

Seward County Chamber & Development Partnership Target Industries Review May 2017

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Executive Summary

This study identifies a core set of industries as likely candidates for future retention, expansion, and possible recruitment efforts by Seward County Chamber & Development Partnership (SCC&DP). The area included in the study consists of Seward County plus eight nearby counties. One of the eight counties, Lancaster, is a core metropolitan county, six of the remaining seven counties abut Seward County, and one county, Gage has strong commuter ties to the area. Key findings of this report include:

- **Seward County is a net exporter of labor and has 2,152 or 27.3 percent fewer primary jobs within the county than residents working at primary jobs.**
- **Seward County provides other counties, especially Lancaster County, substantial numbers of both workers and jobs for its residences; but, overall, experiences a relatively large net outflow of workers.**
- **Seward County's moderate growth and ability to increase its population through net in-migration positively impact its ability to attract new businesses.** Seward County's population grew by 654 people or 4.0 percent from 2000 to 2015. Seward county achieved a natural increase, births minus deaths, of 465 people and positive migration trends resulted in a net increase of 189 people.
- **Of the three main geographic regions in this report, Seward County has the lowest proportion, 33.7 percent, of population in the prime working age group of 25 to 54 years of age.** However, this is not a major concern as there is relatively small variation in the proportion of residents in the prime working age group across the three areas.
- **When measured by the percent of adult population with at least a Bachelor's degree, Seward County has a relatively low level of educational attainment compared to the Core Metro County and to Nebraska as a whole.** As shown in Table Five, 26.1 percent of Seward County's population 24 years and older has attained at least a Bachelor's degree. This is substantially better than the 20.5 percent for the Rural Counties, but far less than the 36.7 percent for the Core Metro County and less than the 29.3 percent statewide average.
- **Seward County's relatively low percentage of adults with at least a Bachelor's degree is a concern.** However, the close proximity of a well-educated labor pool in Lancaster County should allow Seward County to sustain its core businesses and compete for many business expansion or relocation projects.
- **The average income level of Seward County residents is high relative to almost all the Rural Counties, the Core Metro County, Nebraska statewide and, by at least one measure, the United States averages.**
- **SOC 51-0000 Production Occupations, has by far the largest number of net in-commuters, 207, to Seward County.** It is likely this is due primarily to the high, local median hourly wage of \$17.20. Seward County's median wage for production workers is higher than the Rural Counties, \$16.80, the Core Metro County, \$16.60, and the United States as a whole, \$16.68.

- **The availability of workers in the occupations below is likely to be key to future growth of the Seward Target Area economy:**
 - SOC 11-0000 Management Occupations
 - SOC 13-0000 Business and Financial Operations Occupations
 - SOC 25-0000 Education, Training, and Library Occupations
 - SOC 29-0000 Healthcare Practitioners and Technical Occupations
 - SOC 49-0000 Installation, Maintenance, and Repair Occupations
 - SOC 53-0000 Transportation and Material Moving Occupations
 - SOC 51-0000 Production Occupations

Information on recent and projected labor force, workforce, and industry trends, plus data on occupational and industry wages is used to identify the relative strengths and importance of existing industries and occupations in the study area. Location quotient analysis is used to identify an initial, broad set of industries for further study as possible future drivers of the study area economy. Shift-share analysis for the recent period 2010 to 2016 and projected values for the period 2016 to 2022 is used to identify more detailed, 4-digit North American Industrial Classification System (NAICS) code, industries as possible future drivers of the Seward Target Area economy. Sales to the core industries by other local businesses are compared to exports and this supply chain analysis identifies possible opportunities for local input substitution.

The core industries identified as possible drivers of the area economy in the location quotient analysis are grouped into seven, broad industry groups:

- 1) Crop and Animal Related Manufacturing
- 2) Metal, Metal Products, and Machinery Manufacturing
- 3) All Other Manufacturing
- 4) Wholesale Trade
- 5) Transportation and Warehousing
- 6) Finance and Insurance
- 7) Professional, Scientific, and Technical Services

Shift share analysis is used to identify 20 more detailed, 4-digit NAICS codes industries, shown below, as likely to be highly important to the current and future economic vitality of Seward County:

- 1) NAICS 3111 Animal Food Manufacturing
- 2) NAICS 3112 Grain and Oilseed Milling
- 3) NAICS 3116 Animal Slaughtering and Processing
- 4) NAICS 3323 Architectural and Structural Metals Manufacturing
- 5) NAICS 3327 Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing
- 6) NAICS 3335 Metalworking Machinery Manufacturing
- 7) NAICS 3251 Basic Chemical Manufacturing
- 8) NAICS 3262 Rubber Product Manufacturing
- 9) NAICS 3273 Cement and Concrete Product Manufacturing
- 10) NAICS 3362 Motor Vehicle Body and Trailer Manufacturing
- 11) NAICS 3363 Motor Vehicle Parts Manufacturing
- 12) NAICS 4233 Lumber and Other Construction Materials Merchant Wholesalers
- 13) NAICS 4238 Machinery, Equipment, and Supplies Merchant Wholesalers
- 14) NAICS 4239 Miscellaneous Durable Goods Merchant Wholesalers
- 15) NAICS 4821 Rail Transportation
- 16) NAICS 4841 General Freight Trucking
- 17) NAICS 4842 Specialized Freight Trucking
- 18) NAICS 5223 Activities Related to Credit Intermediation
- 19) NAICS 5241 Insurance Carriers
- 20) NAICS 5413 Architectural, Engineering, and Related Services

A total of sixteen industries are identified as targets for import substitution:

- 1) NAICS 322211 Corrugated and Solid Fiber Box Manufacturing
- 2) NAICS 325120 Industrial Gas Manufacturing
- 3) NAICS 326299 All Other Rubber Product Manufacturing
- 4) NAICS 327390 Other Concrete Product Manufacturing
- 5) NAICS 332710 Machine Shops
- 6) NAICS 333413 Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing
- 7) NAICS 423120 Motor Vehicle Supplies and New Parts Merchant Wholesalers
- 8) NAICS 423610 Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers
- 9) NAICS 423930 Recyclable Material Merchant Wholesalers
- 10) NAICS 482110 Rail Transportation
- 11) NAICS 484220 Specialized Freight (except Used Goods) Trucking, Local
- 12) NAICS 484230 Specialized Freight (except Used Goods) Trucking, Long-Distance
- 13) NAICS 522110 Commercial Banking
- 14) NAICS 524210 Insurance Agencies and Brokerages
- 15) NAICS 561720 Janitorial Services
- 16) NAICS 811310 Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance

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Introduction

The purpose of this study is to provide the Seward County Chamber & Development Partnership (SCC&DP) with information to be used as part of a process to identify industries for future retention, expansion, and possible recruitment efforts. Additional information that may be used in this targeting process includes insights of SCC&DP and community members plus possible further investigations conducted by SCC&DP.

This report contains information on the relative sizes and trends, both recent and projected, of area industries and labor forces, plus information on interactions between the Seward County economy and the economies of counties linked to it by commuting patterns. Industries that are key drivers of Seward County's recent economic growth, that are expected to be future drivers of economic growth, and that appear to have potential to become drivers of the area economy are identified in this study. Also identified are industries that are currently highly important to the area's economic health but may be at risk due to expected declines in overall national employment.

Methodology

U.S. Census Department's Bureau of the Census and Economic Modeling Specialist International (EMSI) are the primary sources of information for this study. EMSI, a private data vendor, collects and analyzes data from a variety of public and private sources such as the U.S. Census Department, the U.S.-Department of Labor, and the U.S. Department of Education. EMSI uses this information to derive estimates of local data suppressed by government agencies to protect proprietary information. Data from EMSI enables a level of analysis that would not be possible in many Nebraska counties due to high levels of data suppression common in areas of relatively small population. NPPD subscribes to EMSI data services and provides this information to wholesale and retail customers as part of its economic development services to these communities.

Data from the U.S. Census Bureau's OnTheMap Application have been used to identify eight counties closely linked to Seward County based on proximity and commuting patterns. Seven of these eight counties are adjacent to Seward County.

One of the eight counties is a core metropolitan county (Core Metro). Seward and the remaining seven counties are referred to as rural in this report¹. For the analysis of area industries workforces and labor forces data, the seven rural counties are usually combined into a single group (Rural Counties) and information for Seward County is reported separately. In the analysis of potential key or target industries, information about Seward County is combined with the other Rural Counties (Seward Plus Rural Counties).

Information on recent and projected labor force, workforce, and industry trends plus data on occupational and industry wages is reported for the Core Metro County, Rural Counties, and Seward County. This information is used to identify the relative strengths and importance of existing industries and occupations in the Core Metro County and the Seward Plus Rural Counties groups.

Location quotient analysis, using past, present, and projected future employment, wages and gross regional product, is used to identify an initial, broad set of industries for further study as possible drivers of the study area economy. Shift share analysis for the periods 2010 to 2016 and 2016 to 2022 is used to classify more detailed, 4-digit North American Industrial Classification (NAICS) code, industries as: (a) important drivers of area economies, (b) potential drivers of area economies, (c) important industries with national trends of declining employment, and (d) other industries. The other industries group includes businesses that primarily support local population such as retail trade, construction, personal service, and education.

¹ Seward County is part of the Lincoln, Nebraska Metropolitan Statistical Area (MSA) and Saunders County is part of the Omaha-Council Bluffs MSA. However, both exhibit demographic and economic characteristics closely aligned with the rural counties in this study.

Lastly, sales to key industries and to industries identified as having the potential to become key industries by businesses outside the study area are compared to exports by similar local businesses. This supply chain analysis identifies possible opportunities for local input substitution.

Study Area and Commuting Patterns

The geographic area selected for this study is based upon commuting data from the U.S. Census Bureau’s OnTheMap Application. As shown in Table One below and Figure One on the following page, seven counties (Butler, Fillmore, Lancaster, Saline, Saunders, Polk and York) abut Seward County. Gage County is in close proximity and easily accessed via highway.

As shown in Table One, Seward County is the location of primary jobs for 2,901, 36.8 percent, of the county’s 7,892 employed residents. Gage County, plus the five adjacent rural and exurban counties provide primary jobs for 716, 9.1 percent, of Seward County’s employed residents. Lancaster County, a core metropolitan county, provides jobs for 34.6 percent, 2,731, of Seward County’s residents. Also shown in Table One, Seward County provides 50.5 percent of the workers for primary jobs within the county. The eight other study area counties in Table One provide, 1,764 or 30.7 percent of workers for Seward County’s primary jobs.

Table One also shows **Seward County is a net exporter of labor** and has 2,152 or 27.3 percent fewer primary jobs within the county than residents working at primary jobs.

Table One
Worker Inflows and Resident Outflows 2014

Nebraska County	Where Seward County Workers Live		Where Seward County Residents are Employed	
	Number	Percent	Number	Percent
Seward County	2,901	50.5%	2,901	36.8%
Lancaster County	915	15.9%	2,731	34.6%
York County	232	4.0%	261	3.3%
Saline County	222	3.9%	216	2.7%
Butler County	159	2.8%	94	1.2%
Douglas County ^a	121	2.1%	480	6.1%
Gage County	87	1.5%	68	0.9%
Fillmore County	68	1.2%	27	0.3%
Hall County ^a	55	1.0%	127	1.6%
Saunders County	47	0.8%	37	0.5%
Sarpy County ^a	36	0.6%	99	1.3%
Platte County ^a	45	0.8%	85	1.1%
Polk County	34	0.6%	13	0.2%
All Other Locations	818	14.3%	753	9.5%
Total	5,740	100.0%	7,892	100.0%

^a Not part of the Seward County Target Study Area.

Source: U.S. Census Bureau, OnTheMap Application, <http://onthemap.ces.census.gov>

Figure One
Study Area



Source: U.S. Census Bureau, OnTheMap Application, <http://onthemap.ces.census.gov>.

Lancaster County is a core metropolitan county (Core Metro). Seward County and Saunders County are respectively part of the Lincoln and Omaha metropolitan statistical areas and each may be characterized as a combination of exurban and rural areas. The remaining six counties (Butler, Fillmore, Gage, Saline, Polk, and York) are usually classified as rural. For the analysis of area industries, workforces, and labor forces data, Saunders County is combined with the six rural counties to form the “Rural Counties” group and information for Seward County is reported separately. In the analysis of potential key or target industries, information about Seward County is combined with information for the Rural Counties to form the “Seward Plus Rural” group.

Study Area – Labor Force

The size, skills composition, and recent and projected trends of an area’s labor force are critical to a community’s efforts to retain, grow, and attract businesses that offer superior compensation packages. An evaluation of a region’s current and potential employee pool is a critical step in identifying industries that will be a good fit and promote future growth.

