



SET Phase V Module

Partners for Progress, Nebraska



Center for Regional Development
Advancing Collaboration : Energizing Regions

01 overview

Partners for Progress, NE

Overview

Southeast Nebraska Partners For Progress (P4P) Region

The Partners For Progress Region is comprised of five southeastern Nebraska counties. U.S. Route 75 passes through the region going to Omaha to the North.

- Johnson
- Nemaha
- Otoe
- Pawnee
- Richardson

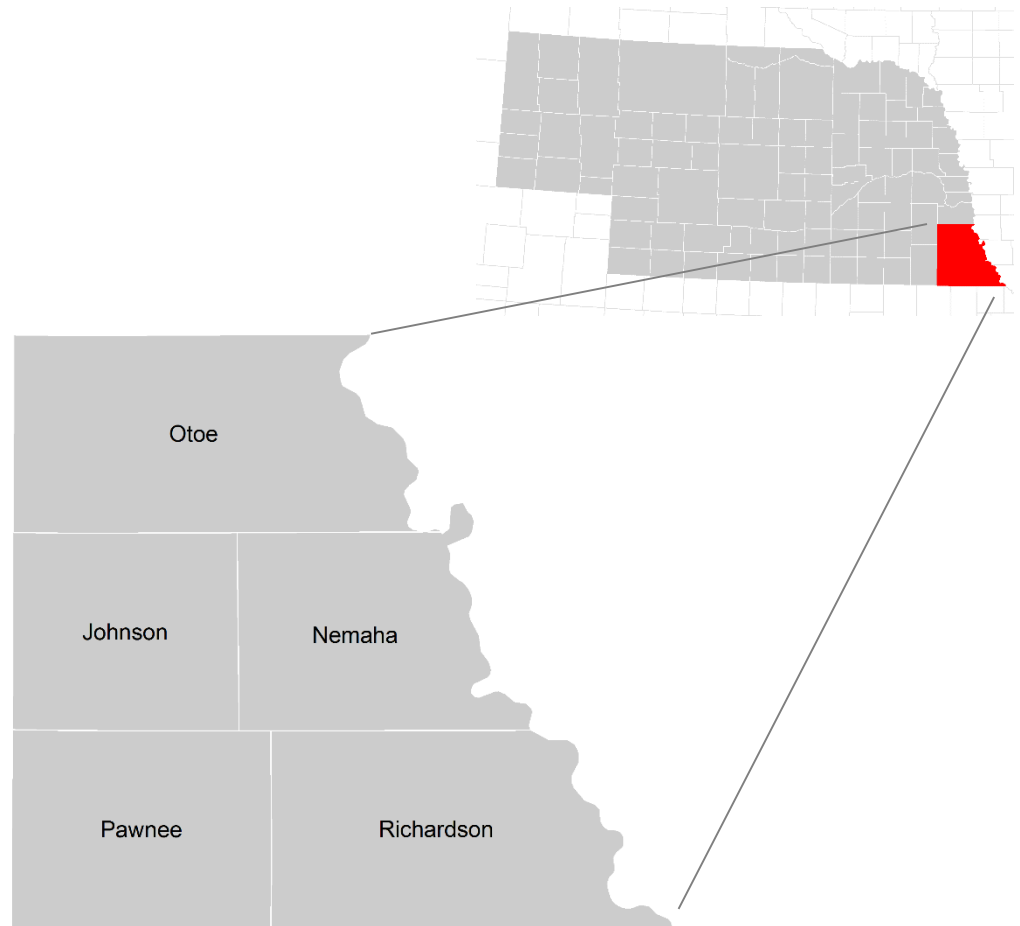


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Distribution of clusters in the Region by quadrants



Industry and occupation

Establishments

Components of Change for Establishments 2000-2011

Establishments Launched	3,691
Establishments Closed	2,278
Net Change	1,413
Net Migration (Establishments moving into minus the establishments moving out of the region)	6
Total Change	1,419
Percent Change	43.3%

An establishment is a physical business location.

Branches, standalones and headquarters are all considered types of establishments.



Definition of Company Stages



Note: In-migration and Out-migration includes movement within the region.

