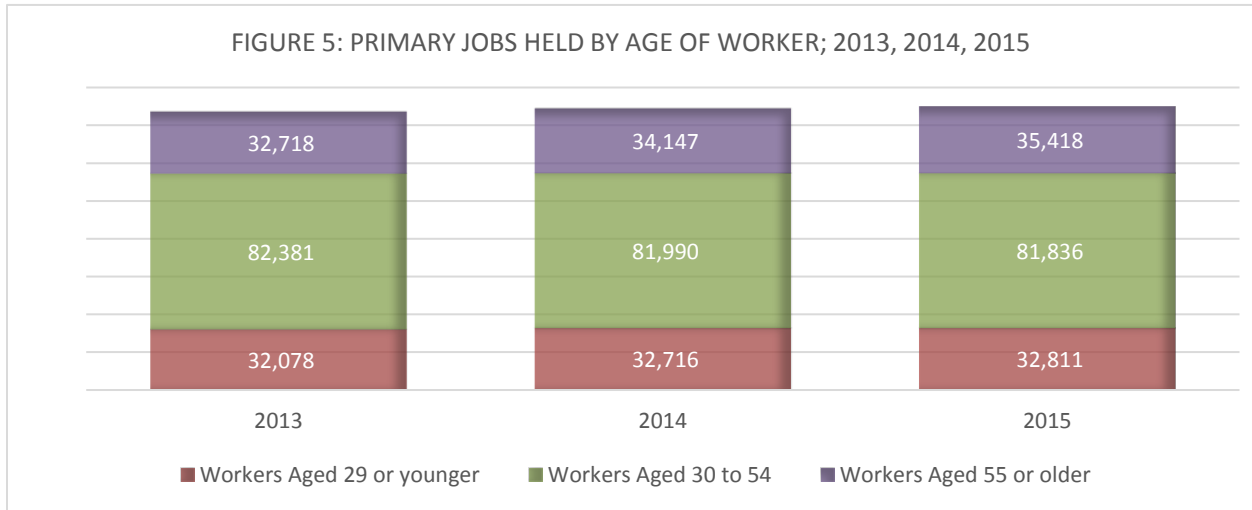
Individuals aged 30 to 54 make up the most important working-age demographic in Orange County. This demographic had the highest labor force participation rate — 69.46 percent in 2015 — and accounted for 54.53 percent (81,836) of all primary jobs held, little changed on the year. The number of residents aged 55 or older holding a primary job continues to advance, rising from



34,147 primary jobs held in 2014 to 35,418 in 2015. Labor market participation remains steady.

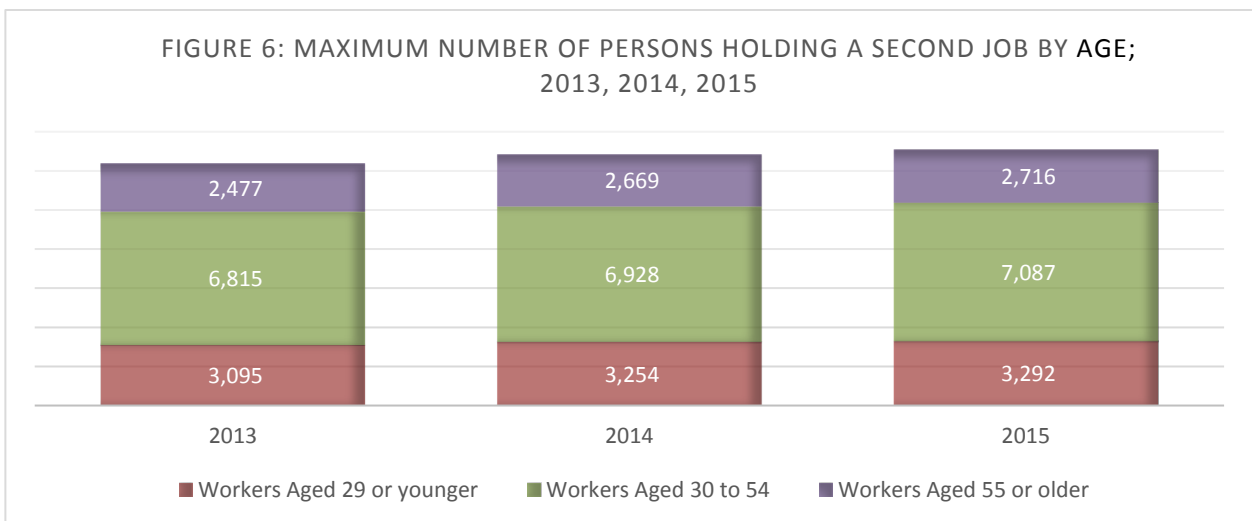


The youngest demographic, those aged 29 or younger, accounted for 21.86 percent (32,811) of all primary jobholders in 2015, down slightly on the year. Labor force participation among workers aged 29 or younger was 50.37 percent in 2015 compared to 52.70 percent in 2014 (see Figures 4 and 5).



The increase in the number of jobholders aged 55 and older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2013 and 2015, the number of Orange County residents aged 55 to 69 increased by 3,186, while the number of persons aged 30 to 54 declined by 2,782. An important secondary issue is the continued impact of the Great Recession on retirement security.

In 2015, the maximum number of Orange County residents who held more than one job was 13,095, up from 12,851 in 2014. The majority of multiple jobholders were aged 30 to 54, followed by workers aged 29 years or younger (see Figure 6).

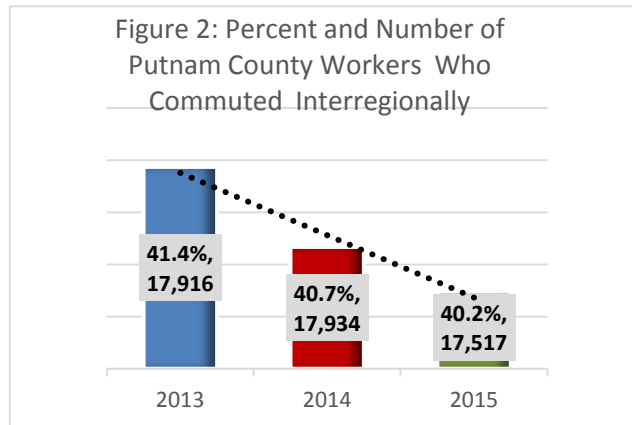
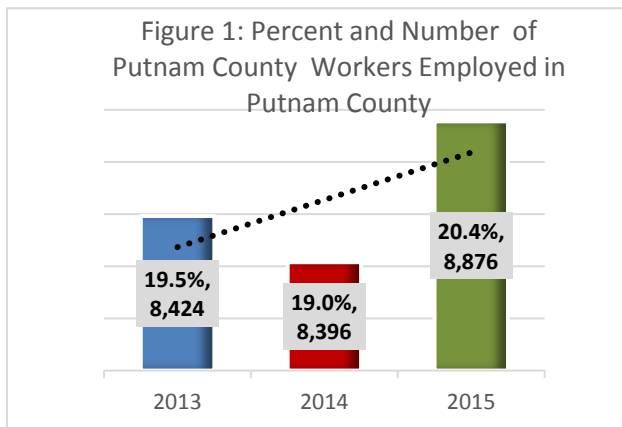


Putnam County Commutation Flows

Consistent with the near-term trend, the number of Putnam County residents who held a job continues to outpace employment opportunities within the county. On the year, labor market efficiency declined from -21,182 in 2014 to -20,299 in 2015 (see Chart 1).

