



Research Brief #8

Navigating a New Economic Era:

Evolving Workforce Trends

October 2025

This is the 8th brief in a series produced by Goodwill of Western New York, in partnership with the University at Buffalo Regional Institute (UBRI). The research is intended to promote data-driven decision-making in workforce development that benefits individuals facing barriers to training and employment in the Western New York region. In support of Goodskills Career Builder (GCB), this brief is part of a collaborative effort to expand access to higher-paying careers for all individuals. It examines how the regional economy and workforce has evolved since COVID-19 with an updated look at Goodwill's target populations for training and target sectors. Funding for the brief is from a Build Back Better Regional Challenge grant from the US Economic Development Administration.

Context: Lagging job growth; higher un/underemployment

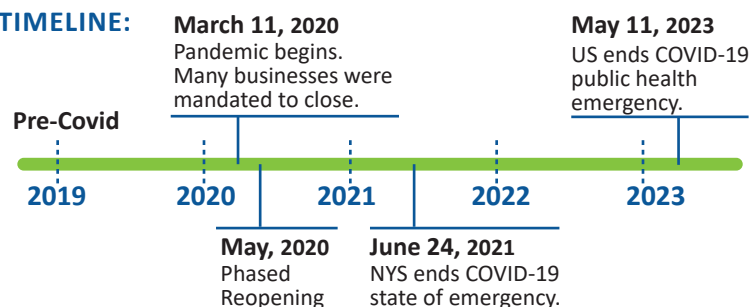
Even as the economic crisis caused by COVID-19 has receded, the importance of providing robust training for un/underemployed populations remains critical. Not only do more people need job training now than before the pandemic, a skilled workforce is essential for boosting continued regional growth, which has lagged national trends.

Across Western New York (WNY), nearly 205,000 individuals could benefit from training and higher-paying careers. This includes 33,500 unemployed individuals as of February 2025, a 17% increase since 2019.

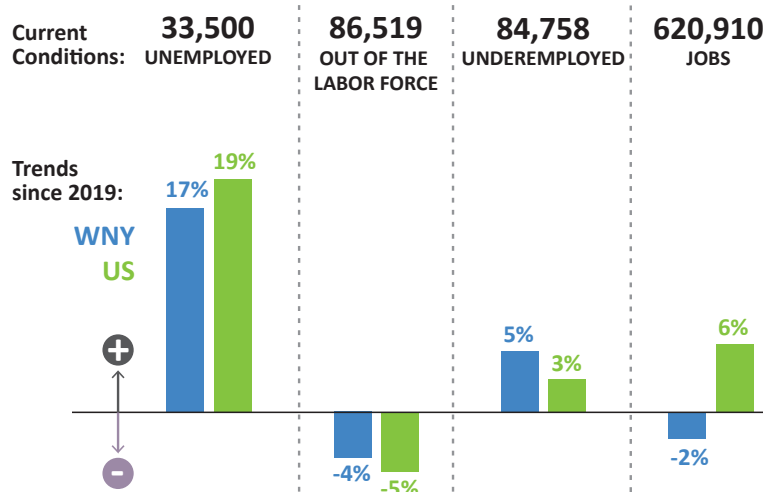
It also includes 86,500 individuals who are out of the workforce, a decline from pre-COVID levels, likely due to the strong labor market, higher wages, and expanded pathways into sectors like manufacturing and tech. Yet the population of working poor, with incomes under 200% of the Federal Poverty Level, has grown 5% since before the pandemic, to 84,758, with a more significant increase in WNY than across the US.

The pandemic caused significant job losses, particularly in service sectors, and the region has still not fully recovered. Overall job numbers in WNY remain 2% below pre-pandemic levels, contrasting with 6% job growth across the US. As demand for many Goodskills Career Builder (GCB) roles has increased since 2019, industry-driven training will be crucial to driving continued job growth across WNY.

TIMELINE:



Current Conditions and Trends in WNY and US



Sources: Unemployment (NYSDOL LAUS, 2019 and Feb. 2025), Out of Labor Force (US Census ACS, 2019 and 2023-5yr estimates), Underemployment (IPUMS ACS 2019 and 2023-5yr estimates), Jobs (Lightcast, QCEW, 2019, 2025). See back page for details.