The traditional definition of a labor force is the people living within an area, e.g., Seward County residents, 16-years of age or older that are either working or actively seeking employment. The labor force may work at locations within or outside their area of residence. In addition to the traditional definition of labor force, the U.S. Department of Labor publishes information on discouraged workers and underemployed workers at the state and national levels.

This section provides information on the demographic characteristics of Seward County’s, Rural Counties’, and the Core Metro County’s populations and labor force.

Population Growth and Components of Growth

As is typical of many exurban Nebraska areas, Seward County has recently experience relatively slow but steady population growth. The Core Metro area, Lancaster County, continues to experience strong population growth and the Rural Counties as a whole have experienced small population declines. Nebraska as a whole has experienced a population increase. As shown in Table Two, Seward County’s population grew by 654 people or 4.0 percent from 2000 to 2015. Seward County achieved a natural increase, births minus deaths, of 465 people and positive migration trends resulted in a net increase of 189 people. This in-migration was equal to 1.1 percent of the 2000 population. Overall, the seven Rural Counties experienced moderate declines with a total population loss of 2,466 or 2.7 percent including net out-migration of 3,791 people. **Seward County’s moderate growth and ability to increase its population through net in-migration positively impact its ability to attract new businesses.**

Table Two
Population Change by Areas and Total 2000–2015

Area	Population		Population Change 2000–2015		Natural Increase 2000–2015	Net Migration 2000–2015	
	2000	2015	Number	Percent		Number	Percent
Seward County	16,496	17,150	654	4.0	465	189	1.1
Rural Counties	92,398	89,932	-2,466	-2.7	1,325	-3,791	-4.1
Core Macro	250,291	301,795	51,504	20.6	33,619	17,885	7.1
Study Area	359,185	408,877	49,692	13.8	35,409	14,283	4
Nebraska	1,711,263	1,881,503	170,240	9.9	188,745	-18,505	-1.1

Source: U.S. Bureau of the Census, Census of Population, May 2016

When measured by population growth, the Core Metro County performed much better than Seward County and better than the state as a whole over the period 2000 to 2015. During the period 2000 to 2015, Core Metro County population increased by 51,504 or 20.6 percent or more than double the 9.9 percent increase for the state as a whole. During the same 15-year period, net in-migration for the Core Metro County was equal to 7.1 percent of 2000 population while Nebraska as a whole experienced out-migration of about 1.1 percent.

The close proximity of growing population centers provides both a challenge and an opportunity for Seward County. Growing counties provide a potential source of workers to support the expansion of local businesses but also offer a nearby alternative to families considering relocating to another area with similar life styles. Additionally, growing, nearby counties often compete for local workers. **Data from Table One, presented earlier, suggests Seward County provides other counties, especially Lancaster County, substantial numbers of both workers and jobs for its residences; but, overall, experiences a relatively large net outflow of workers.**

Population Age Profile

The age distribution of its population is another important factor in assessing the ability of an area to support future business and economic growth. Table Three contains information on the size and distribution of population by study area for important age groups.

As shown in Table Three, **Seward County has the lowest proportion, 33.7 percent, of population in the prime working age group, 25 to 54 years of age, of the three areas in this report.** However, this is not a major concern as the proportion of residents in the prime working age group is similar across the three area and ranges from 33.7 in the Seward County to 37.6 percent in the Core Metro County.

**Table Three
Age Profiles by Areas and Total 2015**

Age Group	Seward County		Rural Counties		Core Metro		Study Area Total	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
0 to 14	3,283	19.2	17,177	19.1	59,776	19.5	80,236	19.4
15 to 24	2,959	17.3	11,455	12.7	57,700	18.8	72,114	17.4
25 to 54	5,761	33.7	31,331	34.8	115,172	37.6	152,264	36.8
55 to 64	2,206	12.9	12,858	14.3	35,395	11.5	50,459	12.2
65 Plus	2,901	17.0	17,119	19.0	38,425	12.5	58,445	14.1
15 to 64	10,926	63.9	55,644	61.9	208,267	68.0	274,837	66.5
Total	17,110	100.0	89,940	100.0	306,468	100.0	413,518	100.0

Source: U.S. Bureau of the Census, Census of Population, May 2016

Data in Table Four provides information on the number of jobs as a percent of total population and working age population (ages 15 to 64) for each of the seven counties. In York (103.7 percent), Lancaster (87.7 percent), and Saline (85.4 percent), working age population is a high percentage of primary jobs. This indicates relatively tight local labor markets and a likely high level of dependence on in-commuters from other areas to fill job openings. **The relatively low percentage of jobs relative to the working age population (71.5 percent) in Seward County is another indication the county is a net exporter of labor.**

Table Four
2015 Jobs as a Percent of 2015 Population Ages 15 to 64

County	Jobs 2015	2015 Jobs Percent of 2015 Population	2015 Jobs as a Percent 2015 Population Ages 15 to 64
Seward	7,815	45.7%	71.5%
Butler	3,370	41.5%	68.8%
Fillmore	2,712	48.3%	78.0%
Gage	10,632	48.5%	79.5%
Lancaster	182,691	59.6%	87.7%
Polk	1,950	37.5%	61.8%
Saline	7,854	55.0%	85.4%
Saunders	6,725	32.0%	51.5%
York	8,807	63.8%	103.7%

Sources: U.S. Bureau of the Census, Census of Population, May 2016
 Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Population Educational Attainment Profile

An area’s ability to support current and future industry expansions and attract new business formations or relocations is heavily dependent on the quality and quantity of workers and their current skill sets. Unfortunately, most of the data on workers’ skills is collected from the local workforce, much of which often comes from areas other than the county, e.g., Seward County, or region being studied. Until recently, this lack of information about the skills of the resident population has made educational attainment the default metric for evaluation of the potential skills and quality of an area’s labor force. This information is often supplemented with interviews of local employers to ascertain the availability and quality of important skills. Recently, estimates of the occupations of area residents have become available and are reported in the “*Major Occupations and Wages*” section of this report.

As shown in Table Five on the following page, all of the areas in this study have high percentages of residents 25 years of age and older with at least a high school diploma. The percent of residents 25 years of age and older with a Bachelor’s degree or higher is highest in the Core Metro County and lowest in the Rural Counties.

When measured by the percent of adult population with at least a Bachelor’s degree, Seward County has a relatively low level of education attainment compared to the Core Metro County and to Nebraska as a whole. As shown in Table Five, 26.1 of Seward County’s population aged 25 years and older have attained at least a Bachelor’s degree. This is substantially better than the 20.5 percent for the Rural Counties, but far less than the 36.7 percent for the Core Metro County and less than the 29.3 percent statewide average. **Seward County’s relatively percentage of adults with at least a Bachelor’s degree should be a concern. However, the close proximity of a well-educated labor pool in Lancaster County should allow the county to sustain its businesses and compete for many business expansion or relocation projects.**

**Table Five
Educational Attainment, 2010–2014, 5-Year Estimates**

	Target County		Rural Counties		Core Metro		Target Area Total		Nebraska	
	#	%	#	%	#	%	#	%	#	%
Total; Estimate; Population 25 years and over -	10,783	100.0	61,298	100.0	184,111	100.0	256,192	100.0	1,215,400	100.0
Less than 9th grade	280	2.6	2,472	4.0	4,446	2.4	7,198	2.8	49,864	4.1
9th to 12th grade, no diploma	475	4.4	3,117	5.1	7,518	4.1	11,110	4.3	63,610	5.2
High school graduate (includes equivalency)	3,180	29.5	21,206	34.6	41,536	22.6	65,922	25.7	334,449	27.5
Some college, no degree	2,372	22.0	14,319	23.4	42,154	22.9	58,845	23.0	290,878	23.9
Associate's degree	1,658	15.4	7,603	12.4	20,845	11.3	30,106	11.8	120,763	9.9
Bachelor's degree	1,940	18.0	8,705	14.2	44,018	23.9	54,663	21.3	238,158	19.6
Graduate or professional degree	878	8.1	3,876	6.3	23,594	12.8	28,348	11.1	117,678	9.7
Total; Estimate; High school graduate or higher	10,028	93.0	55,709	90.9	172,147	93.5	237,884	92.9	1,101,926	90.7
Total; Estimate; Bachelor's degree or higher	2,818	26.1	12,581	20.5	67,612	36.7	83,011	32.4	355,836	29.3

Source: U.S. Census Bureau, 2010-2015 American Community Survey 5-Year Estimates.

Income and Poverty

Information in Table Six, following page, shows **the average income level of Seward County residents is high relative to almost all the averages of the Rural Counties, the Core Metro County, Nebraska statewide and, by at least one measure, the United States average.** The most recent data available from 2015 shows Seward County median household income, \$59,662, is higher than six of the seven Rural Counties, the Core Metro County, the state average of \$52,997, and the United States average of \$53,889. Seward County per capita income of \$28,124 is higher than four of the Rural Counties, the Core Metro County, the state average of \$27,882, but is lower than the United States average of \$28,930.

The proportion of Seward County residents living below the poverty level, 9.4 percent in the most recent surveys, is the third lowest among both the Rural Counties, lower than the Core Metro County, lower than the Nebraska value of 12.7 percent, and lower than the national value of 15.5 percent.

When an area’s full time employment is defined as the percentage of its population ages 16 to 64 working at least 35 hours per week, the percentage of Seward County’s residents employed full time, 53.5 percent, is slightly lower than the statewide average of 55.8 percent, and lower than all but one of seven rural counties in the study. Overall Table Six indicates **Seward County incomes are relatively high in comparison to the other areas.**

**Table Six
Income, Poverty Rates, and Hours Worked by County, Areas, and Total**

Area	Median household income in the past 12 months (2015 Inflation-adjusted dollars)	Per capita income in the past 12 months (2015 Inflation-adjusted dollars)	Percentage of all persons living below poverty level	Percent of 16 to 64 years; that usually worked 35 or more hours per week - 50 to 52 weeks
Seward	59,662	28,124	9.4	53.5
Rural Counties				
Butler	51,027	29,457	8.5	60.7
Fillmore	52,316	27,875	9.4	63.1
Gage	50,010	26,207	9.7	57.9
Polk	57,312	30,428	7.6	61.6
Saline	51,738	21,955	11.2	51.1
Saunders	60,854	29,637	9.7	57.4
York	51,802	27,646	10.8	56.8
Core Metro Counties				
Lancaster	51,830	27,764	14.7	53.2
Nebraska	52,997	27,882	12.7	55.8
United States	53,889	28,930	15.5	47.7

Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.

Study Area – Workforce

While data about an area’s labor force describe the characteristics of local residents, analysis of an area’s workforce provides information about workers at local businesses, regardless of where they live. **Analysis of workforce data provides insights into the types of businesses that have been and are likely to be successful within a region.** Table Seven below provides information on the relative size as measured by 2016 employment, relative compensation paid as indicated by 2016 average earnings inclusive of benefits, and productivity as measured by 2016 gross regional product for very broad categories of Seward County businesses.

Table Seven
Seward County
Employment, Earnings & Gross Regional Product by Industry, 2016

NAICS	Description	2016 Employment		2016 Average	2016 Gross Regional Product	
		Number	Percent	Earnings \$	Level 1,000 \$	Percent
11	Crop and Animal Production	297	4.2	32,414	65,593	12.1
21	Mining, Quarrying, and Oil and Gas Extraction	0	0.0	0	1,114	0.2
22	Utilities	NA	NA	NA	593	0.1
23	Construction	450	6.3	47,001	38,266	7.1
31	Manufacturing	1,114	15.7	62,609	98,506	18.2
42	Wholesale Trade	316	4.5	61,099	42,939	7.9
44	Retail Trade	540	7.6	26,658	26,511	4.9
48	Transportation and Warehousing	406	5.7	63,834	39,709	7.3
51	Information	52	0.7	32,955	7,006	1.3
52	Finance and Insurance	211	3.0	65,115	33,843	6.3
53	Real Estate and Rental and Leasing	25	0.4	38,846	17,028	3.2
54	Professional, Scientific, and Technical Services	99	1.4	64,444	11,297	2.1
55	Management of Companies and Enterprises	11	0.2	72,825	925	0.2
56	Administrative and Support and Waste Management and	117	1.6	29,873	6,638	1.2
61	Educational Services	709	10.0	22,518	18,005	3.3
62	Health Care and Social Assistance	700	9.9	50,456	41,056	7.6
71	Arts, Entertainment, and Recreation	38	0.5	12,950	1,404	0.3
72	Accommodation and Food Services	413	5.8	12,833	7,567	1.4
81	Other Services (except Public Administration)	281	4.0	24,246	12,422	2.3
90	Government	1,320	18.6	48,908	69,908	12.9
	Total	7,098	100.0	44,473	540,329	100.0

NA: Not available.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Seven above, NAICS 31 Manufacturing and NAICS 90 Government, which includes public power utilities, account for 34.3 percent, 2,434, of 2016 jobs and 31.2 percent of 2016 gross regional product in Seward County, plus both pay above average compensation. Average Earnings (total

compensation) for NAICS 31 Manufacturing, \$62,609, and NAICS 90 Government, \$48,908, are both well above the Seward County average of \$44,473. Businesses in NAICS 42 Wholesale Trade, NAICS 48 Transportation and Warehousing, NAICS 52 Finance and Insurance, and NAICS 62 Health Care and Social Assistance also employ at least two percent of the Seward County workforce and pay above average compensation.