Chart 1: Putnam County: Labor Market Efficiency

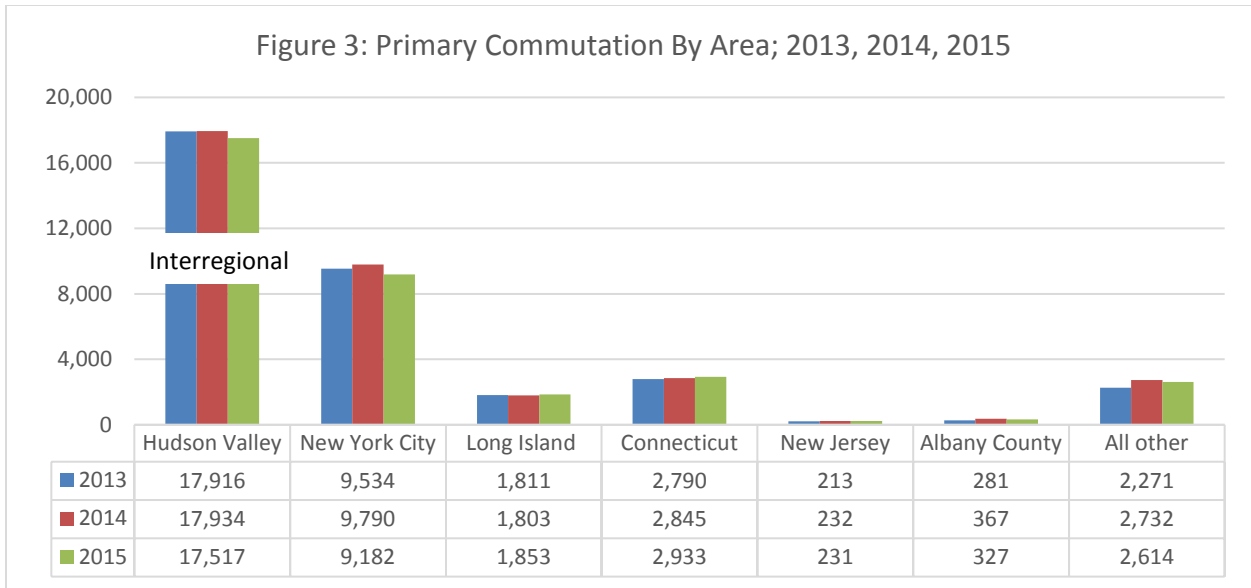
	2013	2014	2015
Net Outflow/Inflow	-20,565	-21,182	-20,299
Employed in Putnam	22,675	22,917	23,234
Living in Putnam	43,240	44,099	43,533



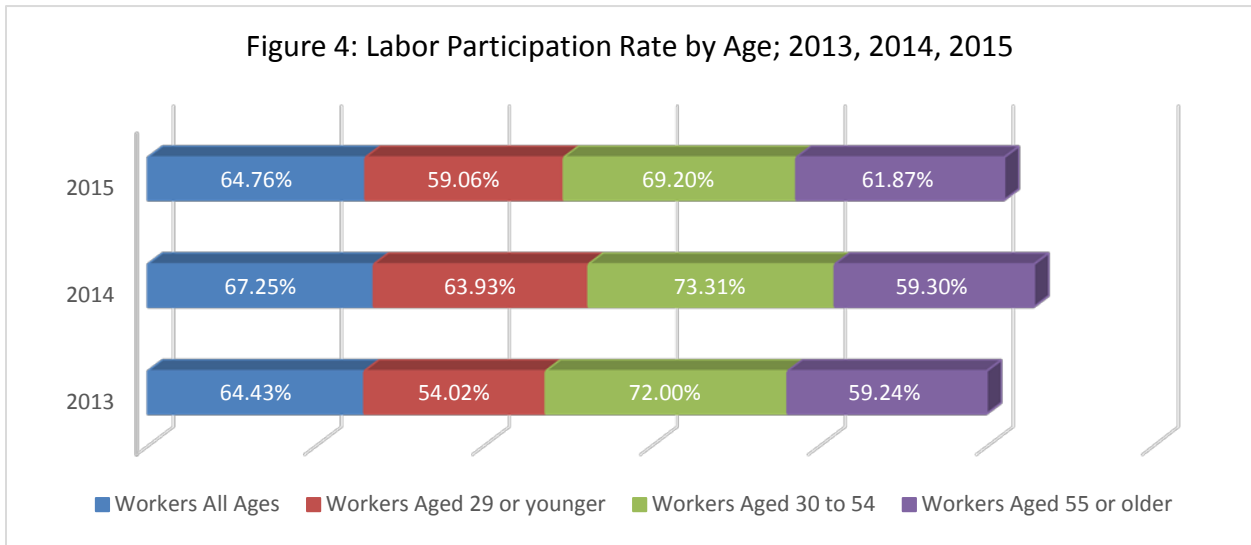
Year-over-year, the number of Putnam County residents who worked in the county increased slightly, rising from 8,396 in 2014 to 8,876 in 2015 (see Figure 1). Employment outside the county fell from 35,703 jobs held in 2014 to 34,657 in 2015.

Interregional employment remains the norm at 50.5 percent of all commutation and 40.2 percent of all primary jobs held by Putnam County residents (see Figure 2). The most important source of commuter employment was Westchester County at more than 40 percent (14,048) of total commuter employment and 32.3 percent of all primary jobs held; Dutchess County was a distant second at 5.5 percent (1,918) of total commutation and 4.4 percent of all primary jobs held. Outside the region, New York City (NYC) remains the most important source of commuter employment at 26.5 percent (9,182) of all commutation and 21.1 percent of all primary jobs held. New York County provided the most jobs at 5,792, down 353 primary jobs on the year (see Figure 3).





Individuals aged 30 to 54 constitute the most important working-age demographic in Putnam County. This demographic has the highest labor force participation rate — 69.2 percent in 2015 — and accounts for more than 53.00 percent (23,450) of all primary jobs held, falling 651 jobs on the year. The number of individuals aged 55 or older holding a primary job

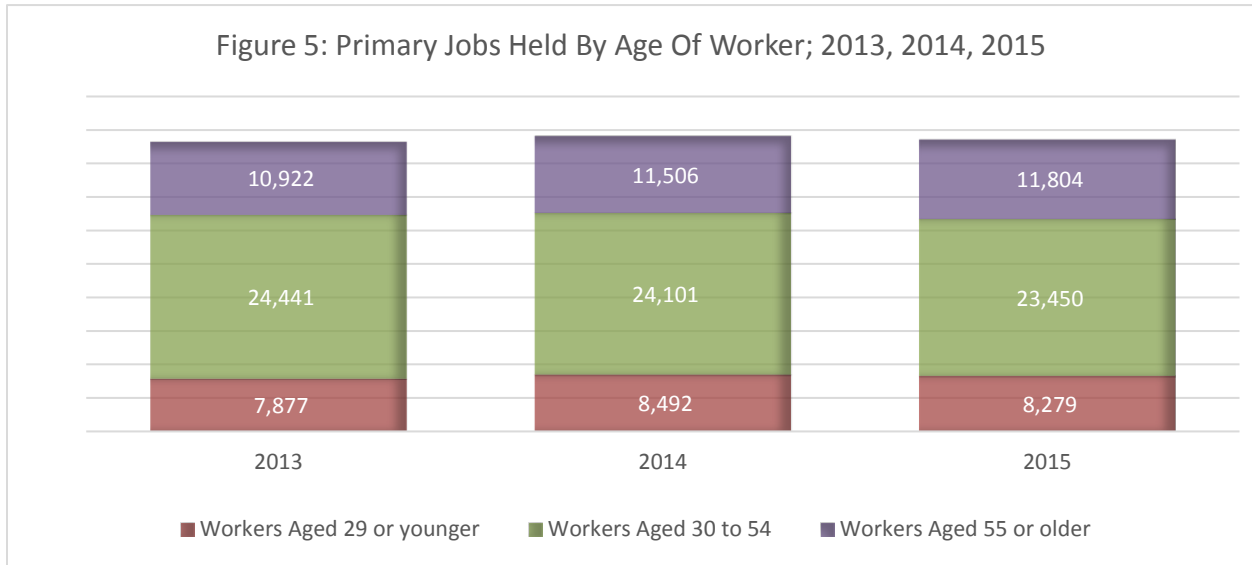


continued to climb, rising from 11,506 primary jobs held in 2014 to 11,804 in 2015. Consistent with this increase, labor market participation by individuals aged 55 or older increased on the year from 59.3 percent of all eligible workers in 2014 to 61.9 percent of all eligible

OF ALL THE PUTNAM COUNTY RESIDENTS WHO HELD A JOB, MORE THAN 79 PERCENT COMMUTED TO WORK.



workers in 2015. The youngest demographic, those aged 29 or younger, represented 19.0 percent of all primary jobholders in 2015, down slightly on the year. Labor force participation among workers aged 29 or younger was 59.1 percent in 2015 compared to 63.9 percent in 2014 (see



Figures 4 and 5).

The increase in the number of jobholders aged 55 and older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2013 and 2015, the number of Putnam County residents aged 55 to 69 increased by 969, while the number of persons aged 30 to 54 declined by 1,225. An important secondary issue is the continued impact of the Great Recession on retirement security.

