




# Putting LEAP to Work for Your LDD

Appalachian Regional  
Commission

Economic Development  
Research Group



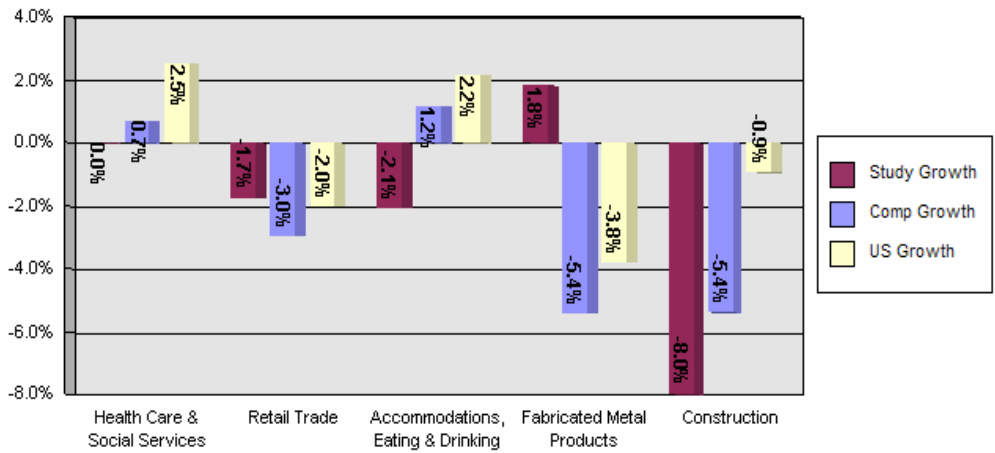
## Uses for LEAP

1. Content for Newsletters
2. CEDS Reports and Annual Updates
3. Progress Reports
4. Assess Strengths and Weaknesses
5. Industry Targeting
6. Barriers and Strategy Plans
7. “What If” Scenarios

## Quick Content for Newsletters

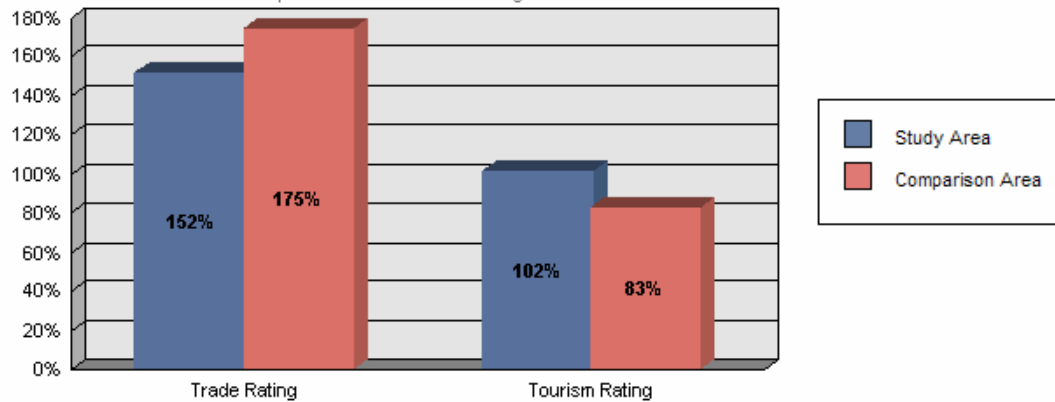
- Keep constituents and stakeholders informed
  - Show profiles of the region
  - Leading sectors of the economy
  - Display regional comparisons
  - Show drivers of growth

**Study Area, Comparison Area, and US Annual Average Growth in Study Area's Five Largest Sectors**



**International Trade & Tourism**

Compared to National Average



## CEDS Reports and Annual Updates

- Background information on region (population, labor force skill, costs, etc)
- Local and regional economic data (jobs, income, value added, output)
- Trends and gaps
- Strategy and targeting -
  - Identify leading and struggling industries
  - Identify candidates for industry targeting
  - Identify barriers to industry growth