Industry and occupation

Establishments

Number of Establishments by Company Stages

Stage	2000		2011	
	Establishments	Proportion	Establishments	Proportion
Stage 0	1,270	38.8%	2,091	44.5%
Stage 1	1,683	51.4%	2,274	48.4%
Stage 2	294	9.0%	307	6.5%
Stage 3	27	0.8%	21	0.4%
Stage 4	1	0.03%	1	0.02%
Total	3,275	100%	4,694	100%

Questions:

- What stage businesses have shaped the region's economic growth in the last 10 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

Industry and occupation

Establishments

Number of Jobs by Company Stages

Year	2000	2011	% Change
Stage 0	1,270	2,091	64.6%
Stage 1	5,623	6,779	20.6%
Stage 2	7,387	7,902	7.0%
Stage 3	4,763	3,272	-31.3%
Stage 4	560	600	7.1%
Total	19,603	20,644	5.3%

Sales (\$ 2013) by Company Stages

Year	2000	2011	% Change
Stage 0	157,046,822	142,325,939	-9.4%
Stage 1	774,250,527	571,747,586	-26.2%
Stage 2	807,391,169	685,196,396	-15.1%
Stage 3	613,822,384	326,758,993	-46.8%
Stage 4	135,132,045	113,053,222	-16.3%
Total	2,487,642,948	1,839,082,135	-26.1%

Questions:

- What establishments are the most numerous based on company stages?
- What stages have experienced the largest growth? The greatest decline?
- What company stage employs the largest number of people?
- What stage captures the most sales?
- Which ones have experienced the greatest percentage loss over the 2000-11 period?

Industry and occupation

Top industry sectors by employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
52	Finance and Insurance	907	1,125	218	24%	10%
53	Real Estate and Rental and Leasing	460	622	162	35%	19%
31	Manufacturing	2,147	2,299	152	7%	5%
62	Health Care and Social Assistance	1,967	2,085	118	6%	11%
72	Accommodation and Food Services	1,270	1,381	111	9%	8%
61	Educational Services	128	211	83	65%	6%
42	Wholesale Trade	538	611	73	14%	8%
90	Government	4,777	4,807	30	1%	1%
21	Mining, Quarrying, and Oil and Gas Extraction	65	84	19	29%	8%

Questions:

- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

Industry and occupation

Top industry sectors by employment decline

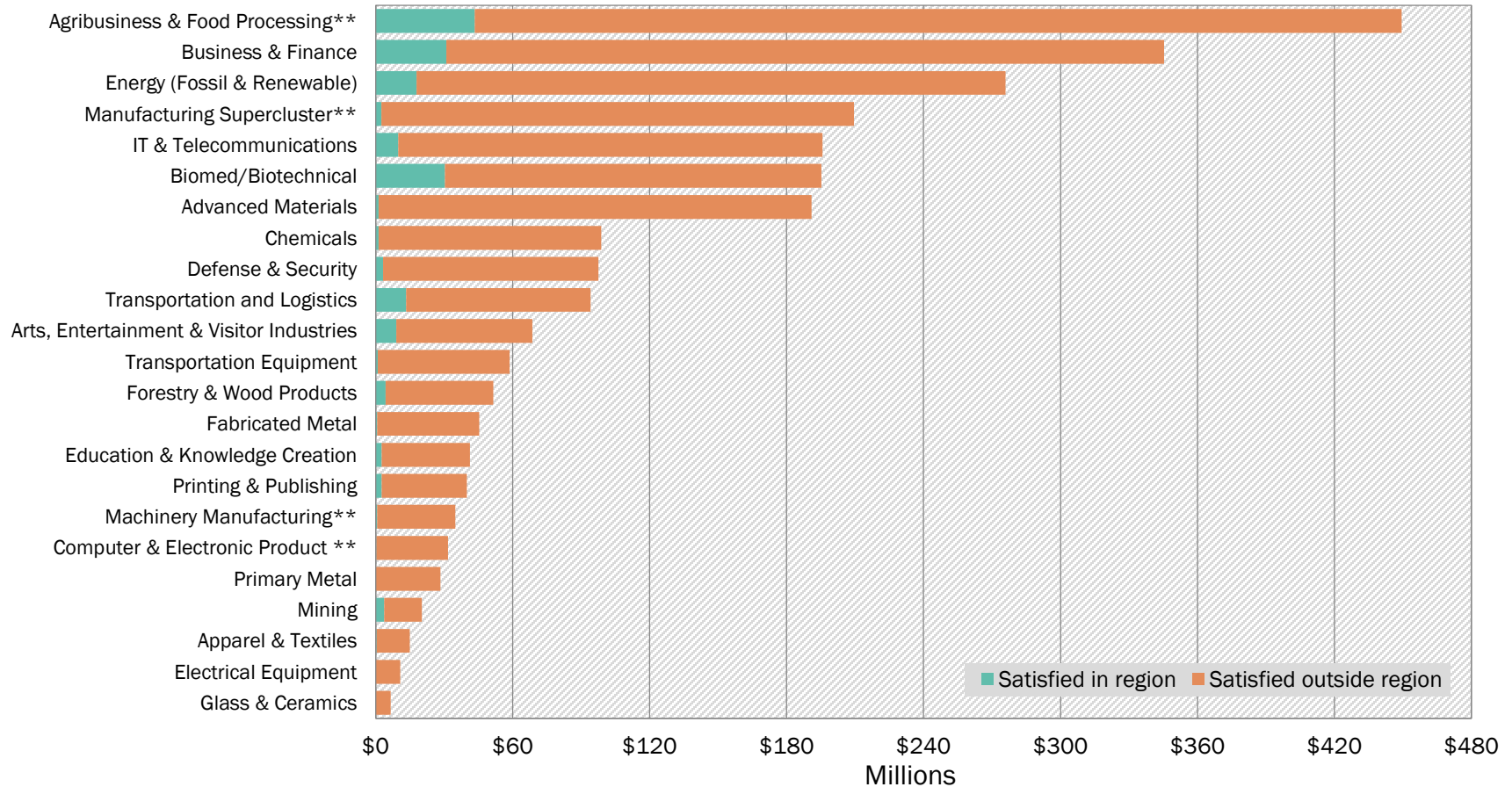
NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
11	Crop and Animal Production	2,831	2,563	-268	-9%	-4%
56	Administrative and Support and Waste Management and Remediation Services	673	515	-158	-23%	7%
23	Construction	1,342	1,235	-107	-8%	-5%
54	Professional, Scientific, and Technical Services	570	485	-85	-15%	3%
81	Other Services (except Public Administration)	1,285	1,218	-67	-5%	10%
48	Transportation and Warehousing	633	593	-40	-6%	1%
51	Information	158	120	-38	-24%	1%
55	Management of Companies and Enterprises	74	41	-33	-45%	14%

Questions:

- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?