In 2015, the maximum number of Putnam residents who held more than one job was 3,544. The majority of multiple jobholders were aged 30 to 54 followed by workers aged 55 or older (see Figure 6).



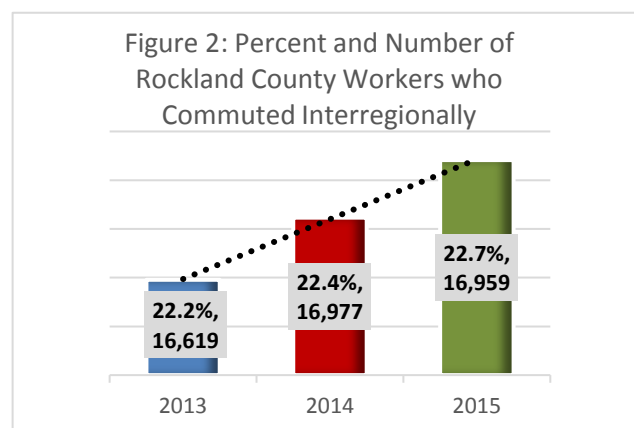
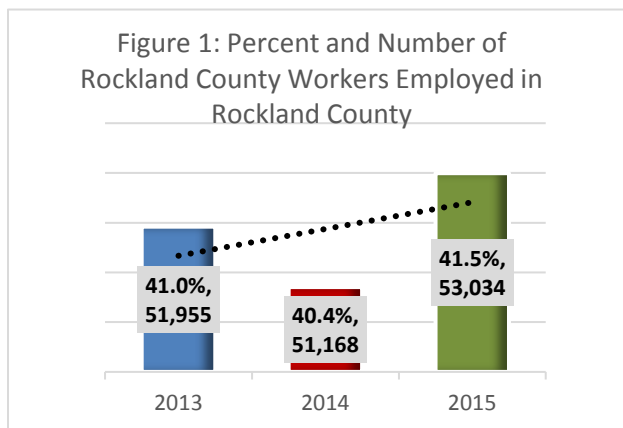
Rockland County Commutation Flows

Consistent with trend, the number of Rockland County residents who held a job continued to outpace employment opportunities in the

Chart 1: Rockland County: Labor Market Efficiency

	2013	2014	2015
Net Outflow/Inflow	-21,679	-26,779	-24,353
Employed in Rockland	105,166	100,023	103,448
Living in Rockland	126,845	126,802	127,801

county, but the gap is closing. As of 2015, the number of county residents who held a job exceeded employment opportunities in the county by 24,353, down from 26,779 jobs held in 2014 (see Chart 1).



The number of Rockland County residents who worked in the county increased from 51,168 in 2014 to 53,034 in 2015 (see Figure 1). During the same period, the number of residents employed outside the county declined, falling from 75,634 jobs held in 2014 to 74,767 jobs held in 2015.

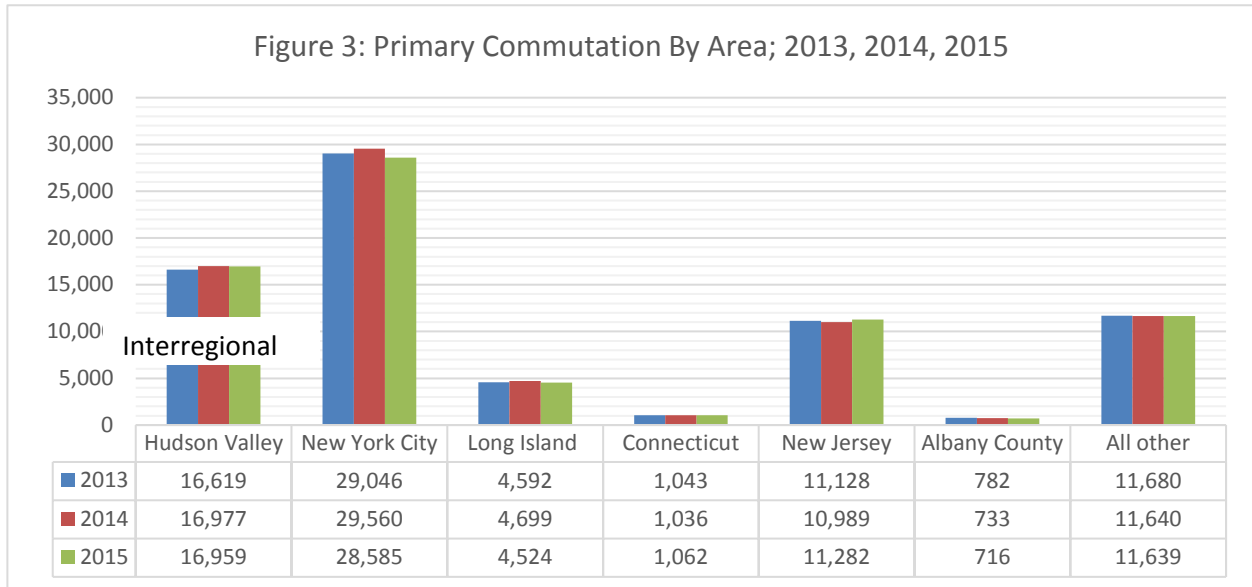
Interregional employment accounted for 22.7 percent (16,959) of all commutation and 13.3 percent of all primary jobs held (see Figure 2). The most important source of commuter employment was Westchester County at 16.6 percent (12,388) of total commutation and 9.7

MORE THAN HALF OF ALL ROCKLAND COUNTY RESIDENTS WHO HELD A JOB COMMUTED TO WORK.

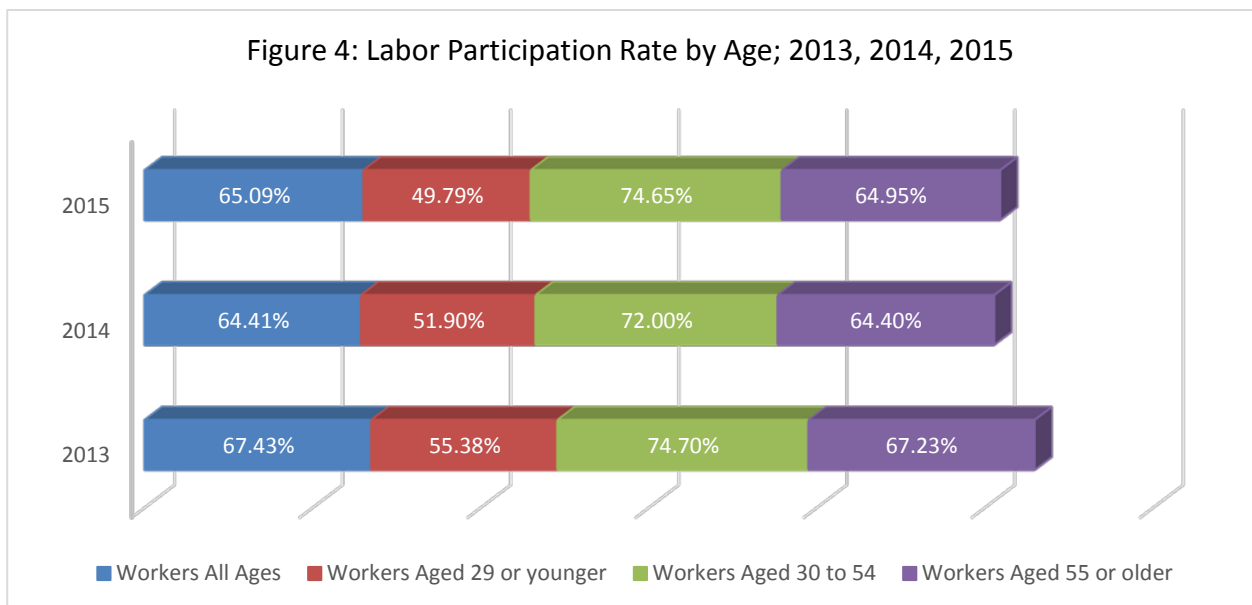
percent of all primary jobs held; Orange County was a distant second at 4.8 percent (3,567) of all commutation and 2.8 percent of total employment. Outside the region, New York City (NYC) remains the most important source of commuter employment at 38.2 percent (28,585) of total