# Example: CEDS Report - Trends

- Trends for 55 industries by 3 digit NAICS

		Employment - Southern Tier West				Adjusted Annual Growth (%) Comparison			Trend Ratio (Growth Relative to US)
		2000	2005	% of Total (2005)	Mix Ratio	Southern Tier West	Area - Broome County, NY	United States	
111	Crop Production	3,614	1,408	1.1%	9.71	-17.2%	-23.3%	-5.4%	3.2
112	Animal Production	1,116	2,573	2.1%	4.81	18.2%	17.1%	7.6%	2.4
113	Forestry & Logging	741	183	0.2%	3.03	-24.4%	-7.5%	-9.9%	2.5
114	Fishing, Hunting & Trapping	56	20	0.0%	0.00	-18.4%	-18.2%	-3.2%	5.7
115	Support for Ag. & Forestry	395	558	0.5%	23.95	7.1%	8.5%	0.6%	11.5
211	Oil & Gas Extraction	338	110	0.1%	0.00	-20.1%	-2.0%	-1.4%	14.1
212-213	Mining & Support Activities	292	333	0.3%	8.13	2.6%	6.9%	5.6%	0.5
221	Utilities	1,325	488	0.4%	0.43	-18.1%	-0.8%	-4.8%	3.8
230	Construction	6,788	4,480	3.6%	0.81	-8.0%	-5.4%	-0.9%	8.6
311	Food Products	3,481	3,289	2.6%	2.75	-1.1%	1.7%	-0.2%	6.8
312	Beverage & Tobacco Products	97	102	0.1%	0.00	1.1%	-100.0%	-1.5%	-0.7
313	Textile Mills	1	0	0.0%	0.00	-100.0%	12.9%	-8.1%	12.3
314	Textile Product Mills	148	36	0.0%	0.00	-24.8%	1.6%	-5.6%	4.4
315	Apparel Manufacturing	28	4	0.0%	0.00	-31.9%	-41.3%	-11.3%	2.8
316	Leather & Allied Products	5	9	0.0%	0.00	12.4%	-100.0%	-8.3%	-1.5
321	Wood Products	1,138	694	0.6%	8.17	-9.4%	-2.8%	-3.2%	3
322	Paper Manufacturing	229	303	0.2%	1.57	5.7%	-3.6%	-4.2%	-1.4
323	Printing & Related	313	195	0.2%	0.24	-9.1%	-7.1%	-3.2%	2.8

## Progress Reports

- Show improving sectors and growth successes
- Show declining sectors and industry change
- Show changes relative to other areas, the rest of the state or the rest of the US
- Update annually

# Example: Progress Reports

## Area Comparison Assessment

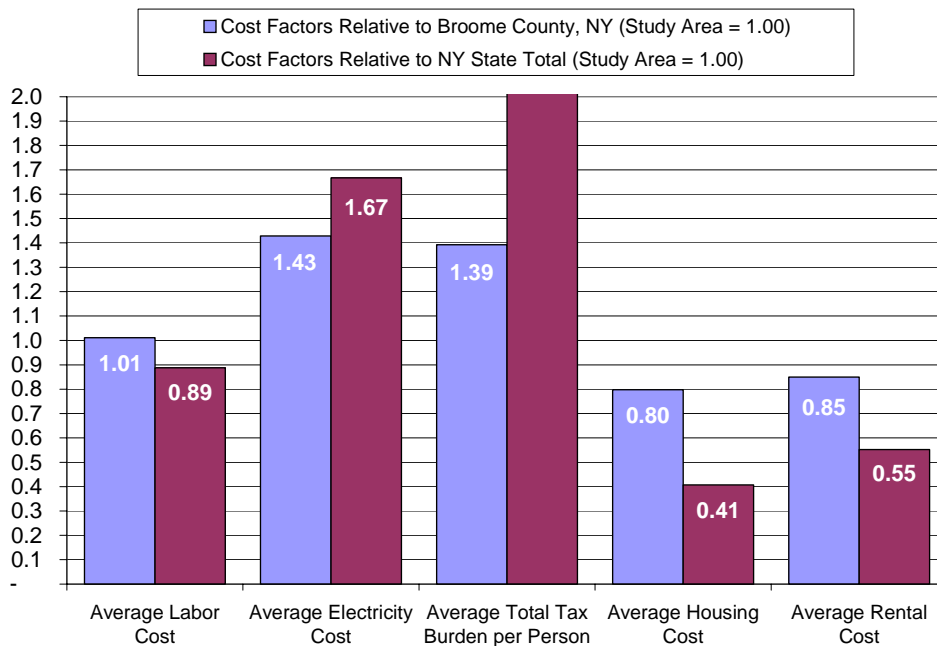
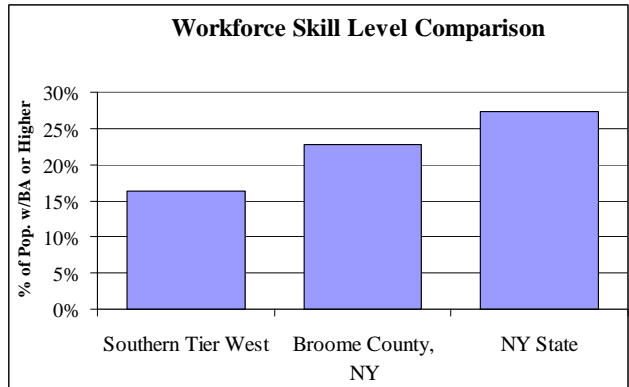
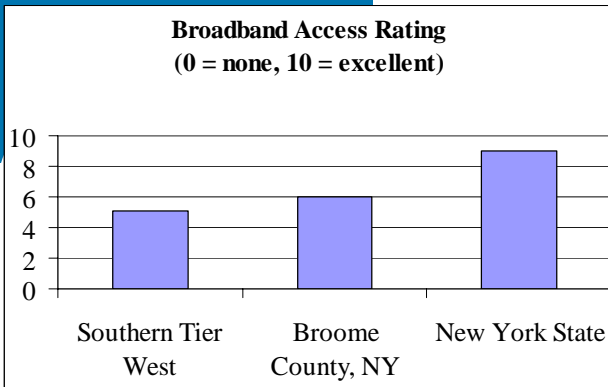
Performance Measurement = Employment  
Actual Number of Jobs