Table Eight provides the same information as Table Seven for the seven Rural Counties in the study area. NAICS 31 Manufacturing, NAICS 42 Wholesale Trade, NAICS 48 Transportation and Warehousing, NAICS 52 Finance and Insurance, and NAICS 90 Government account for 51.4 percent, 19,606, of 2016 jobs, 58.1 percent of 2016 gross regional product, and pay above average wages.

Table Eight
Rural Counties, Seward Target Study,
Employment, Earnings & Gross Regional Product by Industry, 2016

NAICS	Description	2016 Employment		2016	2016 Gross Regional	
		Number	Percent	Average Earnings \$	Product Level 1,000\$	Percent
11	Crop and Animal Production	1,468	3.8	43,739	345,537	10.9
21	Mining, Quarrying, and Oil and Gas Extraction	58	0.2	17,531	9,295	0.3
22	Utilities	28	0.1	79,542	9,275	0.3
23	Construction	1,767	4.6	50,794	174,842	5.5
31	Manufacturing	6,477	17.0	60,095	798,635	25.2
42	Wholesale Trade	1,796	4.7	57,017	246,290	7.8
44	Retail Trade	3,750	9.8	28,600	186,512	5.9
48	Transportation and Warehousing	1,395	3.7	61,070	144,460	4.6
51	Information	223	0.6	41,008	24,445	0.8
52	Finance and Insurance	1,226	3.2	56,961	175,208	5.5
53	Real Estate and Rental and Leasing	100	0.3	32,185	96,069	3.0
54	Professional, Scientific, and Technical Services	658	1.7	58,494	66,342	2.1
55	Management of Companies and Enterprises	121	0.3	75,350	10,840	0.3
56	Administrative and Support and Waste Management and Remediation Services	825	2.2	31,959	46,165	1.5
61	Educational Services	1,079	2.8	31,073	38,076	1.2
62	Health Care and Social Assistance	4,384	11.5	36,887	192,216	6.1
71	Arts, Entertainment, and Recreation	341	0.9	13,355	9,794	0.3
72	Accommodation and Food Services	2,281	6.0	13,932	54,141	1.7
81	Other Services (except Public Administration)	1,464	3.8	23,619	66,294	2.1
90	Government	8,712	22.8	49,444	476,103	15.0
	Total	38,153	100.0	44,410	3,170,537	100.0

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Nine below, NAICS 31 Manufacturing, NAICS 42 Wholesale Trade, NAICS 48 Transportation and Warehousing, NAICS 52 Finance and Insurance, NAICS 54 Professional, Scientific, and Technical Services, NAICS 62 Health Care and Social Assistance, and NAICS 90 Government account for 59.9 percent, 105,460, of 2016 jobs, 69.3 percent of 2016 gross regional product, and pay above average wages in the Core Metro County of this study. Average Earnings (total compensation) for NAICS 31 Manufacturing, \$65,557, NAICS 42 Wholesale Trade, \$62,058, NAICS 48 Transportation and Warehousing, \$67,357, NAICS 52 Finance and Insurance, \$66,010, NAICS 54 Professional, Scientific, and Technical Services, \$69,304, NAICS 62 Health Care and Social Assistance, \$52,036, and NAICS 90 Government, \$63,570 are all well above the Core Metro County average of \$51,352.

Table Nine
Core Metro County, Seward Target Study,
Employment, Earnings & Gross Regional Product by Industry, 2016

NAICS	Description	2016 Employment		2016 Average Earnings \$	2016 Gross Regional Product	
		Number	Percent		Level 1,000\$	Percent
11	Crop and Animal Production	451	0.3	29,288	103,678	0.7
21	Mining, Quarrying, and Oil and Gas Extraction	NA	NA	NA	7,211	0.1
22	Utilities	146	0.1	100,872	56,505	0.4
23	Construction	8,276	4.7	56,066	765,813	5.5
31	Manufacturing	12,608	7.2	65,557	1,611,675	11.5
42	Wholesale Trade	3,705	2.1	62,058	590,456	4.2
44	Retail Trade	19,257	10.9	30,809	928,655	6.6
48	Transportation and Warehousing	10,419	5.9	67,357	946,652	6.8
51	Information	2,838	1.6	75,996	481,121	3.4
52	Finance and Insurance	11,067	6.3	66,010	1,716,093	12.3
53	Real Estate and Rental and Leasing	1,664	0.9	43,360	422,716	3.0
54	Professional, Scientific, and Technical Services	8,559	4.9	69,304	823,999	5.9
55	Management of Companies and Enterprises	2,448	1.4	81,592	236,421	1.7
56	Administrative and Support and Waste Management and Remediation Services	7,873	4.5	33,721	373,215	2.7
61	Educational Services	2,925	1.7	30,920	108,141	0.8
62	Health Care and Social Assistance	23,092	13.1	52,036	1,372,635	9.8
71	Arts, Entertainment, and Recreation	3,352	1.9	16,214	103,524	0.7
72	Accommodation and Food Services	14,383	8.2	17,573	368,467	2.6
81	Other Services (except Public Administration)	7,077	4.0	33,482	342,707	2.4
90	Government	36,010	20.4	63,570	2,629,181	18.8
	Total	176,156	100.0	51,352	13,988,862	100.0

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Ten on the following page, industries in NAICS 31 Manufacturing , NAICS 42 Wholesale Trade, NAICS 48 Transportation and Warehousing, NAICS 52 Finance and Insurance, and NAICS 90 Government provide above average compensation and make up significant portions of the economics in each of the three geographic segments of the Seward Target Area. Industries in NAICS 62 Health Care and Social Assistance make up significant portions of the economies in all three areas and provide above average compensation in Seward County and the Core Metro County, but provide below average compensation in the Rural Counties. Industries in NAICS 54 Professional, Scientific, and Technical Services provides above average wages in all three of the areas, but have low levels of employment in Seward County and the Rural Counties.

It is highly likely businesses in the broad categories of NAICS 31 Manufacturing, NAICS 42 Wholesale Trade, 48 Transportation and Warehousing, NAICS 52 Finance and Insurance, and NAICS 62 Health Care and Social Assistance will be the major sources of future employment growth in the Seward Target Area. Because of their high wages and large presence in the nearby core metropolitan county, SCC&DP may also want to target businesses in NAICS 54 Professional, Scientific, and Technical Services. While NAICS 90 Government makes up large portions of each area economy and provide above average compensation, recent trends suggest this may not be as strong a target for future growth.

Table Ten
Distribution of 2016 Employment, Gross Regional Product & Earnings as a Percent of U.S. Average
Seward County, Rural Counties & Metro Core County

NAICS	Seward County			Rural Counties			Core Metro County		
	Percent 2016 Employment	Percent 2016 GRP	2016 Average Annual Earnings	Percent 2016 Employment	Percent 2016 GRP	2016 Average Annual Earnings	Percent 2016 Employment	Percent 2016 GRP	2016 Average Annual Earnings
11 Crop and Animal Production	4.2	12.1	32,414	3.8	10.9	43,739	0.3	0.7	29,288
21 Mining, Quarrying, and Oil and Gas Extraction	0.0	0.2	0	0.2	0.3	17,531	NA	0.1	NA
22 Utilities	NA	0.1	NA	0.1	0.3	79,542	0.1	0.4	100,872
23 Construction	6.3	7.1	47,001	4.6	5.5	50,794	4.7	5.5	56,066
31 Manufacturing	15.7	18.2	62,609	17.0	25.2	60,095	7.2	11.5	65,557
42 Wholesale Trade	4.5	7.9	61,099	4.7	7.8	57,017	2.1	4.2	62,058
44 Retail Trade	7.6	4.9	26,658	9.8	5.9	28,600	10.9	6.6	30,809
48 Transportation and Warehousing	5.7	7.3	63,834	3.7	4.6	61,070	5.9	6.8	67,357
51 Information	0.7	1.3	32,955	0.6	0.8	41,008	1.6	3.4	75,996
52 Finance and Insurance	3.0	6.3	65,115	3.2	5.5	56,961	6.3	12.3	66,010
53 Real Estate and Rental and Leasing	0.4	3.2	38,846	0.3	3.0	32,185	0.9	3.0	43,360
54 Professional, Scientific, and Technical Services	1.4	2.1	64,444	1.7	2.1	58,494	4.9	5.9	69,304
55 Management of Companies and Enterprises	0.2	0.2	72,825	0.3	0.3	75,350	1.4	1.7	81,592
56 Administrative and Support and Waste Management and Remediation Services	1.6	1.2	29,873	2.2	1.5	31,959	4.5	2.7	33,721
61 Educational Services	10.0	3.3	22,518	2.8	1.2	31,073	1.7	0.8	30,920
62 Health Care and Social Assistance	9.9	7.6	50,456	11.5	6.1	36,887	13.1	9.8	52,036
71 Arts, Entertainment, and Recreation	0.5	0.3	12,950	0.9	0.3	13,355	1.9	0.7	16,214
72 Accommodation and Food Services	5.8	1.4	12,833	6.0	1.7	13,932	8.2	2.6	17,573
81 Other Services (except Public Administration)	4.0	2.3	24,246	3.8	2.1	23,619	4.0	2.4	33,482
90 Government	18.6	12.9	48,908	22.8	15.0	49,444	20.4	18.8	63,570
Total	100.0	100.0	44,473	100.0	100.0	44,410	100.0	100.0	51,352

NA – Not available.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Major Occupations and Wages

The composition of occupations, including associated skill levels, employed within a region is determined by the mix of existing industries. An analysis of average area compensation relative to national averages provides information on the relative skill levels and the attractiveness of an area for retention and growth of industries dependent upon specific skills.

Tables Eleven through Thirteen on the following pages provide information on the number of employees, projected total change in employment between 2016 and 2022, median hourly earnings of employees in Seward County, the Rural Counties, and the Core Metro County. Information on employment and median hourly earnings of residents for these three areas are also provided. These tables also contain a comparison of median hourly earnings by occupation relative to an area's overall average by major occupational group. Table Fourteen compares median pay per occupation to the median U.S. compensation for each of the areas in the study.

As shown in Tables Eleven through Fourteen, Standard Occupational Code (SOC) 43-0000 Office and Administrative Support is the largest occupational group in all three areas, but also has below average wages in each area. The large numbers of Office and Administrative Support workers in all areas is due to the prevalence of these occupations across virtually all industries. The low absolute and relative average wages for this occupation within the study area, suggest relatively low overall levels of productivity for this group.

Data in Table Fourteen show, occupational groups with a substantial number of employees and wages above local averages in each of the three areas are SOC 11-0000 Management Occupations; SOC 13-0000 Business and Financial Operations Occupations; SOC 25-0000 Education, Training, and Library Occupations; SOC 29-0000 Healthcare Practitioners and Technical Occupations; and SOC 49-0000 Installation, Maintenance, and Repair Occupations. SOC 51-0000 Production Occupations and SOC 53-0000 Transportation and Material Moving Occupations have median hourly earnings near of above the national average in all three areas of the study but have lower than the local average in at least one area. This suggests local workers in SOC 51-0000 Production Occupations and SOC 53-0000 Transportation and Material Moving Occupations while highly productive are employed in relatively low wage positions compared to other local workers.