Industry Clusters: Leakages

Regional requirements, 2013

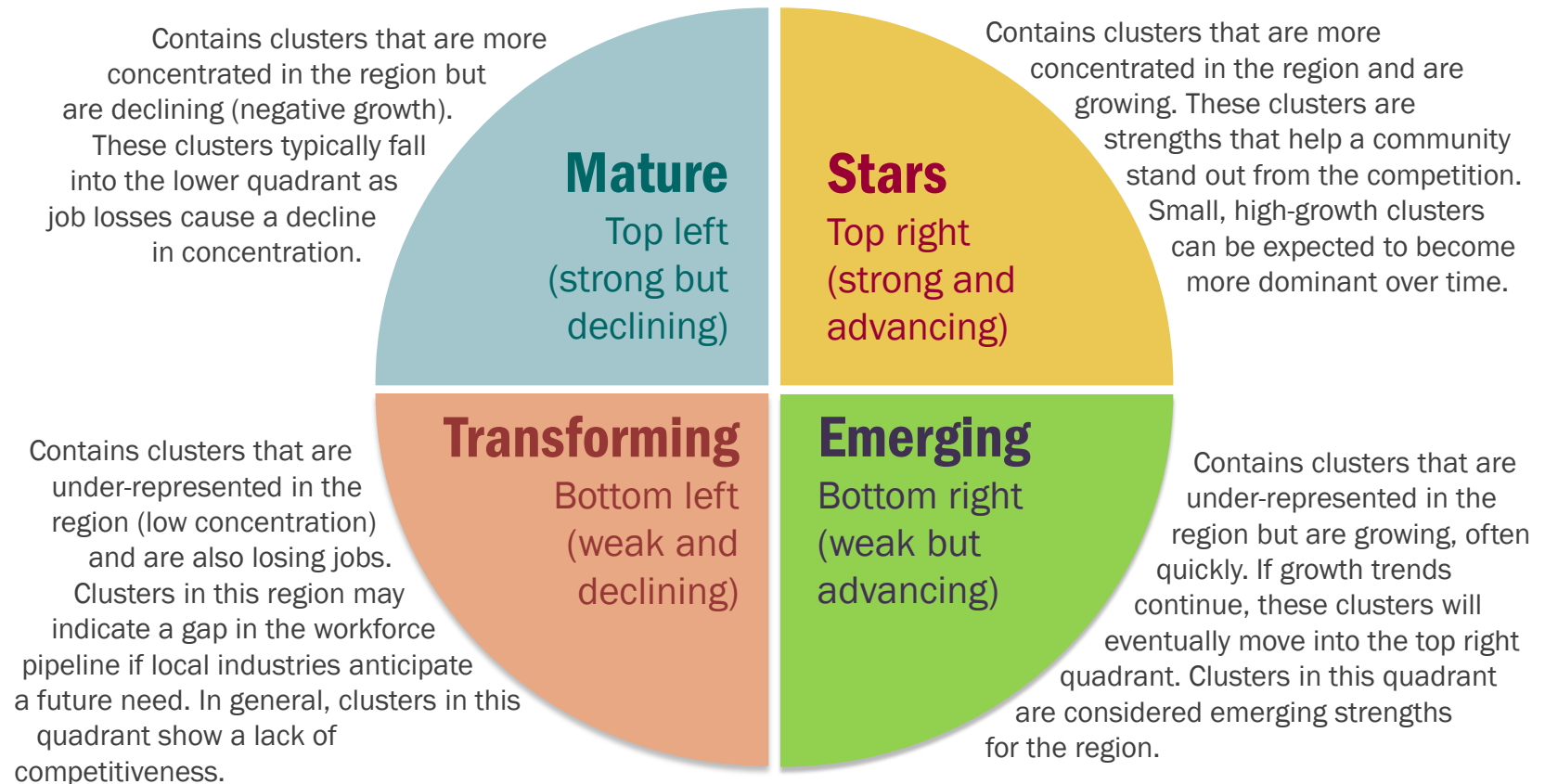


* *Note: current Star clusters

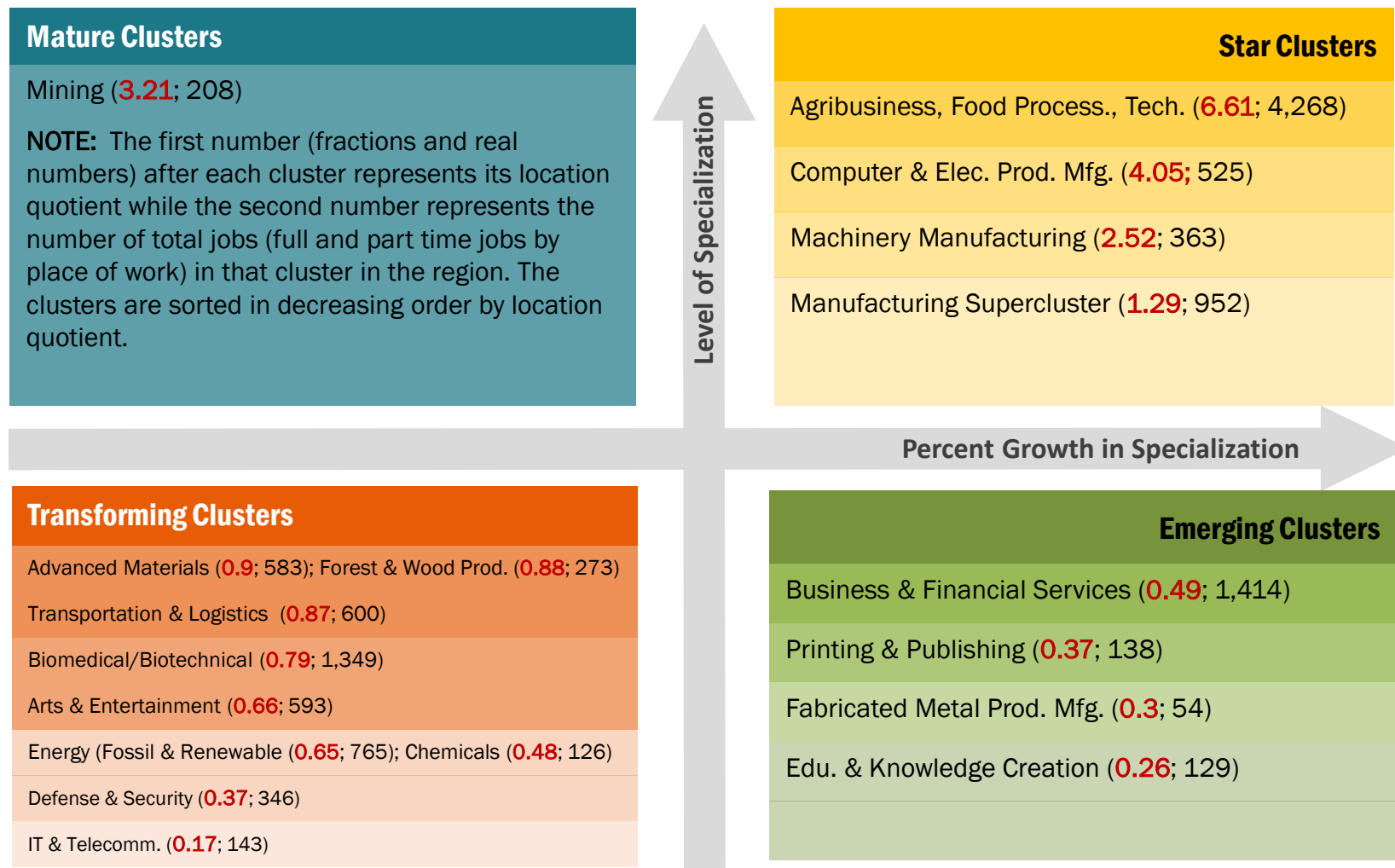
Industry cluster analysis

How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.



Industry cluster analysis



section 02

* Note: Numbers in parenthesis include location quotient and employment in 2014.

Industry and occupation

Bubble chart interpretation

Mature Industries

Southeast Nebraska Partners for Progress (P4P) Region has only one cluster in the Maturing stage: Mining. These mining industries are relatively concentrated, but their growth is trending downward. Overall, this is likely a reflection of nationwide changes in mining jobs and emphasis on less use of fossil fuels. It is worth noting, however, that the Partners for Progress Region may find it worthwhile to invest in efforts to shore up the concentration of these industries.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Partner for Progress Region, Advanced Materials, Forest and Wood Products, Transportation and Logistics, Biomedical/Biotechnical, Arts and Entertainment, Energy (fossil and renewable), Chemicals, Defense and Security and IT and Telecommunication are transforming cluster. Any amount of growth in these industries would require relatively large investments.

