



# Target Industry Cluster Analysis

Partners for Progress Region, Nebraska



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Target Industry Cluster

# 01 overview

Partners for Progress, NE

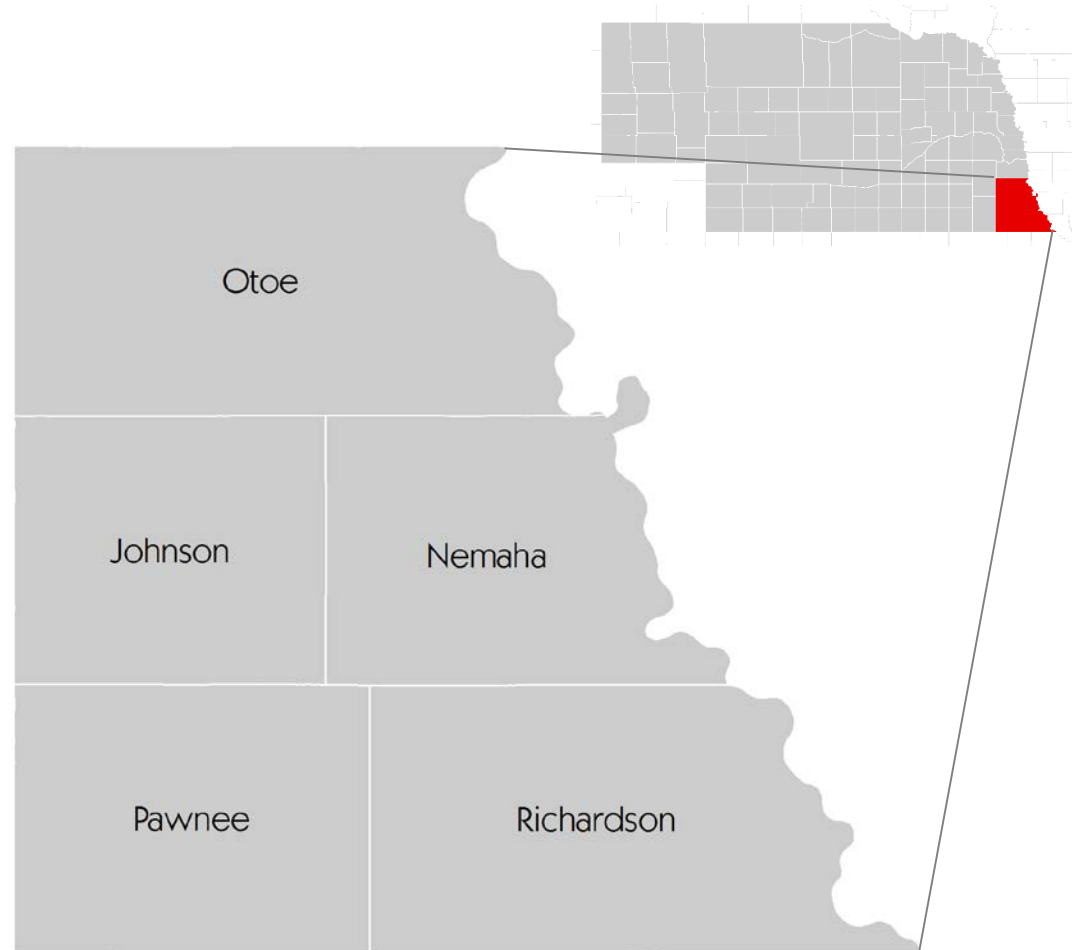
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## Overview