Workforce Trends:

A smaller, stronger, more diverse workforce

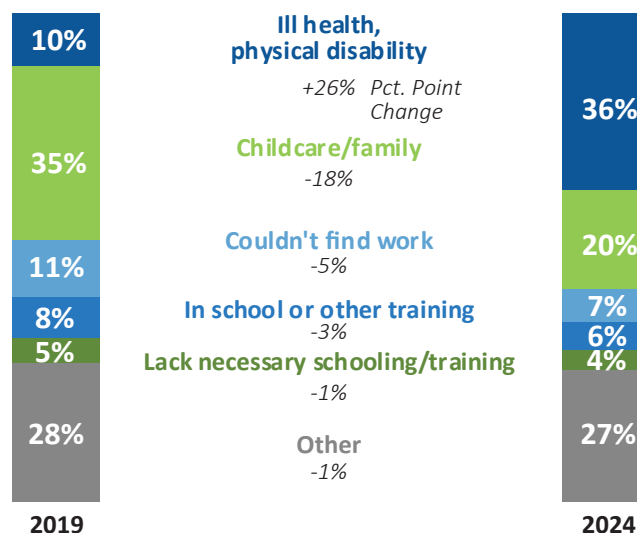
Western New York has more than 61,600 “discouraged workers” between the ages of 25 and 54 who are out of the labor force, not retired, and not actively seeking work. Poor health and disability are the most common reasons these adults don’t seek work. A fifth cite family and childcare responsibilities. Less than 10% report being unable to find work, being already enrolled in training, or lacking school or training. While childcare and family responsibilities remain a significant barrier, this factor has declined by 18 percentage points since 2019, likely due to the increased prevalence of remote and flexible work arrangements. Poor health or disability was the only reason for unemployment that increased between 2019 and 2024.

While reasons for being out of the workforce have evolved, the regional workforce itself has undergone a transformation too. It is smaller today than it was prior to COVID-19. The labor force has shrunk by 14,500 and the number of jobs has decreased by nearly the same number. These trends suggest that the shortage of talent may be constraining job growth. With the unemployment rate down, fewer people are actively looking for work today, compared to 2019. This is a positive shift for workers but makes it more difficult for employers to fill job openings.

The workforce is also more skilled today than it was in 2019, with 3.3% fewer people who stopped their education at high school. The increase in educational attainment has contributed to a slight decline in poverty across workers in WNY.

Through the work of training programs such as Goodskills Career Builder and collaborative initiatives such as the WNY Manufacturing and Tech Workforce Coalition, diversity within the workforce has expanded across the board - across the region, across all job sectors, and specifically across manufacturing and tech. Manufacturing has seen the most significant strides, with workers of color increasing by 4% since 2019, indicating a more inclusive and representative workforce in a significant and growing regional industry. Diversity in tech jobs, at 2%, has kept pace with the increase in diversity across the region.

There are an estimated 61,672 discouraged workers in WNY. Their main reasons for not looking for work include:



Source: UBRI analysis of data from the Consumer Population Survey (CPS), 2019 and 2024, accessed through IPUMS. Main reasons for not looking for work reflect CPS data for Upstate NY.

Key Workforce Trends Since 2019, WNY

	Pre-COVID 2019	Change since 2019	Latest Available
Jobs, 2025	634,844	-2.2%	620,910
Labor Force, 2025	681,200	-2.1%	666,700
Unemployment Rate, 2025	5%	-0.7 percentage point	4.3%
Individuals with no more than HS, 2023	376,657	-3.3%	364,129
Workers in Poverty, 2023	6.2%	-0.3 percentage point	5.9%

Source: UBRI analysis of data from Lightcast Industry Tables (Jobs), NYSDOL LAUS (Labor Force and Unemployment) and American Community Survey (Education and Poverty). The latest data available for individuals with no more than a high school education and workers in poverty is 2023. For other measures, the most recent data is 2025.

Trends in Diversity Since 2019, WNY

Percentage of People of Color	Pre-COVID 2019	Change since 2019	Latest Available
across region	21%	+2%	23%
across all jobs	23%	+3%	26%
across manufacturing	15%	+4%	19%
across tech	16%	+2%	18%

Source: UBRI analysis of data from American Community Survey (across region), Lightcast Industry Tables (across all jobs, manufacturing and tech). The latest available data for the region is 2023. For other measures, the most recent data is 2024.

Occupational Trends:

Growing manufacturing roles with a more competitive tech landscape

As the regional economy continues to recover from COVID-19, manufacturing has emerged as a strong sector, adding nearly 1,000 jobs between 2019 and 2025. Job postings for GCB roles increased 27% over this period, while the average posted salary grew by 37%—more than 10 percentage points above the rate of inflation.

With fewer competing employers for new hires, the data suggests concentrated growth, potentially by industry subsector or employer size. Rapid growth in demand for work readiness and technical skills—such as communication, troubleshooting, English proficiency, operations and machinery—highlights the critical need for shorter-term postsecondary training and strong trainer-employer partnerships.

Top growing roles for manufacturing generated approximately 1,300 new jobs in WNY between 2019 and 2025. These include CNC Operators, Production Workers, Industrial Machinery Mechanics, Maintenance and Repair Workers and Assemblers—roles that GCB graduates can fill either directly from training or with additional specialized training.