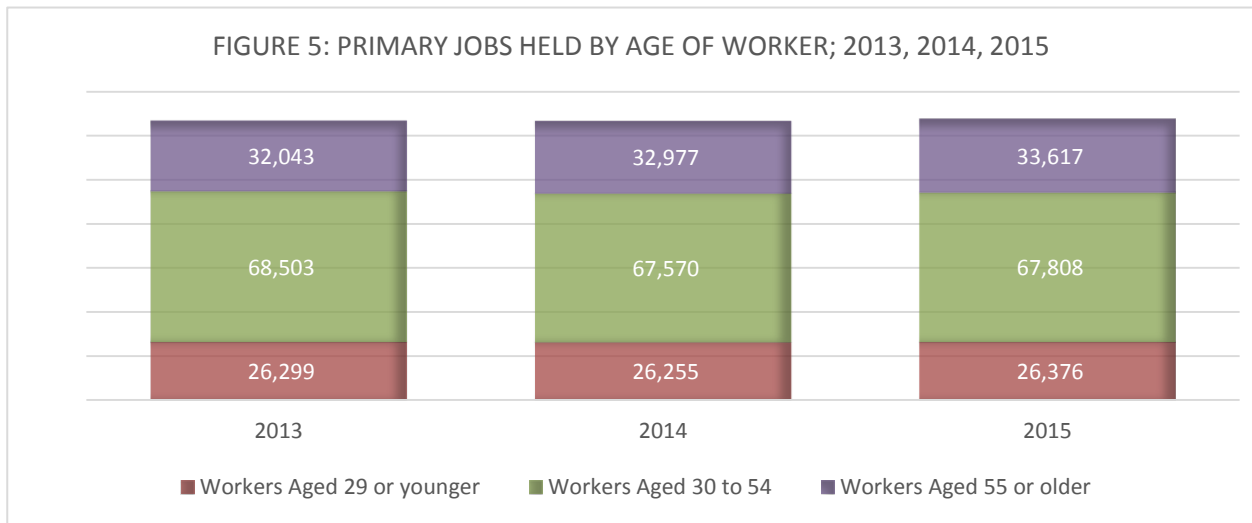
commutation. New York County provided the most jobs at 16,876, down from 17,901 in 2014 (see Figure 3).



Those residents aged 30 to 54 comprised the most important working-age demographic in Rockland County. This demographic has the highest labor-force participation rate — 74.7 percent — and accounted for more than 53.1 percent (67,808) of all primary jobs held in 2015. The number of individuals aged 55 or older holding a primary job continues to advance, rising from 32,977 in 2014 to 33,617 in 2015. Labor market participation by individuals aged 55 or older was little changed on the year. The youngest demographic, those aged 29 or younger,



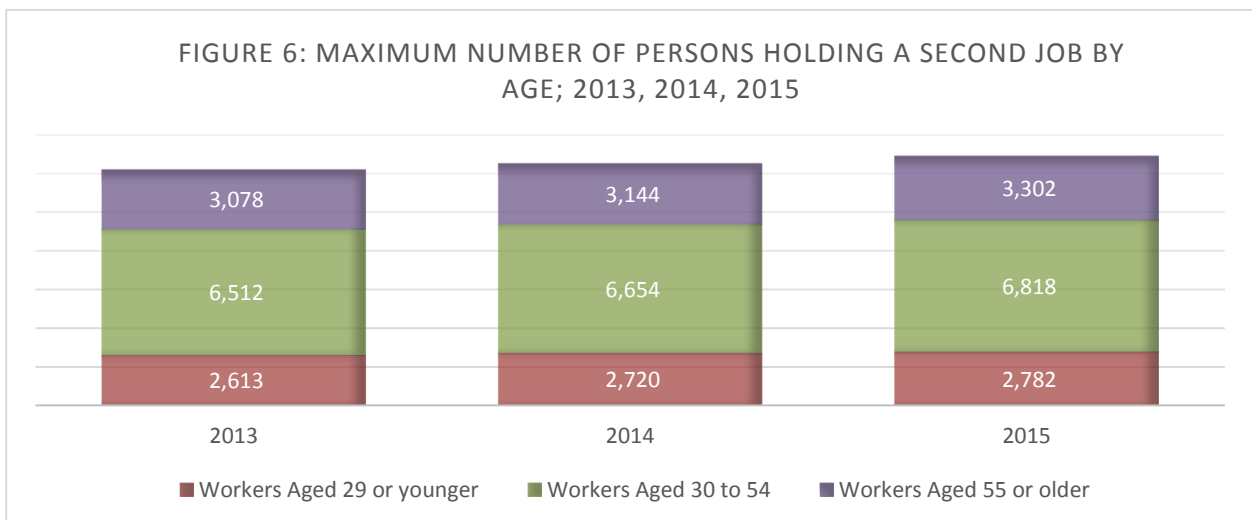
represented 20.6 percent of all primary jobholders in 2015, down slightly on the year. Labor force participation among workers aged 29 or younger was down on the year, falling from 51.9



percent in 2014 to 49.8 percent in 2015 (see Figures 4 and 5).

The increase in the number of jobholders aged 55 and older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2013 and 2015, the number of county residents aged 55 to 69 increased by 2,112, while the number of residents aged 30 to 54 declined by 1,479. An important secondary issue is the continued impact of the Great Recession on retirement security.

In 2015, the maximum number of Rockland County residents who held more than one job was 12,902, up slightly on the year. The majority of multiple jobholders were aged 30 to 54, followed by workers aged 55 years and older (see Figure 6).



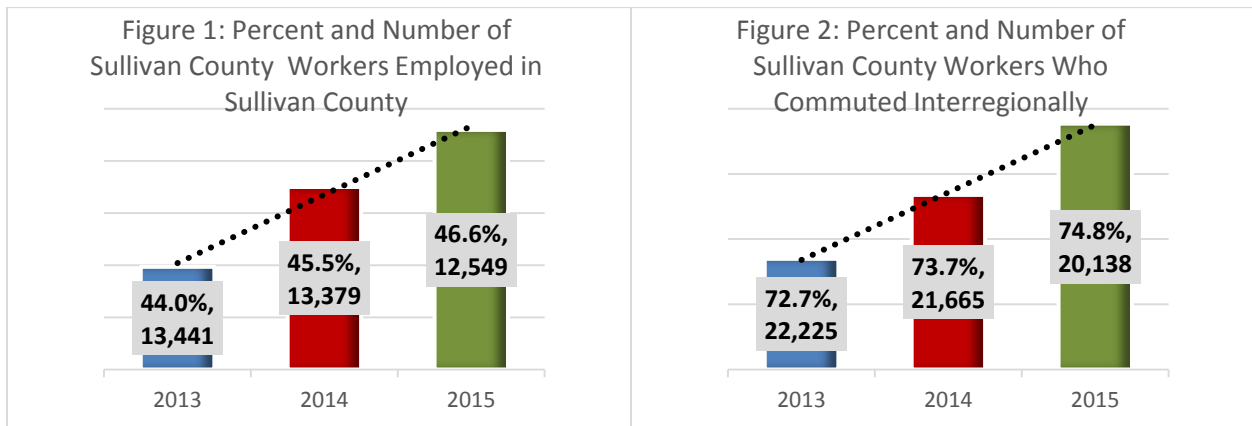
Sullivan County Commutation Flows

Labor-market efficiency in Sullivan County improved on the year, rising from -7,280 in 2014 to -4,912 in 2015 (see Chart 1). The number of

Chart 1: Sullivan County: Labor Market Efficiency

	2013	2014	2015
Net Outflow/Inflow	-8,588	-7,280	-4,912
Employed in Sullivan	21,983	22,125	22,021
Living in Sullivan	30,571	29,405	26,933