Table Eleven

Seward County, 2016 Workforce (Local Jobs), Labor Force (Local Residents), and Median Hourly Workforce Earnings Plus 2016–2022 Projected Workforce Change and Total Job Openings* by Standard Occupational Category (SOC)

SOC	Occupation Category	2016 Workforce		Employment of Residents By SOC		2016 Median Hourly Earnings		Projected Change in Local Jobs 2016-2022	
		#	%	#	%	Hourly \$	% Area Avg.	Increase	Openings
11-0000	Management Occ.	159	3.5	201	3.9	40.77	219.7	131	63
13-0000	Business and Financial Operations Occ.	143	3.1	214	4.2	26.23	141.3	104	52
15-0000	Computer and Mathematical Occ.	92	2.0	125	2.4	25.16	135.6	46	23
17-0000	Architecture and Engineering Occ.	69	1.5	70	1.4	31.52	169.8	33	23
19-0000	Life, Physical, and Social Science Occ.	21	0.5	46	0.9	21.01	113.2	15	NA
21-0000	Community and Social Service Occ.	72	1.6	103	2.0	17.05	91.9	72	31
23-0000	Legal Occ.	NA	NA	15	0.3	NA	NA	NA	NA
25-0000	Education, Training, and Library Occ.	424	9.2	443	8.6	24.64	132.8	299	139
27-0000	Arts, Design, Entertainment, Sports, and Media Occ.	67	1.5	74	1.4	16.14	87.0	26	18
29-0000	Healthcare Practitioners and Technical Occ.	167	3.6	235	4.6	33.14	178.6	130	60
31-0000	Healthcare Support Occ.	75	1.6	114	2.2	13.44	72.4	108	44
33-0000	Protective Service Occ.	43	0.9	79	1.5	16.80	90.5	62	23
35-0000	Food Preparation and Serving Related Occ.	351	7.6	409	8.0	9.52	51.3	159	121
37-0000	Building and Grounds Cleaning and Maintenance Occ.	160	3.5	175	3.4	11.50	62.0	120	60
39-0000	Personal Care and Service Occ.	87	1.9	138	2.7	11.76	63.4	76	44
41-0000	Sales and Related Occ.	414	9.0	444	8.6	13.83	74.5	160	153
43-0000	Office and Administrative Support Occ.	789	17.2	893	17.4	14.70	79.2	386	187
45-0000	Farming, Fishing, and Forestry Occ.	47	1.0	39	0.8	15.28	82.3	102	30
47-0000	Construction and Extraction Occ.	126	2.7	159	3.1	17.92	96.6	340	118
49-0000	Installation, Maintenance, and Repair Occ.	186	4.0	205	4.0	20.06	108.1	135	74
51-0000	Production Occ.	692	15.0	485	9.4	17.20	92.7	188	171
53-0000	Transportation and Material Moving Occ.	353	7.7	430	8.4	19.26	103.8	251	106
55-0000	Military Occ.	56	1.2	41	0.8	19.43	104.7	-5	NA
	Total	4,599	100.0	5,134	100.0	18.56	100.0	2,947	1,556

* Includes turnover of existing workers.

NA: Not available.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twelve
Rural Counties, Seward Target Study,
2016 Workforce (Local Jobs), Labor Force (Local Residents), and Median Hourly Workforce Earnings Plus
2016–2022 Projected Workforce Change and Total Job Openings*
by Standard Occupational Category (SOC)

SOC	Occupation Category	2016 Workforce		Employment of Residents By SOC		2016 Median Hourly Earnings		Projected Change in Local Jobs 2016-2022	
		#	%	#	%	Hourly \$	% Area Avg.	Increase	Openings
11-0000	Management Occ.	1,399	3.7	1,913	3.7	38.80	222.7	132	352
13-0000	Business and Financial Operations Occ.	1,079	2.8	1,805	3.5	26.87	154.2	103	253
15-0000	Computer and Mathematical Occ.	310	0.8	740	1.5	30.88	177.3	46	77
17-0000	Architecture and Engineering Occ.	345	0.9	433	0.8	33.28	191.0	42	101
19-0000	Life, Physical, and Social Science Occ.	378	1.0	320	0.6	28.16	161.7	29	107
21-0000	Community and Social Service Occ.	907	2.4	1,124	2.2	16.54	94.9	29	179
23-0000	Legal Occ.	109	0.3	157	0.3	23.89	137.1	6	19
25-0000	Education, Training, and Library Occ.	2,695	7.1	3,417	6.7	19.93	114.4	130	566
27-0000	Arts, Design, Entertainment, Sports, and Media Occ.	285	0.7	331	0.6	15.43	88.6	21	77
29-0000	Healthcare Practitioners and Technical Occ.	1,995	5.2	2,543	5.0	28.82	165.4	167	479
31-0000	Healthcare Support Occ.	1,334	3.5	1,521	3.0	12.08	69.3	90	306
33-0000	Protective Service Occ.	790	2.1	923	1.8	18.77	107.7	17	168
35-0000	Food Preparation and Serving Related Occ.	2,884	7.6	4,036	7.9	9.81	56.3	15	734
37-0000	Building and Grounds Cleaning and Maintenance Occ.	1,183	3.1	1,593	3.1	11.00	63.1	130	293
39-0000	Personal Care and Service Occ.	1,135	3.0	1,492	2.9	10.12	58.1	62	233
41-0000	Sales and Related Occ.	3,245	8.5	5,063	9.9	14.24	81.7	173	852
43-0000	Office and Administrative Support Occ.	5,076	13.3	7,776	15.2	13.89	79.7	190	915
45-0000	Farming, Fishing, and Forestry Occ.	1,158	3.0	1,174	2.3	14.61	83.9	169	373
47-0000	Construction and Extraction Occ.	1,722	4.5	2,215	4.3	17.21	98.8	213	426
49-0000	Installation, Maintenance, and Repair Occ.	1,842	4.8	2,220	4.4	18.83	108.1	171	492
51-0000	Production Occ.	4,627	12.1	4,882	9.6	16.80	96.4	461	1,214
53-0000	Transportation and Material Moving Occ.	3,347	8.8	4,756	9.3	15.06	86.5	322	884
55-0000	Military Occ.	307	0.8	596	1.2	21.14	121.4	-37	40
	Total	38,153	100.0	51,029	100.0	17.42	100.0	2,682	9,138

* Includes turnover of existing workers.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Thirteen
Core Metro County, Seward Target Study,
2016 Workforce (Local Jobs), Labor Force (Local Residents), and Median Hourly Workforce Earnings Plus
2016–2022 Projected Workforce Change and Total Job Openings*
by Standard Occupational Category (SOC)

SOC	Occupation Category	2016 Workforce		Employment of Residents By SOC		2016 Median Hourly Earnings		Projected Change in Local Jobs 2016-2022	
		#	%	#	%	Hourly \$	% Area Avg.	Increase	Openings
11-0000	Management Occ.	7,301	4.1	6,569	4.2	43.26	221.2	488	1,575
13-0000	Business and Financial Operations Occ.	10,439	5.9	9,162	5.9	28.65	146.5	622	2,097
15-0000	Computer and Mathematical Occ.	6,047	3.4	5,381	3.5	28.38	145.1	572	1,159
17-0000	Architecture and Engineering Occ.	2,771	1.6	2,416	1.6	31.12	159.1	168	596
19-0000	Life, Physical, and Social Science Occ.	2,011	1.1	1,696	1.1	23.99	122.6	68	439
21-0000	Community and Social Service Occ.	4,244	2.4	3,541	2.3	17.24	88.1	259	836
23-0000	Legal Occ.	1,040	0.6	894	0.6	33.51	171.3	35	159
25-0000	Education, Training, and Library Occ.	10,602	6.0	9,183	5.9	23.26	118.9	849	2,271
27-0000	Arts, Design, Entertainment, Sports, and Media Occ.	2,703	1.5	2,331	1.5	18.93	96.8	16	480
29-0000	Healthcare Practitioners and Technical Occ.	9,806	5.6	8,809	5.7	31.74	162.3	536	1,911
31-0000	Healthcare Support Occ.	4,008	2.3	3,663	2.4	13.65	69.8	568	1,162
33-0000	Protective Service Occ.	2,811	1.6	2,446	1.6	19.86	101.5	58	482
35-0000	Food Preparation and Serving Related Occ.	15,391	8.7	13,350	8.6	9.89	50.6	923	4,533
37-0000	Building and Grounds Cleaning and Maintenance Occ.	5,524	3.1	4,885	3.1	10.78	55.1	401	1,116
39-0000	Personal Care and Service Occ.	5,380	3.1	4,745	3.1	11.15	57.0	815	1,560
41-0000	Sales and Related Occ.	16,764	9.5	14,943	9.6	14.01	71.6	862	4,175
43-0000	Office and Administrative Support Occ.	31,415	17.8	27,392	17.6	14.93	76.3	725	5,087
45-0000	Farming, Fishing, and Forestry Occ.	330	0.2	294	0.2	16.23	83.0	42	97
47-0000	Construction and Extraction Occ.	6,867	3.9	6,519	4.2	18.97	97.0	508	1,173
49-0000	Installation, Maintenance, and Repair Occ.	5,800	3.3	5,237	3.4	21.64	110.6	295	1,169
51-0000	Production Occ.	10,282	5.8	10,207	6.6	16.60	84.9	360	1,937
53-0000	Transportation and Material Moving Occ.	13,535	7.7	10,490	6.8	19.56	100.0	908	2,889
55-0000	Military occ.	1,085	0.6	1,139	0.7	21.73	111.1	-39	149
	Total	176,156	100.0	155,291	100.0	19.56	100.0	10,038	37,051

* Includes turnover of existing workers.

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Data shown in Tables Eleven, Twelve, and Thirteen on the previous pages, indicates Seward County is a net exporter of labor with 535 more employed residents, 5,134, than jobs, 4,599, in the county. The combined seven Rural Counties are large net exporters of labor with 12,876 more employed residents, 51,029, than jobs, 38,153, in the area. The Core Metro County is a large, net importer of labor with 20,865 more jobs, 176,156, than employed residents.

SOC 51-0000 Production Occupations, has by far the largest number of net in-commuters, 207, to Seward County. This is likely due primarily to the local median hourly wage of \$17.20, which is higher than the median wage for the Rural Counties, \$16.80, the Metro County, \$16.60, and the United States as a whole, \$16.68. No other occupation showed a large numbers of net in-commuters to Seward County.

Occupations with large numbers of net out-commuters from Seward County plus their local median wage include:

- (a) SOC 43-0000 Office and Administrative Support Occupations, 104 net out-commuters, \$14.70 local median hourly wage.
- (b) SOC 53-0000 Transportation and Material Moving Occupations, 77 net out-commuters, \$19.26 local median hourly wage.
- (c) SOC 29-0000 Healthcare Practitioners and Technical Occupations, 68 net out-commuters, \$33.14 local median hourly wage.

None of the Rural Counties' occupations experienced large numbers of net in-commuters.

Occupations with large numbers of net out-commuters from the Rural Counties plus their local median wage include:

- (a) SOC 43-0000 Office and Administrative Support Occupations, 2,700 net out-commuters, \$13.89 local median hourly wage.
- (b) SOC 41-0000 Sales and Related Occupations, 1,818 net out-commuters, \$14.24 local median hourly wage.
- (c) SOC 53-0000 Transportation and Material Moving Occupations, 1,409 net out-commuters, \$15.06 local median hourly wage.

Occupations with large numbers of net in-commuters to the Metro County plus their local median wage include:

- (a) SOC 43-0000 Office and Administrative Support Occupations, 4,023 net in-commuters, \$14.93 local median hourly wage.
- (b) SOC 53-0000 Transportation and Material Moving Occupations, 3,045 net in-commuters, \$19.56 local median hourly wage.
- (c) SOC 35-0000 Food Preparation and Serving Related Occupations, 2,041 net in-commuters, \$9.89 local median hourly wage.

None of the Metro County's occupations experienced large numbers of net out-commuters.