# 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 connecting to Omaha to the North.

- Johnson
- Nemaha
- Otoe
- Pawnee
- Richardson



# 02 Industry cluster analysis

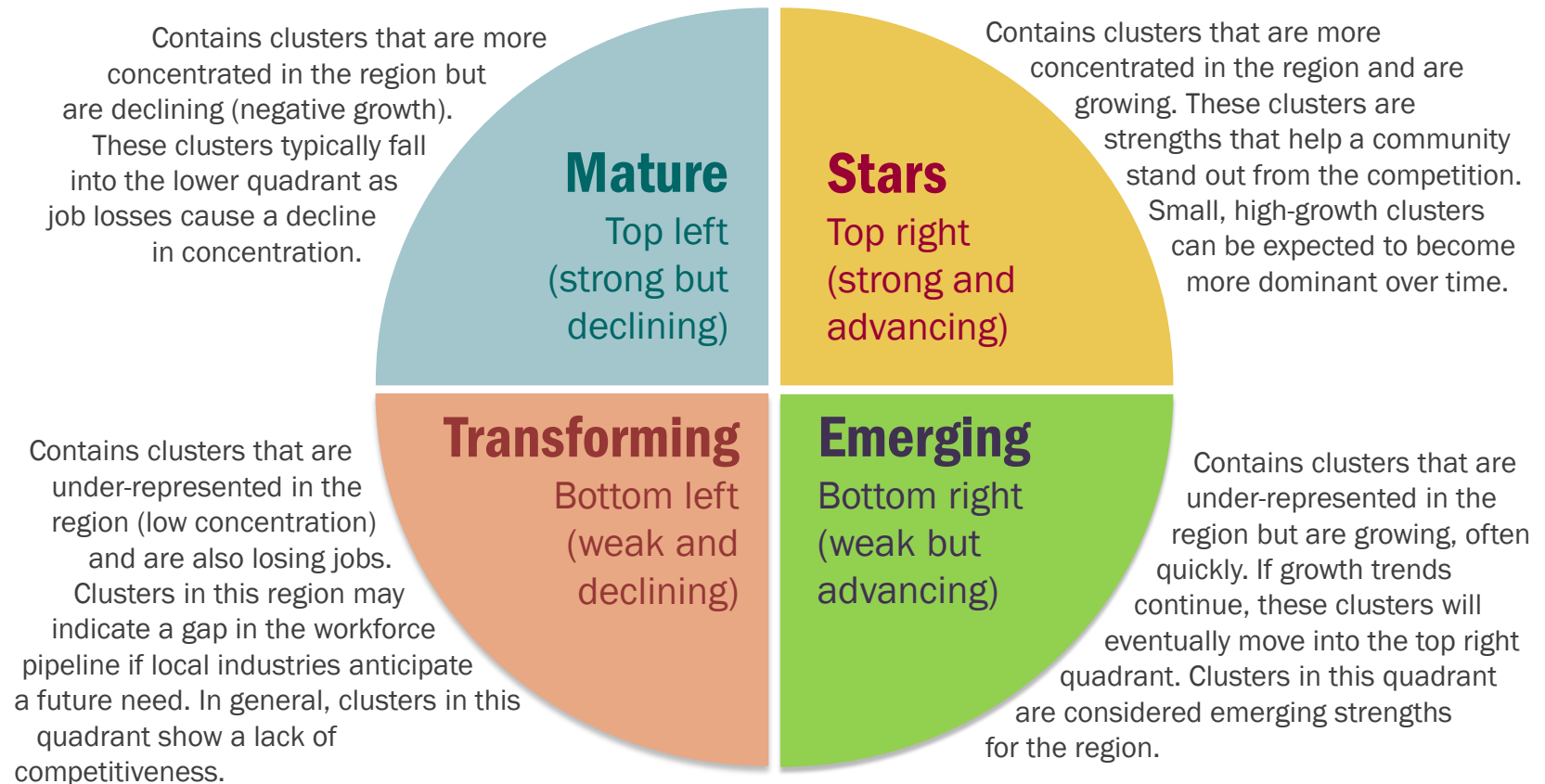
Partners for Progress, NE

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## Industry cluster analysis