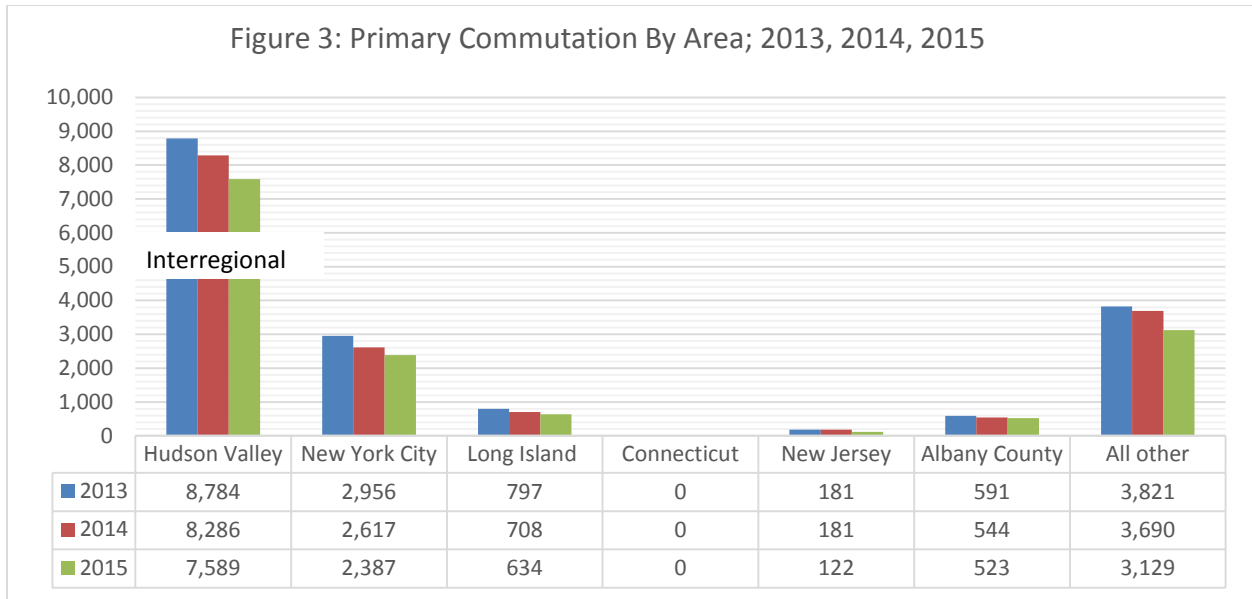
county residents who worked in the county fell from 13,379 in 2014 to 12,549 in 2015. During the same period, the number of residents employed outside the county decreased by 1,642, from 16,026 in 2014 to 14,384 in 2015 (see Figures 1 and 2).



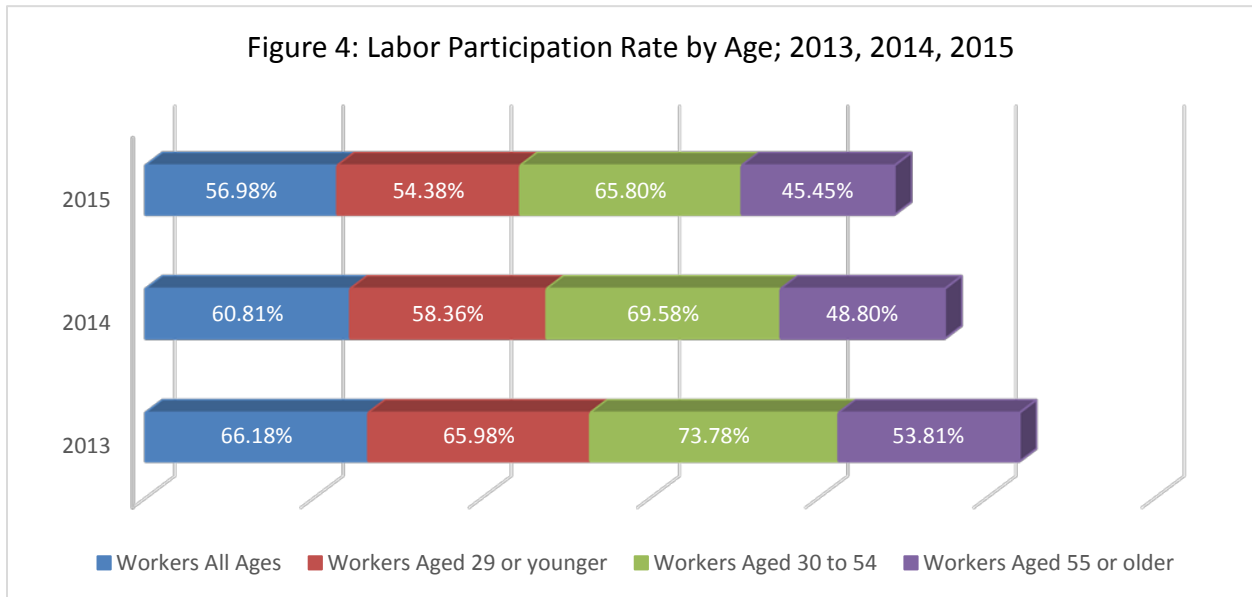
Consistent with the long-term trend, employment within the Hudson Valley — excluding Sullivan County — remains the norm at 52.8 percent of all primary jobs held. Within the region, the most important source of commuter employment was Orange County at 33.0 percent of total commutation; Ulster County was a distant second at 7.2 percent. Outside the region, New York City (NYC) remains the most important source of commuter employment at 16.6 percent of all commutation. Within the city, New York County provided the most jobs at 1,372 (see Figure 3).

MORE THAN HALF OF ALL SULLIVAN COUNTY RESIDENTS WHO HELD A JOB COMMUTED TO WORK.





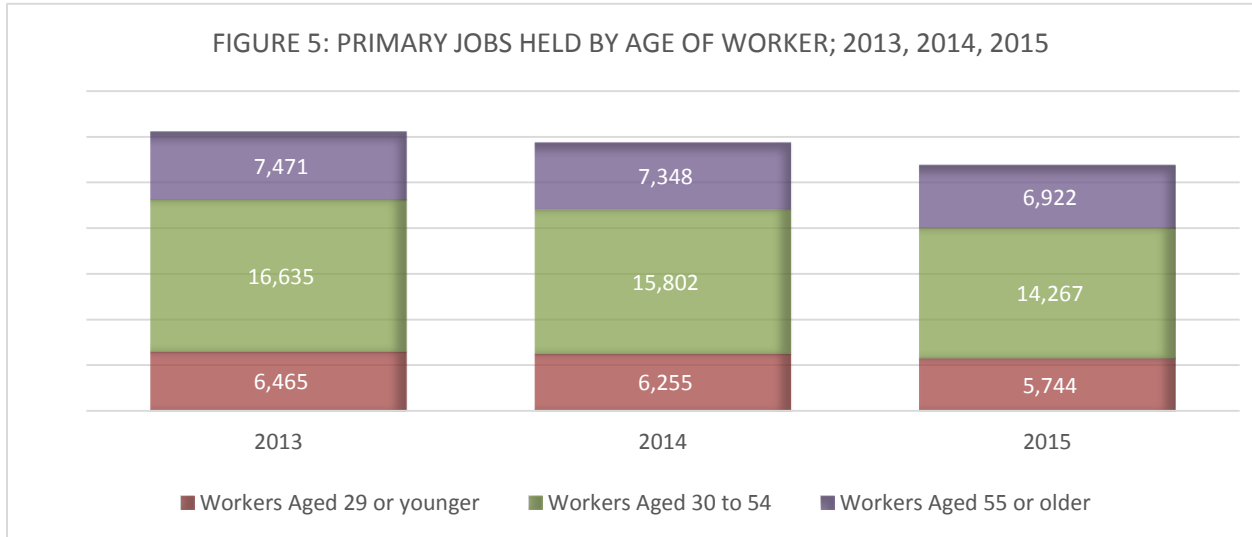
The county’s most important working-age demographic is comprised of individuals aged 30 to 54. This demographic has the highest labor force participation rate — just above 65.0 percent in 2015 — and accounts for 52.9 percent of all primary jobs held. The number of



individuals aged 55 or older holding a primary job declined on the year, falling from 7,348 primary jobs held in 2014 to 6,922 in 2015. Labor market participation by individuals aged 55 or older also decreased, falling from 48.8 percent of all eligible workers in 2014 to 45.5 percent in 2015. The youngest demographic, those aged 29 or younger, represented 21.3 percent of all primary jobholders in 2015, up slightly on the year. Labor force participation among workers