Table Fourteen
Employment Distribution, Median Hourly Earnings, and Median Hourly Earnings as a Percent of U.S.
by Standard Occupational Category (SOC), 2016, Seward County, Rural Counties, and Core Metro County

SOC	Occupation Category	Seward County			Rural Counties			Core Metro County		
		% Jobs	Median Hourly Earnings		% Jobs	Median Hourly Earnings		% Jobs	Median Hourly Earnings	
			\$	% US		\$	% US		\$	% US
11-0000	Management Occ.	3.5	40.77	83.0	3.7	38.80	78.9	4.1	43.26	88.0
13-0000	Business and Financial Operations Occ.	3.1	26.23	80.9	2.8	26.87	82.8	5.9	28.65	88.3
15-0000	Computer and Math. Occ.	2.0	25.16	63.0	0.8	30.88	77.4	3.4	28.38	71.1
17-0000	Arch. and Engineering Occ.	1.5	31.52	81.8	0.9	33.28	86.4	1.6	31.12	80.7
19-0000	Life, Physical, and Soc. Sc. Occ.	0.5	21.01	65.3	1.0	28.16	87.5	1.1	23.99	74.6
21-0000	Comm. and Social Service Occ.	1.6	17.05	80.9	2.4	16.54	78.5	2.4	17.24	81.8
23-0000	Legal Occ.	NA	NA	NA	0.3	23.89	53.4	0.6	33.51	75.0
25-0000	Education, Training, and Library Occ.	9.2	24.64	102.8	7.1	19.93	83.2	6.0	23.26	97.1
27-0000	Arts, Design, Entertainment, Sports, and Media Occ.	1.5	16.14	67.7	0.7	15.43	64.8	1.5	18.93	79.4
29-0000	Healthcare Practitioners and Technical Occ.	3.6	33.14	91.3	5.2	28.82	79.4	5.6	31.74	87.4
31-0000	Healthcare Support Occ.	1.6	13.44	97.0	3.5	12.08	87.2	2.3	13.65	98.6
33-0000	Protective Service Occ.	0.9	16.80	80.1	2.1	18.77	89.5	1.6	19.86	94.7
35-0000	Food Preparation and Serving Related Occ.	7.6	9.52	90.7	7.6	9.81	93.4	8.7	9.89	94.2
37-0000	Building and Grounds Cleaning and Maintenance Occ.	3.5	11.50	93.2	3.1	11.00	89.1	3.1	10.78	87.4
39-0000	Personal Care and Service Occ.	1.9	11.76	100.7	3.0	10.12	86.6	3.1	11.15	95.5
41-0000	Sales and Related Occ.	9.0	13.83	84.4	8.5	14.24	86.9	9.5	14.01	85.5
43-0000	Off. and Admin. Support Occ.	17.2	14.70	87.8	13.3	13.89	82.9	17.8	14.93	89.1
45-0000	Farm., Fish., and Forestry Occ.	1.0	15.28	126.9	3.0	14.61	121.3	0.2	16.23	134.8
47-0000	Constr. and Extraction Occ.	2.7	17.92	81.1	4.5	17.21	77.9	3.9	18.97	85.9
49-0000	Install., Maint. & Repair Occ.	4.0	20.06	93.7	4.8	18.83	88.0	3.3	21.64	101.1
51-0000	Production Occ.	15.0	17.20	103.1	12.1	16.80	100.7	5.8	16.60	99.5
53-0000	Transportation and Material Moving Occ.	7.7	19.26	121.0	8.8	15.06	94.6	7.7	19.56	122.9
55-0000	Military Occ.	1.2	19.43	110.8	0.8	21.14	120.6	0.6	21.73	124.0
	Total	100.0	18.56	85.9	100.0	17.42	80.6	100.0	19.56	90.5

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Information shown in Table Fourteen on the previous page indicates occupations with relatively large numbers of employees and wages that tend to be at or above the local median average in at least one of the three areas of this study. **The availability of workers in these occupations is likely to be key to future growth of the Seward Target Area economy:**

- (a) SOC 11-0000 Management Occupations
- (b) SOC 13-0000 Business and Financial Operations Occupations
- (c) SOC 25-0000 Education, Training, and Library Occupations
- (d) SOC 29-0000 Healthcare Practitioners and Technical Occupations
- (e) SOC 49-0000 Installation, Maintenance, and Repair Occupations
- (f) SOC 53-0000 Transportation and Material Moving Occupations

Although the median wage for SOC 51-0000 Production Occupations, is below the area averages in each of the three regions, the large number of area workers in this category and the importance of businesses in NAICS 31 Manufacturing in Seward County also makes these occupations key to future growth.

Analysis of Potential Targets

As noted in previous sections of this study, the broad industry categories Manufacturing; Wholesale Trade; Transportation and Warehousing; Finance and Insurance; Professional, Scientific, and Technical Services; and Health Care and Social Assistance make up a large portion of the current Seward County, Rural Counties, or Core Metro County economies when measured by employment and contribution to gross regional product. Additionally these industries pay from average to well above average wages.

Information in this section provides a more detailed analysis of the industries and sub-industries within the study area. This information is used to assess the suitability of individual industries as potential targets for retention, expansion, and recruitment efforts.

Excluded from this analysis are industries whose growth is highly dependent on local population growth. These include Retail Trade, Construction, Government, and Real Estate and Rental and Leasing. Industries currently employing less than 2.0 percent of the workforce are also excluded as information on these industries is subject to large errors in estimation. Additionally, only industries with average annual total earnings (wages and benefits) of at least \$45,500, just above the average for Seward County, are included.

The services provided by Healthcare and Social Assistance establishments in rural areas are often designed to serve local markets. This local market focus typically excludes them from consideration as key drivers of area economies. Initially, the large presence of this industry in both Seward County and the Core Metro County justified the inclusion of this sector for further analysis in the study.

Location Quotient (LQ) Analysis

In this section, LQ analysis is used to identify study area industries that have recently and/or are expected to in the future perform better than the national average. Superior performance by area industries indicates the presence of substantial competitive advantages or regional strengths. These advantages and/or strengths, such as access to skilled labor or access or specialized resources, are critical to an industry and provide a rationale for a region's expected future growth.

LQs indicate whether the percentage of total employment² by an area industry is greater than the national average (LQ>1), is equal to the national average (LQ=1) or is less than the national average (LQ<1). Industries with a LQ>1 typically indicate the presence of a comparative advantage, such as a large source of skilled labor or access to specialized transportation linkages.

² In addition to employment, location quotients can be calculated for other factors, such as total sales and taxes. For this report LQs are reported for employment only.

Industries with a LQ>1, experiencing local employment growth, with expected future growth and paying good wages (at least \$44,500 per year) are key to the future growth of a region. Industries with low LQs, but increasing levels of employment and good wages may have the potential to become key drivers of the economy. Industries with a LQ>1 and stable to declining local employment are considered to be mature or declining industries. Mature or declining industries may command significant retention efforts when they employ large numbers of area workers. Other combinations of LQs and growth are typically not of interest and are not considered for further analysis in this study. The criteria used to categorize industries based on their likely potential to drive future growth are summarized in Table Fifteen below.

**Table Fifteen
Initial Classification of Industries by Potential to Drive Local Growth**

Category	LQ	Recent Growth	Projected Growth	Compensation
Key to Future Growth	1+	+	+	>\$44,500
Potential to Drive Future Growth	<1	+	+/-	>\$44,500
Mature or Declining	1+	+/-	-/+	>\$44,500
Not Further Considered	<1	+/-	-/+	> or < \$44,500

Tables Sixteen through Eighteen on the following pages contain information on recent, current, and projected future employment and LQs plus current average total earnings by major industry sector for Seward County, the other Rural Counties, and the Core Metro County. Similarities in these data for Seward County and the other Rural Counties justify combining them into a new, single category Seward Plus Rural Counties for the remainder of this study.

Table Nineteen contains information on current LQs, the expected trend in LQ values from 2016 to 2022, the distribution of jobs by industry, and whether or not a broad industry will be considered for further study for Seward and the Rural Counties and the Core Metro County areas. Industries are selected for further study if they are classified as Key to Future Growth or as having the Potential to Drive Future Growth using the criteria in Table Fifteen above. The five major industries initially selected for further analysis as shown in Table Nineteen are NAICS 31 Manufacturing; NAICS 42 Wholesale Trade; NAICS 48 Transportation and Warehousing; NAICS 52 Finance and Insurance; and NAICS 54 Professional, Scientific, and Technical Services.

NAICS 62 Health Care and Social Assistance meets the criteria for a potential study target in the Core Metro County, but not in Seward Plus Rural Counties and was not retained for further study.

As shown in Table Sixteen, Seward County employment in NAICS 31 Manufacturing; NAICS 42 Wholesale Trade; NAICS 48 Transportation and Warehousing; NAICS 52 Finance and Insurance; NAICS 54 Professional, Scientific, and Technical Services; NAICS 55 Management of Companies and Enterprises; and NAICS 62 Health Care and Social Assistance is projected to increase from 2016 to 2022. Additionally average earning in each of these industries exceeds the overall average for Seward County.

Table Sixteen
Seward County, Employment, Employment Percent Change,
Location Quotients, and Average Annual Earnings, 2010–2022, Selected Years

NAICS	Description	Employment				LQ			Average Earnings 2016
		2010	2016	2022	% Change 2016 - 2022	2010	2016	2022	
11	Crop and Animal Production	333	297	258	-13.1	5.34	4.40	3.63	32,414
21	Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0.0	0.00	0.00	0.00	0
22	Utilities	<10	<10	<10	NA	0.02	0.04	0.03	NA
23	Construction	303	450	553	22.9	1.08	1.38	1.60	47,001
31	Manufacturing	948	1,114	1,163	4.4	1.68	1.88	1.91	62,609
42	Wholesale Trade	248	316	377	19.3	0.92	1.11	1.27	61,099
44	Retail Trade	587	540	575	6.5	0.83	0.71	0.72	26,658
48	Transportation and Warehousing	404	406	413	1.7	1.98	1.71	1.60	63,834
51	Information	47	52	53	1.9	0.35	0.39	0.39	32,955
52	Finance and Insurance	224	211	215	1.9	0.82	0.74	0.72	65,115
53	Real Estate and Rental and Leasing	22	25	30	20.0	0.23	0.24	0.27	38,846
54	Professional, Scientific, and Technical Services	109	99	108	9.1	0.30	0.23	0.23	64,444
55	Management of Companies and Enterprises	<10	11	16	45.5	0.03	0.10	0.13	72,825
56	Administrative and Support and Waste Management and Remediation Services	100	117	150	28.2	0.27	0.27	0.32	29,873
61	Educational Services	726	709	702	-1.0	4.41	3.94	3.54	22,518
62	Health Care and Social Assistance	577	700	783	11.9	0.72	0.77	0.77	50,456
71	Arts, Entertainment, and Recreation	64	38	29	-23.7	0.68	0.35	0.25	12,950
72	Accommodation and Food Services	342	413	417	1.0	0.63	0.65	0.61	12,833
81	Other Services (except Public Administration)	284	281	297	5.7	0.99	0.99	1.01	24,246
90	Government	1,257	1,320	1,406	6.5	1.04	1.13	1.19	48,908
	Total	6,578	7,098	7,546	6.3	-	-	-	44,473

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Similar to Table Sixteen, Table Seventeen shows Rural Counties employment in NAICS 31 Manufacturing; NAICS 42 Wholesale Trade; NAICS 48 Transportation and Warehousing; NAICS 52 Finance and Insurance; NAICS 54 Professional, Scientific, and Technical Services; and NAICS 55 Management of Companies and Enterprises is projected to increase from 2016 to 2022. Additionally average earning in each of these industries exceeds the overall average for the Rural Counties.

Table Seventeen
Rural Counties, Seward Target Study,
Employment, Employment Percent Change,
Location Quotients, and Average Annual Earnings, 2010–2022, Selected Years

NAICS	Description	Employment				LQ			Average Earnings 2016
		2010	2016	2022	% Change 2016 - 2022	2010	2016	2022	
11	Crop and Animal Production	1,018	1,468	1,692	15.3	2.94	4.05	4.40	43,739
21	Mining, Quarrying, and Oil and Gas Extraction	33	58	68	17.2	0.19	0.33	0.36	17,531
22	Utilities	14	28	33	17.9	0.09	0.19	0.21	79,542
23	Construction	1,531	1,767	2,017	14.1	0.99	1.01	1.08	50,794
31	Manufacturing	6,133	6,477	7,258	12.1	1.96	2.03	2.20	60,095
42	Wholesale Trade	1,517	1,796	2,034	13.3	1.02	1.18	1.26	57,017
44	Retail Trade	3,846	3,750	3,830	2.1	0.97	0.92	0.89	28,600
48	Transportation and Warehousing	1,254	1,395	1,524	9.2	1.11	1.09	1.09	61,070
51	Information	261	223	213	-4.5	0.35	0.31	0.29	41,008
52	Finance and Insurance	1,241	1,226	1,254	2.3	0.82	0.80	0.78	56,961
53	Real Estate and Rental and Leasing	112	100	118	18.0	0.21	0.18	0.20	32,185
54	Professional, Scientific, and Technical Services	572	658	732	11.2	0.28	0.29	0.29	58,494
55	Management of Companies and Enterprises	84	121	167	38.0	0.17	0.21	0.27	75,350
56	Administrative and Support and Waste Management and Remediation Services	658	825	968	17.3	0.33	0.36	0.38	31,959
61	Educational Services	926	1,079	1,133	5.0	1.01	1.11	1.06	31,073
62	Health Care and Social Assistance	4,261	4,384	4,765	8.7	0.95	0.90	0.86	36,887
71	Arts, Entertainment, and Recreation	397	341	352	3.2	0.76	0.60	0.56	13,355
72	Accommodation and Food Services	2,286	2,281	2,291	0.4	0.76	0.67	0.61	13,932
81	Other Services (except Public Administration)	1,511	1,464	1,478	1.0	0.95	0.96	0.93	23,619
90	Government	8,887	8,712	8,907	2.2	1.33	1.39	1.39	49,444
	Total	36,541	38,153	40,835	7.0	-	-	-	44,410

NA: Not Available.

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Eighteen shows employment in Core Metro County in NAICS 31 Manufacturing; NAICS 42 Wholesale Trade; NAICS 48 Transportation and Warehousing; NAICS 51 Information, NAICS 52 Finance and Insurance; NAICS 54 Professional, Scientific, and Technical Services; NAICS 55 Management of Companies and Enterprises; and NAICS 62 Health Care and Social Assistance is projected to increase from 2016 to 2022. Additionally average earning in each of these industries exceeds the overall average for the Core Metro County.