Star Industries

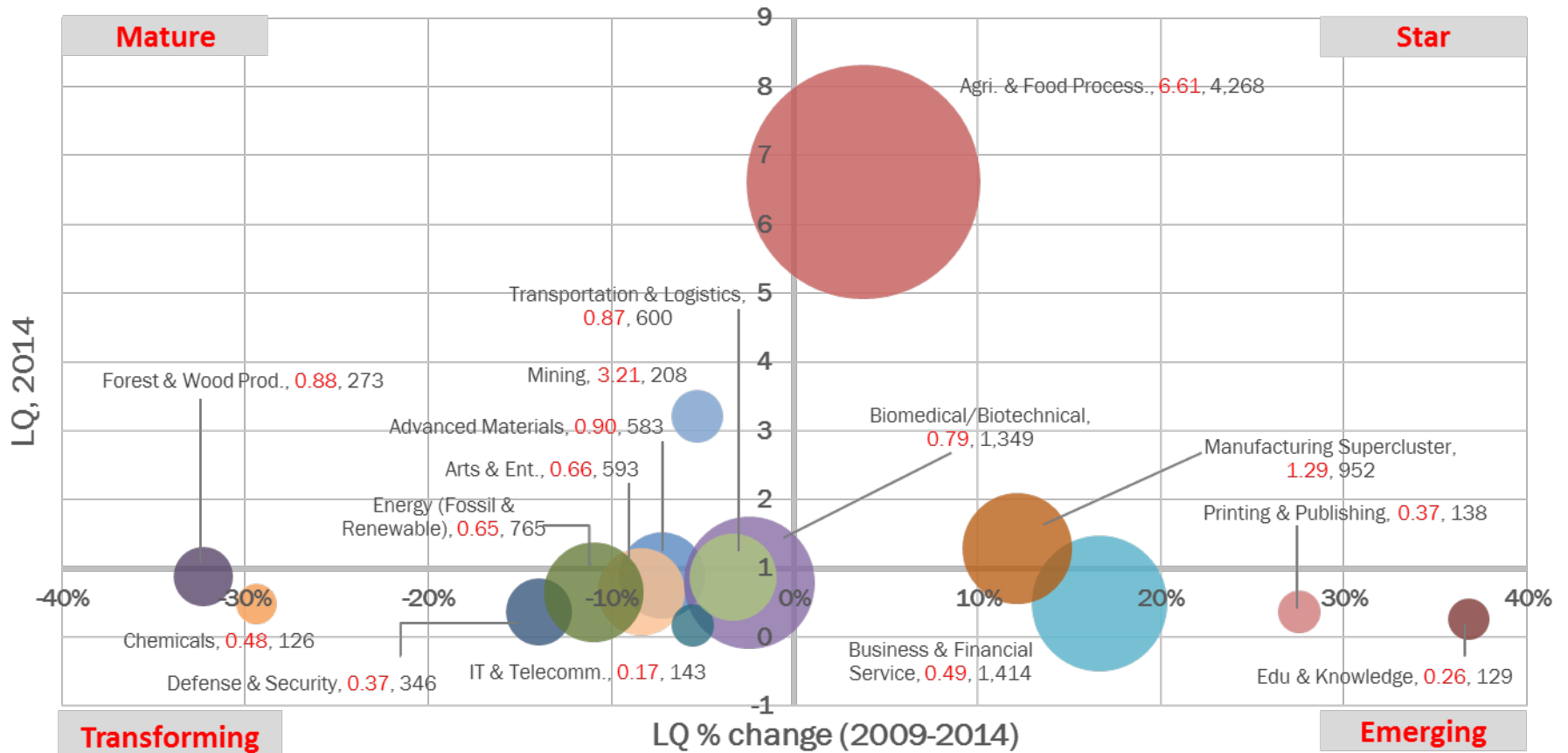
Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. The most highly concentrated of the Star industry clusters in the Partners for Progress Region is Agribusiness, Food Production and Technology. Its location quotient is 6.61, indicating that the cluster is more than 6 times more concentrated in the region compared to the U.S. Other strong clusters of note in the region include Computer and Electronic Products Manufacturing, Machinery Manufacturing, and Manufacturing Supercluster.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are four Emerging clusters in the Partners for Progress Region: Business and Financial Services, Printing and Publishing, Fabricated Metal Product Manufacturing and Education and Knowledge Creation clusters.