NAICS	Sector	Study Area			Comparison Area			United States		Adjusted Annual Growth
		2000	2005	Adjusted Annual Growth	2000	2005	Adjusted Annual Growth	2000	2005	
		Southern Tier West			Broome County, NY					
111	Crop Production	3,614	1,408	-17.18%	505	134	-23.34%	2,112,968	1,598,373	-5.43%
112	Animal Production	1,116	2,573	18.17%	224	493	17.10%	923,322	1,332,343	7.61%
113	Forestry & Logging	741	183	-24.41%	82	56	-7.45%	225,828	134,240	-9.88%
114	Fishing, Hunting & Trapping	56	20	-18.35%	6	2	-18.24%	118,810	100,940	-3.21%
115	Support for Agriculture & Forestry	395	558	7.14%	14	22	8.50%	700,341	722,327	0.62%
211	Oil & Gas Extraction	338	110	-20.14%	9	8	-1.95%	405,490	377,383	-1.43%
212-213	Mining & Support Activities	292	333	2.64%	27	38	6.89%	344,908	453,681	5.64%
221	Utilities	1,325	488	-18.11%	1,101	1,058	-0.79%	692,512	542,416	-4.77%
230	Construction	6,788	4,480	-7.98%	6,699	5,081	-5.38%	11,729,350	11,193,900	-0.93%
311	Food Products	3,481	3,289	-1.13%	1,018	1,105	1.66%	1,589,889	1,576,747	-0.17%
312	Beverage & Tobacco Products	97	102	1.09%	3	0	-100.00%	211,883	196,730	-1.47%
313	Textile Mills	1	0	-100.00%	2	3	12.86%	365,752	239,422	-8.13%
314	Textile Product Mills	148	36	-24.77%	257	278	1.59%	245,416	183,742	-5.62%
315	Apparel Manufacturing	28	4	-31.86%	49	3	-41.30%	565,656	311,531	-11.25%
316	Leather & Allied Products	5	9	12.35%	356	0	-100.00%	75,519	48,894	-8.33%
321	Wood Products	1,138	694	-9.42%	90	78	-2.77%	708,611	603,322	-3.17%
322	Paper Manufacturing	229	303	5.71%	213	178	-3.60%	597,589	483,120	-4.16%
323	Printing & Related Support Activities	313	195	-9.05%	1,063	737	-7.08%	829,102	703,763	-3.22%
324	Petroleum & Coal Products	84	67	-4.35%	35	46	5.75%	123,668	111,033	-2.13%
325	Chemical Manufacturing	477	1,380	23.69%	467	219	-14.06%	1,133,793	868,352	-5.19%
326	Plastics & Rubber Products	588	322	-11.32%	551	508	-1.60%	997,007	808,257	-4.11%
327	Nonmetallic Mineral Products	1,276	869	-7.39%	183	171	-1.33%	603,869	502,393	-3.61%
331	Primary Metal Manufacturing	459	232	-12.78%	104	0	-100.00%	619,876	461,529	-5.73%
332	Fabricated Metal Products	5,091	5,577	1.84%	1,445	1,094	-5.47%	1,811,396	1,492,142	-3.80%