Table Eighteen
Core Metro Counties, Seward Target Study,
Employment, Employment Percent Change,
Location Quotients, and Average Annual Earnings, 2010–2022, Selected Years

NAICS	Description	Employment				LQ			Average Earnings 2016
		2010	2016	2022	% Change 2016 - 2022	2010	2016	2022	
11	Crop and Animal Production	388	451	508	0.1	0.25	0.27	0.29	29,288
21	Mining, Quarrying, and Oil and Gas Extraction	NA	NA	NA	NA	0.00	0.01	0.00	NA
22	Utilities	238	146	144	0.0	0.36	0.22	0.21	100,872
23	Construction	6,692	8,276	9,016	0.1	0.98	1.02	1.06	56,066
31	Manufacturing	11,695	12,608	12,984	0.0	0.85	0.86	0.86	65,557
42	Wholesale Trade	3,693	3,705	3,748	0.0	0.56	0.53	0.51	62,058
44	Retail Trade	17,199	19,257	20,497	0.1	0.99	1.02	1.05	30,809
48	Transportation and Warehousing	9,551	10,419	11,171	0.1	1.91	1.76	1.76	67,357
51	Information	2,145	2,838	3,065	0.1	0.66	0.85	0.91	75,996
52	Finance and Insurance	9,981	11,067	11,909	0.1	1.50	1.57	1.62	66,010
53	Real Estate and Rental and Leasing	1,631	1,664	1,734	0.0	0.70	0.65	0.65	43,360
54	Professional, Scientific, and Technical Services	7,853	8,559	8,750	0.0	0.87	0.82	0.76	69,304
55	Management of Companies and Enterprises	2,880	2,448	2,508	0.0	1.29	0.92	0.87	81,592
56	Administrative and Support and Waste Management and Remediation Services	6,750	7,873	8,484	0.1	0.76	0.74	0.73	33,721
61	Educational Services	2,509	2,925	3,047	0.0	0.62	0.65	0.62	30,920
62	Health Care and Social Assistance	20,672	23,092	25,519	0.1	1.05	1.03	1.01	52,036
71	Arts, Entertainment, and Recreation	2,709	3,352	3,852	0.1	1.19	1.27	1.34	16,214
72	Accommodation and Food Services	12,677	14,383	15,172	0.1	0.95	0.91	0.89	17,573
81	Other Services (except Public Administration)	6,705	7,077	7,076	0.0	0.95	1.01	0.98	33,482
90	Government	34,893	36,010	37,004	0.0	1.18	1.24	1.27	63,570
	Total	160,866	176,156	186,194	0.1	-	-	-	51,352

NA: Not Available.

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

The information in Table Nineteen shows industries in NAICS 31 Manufacturing; NAICS 42 Wholesale Trade; NAICS 48 Transportation and Warehousing; and NAICS 52 Finance and Insurance meet the criteria to be potential targets in both the Seward Plus Rural Counties and the Core Metro Counties areas. Industries in NAICS 62 Health Care and Social Assistance met the criteria to be potential targets in the Core Metro County but not in Seward Plus the Rural Counties due to low average earnings. Industries in NAICS 55 Management of Companies and Enterprises do not meet potential target criteria because they employ well below two percent of the workforce in both areas. While industries in NAICS 54 Professional, Scientific, and Technical Services employ only 1.7 percent of the workers in the Seward Plus Rural Counties area, this industry was retained as a potential target for the study because of Seward County’s proximity to Lancaster County.

Table Nineteen
Potential Target Indicators, Location Quotients, Jobs and Income
Combined Seward and Rural Counties & Core Macro County

NAICS	Seward Plus Rural Counties				Core Macro County				
	2016 LQ & Projected Trend *	2016 Percent Total	2016 Total Income	Potential Target	2016 LQ & Projected Trend *	2016 Percent Total	2016 Total Income	Potential Target	
11	Crop and Animal Production	4.1 +	3.9	41,834	No	0.27 +	0.3	29,288	No
21	Mining, Quarrying, and Oil and Gas Extraction	0.28 +	0.1	17,531	No	0.01 o	0.0	NA	No
22	Utilities	0.17 +	0.1	79,298	No	0.22 o	0.1	100,872	No
23	Construction	1.07 +	4.9	50,025	No	1.02 +	4.7	56,066	No
31	Manufacturing	2.00 +	16.8	60,464	Yes	0.86 +	7.2	65,557	Yes
42	Wholesale Trade	1.17 +	4.7	57,628	Yes	0.53 o	2.1	62,058	Yes
44	Retail Trade	0.89 o	9.5	28,355	No	1.02 +	10.9	30,809	No
48	Transportation and Warehousing	1.19 o	4.0	61,693	Yes	1.76 o	5.9	67,357	Yes
51	Information	0.32 o	0.6	39,490	No	0.85 +	1.6	75,996	Yes
52	Finance and Insurance	0.79 o	3.2	58,157	Yes	1.57 +	6.3	66,010	Yes
53	Real Estate and Rental and Leasing	0.19 +	0.3	33,521	No	0.65 o	0.9	43,360	No
54	Professional, Scientific, and Technical Services	0.28 +	1.7	59,273	Yes	0.82 o	4.9	69,304	Yes
55	Management of Companies and Enterprises	0.19 +	0.3	75,140	Yes	0.92 o	1.4	81,592	Yes
56	Administrative and Support and Waste Management and Remediation Services	0.34 +	2.1	31,699	No	0.74 o	4.5	33,721	No
61	Educational Services	1.56 o	4.0	27,679	No	0.65 o	1.7	30,920	No
62	Health Care and Social Assistance	0.88 o	11.2	38,756	No	1.03 o	13.1	52,036	Yes
71	Arts, Entertainment, and Recreation	0.56 o	0.8	13,315	No	1.27 +	1.9	16,214	No
72	Accommodation and Food Services	0.67 o	6.0	13,763	No	0.91 o	8.2	17,573	No
81	Other Services (except Public Administration)	0.97 o	3.9	23,720	No	1.01 o	4.0	33,482	No
90	Government	1.35 +	22.2	49,373	No	1.24 +	20.4	63,570	No

* Future Trend Symbols: + increasing; o neutral; - decreasing

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

A more detailed analysis of the sub-industries, i.e., 3-Digit NAICS Code industries, within the five major industries selected for study, indicates the need to reorganize some of them into new groups of seven categories. Table Twenty shows the seven industry categories used in the following sections of this study. Manufacturing is broken out into three sectors: a. NAICS 31 Crop and Animal Production and Related Manufacturing; b. NAICS 32 Metal, Metal Products, and Machinery Manufacturing; and c. NAICS 33 All Other Manufacturing. The remaining broad industry categories, NAICS 42 Wholesale Trade; NAICS 48 Transportation and Warehousing; NAICS 52 Finance and Insurance; and NAICS 54 Professional, Scientific, and Technical Services are the same as the major industries in previous sections of the study.

Table Twenty
Jobs and Percent Area Jobs by Target Industry Group
Seward and Rural Counties & Core Metro County

Target Industry Group	Seward Plus Rural Counties		Core Metro	
	Total Jobs	Percent Area Jobs	Total Jobs	Percent Area Jobs
Crop and Animal Production and Related Manufacturing	5,019	11.1	2,596	1.5
Metal, Metal Products and Machinery Manufacturing	1,413	3.1	1,882	1.1
All Other Manufacturing	2,714	6.0	8,497	4.8
Wholesale Trade	2,112	4.7	3,705	2.1
Transportation and Warehousing	1,794	4.0	10,414	5.9
Finance and Insurance	1,437	3.2	11,067	6.3
Professional, Scientific, and Technical Services	757	1.7	8,559	4.9
Total	15,246	33.8	46,720	26.6

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

As shown in Table Twenty above, the seven industry categories account for 33.8 percent of current employment in Seward and the Rural Counties and 26.6 percent in the Core Metro County. Crop and Animal Related Manufacturing is by far the largest industry category by employment in Seward Plus Rural Counties, while Finance and Insurance, 11,067 jobs, and Transportation and Warehousing, 10,414 jobs, are the largest in the Core Metro County.

All Other Manufacturing, Wholesale Trade, Transportation and Warehousing, and Finance and Insurance are the second, third, fourth, and fifth largest target industry employers in Seward Plus Rural Counties. Professional, Scientific, and Technical Services and All Other Manufacturing are the third and fourth largest employers in the Core Metro County.

Shift Share Analysis

Further analysis and refinement of the study area industries is accomplished using shift share analysis. Shift share analysis decomposes actual or projected changes in a local industry's employment into three components. These are the:

- National effect:** the local industry's starting employment multiplied by the percent change in national average employment for all industries—this shows the change in local employment attributable to the change in economy-wide employment;
- Industry effect:** the local industry's starting employment multiplied by the percent change in national employment for the industry minus the national effect—this shows the change in local employment attributable to an industry's employment trends after adjusting for national employment trends; and
- Competitive effect:** the difference between a local industry's ending and starting employment minus the national effect and the industry effect—this is an indication of the change in local employment attributable to an area's relative advantage or competitiveness.

The following is an example of a shift share decomposition:

1. Local Industry A grows by 10.0 percent from 1,000 to 1,100.
2. The average of all industry employment change in the U.S. is a 3.0 percent increase; the national effect is 30 or 1,000 times .03.
3. Average U.S. growth for Industry A is 5.0 percent.
4. The industry effect is .05 (5.0 percent) times 1,000 minus the national effect of 30; this is 50 minus 30 and the industry effect equals 20.
5. The competitive effect is 100 minus 30, the national effect, minus 20, the industry effect, and is equal to 50 or 5.0 percent. The industry has grown twice as fast as the average of similar industries across the U.S.

If a local industry's employment changes by the same percentage as the U.S. average for that industry, 5.0 percent in the above example, the competitive effect is zero. The change in employment for a U.S. industry is also referred to as the **expected effect** for a local industry.

If the competitive effect is very strong, a local industry can grow when the national and industry effects are both negative. Likewise, if a national industry is experiencing strong growth, the expected effect can be positive when the national effect is negative. Industries with positive industry and local competitive shift share effects are either key drivers or are likely to become key drivers of the local economy.

The criteria used to evaluate 4-digit NAICS industries within the seven broad industry categories, shown in Table Twenty, and the categories assigned are shown in Table Twenty-One. Industries are selected as Key to Future Growth (K) if they have an LQ greater than one, they are projected to have both a positive competitive effect and they have a positive expected growth effect (industry effect plus national effect) and current annual

earnings greater than \$44,500. Potential to Drive Future Growth (P) industries are projected to have a positive competitive effect, positive expected growth (Industry plus national effect), and current annual earnings greater than \$44,500, but have an LQ less than one. Mature (M), possibly declining industries, have an LQ greater than one and a negative expected growth effect.

Table Twenty-One
Shift Share Classification of Industries by Potential to Drive Local Growth

Shift Share Analysis Category	LQ	Projected Change LQ	Projected Competitive Effect	Expected Growth Effect (Projected Industry Effect + National Effect)	Average Earnings >\$44,500
(K) Key to Future Growth	>1	+/-	+	+	Yes
(P) Potential to Drive Future Growth	.1-1.0	+/-	+/-	+	Yes
(M) Mature or Declining	>1	+/-	+/-	-	Yes
(X) Not Further Considered	>.01	+/-	+/-	+/-	Yes/No

Table Twenty-Two, Parts A through N on this and the following pages contain the projected 2016 through 2022 national effects, industry effects, expected change effects, and competitive effects; the 2016 LQ and projected 2022 LQ; and the shift share target category, from Table Twenty-One for 4-digit NAICS industries in each of the two study areas for each of the seven target industry categories in Table Twenty.

Table Twenty-Two, Part A
Seward Plus Rural Counties,
"Crop and Animal Production and Related Manufacturing"

NAICS	Description	2016-2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
1110	Crop Production	26	-22	4	93	2.18	2.72	K
3111	Animal Food Manufacturing	59	42	101	124	47.99	54.29	K
3112	Grain and Oilseed Milling	9	-1	8	-36	7.11	5.26	M
3116	Animal Slaughtering and Processing	147	-62	85	82	13.93	14.46	K
3149	Other Textile Product Mills	2	-2	0	2	1.37	1.48	X
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	8	-1	7	30	10.01	12.62	K

Source and Target codes at end of table.

Table Twenty-Two, Part B
Metro County,
"Crop and Animal Production and Related Manufacturing"

NAICS	Description	2016-2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
3111	Animal Food Manufacturing	9	6	15	-28	1.92	1.57	M
3112	Grain and Oilseed Milling	25	-3	22	-48	5.08	4.49	M
3116	Animal Slaughtering and Processing	76	-32	44	109	1.85	2.05	K

Source and Target codes at end of table.