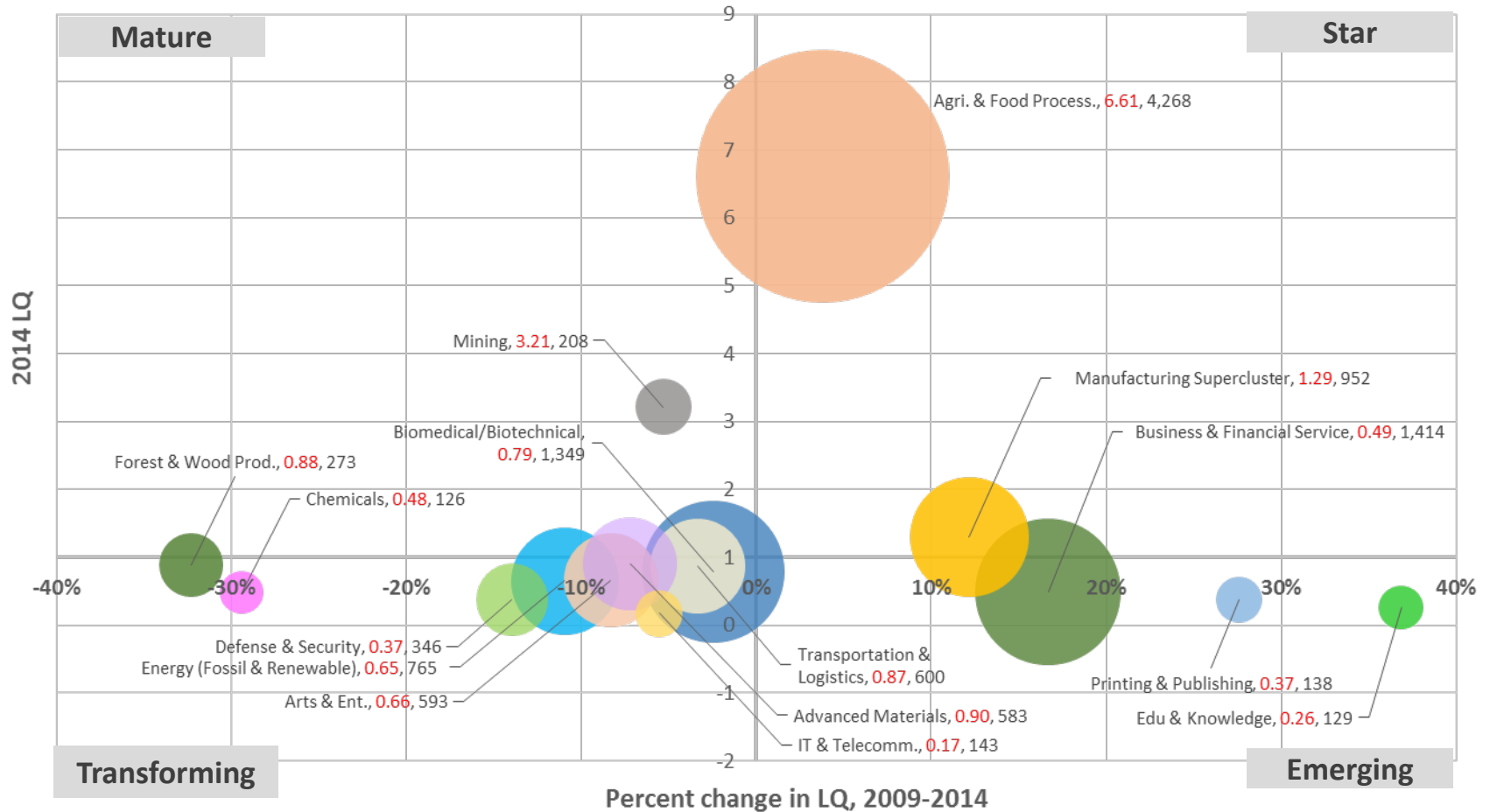
# How to interpret cluster data results

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



## Industry and occupation

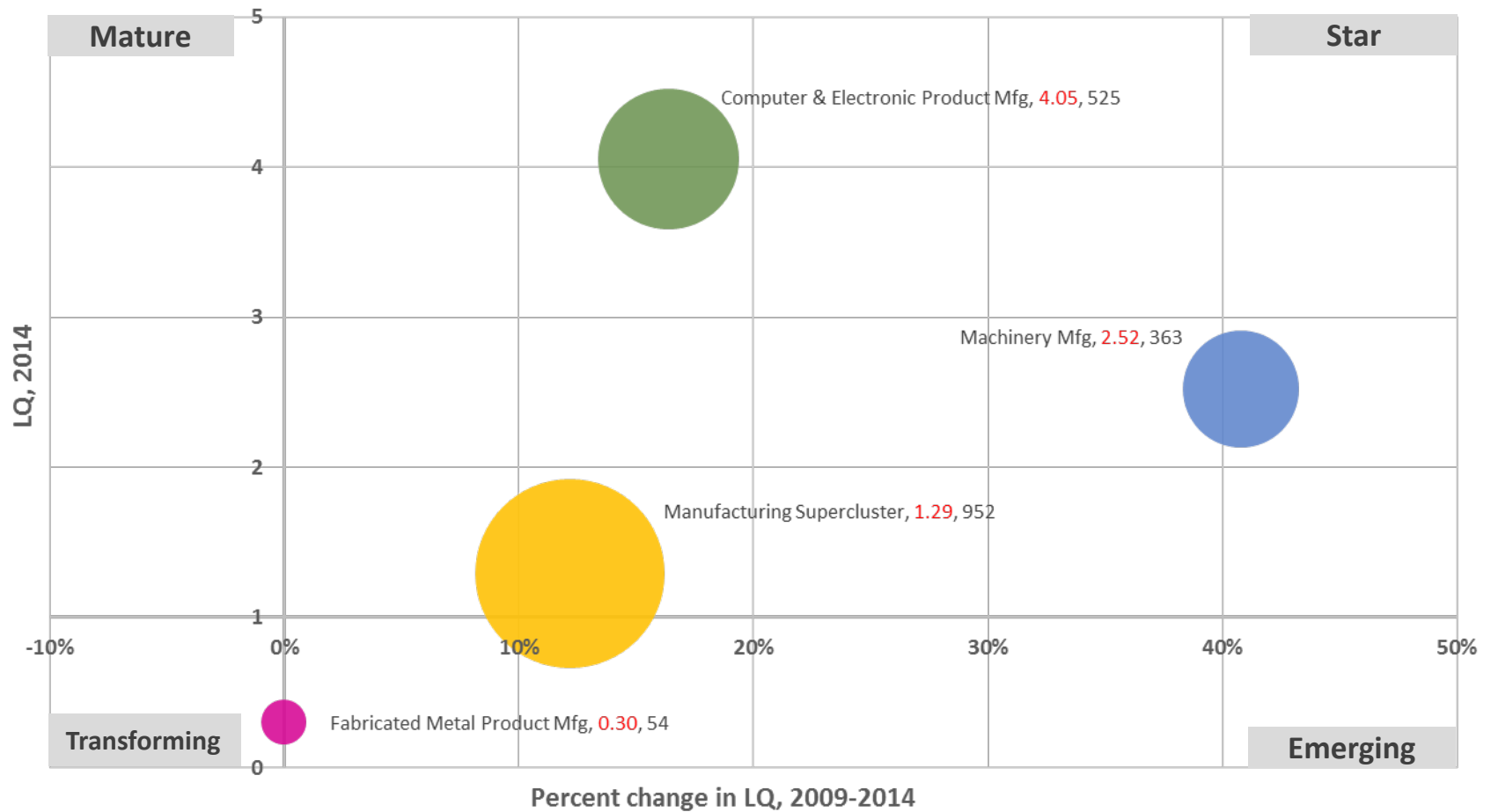