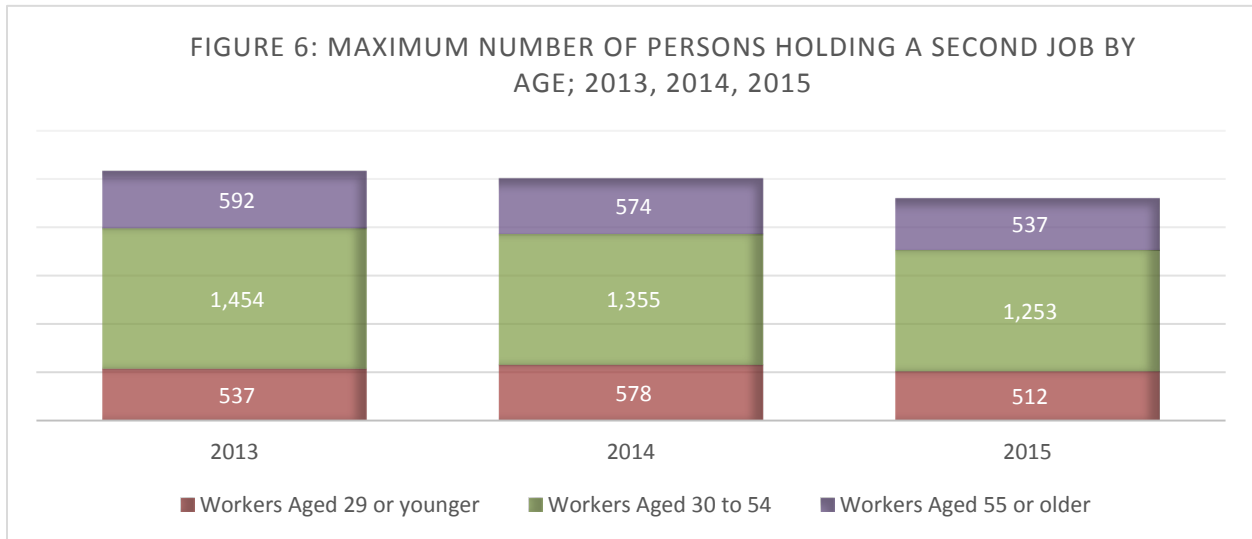


aged 29 or younger was 54.4 percent in 2015 compared to 58.4 percent in 2014 (see Figures 4 and 5).



The increase in the number of jobholders aged 55 and older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2010 and 2015, the number of Sullivan County residents aged 55 to 69 increased by 335, while the number of residents aged 30 to 54 declined by 1,156. An important secondary issue is the continued impact of the Great Recession on retirement security.

In 2015, the maximum number of county residents who held more than one job was 2,302. The majority of multiple jobholders were aged 30 to 54 (see Figure 6).

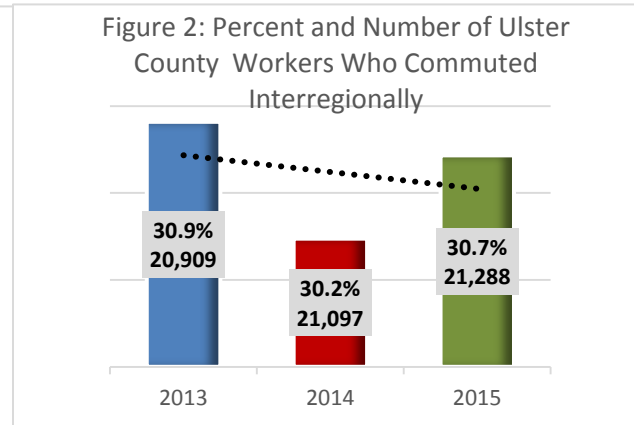
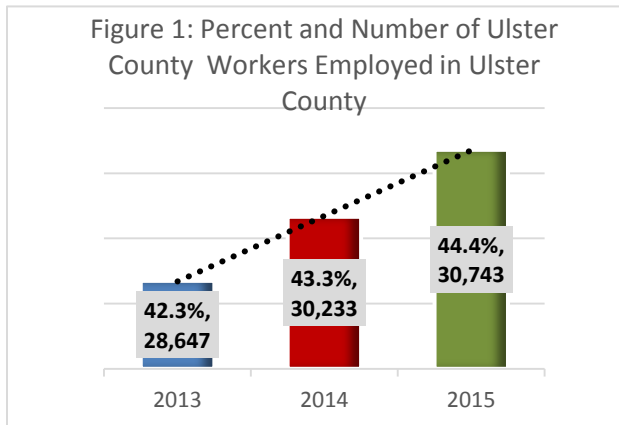


Ulster County Commutation Flows

Consistent with the near-term trend, the number of Ulster County residents who held a job continued to outpace employment opportunities within the county. As of 2015, the number of county residents who held a job exceeded employment opportunities within the county by -16,863, down slightly on the year (see Chart 1).

Chart 1: Ulster County: Labor Market Efficiency

	2013	2014	2015
Net Outflow/Inflow	-15,000	-16,460	-16,863
Employed in Ulster	52,648	53,312	52,443
Living in Ulster	67,648	69,772	69,306



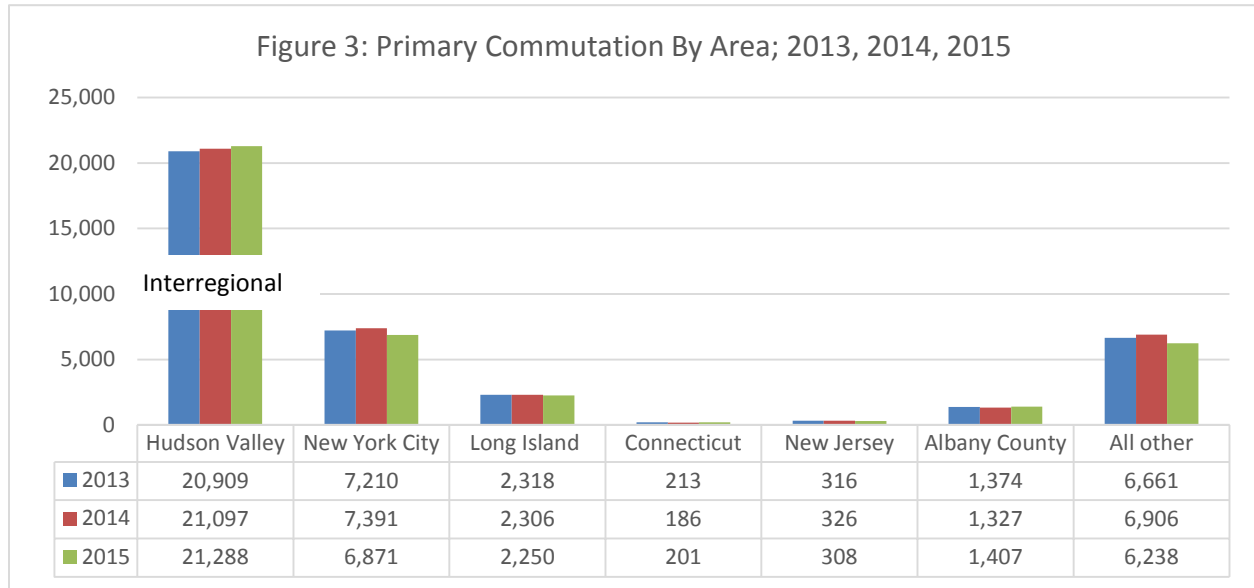
On the year, the number of county residents who worked in the county rose from 30,233 in 2014 to 30,743 in 2015, while commuter employment decreased from 39,539 in 2014 to 38,563 in 2015 (see Figure 1).