Opportunities for GCB roles in tech and tech-enabled positions show a slightly different picture. Notably, job postings are down 25% since 2019 and the number of competing employers decreased by 15%, with fewer companies seeking to fill these roles. Despite this reduction in job market activity, the median advertised salary is up 24%. However, this lags the 26% rate of inflation between 2019 and 2025.

Top growing skills for these roles show how employers increasingly seek a combination of essential work readiness skills (like English proficiency), specialized knowledge and skills (such as retail operations and office equipment) and software skills (including CRM).

Top growing roles from 2019 to 2025 are in sales and finance. Longer posting durations in 2025 suggest employers are struggling more to find candidates with the right skills for these roles.

GCB MANUFACTURING JOB POSTINGS		2025	Change 2019-2025
MANUFACTURING	Median Advertised Salary	\$45,696	37%
	Median Posting Duration	26 days	-4%
	# of Postings	6,580	27%
	# of Competing Employers	1,495	-10%
	Job Growth, 2019-2025		
	CNC Operators		355
	Production Workers		332
	Industrial Machinery Mechanics		235
	Maintenance and Repair Workers		207
	Electrical, Electronic, Electromechanical Assemblers		172
TECH/TECH-ENABLED	# Change in Job Postings 2019-2025		
	Communication		405
	Troubleshooting/Problem Solving		393
	English Language		375
	Operations		326
	Machinery		284
	# Change in Job Postings 2019-2025		
TECH/TECH-ENABLED	Median Advertised Salary	\$46,720	24%
	Median Posting Duration	26 days	18%
	# of Postings	13,765	-25%
	# of Competing Employers	3,144	-15%
	Job Growth 2019-25		
	Sales Representatives		455
	Bookkeeping, Accounting, and Auditing Clerks		240
	Financial Clerks		107
	Loan Interviewers and Clerks		85
	Concierges		23
TECH/TECH-ENABLED	# Change in Job Postings 2019-2025		
	English Language		228
	Retail Operations		158
	Customer Service (CRM) Software		84
	Office Equipment		68
	Account Software		65
	# Change in Job Postings 2019-2025		

Source: UBRI analysis of Lightcast Job Postings for GCB roles in Manufacturing and Tech and Sales and Services. Top growing roles were identified using Lightcast Occupational Tables for 2019 and 2025.

Looking Ahead

GCB acts as a vital bridge, empowering both employers and individuals through industry-driven training for careers in manufacturing and tech. GCB was established in response to the COVID-19 pandemic, designed to provide short-term training with rapid skill development and retooling for high-demand sectors. The flexibility of GCB extends beyond the pandemic to address ongoing trends that reshape the economy and workforce. While economic shocks on the scale of COVID are rare, smaller disruptions are common and necessitate a nimble workforce entity, like GCB, that can adapt to changes.

Current market data indicates ongoing shifts, influenced by foreign policy changes, tariff uncertainty, and disruptions to public benefit programs such as Medicaid and SNAP recently passed under the *One Big Beautiful Bill Act*. In WNY, these legislative changes are estimated to result in a \$591.3 million annual loss to the regional economy with 82,914 individuals potentially losing healthcare coverage. For SNAP, changes are associated with a \$131 million annual cost to state and local government, and more than 20,100 households potentially losing some or all benefits.

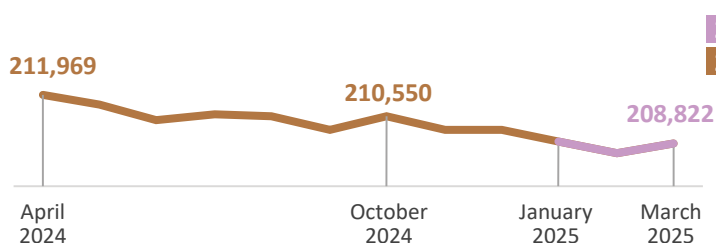
Benefit losses could have a ripple effect on job training and/or employment, increasing demand for wraparound

supports for individuals struggling with food insecurity and/or untreated health issues that can lead to absenteeism.

In WNY, the number of Supplemental Nutrition Assistance Program (SNAP) recipients decreased 2% over the most recent 12 months (April 2024–March 2025). Recent federal legislative changes could further reduce recipient numbers while increasing the pool of adults seeking job training or work to maintain Medicaid and/or SNAP eligibility. Meanwhile, daily job postings declined 15% over the month of May 2025, and the overall number of job postings is down 8% compared to May 2024. Economic uncertainty related to tariffs is likely contributing to more conservative hiring. Slower hiring and more individuals seeking work only emphasize the importance of training programs like GCB.