# Industry cluster bubble chart



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

## Industry and occupation

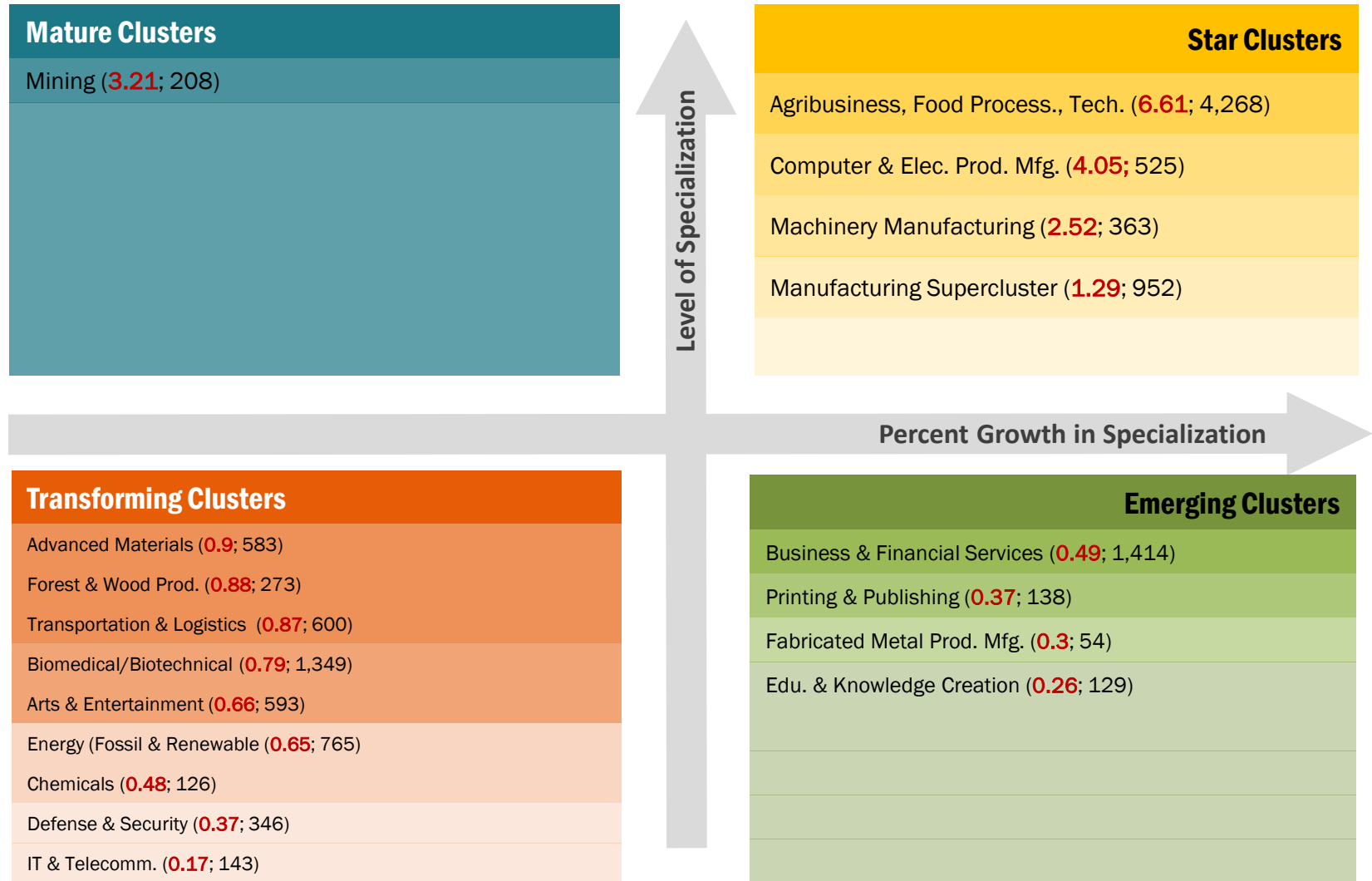
# Manufacturing sub-cluster bubble chart