Interregional employment remains the norm at 30.7 percent (21,288) of all primary jobs held and 55.2 percent of all commutation (see Figure 2). The primary source of commuter employment was Dutchess County at 14.1 percent (9,742) of all primary jobs held and 25.3 percent of total commutation; Orange County came second at 10.6 (7,341) percent of all jobs held and 19.0 percent of total commutation. Outside the region, New York City (NYC) continues to be the most important source of commuter employment at 17.8 percent (6,871) of total commutation and 9.9 percent of all primary jobs held. New York County provided the most jobs at 3,819,

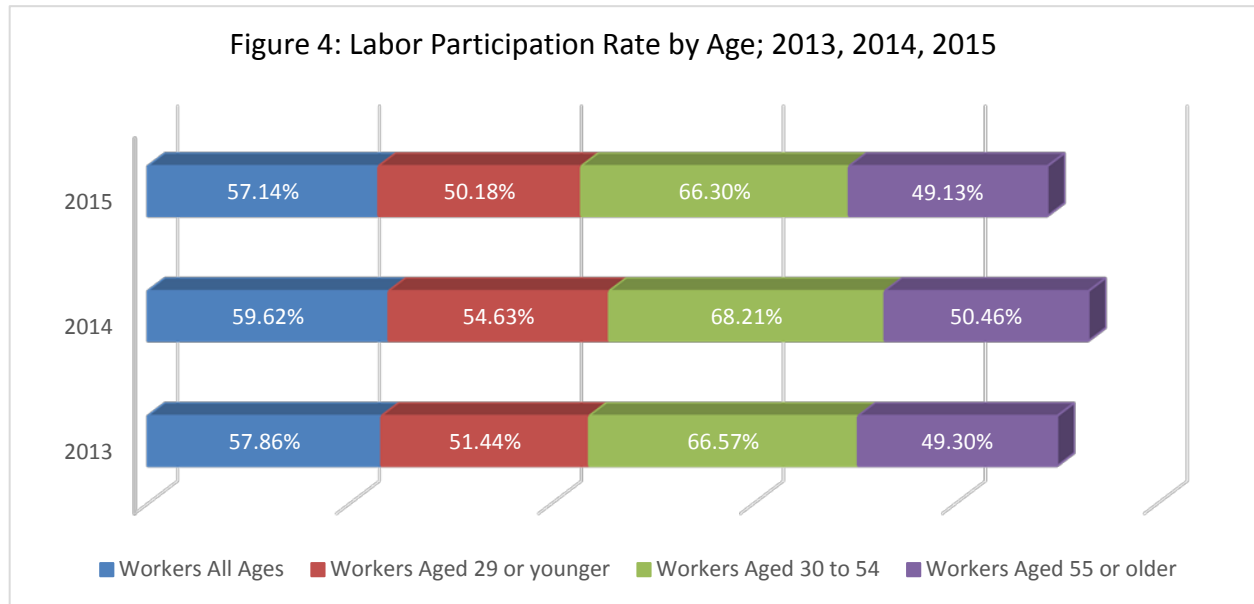
MORE THAN HALF OF ALL ULSTER COUNTY RESIDENTS WHO HELD A JOB COMMUTED TO WORK.



down from 4,223 in 2014 (see Figure 3).

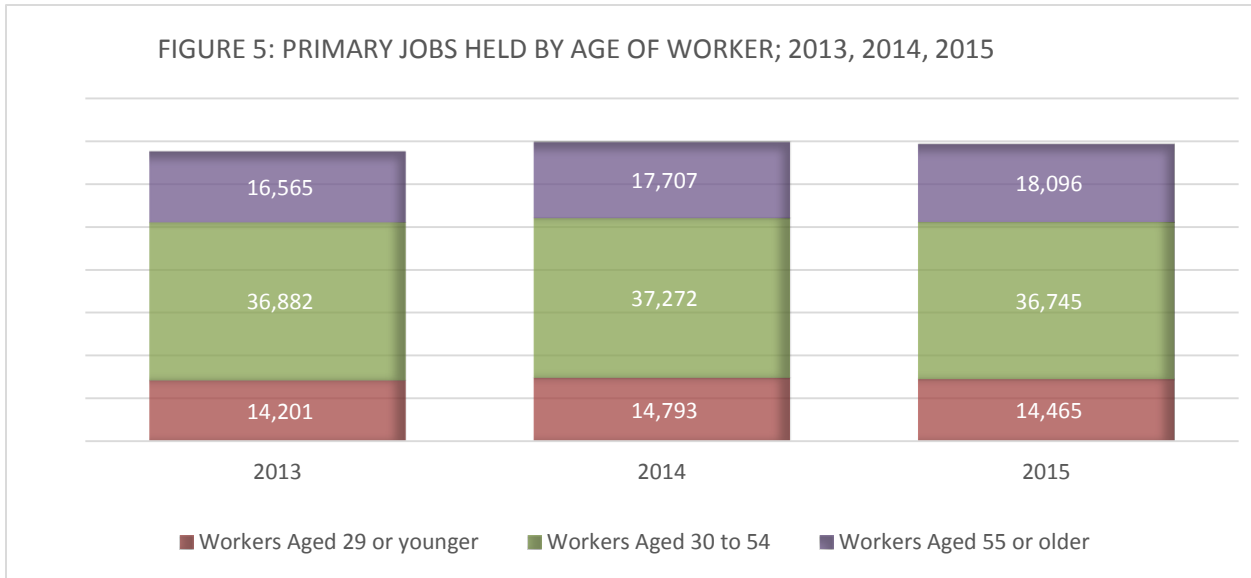


The main working-age demographic in Ulster County are those individuals aged 30 to 54. This demographic has the highest labor force participation rate — 66.3 percent in 2015 — and accounts for slightly more than 53.0 percent of all primary jobs held. The number of individuals aged 55 or older holding a primary job continues to advance, rising from 17,707 primary jobs



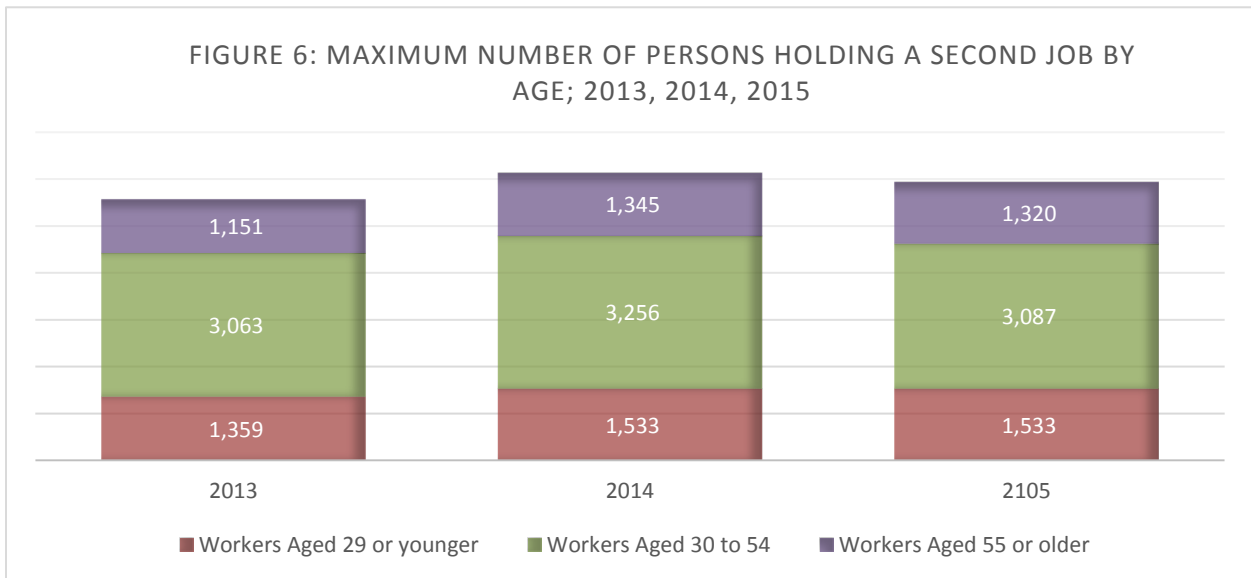
held in 2014 to 18,096 in 2015. The youngest demographic, those aged 29 or younger, represented 20.9 percent of all primary jobholders in 2015, down on the year. Labor force participation among these workers was 50.2 percent in 2015 compared to 54.6 percent in 2014 (see Figures 4 and 5).





The increase in the number of jobholders aged 55 and older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2013 and 2015, the number of Ulster County residents aged 55 to 69 increased by 1,482, while the number of residents aged 30 to 54 declined by 2,172. An important secondary issue is the continued impact of the Great Recession on retirement security.