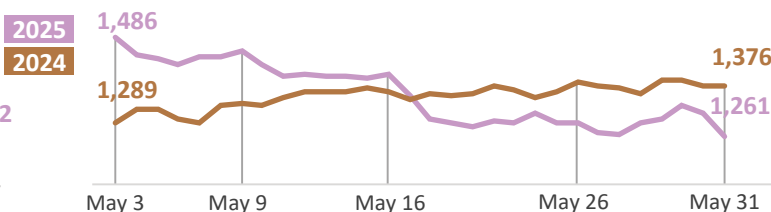
GCB has strategies to anticipate future workforce needs and stay ahead of the curve. Through partnerships with employers and workforce leaders, the program gains firsthand insights into evolving demand for skills. This feedback informs curriculum development, ensuring it remains relevant and aligned with market demand. In partnership with UBRI, GCB takes a proactive, data-driven approach to all aspects of workforce development, from outreach and recruitment to training, job placement and retention. The program is operationalized in four counties: Cattaraugus, Chautauqua, Erie and Niagara, to ensure the program is well positioned to meet local training needs.

Trends in SNAP Benefit Enrollment, WNY, 2024-25



Source: UBRI analysis of data from New York State Office of Temporary and Disability Assistance, Supplemental Nutrition Assistance Program (SNAP) Caseloads and Expenditures, 2024-2025

Trends in Unique Job Postings in Manufacturing, WNY, May 2024 vs May 2025



Source: UBRI analysis of job posting data for WNY from Lightcast. Includes all manufacturing (NAICS 31-33) job postings.

Data Sources and Notes

PAGE 1: Unemployed: NYS Department of Labor, Local Area Employment Statistics, 2019 & February 2025. *Note:* Unemployed are those actively seeking work. **Out of the Labor Force:** US Census American Community Survey, 5-year estimates (2014-2019 & 2018-2023). *Note:* Includes adults aged 25-54. **Underemployed:** IPUMS-American Community Survey, 5-year estimates (2015-2019 & 2019-2023). *Note:* Reflects adults (18+) not in school with earnings below 200% of the federal poverty level. **Jobs:** Lightcast, Industry Tables, 2019 & 2025.

PAGE 2: Reasons for Not Looking for Work: UBRI analysis of IPUMS-CPS, University of Minnesota, 2019 & 2024. Factors with at least 10% citing are shown. Other factors (less than 10%): Believes no work available (6%), Lacks schooling/training (3%), Transportation problems (1%), Employers think too young/old (1%). **Key Workforce Trends Since 2019:** Jobs: Lightcast (Industry Tables, 2019, 2025). Labor Force & Unemployment: NYSDOL, LAUS (2019-Feb 2025). Education & Poverty: US Census ACS 5-year estimates (2014-2019 and 2018-2023). Diversity Trends: Regional: US Census American Community Survey, 5-year estimates (2014-2019 & 2018-2023); Across Jobs and Industries: Lightcast, Industry Tables, 2019, 2025.

PAGE 3: Median Advertised Salary, Posting Duration, Postings, Competing Employers: UBRI analysis of Lightcast Job Posting data from 2019 and 2025 for Goodskills Career Builder occupations in Manufacturing and Tech/Sales and Services. The US BLS CPI Inflation Calculator was used to calculate the inflation rate between March 2019 and March 2025. **Top growing skills** are present in at least 5% of postings and designated as "rapidly growing" relative to the market. Includes specialized, common and software skills. **Top growing jobs** reflect those showing the largest absolute increase in job numbers across the regional economy between 2013-2019 and 2019-2025, based on UBRI analysis of Lightcast Industry data.

PAGE 4: SNAP and Medicaid Impacts: See One Big Beautiful Bill Act, H.R.1, signed into law 7/4/2025. WNY impacts are based Governor Hochul's estimates that Medicaid changes will lead to a \$13.5 billion annual loss for New York's healthcare economy and 1.5 million residents losing coverage statewide. SNAP changes will cost New York State \$2.1 billion annually with 300,000 households losing some or all coverage. WNY estimates were developed based on Medicaid and SNAP enrollment and spending in WNY, as a proportion of the NYS total. **SNAP enrollment** data for WNY reflects total SNAP recipients. **Job posting** data for WNY reflects total job postings for NAICS 31-33 (Manufacturing). For factors affecting national hiring trends, see "Employers Pull Back on Hiring as Uncertainty Weighs on Plans" (The New York Times, August 1, 2025), which notes how the manufacturing sector has been disproportionately impacted.

Learn More About Goodskills Career Builder

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Recommended Citation:

Goodwill of Western New York and University at Buffalo Regional Institute, State University of New York at Buffalo, School of Architecture and Planning. October 2025. "Navigating a New Economic Era: Evolving Workforce Trends."