Note: Transportation Equipment Mfg., Electrical Equip, Appliance & Component Mfg., and Primary Metal Mfg. subclusters does not exist in the region.



## 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.

# 03 Target Industry cluster

**Arts, Entertainment,  
Recreation And Visitor  
Industries**

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**Biomedical/Biotechnical  
(Life Sciences)**

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**Business And Financial  
Services**

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**Manufacturing Supercluster**

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**Advanced Materials**

## Shift-Share Analysis by Top Industry Sectors: Partners for Progress, NE

### Arts, Entertainment, Recreation And Visitor Industries Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Hotels (except Casino Hotels) and Motels	266	20	1	(21)
Golf Courses and Country Clubs	103	10	(4)	(31)
Independent Artists, Writers, and Performers	58	4	2	1
Radio Networks	22	2	(3)	(4)
Racetracks	16	1	(0)	↑ 9
Bed-and-Breakfast Inns	16	0	0	↑ 12
Nature Parks and Other Similar Institutions	15	1	0	(2)
Fitness and Recreational Sports Centers	15	2	1	(12)
Bowling Centers	11	1	(2)	(4)
All Other Amusement and Recreation Industries	11	1	1	1

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows insufficient data for Sporting and Athletic Goods Manufacturing; Doll, Toy, and Game Manufacturing; Scenic and Sightseeing Transportation, Land; Scenic and Sightseeing Transportation, Water; and Motion Picture and Video Production. These sectors might not be present in the region.

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## Top 15 Inputs by Dollars: Partners for Progress, NE