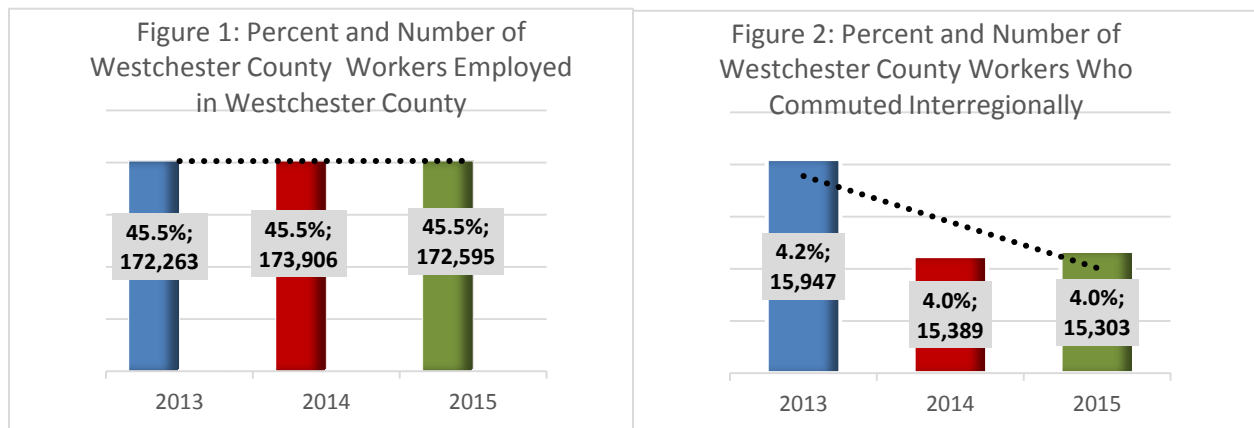
In 2015, the maximum number of county residents who held more than one job was 5,940, compared to 6,134 in 2014. The majority of multiple jobholders were aged 30 to 54, followed by workers aged 29 or younger (see Figure 6).



Westchester County Commutation Flows

Labor market efficiency in Westchester County improved more than 25 percent on the year, rising from -10,484 in 2014 to -7,408 in 2015 (see Chart 1), while the number of residents who worked in the county fell from 173,906 in 2014 to 172,595 in 2015. During the same period, the number of residents employed outside the county fell from 208,496 in 2014 to 206,736 in 2015 (see Figures 1 and 2).

	2013	2014	2015
Net Outflow/Inflow	-12,226	-10,484	-7,408
Employed in Westchester	366,505	371,918	371,923
Living in Westchester	378,731	382,402	379,331

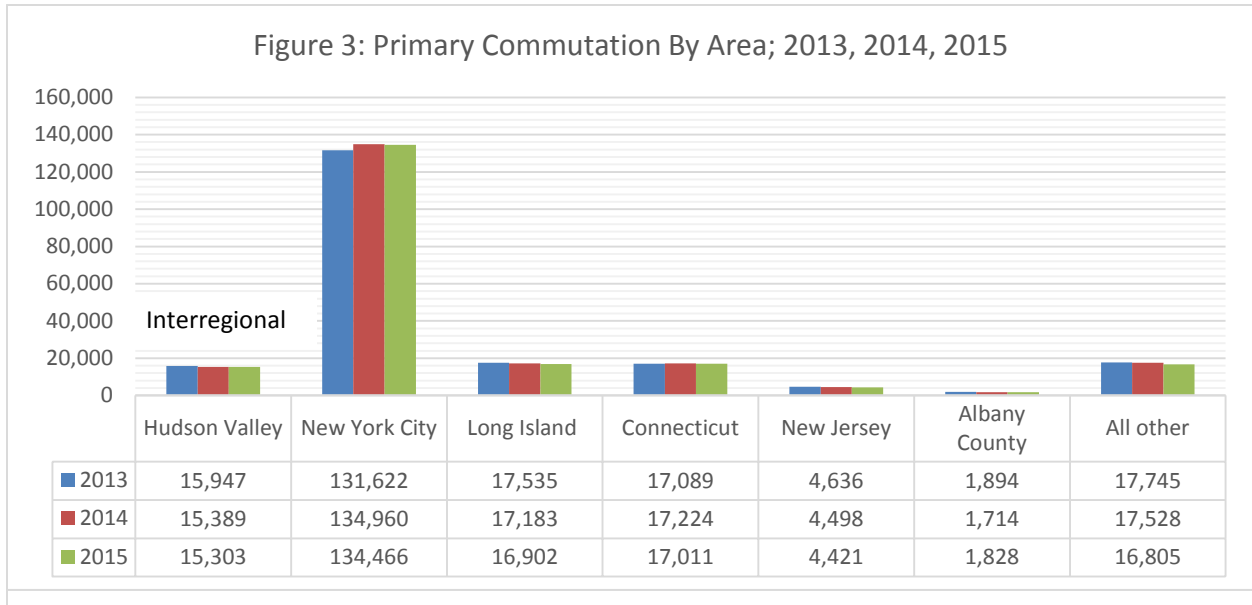


New York City (NYC) remains the most important source of commuter employment at 65.0 percent of all commutation, which is little changed on the year. Within the city, New York County provided the most jobs at 85,467, followed by Bronx County at 26,393.

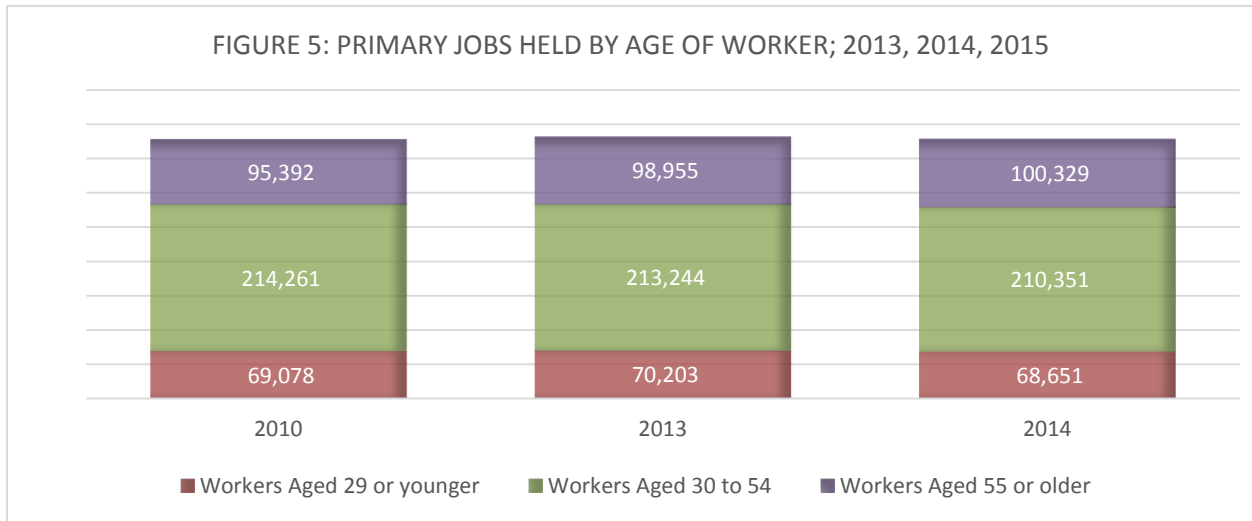
MORE THAN HALF OF ALL WESTCHESTER COUNTY RESIDENTS WHO HELD A JOB COMMUTED TO WORK.

Employment in the Hudson Valley — excluding Westchester County — was of secondary importance at 7.4 percent of all commutation and 4.0 percent of all primary jobs held. Within the region, Rockland County accounted for 3.0 percent of all commutation (see Figure 3).





The most important working-age demographic in the county is comprised of residents aged 30 to 54. This demographic has the highest labor force participation rate — just above 67.5



percent in 2015 — and accounted for more than 55.5 percent of all primary jobs held. The number of individuals aged 55 or older who held a primary job continues to advance, rising from 98,955 primary jobs held in 2014 to 100,329 in 2015. Labor market participation by individuals aged 55 or older decreased from 61.3 percent of all eligible workers in 2014 to 59.9 percent in 2015. The youngest demographic, those aged 29 or younger, represented 18.1 percent of all primary jobholders in 2015, down slightly on the year. Labor force participation among workers



aged 29 or younger was 48.1 percent in 2015 compared to 50.0 percent in 2014 (See Figures 4 and 5).

The increase in the number of jobholders aged 55 and older can be explained in part by the aging of the baby-boom generation. According to the U.S. Census Bureau, between the years 2013 and 2015, the number of Westchester County residents aged 55 to 69 increased by 8,157, while the number of persons aged 30 to 54 declined by 2,901. An important secondary issue is the continued impact of the Great Recession on retirement security.

In 2015, the maximum number of Westchester County residents who held more than one job was 31,580. The majority of multiple jobholders were aged 30 to 54 followed by workers aged 55 years or older (see Figure 6).