Table Twenty-Two, Part C
Seward Plus Rural Counties,
"Metal, Metal Products and Machinery Manufacturing"

NAICS	Description	2016-2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
3311	Iron and Steel Mills and Ferroalloy Manufacturing	2	-2	0	0	1.00	0.99	M
3312	Steel Product Manufacturing from Purchased Steel	4	1	5	21	3.36	4.49	K
3315	Foundries	1	-2	-1	13	0.55	0.91	X
3323	Architectural and Structural Metals Manufacturing	26	-2	24	-7	3.28	3.22	M
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	12	-4	8	11	1.56	1.65	K
3329	Other Fabricated Metal Product Manufacturing	1	0	1	1	0.14	0.15	P
3331	Agriculture, Construction, and Mining Machinery Manufacturing	30	-8	22	140	6.40	8.37	K
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	4	-3	1	1	1.43	1.47	K
3335	Metalworking Machinery Manufacturing	2	-1	1	16	0.39	0.67	P
3339	Other General Purpose Machinery Manufacturing	11	2	13	0	2.01	2.01	K

Source and Target codes at end of table.

Table Twenty-Two, Part D
Metro County,
"Metal, Metal Products and Machinery Manufacturing"

NAICS	Description	2016-2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
3315	Foundries	8	-11	-3	8	0.82	0.89	X
3323	Architectural and Structural Metals Manufacturing	38	-2	36	93	1.23	1.44	K
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	26	-9	17	33	0.86	0.94	P
3328	Coating, Engraving, Heat Treating, and Allied Activities	33	-18	15	21	2.90	3.06	K
3333	Commercial and Service Industry Machinery Manufacturing	13	-17	-4	51	1.71	2.23	X
3335	Metalworking Machinery Manufacturing	10	-8	2	4	0.69	0.72	P

Source and Target codes at end of table.

**Table Twenty-Two, Part E
Seward Plus Rural Counties,
"All Other Manufacturing"**

NAICS	Description	2016-2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
3222	Converted Paper Product Manufacturing	2	-2	0	-7	0.27	0.20	X
3251	Basic Chemical Manufacturing	22	-2	20	41	7.00	7.84	K
3262	Rubber Product Manufacturing	5	-3	2	39	1.64	2.58	K
3273	Cement and Concrete Product Manufacturing	7	-3	4	10	1.62	1.80	K
3362	Motor Vehicle Body and Trailer Manufacturing	22	17	39	20	6.86	7.25	K
3363	Motor Vehicle Parts Manufacturing	83	28	111	-69	6.74	6.39	M
3364	Aerospace Product and Parts Manufacturing	14	-10	4	-14	1.36	1.27	M
3391	Medical Equipment and Supplies Manufacturing	2	0	2	12	0.24	0.36	P

Source and Target codes at end of table.

**Table Twenty-Two, Part F
Metro County,
"All Other Manufacturing"**

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
3222	Converted Paper Product Manufacturing	15	-16	-1	13	0.66	0.71	X
3251	Basic Chemical Manufacturing	5	0	5	16	0.38	0.46	P
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	4	-3	1	-39	0.56	0.22	X
3254	Pharmaceutical and Medicine Manufacturing	80	-18	62	-161	3.37	2.95	M
3255	Paint, Coating, and Adhesive Manufacturing	7	-3	4	22	1.32	1.62	K
3261	Plastics Product Manufacturing	38	-20	18	-13	0.81	0.81	X
3262	Rubber Product Manufacturing	33	-24	9	-22	2.96	2.86	M
3271	Clay Product and Refractory Manufacturing	3	-4	-1	-10	0.81	0.59	X
3272	Glass and Glass Product Manufacturing	1	-1	0	4	0.14	0.18	X
3273	Cement and Concrete Product Manufacturing	22	-12	10	-52	1.43	1.22	M
3279	Other Nonmetallic Mineral Product Manufacturing	3	1	4	7	0.42	0.51	P
3342	Communications Equipment Manufacturing	14	-38	-24	27	1.89	2.22	X
3343	Audio and Video Equipment Manufacturing	2	-4	-2	4	1.22	1.44	X
3344	Semiconductor and Other Electronic Component Manufacturing	85	-122	-37	406	2.77	3.77	X
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	59	-55	4	-44	1.78	1.71	M
3353	Electrical Equipment Manufacturing	17	-7	10	-92	1.47	0.96	M
3359	Other Electrical Equipment and Component Manufacturing	24	0	24	-112	2.24	1.59	M
3362	Motor Vehicle Body and Trailer Manufacturing	12	9	21	61	0.96	1.28	P
3363	Motor Vehicle Parts Manufacturing	46	16	62	163	0.95	1.18	P
3365	Railroad Rolling Stock Manufacturing	11	12	23	13	4.59	4.97	K
3369	Other Transportation Equipment Manufacturing	73	-20	53	-288	26.17	19.51	M
3391	Medical Equipment and Supplies Manufacturing	7	-2	5	-19	0.27	0.23	X
3399	Other Miscellaneous Manufacturing	12	-15	-3	-4	0.52	0.52	X

Source and Target codes at end of table.

**Table Twenty-Two, Part G
Seward Plus Rural Counties,
"Wholesale Trade"**

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	3	-1	2	-9	0.37	0.28	X
4233	Lumber and Other Construction Materials Merchant Wholesalers	1	0	1	11	0.32	0.49	P
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	1	-1	0	7	0.11	0.14	X
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	3	-3	0	20	0.45	0.65	X
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	1	0	1	3	0.18	0.22	P
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	49	-22	27	15	3.42	3.49	K
4239	Miscellaneous Durable Goods Merchant Wholesalers	5	0	5	22	0.74	0.96	P
4245	Farm Product Raw Material Merchant Wholesalers	40	6	46	7	25.19	25.50	K
4247	Petroleum and Petroleum Products Merchant Wholesalers	4	0	4	2	1.75	1.80	K
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	33	-25	8	113	4.75	5.86	K
4251	Wholesale Electronic Markets and Agents and Brokers	3	3	6	-6	0.18	0.16	X

Source and Target codes at end of table.

**Table Twenty-Two, Part H
Metro County,
"Wholesale Trade"**

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	32	-9	23	27	1.14	1.22	K
4232	Furniture and Home Furnishing Merchant Wholesalers	2	0	2	-8	0.22	0.17	X
4233	Lumber and Other Construction Materials Merchant Wholesalers	16	-4	12	4	0.88	0.91	P
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	18	-14	4	-19	0.35	0.33	X
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	16	-14	2	31	0.57	0.66	P
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	12	-4	8	-22	0.59	0.53	X
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	33	-15	18	33	0.59	0.64	P
4239	Miscellaneous Durable Goods Merchant Wholesalers	5	0	5	2	0.20	0.21	P
4241	Paper and Paper Product Merchant Wholesalers	2	-2	0	-2	0.16	0.14	X
4242	Drugs and Druggists' Sundries Merchant Wholesalers	4	-3	1	12	0.23	0.28	P
4244	Grocery and Related Product Merchant Wholesalers	52	-5	47	-57	0.84	0.79	X
4245	Farm Product Raw Material Merchant Wholesalers	5	1	6	-33	0.83	0.50	X
4246	Chemical and Allied Products Merchant Wholesalers	2	-1	1	4	0.15	0.18	P
4247	Petroleum and Petroleum Products Merchant Wholesalers	5	0	5	-10	0.60	0.52	X
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	12	10	22	2	0.74	0.76	P
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	24	-18	6	-88	0.87	0.66	X
4251	Wholesale Electronic Markets and Agents and Brokers	20	15	35	-31	0.26	0.24	X

Source and Target codes at end of table.

**Table Twenty-Two, Part I
Seward Plus Rural Counties,
"Transportation and Warehousing"**

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
4821	Rail Transportation	37	-9	28	38	6.95	7.43	K
4841	General Freight Trucking	28	-5	23	-128	1.32	0.93	M
4842	Specialized Freight Trucking	29	5	34	69	3.00	3.46	K
4862	Pipeline Transportation of Natural Gas	1	1	2	-1	1.92	1.77	M
4884	Support Activities for Road Transportation	1	1	2	3	0.41	0.51	P
4921	Couriers and Express Delivery Services	2	0	2	-6	0.19	0.16	X
4931	Warehousing and Storage	19	25	44	13	1.03	1.07	K

Source and Target codes at end of table.

**Table Twenty-Two, Part J
Metro County,
"Transportation and Warehousing"**

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
4812	Nonscheduled Air Transportation	4	3	7	12	1.22	1.45	K
4821	Rail Transportation	115	-28	87	57	5.51	5.77	K
4841	General Freight Trucking	369	-65	304	60	4.42	4.53	K
4842	Specialized Freight Trucking	38	6	44	60	1.00	1.12	K
4881	Support Activities for Air Transportation	89	95	184	-185	5.61	4.97	M
4882	Support Activities for Rail Transportation	2	4	6	-3	0.68	0.62	X
4885	Freight Transportation Arrangement	4	2	6	11	0.20	0.25	P
4921	Couriers and Express Delivery Services	24	-4	20	-6	0.52	0.52	X
4931	Warehousing and Storage	47	61	108	-1	0.64	0.64	X

Source and Target codes at end of table.

**Table Twenty-Two, Part K
Seward Plus Rural Counties,
"Finance and Insurance"**

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
5221	Depository Credit Intermediation	70	-78	-8	-14	1.94	1.91	M
5223	Activities Related to Credit Intermediation	1	1	2	4	0.19	0.23	P
5231	Securities and Commodity Contracts Intermediation and Brokerage	3	-3	0	17	0.35	0.47	X
5241	Insurance Carriers	5	-3	2	1	0.19	0.19	P
5242	Agencies, Brokerages, and Other Insurance Related Activities	20	17	37	-17	0.79	0.75	X

Source and Target codes at end of table.

**Table Twenty-Two, Part L
Metro County,
"Finance and Insurance"**

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
5221	Depository Credit Intermediation	133	-148	-15	-28	0.94	0.94	X
5223	Activities Related to Credit Intermediation	50	27	77	92	2.01	2.27	K
5231	Securities and Commodity Contracts Intermediation and Brokerage	32	-30	2	34	0.85	0.93	P
5239	Other Financial Investment Activities	18	42	60	18	0.46	0.49	P
5241	Insurance Carriers	238	-142	96	-900	2.37	1.78	M
5242	Agencies, Brokerages, and Other Insurance Related Activities	153	132	285	78	1.57	1.64	K
5259	Other Investment Pools and Funds	1	-3	-2	12	3.12	5.54	X

Source and Target codes at end of table.

Table Twenty-Two, Part M
Seward Plus Rural Counties,
"Professional, Scientific, and Technical Services"

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
5411	Legal Services	9	-9	0	3	0.37	0.38	X
5413	Architectural, Engineering, and Related Services	7	-1	6	1	0.24	0.25	P
5415	Computer Systems Design and Related Services	5	8	13	11	0.11	0.13	P
5416	Management, Scientific, and Technical Consulting Services	5	9	14	4	0.18	0.19	P
5417	Scientific Research and Development Services	6	1	7	-8	0.42	0.39	X

Source and Target codes at end of table.

Table Twenty-Two, Part N
Metro County,
"Professional, Scientific, and Technical Services"

NAICS	Description	2016–2022				LQ 2016	LQ 2022	Target
		National Effect	Industry Effect	Expected Change	Competitive Effect			
5411	Legal Services	71	-70	1	15	0.76	0.78	P
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	53	1	54	-117	0.64	0.55	X
5413	Architectural, Engineering, and Related Services	87	-13	74	6	0.74	0.75	P
5415	Computer Systems Design and Related Services	148	245	393	-68	0.90	0.89	X
5416	Management, Scientific, and Technical Consulting Services	63	109	172	-134	0.56	0.50	X
5417	Scientific Research and Development Services	41	9	50	24	0.73	0.77	P
5418	Advertising, Public Relations, and Related Services	44	7	51	-253	1.07	0.68	M

Target Codes: K-Key to future growth, P-Potential to drive future growth, M-Mature, X-Low local growth potential

Source: Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Seward County Chamber & Development Partnership Target Industries Review May 2017

Table Twenty-Three below contains the 20, 4-digit NAICS industries that achieved a target classification of Key (K), Potential (P) or Mature (M) Industries in both Seward Plus Rural Counties and Core Metro County. These 20 industries can form a core of potential target industries for SCC&DP to consider for further evaluation as potential target industries.