### Arts, Entertainment, Recreation And Visitor Industries Cluster

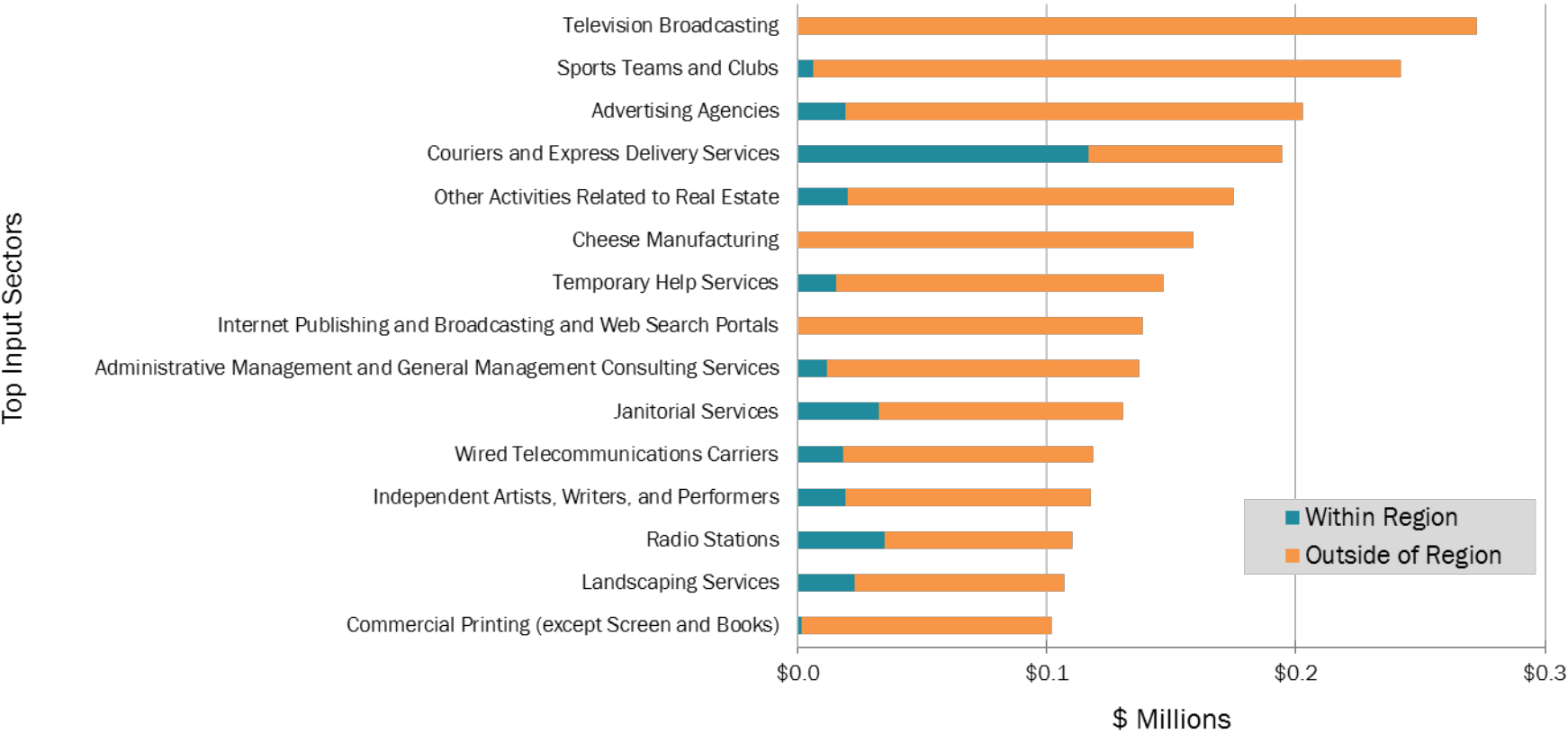
Industries	Estimated Input (\$ Thousands), 2013	% In-Region	% Out of Region
Television Broadcasting **	\$273	0%	100%
Sports Teams and Clubs	\$242	3%	97%
Advertising Agencies	\$203	9%	91%
Couriers and Express Delivery Services	\$194	60%	40%
Other Activities Related to Real Estate	\$175	11%	89%
Cheese Manufacturing **	\$159	0%	100%
Temporary Help Services	\$147	11%	89%
Internet Publishing and Broadcasting and Web Search Portals**	\$138	0%	100%
Administrative Management and General Management Consulting Services	\$137	9%	91%
Janitorial Services	\$131	25%	75%
Wired Telecommunications Carriers	\$119	16%	84%
Independent Artists, Writers, and Performers	\$118	16%	84%
Radio Stations	\$111	32%	68%
Landscaping Services	\$107	21%	79%
Commercial Printing (except Screen and Books)	\$102	1%	99%

Note: \*\* industry sector is not present in the region.

# Top 15 Inputs by Dollars: Partners for Progress, NE

## Arts, Entertainment, Recreation And Visitor Industries Cluster

Leakage Analysis, 2013



section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).

## Top Occupations: Partners for Progress, NE

### Arts, Entertainment, Recreation And Visitor Industries Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Maids and Housekeeping Cleaners	90	2%	\$7.8	Less than high school
Hotel, Motel, and Resort Desk Clerks	59	4%	\$9.8	High school diploma or equivalent
Waiters and Waitresses	33	(15%)	\$8.9	Less than high school
Landscaping and Grounds keeping Workers	22	(15%)	\$8.9	Less than high school
Musicians and Singers	22	47%	\$13.9	High school diploma or equivalent
Writers and Authors	17	31%	\$12.6	Bachelor's degree
Recreation Workers	15	0%	\$10.5	Bachelor's degree
Maintenance and Repair Workers, General	14	0%	\$14.9	High school diploma or equivalent
Lodging Managers	11	0%	\$11.3	High school diploma or equivalent
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	10	(17%)	\$10.2	Less than high school

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI shows insufficient jobs for Audio and Video Equipment Technicians; Sound Engineering Technicians; Broadcast Technicians; Technical Writers; and Reporters and Correspondents. These occupations might not exist in the region.