Industry and occupation

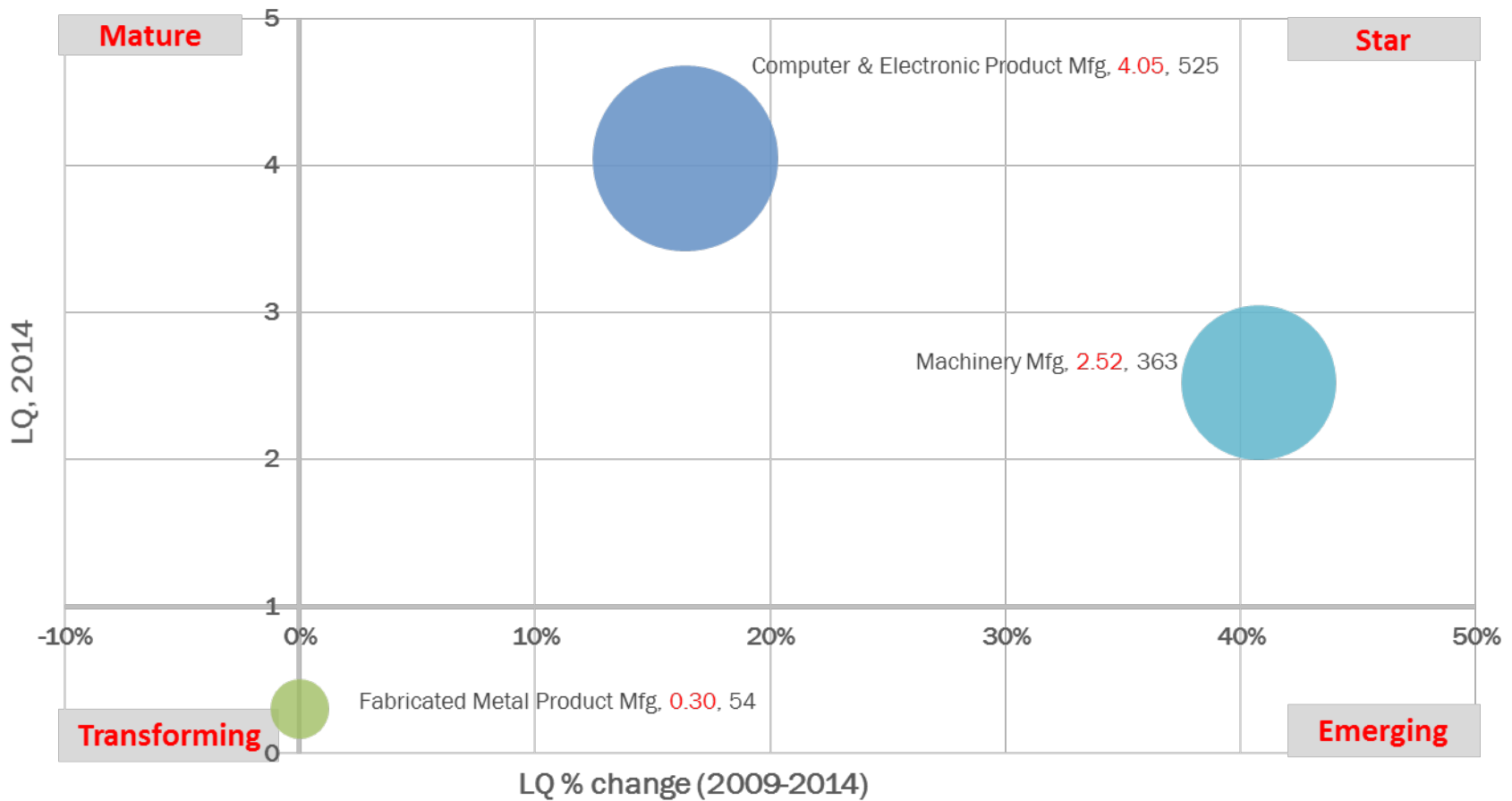
Industry cluster bubble chart



Note: Apparel & Textiles and Glass & Ceramics clusters have too few jobs

Industry and occupation

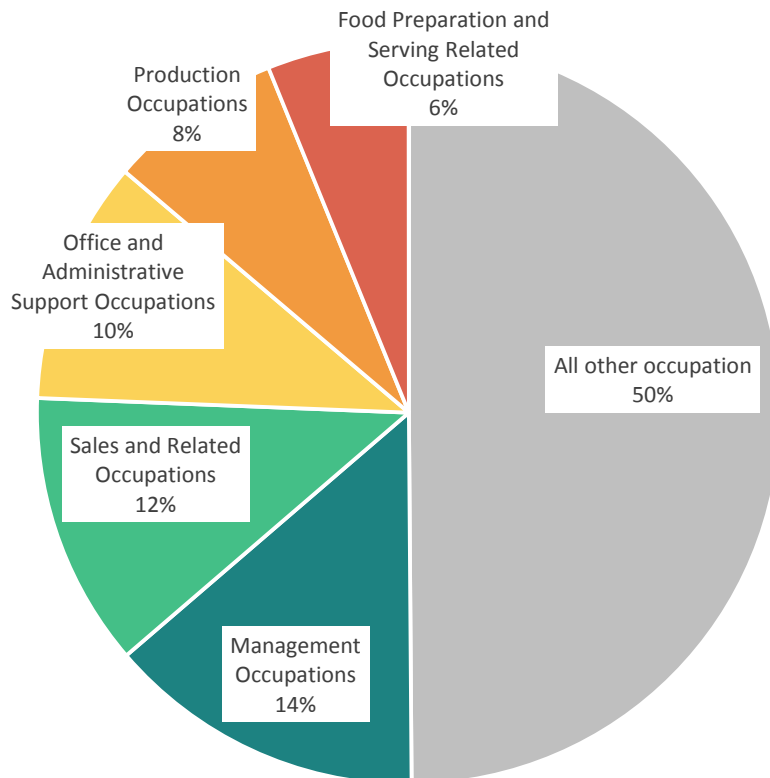
Manufacturing sub-cluster bubble chart



Note: Transportation Equipment Mfg. and Primary Metal Mfg. clusters have too few jobs

Industry and occupation

Top five occupations in 2013

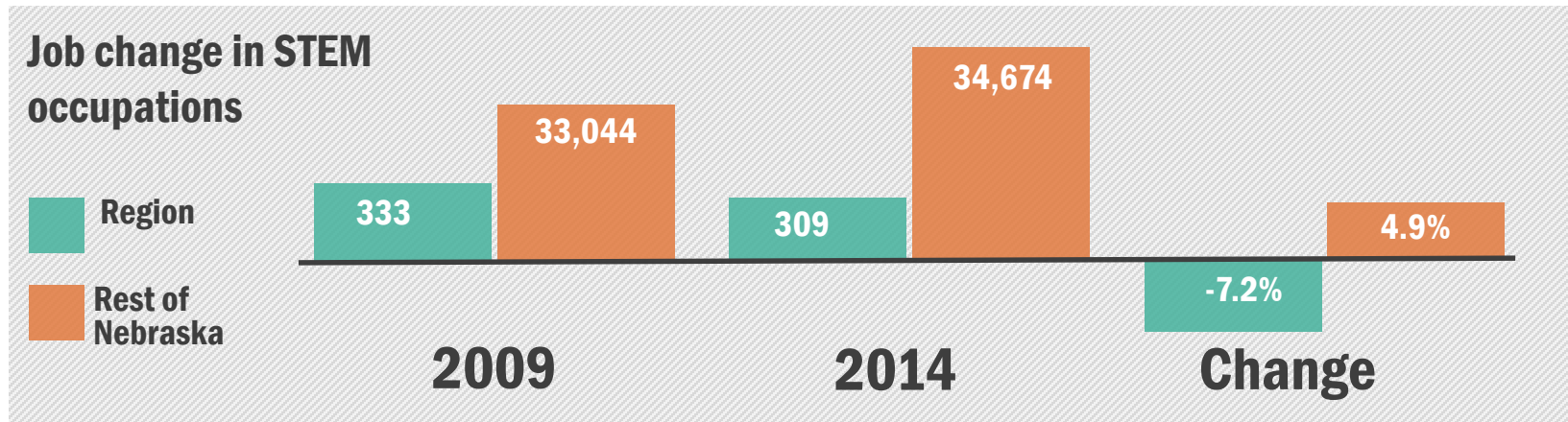


Questions:

- What are the education and skill requirements for these occupations?
- Do the emerging and star clusters align with the top occupations?
- What type salaries do these occupations typically provide?

Industry and occupation

Science, Technology, Engineering & Math



Questions:

- How do STEM jobs compare to the state?
- What has been the trend of STEM jobs over time?
- How important are STEM jobs to the region's Star and Emerging clusters?

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Center for Regional Development
Advancing Collaboration : Energizing Regions

The Purdue Center for Regional Development (PCRD) seeks to pioneer new ideas and strategies that contribute to regional collaboration, innovation and prosperity.

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