**Table Twenty–Three
Key, Potential, and Mature Industries Located in Both Seward Plus Rural and Core Metro County**

Category	NAICS	Description	Seward Plus Rural Counties				Core Metro County			
			2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class	2015–2021 Competitive Effect	2015 LQ	2021 LQ	Class
Crop and Animal Production and Related Manufacturing	3111	Animal Food Manf.	124	47.99	54.29	K	-28	1.92	1.57	M
	3112	Grain and Oilseed Milling	-36	7.11	5.26	M	-48	5.08	4.49	M
Metal, Metal Products and Machinery Manufacturing	3116	Animal Slaughter. & Proc.	82	13.93	14.46	K	109	1.85	2.05	K
	3323	Architectural and Structural Metals Manf.	-7	3.28	3.22	M	93	1.23	1.44	K
All Other Manufacturing	3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manf.	11	1.56	1.65	K	33	0.86	0.94	P
	3335	Metalworking Mach. Manf.	16	0.39	0.67	P	4	0.69	0.72	P
	3251	Basic Chemical Manf.	41	7	7.84	K	16	0.38	0.46	P
	3262	Rubber Product Manf.	39	1.64	2.58	K	-22	2.96	2.86	M
	3273	Cement and Concrete Product Manf.	10	1.62	1.8	K	-52	1.43	1.22	M
Wholesale Trade	3362	Motor Vehicle Body and Trailer Manf.	20	6.86	7.25	K	61	0.96	1.28	P
	3363	Motor Vehicle Parts Manf.	-69	6.74	6.39	M	163	0.95	1.18	P
	4233	Lumber and Other Construction Materials	11	0.32	0.49	P	4	0.88	0.91	P
	4238	Machinery, Equipment, and Supplies Merchant	15	3.42	3.49	K	33	0.59	0.64	P
	4239	Miscellaneous Durable Goods Merchant Wholesalers	22	0.74	0.96	P	2	0.2	0.21	P
Transportation and Warehousing	4821	Rail Transportation	38	6.95	7.43	K	57	5.51	5.77	K
	4841	General Freight Trucking	-128	1.32	0.93	M	60	4.42	4.53	K
	4842	Specialized Freight	69	3.00	3.46	K	60	1.00	1.12	K
Finance and Insurance	5223	Activities Related to Credit Intermediation	4	0.19	0.23	P	92	2.01	2.27	K
	5241	Insurance Carriers	1	0.19	0.19	P	-900	2.37	1.78	M
Professional, Scientific, and Technical Services	5413	Architectural, Engineering, and Related Services	1	0.24	0.25	P	6	0.74	0.75	P

Target Codes: K-Key to future growth, P-Potential to drive future growth, M-Mature, X-Low local growth potential

Data source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Supply Chain Opportunities

Tables Twenty-Four, Parts A through K on the following pages identify local area, 6-Digit NAICS industries currently supplying a large portion of the total inputs purchased locally by industries in Table Twenty-Three. These industries may be able to increase their sales to Key, Potential, and Mature area industries and may also be considered potential targets for SCC&DP retention, expansion, and recruitment efforts.

Table Twenty-Four, Part A
Amount and Percent of Local Industry Purchases by
Manufacturing Crop and Animal Production and Related Industries
With Total Industry Exports Seward Plus Rural Counties, 2015

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
423930	Recyclable Material Merchant Wholesalers	70.3	808,212	8,062,424
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	54.4	3,072,602	25,758,974
522110	Commercial Banking	47.0	2,004,695	154,326,102
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	71.6	907,006	7,102,275

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Four, Part B
Amount and Percent of Local Industry Purchases by
Manufacturing Crop and Animal Production and Related Industries
With Total Industry Exports Core Metro County, 2015

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	52.6	1,500,077	6,673,715
423830	Industrial Machinery and Equipment Merchant Wholesalers	59.6	2,122,832	5,149,677
424210	Drugs and Druggists' Sundries Merchant Wholesalers	69.9	2,426,945	5,528,772
424490	Other Grocery and Related Products Merchant Wholesalers	46.4	959,893	6,281,818
484122	General Freight Trucking, Long-Distance, Less Than Truckload	59.1	3,646,254	17,372,803
484210	Used Household and Office Goods Moving	65.7	1,018,766	5,922,615
484220	Specialized Freight (except Used Goods) Trucking, Local	40.8	1,964,089	38,557,579
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	50.8	1,589,340	2,906,106
541330	Engineering Services	45.4	998,849	45,431,194
541990	All Other Professional, Scientific, and Technical Services	60.2	817,492	9,074,534
551114	Corporate, Subsidiary, and Regional Managing Offices	49.5	11,625,699	208,254,947

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Four, Part C
Amount and Percent of Local Industry Purchases by
Metal, Metal Products and Machinery Manufacturing
With Total Industry Exports Seward Plus Rural Counties, 2015

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
332710	Machine Shops	60.4	1,940,774	11,282,828

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Four, Part D
Amount and Percent of Local Industry Purchases by
Metal, Metal Products and Machinery Manufacturing
With Total Industry Exports Core Metro County, 2015

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
551114	Corporate, Subsidiary, and Regional Managing Offices	49.5	3,584,369	208,254,947

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

Table Twenty-Four, Part E
Amount and Percent of Local Industry Purchases by
All Other Manufacturing
With Total Industry Exports Seward Plus Rural Counties, 2015

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
322211	Corrugated and Solid Fiber Box Manufacturing	66.3	2,105,512	4,478,882
325120	Industrial Gas Manufacturing	44.5	1,019,716	4,633,122
326299	All Other Rubber Product Manufacturing	72.5	1,463,651	12,459,808
327390	Other Concrete Product Manufacturing	74.6	992,320	10,130,615
332710	Machine Shops	58.5	9,105,414	11,282,828
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	44.0	761,889	21,041,739
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	73.8	1,052,580	3,380,136
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	74.7	1,408,318	2,915,484
482110	Rail transportation	71.0	5,978,260	214,886,232
484220	Specialized Freight (except Used Goods) Trucking, Local	61.0	1,271,454	25,922,766
522110	Commercial Banking	42.9	1,388,099	154,326,102
561720	Janitorial Services	59.5	1,213,423	10,918,965

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Four, Part F
Amount and Percent of Local Industry Purchases by
All Other Manufacturing
With Total Industry Exports Core Metro County, 2015**

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
321911	Wood Window and Door Manufacturing	70.4	823,291	2,508,941
325211	Plastics Material and Resin Manufacturing	49.5	2,461,131	41,353,996
327320	Ready-Mix Concrete Manufacturing	68.2	799,343	39,062,884
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	65.9	1,081,542	1,132,849
336390	Other Motor Vehicle Parts Manufacturing	57.2	4,804,205	57,786,758
423830	Industrial Machinery and Equipment Merchant Wholesalers	59.6	997,990	5,149,677
424210	Drugs and Druggists' Sundries Merchant Wholesalers	69.9	1,140,958	5,528,772
484122	General Freight Trucking, Long-Distance, Less Than Truckload	59.1	888,200	17,372,803
541110	Offices of Lawyers	49.5	871,128	31,429,041
541990	All Other Professional, Scientific, and Technical Services	60.2	992,312	9,074,534
551114	Corporate, Subsidiary, and Regional Managing Offices	49.5	20,932,070	208,254,947

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Four, Part G
Amount and Percent of Local Industry Purchases by
Finance and Insurance
With Total Industry Exports Seward Plus Rural Counties, 2015**

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
524210	Insurance Agencies and Brokerages	68.7	2,625,151	48,192,362

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Four, Part H
Amount and Percent of Local Industry Purchases by
Finance and Insurance
With Total Industry Exports Core Metro County, 2015**

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
323111	Commercial Printing (except Screen and Books)	65.4	3,056,431	6,978,141
515120	Television Broadcasting	74.9	1,253,463	2,373,332
519130	Internet Publishing and Broadcasting and Web Search Portals	73.4	2,467,465	12,583,056
522292	Real Estate Credit	66.6	1,565,224	3,043,702
523110	Investment Banking and Securities Dealing	61.3	1,587,333	8,224,318
523120	Securities Brokerage	44.8	1,812,374	19,343,193
524210	Insurance Agencies and Brokerages	64.8	175,928,389	48,794,553
524298	All Other Insurance Related Activities	59.9	15,627,018	3,032,816
541110	Offices of Lawyers	49.5	8,030,777	31,429,041
551114	Corporate, Subsidiary, and Regional Managing Offices	49.5	4,643,807	208,254,947
561210	Facilities Support Services	54.5	995,090	2,838,309
561320	Temporary Help Services	45.8	766,659	26,897,535
561510	Travel Agencies	52.4	3,397,009	3,201,039

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Four, Part H
Amount and Percent of Local Industry Purchases by
Professional, Scientific, and Technical Services
With Total Industry Exports Core Metro County, 2015**

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
541110	Offices of Lawyers	49.5	987,532	31,429,041
541330	Engineering Services	45.4	3,420,671	45,431,194
541611	Administrative Management and General Management Consulting Services	64.2	2,806,103	18,896,589
541613	Marketing Consulting Services	60.2	907,622	9,645,026
541690	Other Scientific and Technical Consulting Services	70.0	1,373,480	3,381,707
541990	All Other Professional, Scientific, and Technical Services	60.2	1,236,125	9,074,534
551114	Corporate, Subsidiary, and Regional Managing Offices	49.5	1,344,798	208,254,947
561320	Temporary Help Services	45.8	1,884,924	26,897,535

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Four, Part I
Amount and Percent of Local Industry Purchases by
Transportation and Warehousing Industries
With Total Industry Exports Seward Plus Rural Counties, 2015**

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
482110	Rail transportation	71.7	1,908,673	214,886,232
522110	Commercial Banking	44.5	1,037,339	154,326,102

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Four, Part J
Amount and Percent of Local Industry Purchases by
Transportation and Warehousing Industries
With Total Industry Exports Core Metro County, 2015**

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	65.9	936,172	1,132,849
336390	Other Motor Vehicle Parts Manufacturing	57.2	4,620,811	57,786,758
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	45.4	801,531	7,291,885
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	52.6	1,849,879	6,673,715
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	70.9	771,957	10,274,623
423830	Industrial Machinery and Equipment Merchant Wholesalers	59.6	2,617,856	5,149,677
424210	Drugs and Druggists' Sundries Merchant Wholesalers	69.9	2,992,875	5,528,772
424490	Other Grocery and Related Products Merchant Wholesalers	46.4	1,183,729	6,281,818
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	57.5	759,862	1,684,115
484122	General Freight Trucking, Long-Distance, Less Than Truckload	59.1	2,158,360	17,372,803
484220	Specialized Freight (except Used Goods) Trucking, Local	40.8	1,162,624	38,557,579
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	50.8	940,794	2,906,106
488410	Motor Vehicle Towing	47.2	2,083,389	1,555,316
492110	Couriers and Express Delivery Services	71.9	45,585,382	13,153,776
492210	Local Messengers and Local Delivery	54.7	3,386,570	1,376,283
493110	General Warehousing and Storage	57.3	9,510,066	12,503,782
517210	Wireless Telecommunications Carriers (except Satellite)	48.1	853,643	32,187,349
519130	Internet Publishing and Broadcasting and Web Search Portals	73.4	1,128,209	12,583,056
522292	Real Estate Credit	66.6	4,098,627	3,043,702
522310	Mortgage and Nonmortgage Loan Brokers	74.8	1,776,389	1,040,299
522390	Other Activities Related to Credit Intermediation	69.4	1,332,259	2,778,167
523110	Investment Banking and Securities Dealing	61.3	1,779,289	8,224,318
523120	Securities Brokerage	44.8	2,031,543	19,343,193
541110	Offices of Lawyers	49.5	2,951,945	31,429,041
541330	Engineering Services	45.4	3,526,077	45,431,194
541512	Computer Systems Design Services	47.8	2,627,171	37,028,168
541990	All Other Professional, Scientific, and Technical Services	60.2	1,658,135	9,074,534
551114	Corporate, Subsidiary, and Regional Managing Offices	49.5	9,454,513	208,254,947
561210	Facilities Support Services	54.5	823,522	2,838,309
561320	Temporary Help Services	45.8	3,993,421	26,897,535
561510	Travel Agencies	52.4	1,007,388	3,201,039
561730	Landscaping Services	59.5	2,356,449	17,336,470
561990	All Other Support Services	50.0	1,171,247	8,071,255

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.

**Table Twenty-Four, Part K
Amount and Percent of Local Industry Purchases by
Wholesale Trade Industries
With Total Industry Exports Core Metro County, 2015**

NAICS	Description	Purchased Out of Region		Exported from Region \$
		Percent	Amount \$	
492110	Couriers and Express Delivery Services	71.9	1,219,263	13,153,776
493110	General Warehousing and Storage	57.3	839,156	12,503,782
551114	Corporate, Subsidiary, and Regional Managing Offices	49.5	3,448,371	208,254,947

Source: Economic Modeling Specialists International (EMSI) / www.economicmodeling.com.