#### section 03

## Shift-Share Analysis by Top Industry Sectors: Partners for Progress, NE

### Biomedical/Biotechnical (Life Sciences) Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Nursing Care Facilities (Skilled Nursing Facilities)	564	52	(48)	(118)
General Medical and Surgical Hospitals	325	22	(14)	↑ 33
Continuing Care Retirement Communities	123	8	10	3
Home Health Care Services	105	7	18	(14)
Pharmacies and Drug Stores	80	5	(7)	↑ 13
Ambulance Services	39	0	0	↑ 36
Outpatient Mental Health and Substance Abuse Centers	27	2	3	(1)
Assisted Living Facilities for the Elderly	22	1	1	1
Pharmaceutical Preparation Manufacturing	17	4	(6)	(38)
Cosmetics, Beauty Supplies, and Perfume Stores	16	1	1	(4)
All Other Miscellaneous Ambulatory Health Care Services	15	1	1	↑ 4

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows insufficient jobs for Dental Laboratories; Dental Laboratories; and Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology).

#### section 03



## Top 15 Inputs by Dollars: Partners for Progress, NE

### Biomedical/Biotechnical (Life Sciences) Cluster

Industries	Estimated Input (\$ Thousands), 2013	% In-Region	% Out of Region
Other Activities Related to Real Estate	\$982	11%	89%
Direct Property and Casualty Insurance Carriers	\$933	4%	96%
Temporary Help Services	\$922	8%	92%
Direct Health and Medical Insurance Carriers **	\$678	0%	100%
Administrative Management and General Management Consulting Services	\$670	11%	89%
Direct Life Insurance Carriers *	\$612	0%	100%
Pharmaceutical Preparation Manufacturing	\$556	3%	97%
Investment Advice	\$554	6%	94%
Office Administrative Services	\$539	7%	93%
Commercial Banking	\$529	38%	62%
Biological Product (except Diagnostic) Manufacturing**	\$464	0%	100%
Wired Telecommunications Carriers	\$421	17%	83%
In-Vitro Diagnostic Substance Manufacturing**	\$419	0%	100%
Surgical and Medical Instrument Manufacturing**	\$377	0%	100%
Wholesale Trade Agents and Brokers	\$366	5%	95%