## Assess Strengths and Weaknesses

- Quickly identify leading and struggling industries by:
  - Labor force and education
  - Market access
  - Broadband and utilities
  - Cost of living and doing business
  - Facility quality



## Barriers and Strategies

- Identify performance gaps
- Identify barriers
- Identify targets

# Example: Barriers to Growth

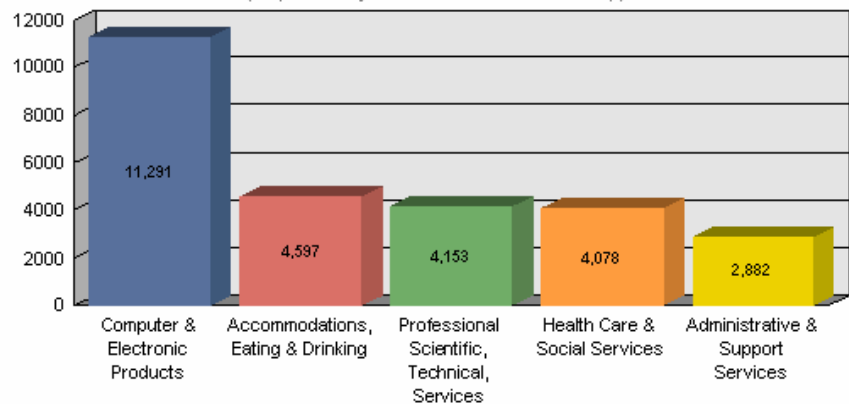
## Barriers Factors by Industry (1=Critical, 2=Important)

Performance Measurement = Employment  
Actual Number of Jobs



NAICS	Sector	Potential Attraction	Prod Cost	Labor Cost	Land Cost	Energy Cost	Tax Cost	Work Force	Labor Skill	Hwy Trans	Rail Trans	Air Trans	Water Trans	Broad Band
221	Utilities	14	-	-	-	-	-	-	1	-	2	-	-	-
230	Construction	374	-	-	-	-	-	-	-	-	-	-	-	-
334	Computer & Electronic Products	15	-	-	-	-	-	-	2	-	-	2	-	-
335	Electric Equipment, Appliances, etc.	19	-	-	-	-	-	-	2	-	-	1	-	-
420	Wholesale Trade	100	-	-	-	-	-	2	2	-	-	2	-	2
481-487	Transportation	206	-	-	-	-	-	-	-	-	-	2	-	-
491-493	Mail, package delivery & warehousing													2
511	Publishing Industries (except Internet)													-
513	Broadcasting													-
521-523	Monetary, Financial, & Credit Activity													2
524	Insurance Carriers & Related Activities													-
532	Rental & Leasing Services													-
541-551	Professional Scientific, Technical, Serv													-
561	Administrative & Support Services													-
621-624	Health Care & Social Services													-
721-722	Accommodations, Eating & Drinking													-

Sectors With Largest Performance Gap  
(Reported by Size of Performance Gap)



## “What If” Scenarios

- Effects of changes in:
  - Cost
  - Access
  - Technology availability ✓
  - Workforce education levels ✓
  - Infrastructure

# “What If” Scenarios

## Scenario Results



Performance Measurement = Employment  
Actual Number of Jobs

NAICS	Sector	Estimate Policy Effect	Low Range Policy Effect	High Range Policy Effect	Remaining Potential Attraction
221	Utilities	6	6	6	8
230	Construction	43	43	43	331
334	Computer & Electronic Products	-73	-73	-73	88
335	Electric Equipment, Appliances, etc.	11	11	11	8
420	Wholesale Trade	73	73	73	27
481-487	Transportation	134	134	158	72
491-493	Mail, package delivery & warehousing	59	51	68	27
511	Publishing Industries (except Internet)	15	15	15	40
513	Broadcasting	14	4	25	5
521-523	Monetary, Financial, & Credit Activity	50	50	57	0
524	Insurance Carriers & Related Activities	21	21	21	97
532	Rental & Leasing Services	17	17	17	189
541-551	Professional Scientific, Technical, Services	158	106	210	1,265
561	Administrative & Support Services	102	102	102	1,225
621-624	Health Care & Social Services	238	132	344	1,689
721-722	Accommodations, Eating & Drinking	285	228	349	2,973
<b>TOTAL</b>		<b>1,153</b>	<b>920</b>	<b>1,426</b>	<b>8,044</b>