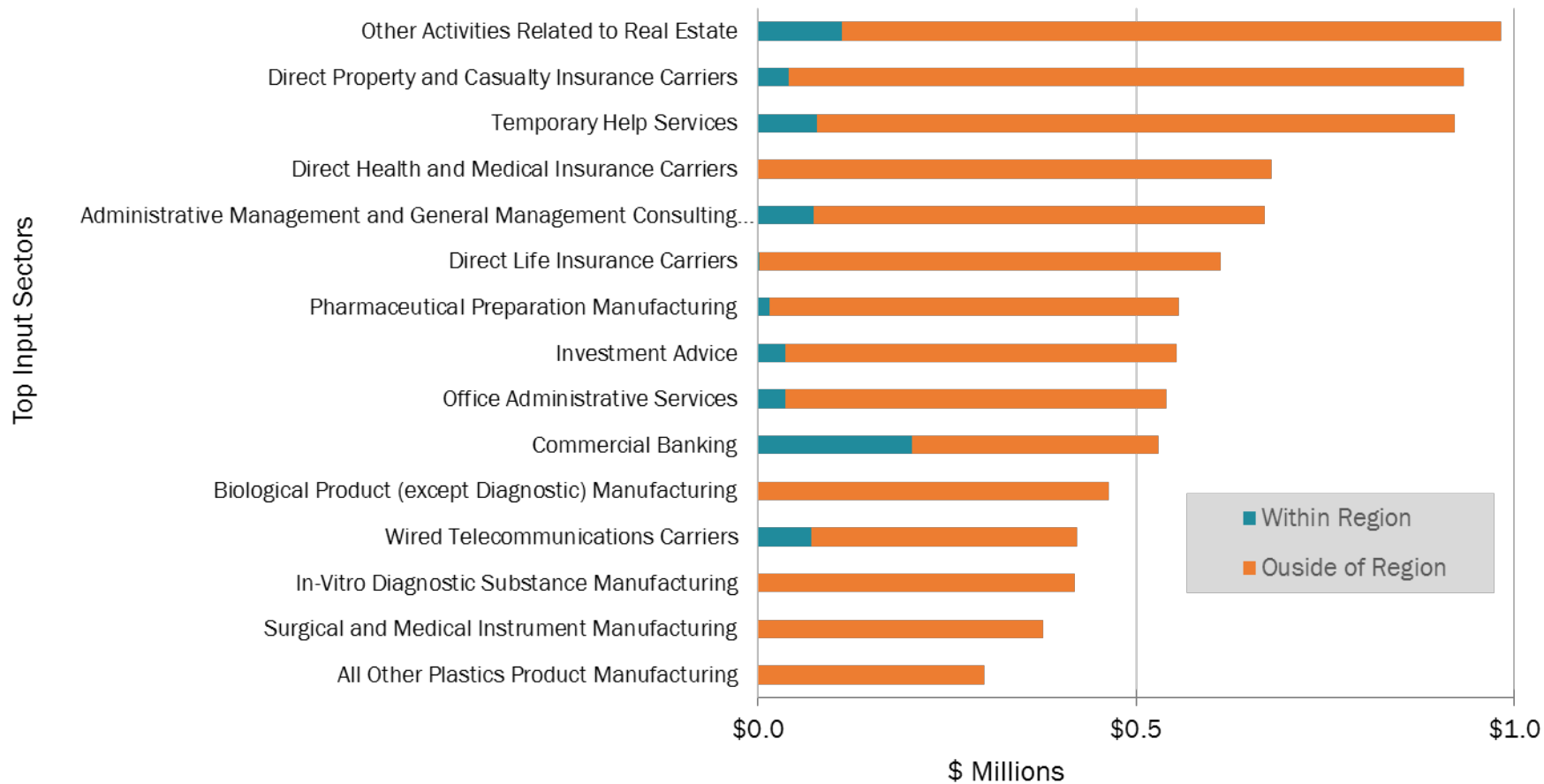
Note: \* industry sector has less than 10 jobs as calculated by EMSI; \*\* industry sector is not present in the region .

#### section 03

## Top 15 Inputs by Dollars: Partners for Progress, NE

### Biomedical/Biotechnical (Life Sciences) Cluster

Leakage Analysis, 2013



#### section 03

## Top Occupations: Partners for Progress, NE

### Biomedical/Biotechnical (Life Sciences) Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Nursing Assistants	320	(12%)	\$11.2	Postsecondary non-degree award
Registered Nurses	135	6%	\$24.4	Associate's degree
Licensed Practical and Licensed Vocational Nurses	122	(5%)	\$17.4	Postsecondary non-degree award
Cooks, Institution and Cafeteria	56	(5%)	\$10.5	Less than high school
Maids and Housekeeping Cleaners	50	(4%)	\$7.8	Less than high school
Home Health Aides	44	7%	\$10.9	Less than high school
Personal Care Aides	40	11%	\$10.0	Less than high school
Emergency Medical Technicians and Paramedics	25	250%	\$15.7	Postsecondary non-degree award
Pharmacists	24	14%	\$53.9	Doctoral or professional degree
Pharmacy Technicians	24	20%	\$13.2	High school diploma or equivalent
Cashiers	23	15%	\$8.5	Less than high school
Medical and Health Services Managers	20	11%	\$38.4	Bachelor's degree
Food Servers, Non restaurant	18	0%	\$9.2	Less than high school
Laundry and Dry-Cleaning Workers	17	(11%)	\$9.0	Less than high school
Medical Records and Health Information Technicians	15	7%	\$15.6	Postsecondary non-degree award

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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## Shift-Share Analysis by Top Industry Sectors: Partners for Progress, NE

### Business and Financial Services Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Insurance Agencies and Brokerages	287	17	23	24
Investment Advice	122	10	(1)	(17)
Portfolio Management	113	3	26	↑ 37
Other Activities Related to Real Estate	92	4	4	↑ 25
Lessors of Nonresidential Buildings (except Mini warehouses)	83	4	13	8
Claims Adjusting	70	4	4	↑ 14
Offices of Lawyers	59	6	(5)	(15)
Offices of Certified Public Accountants	47	3	(1)	↑ 2
Residential Property Managers	46	3	6	(1)
Administrative Management and General Management Consulting Services	46	2	3	↑ 8
Miscellaneous Intermediation	41	2	7	8
Open-End Investment Funds	41	0	0	↑ 38
Other Accounting Services	28	3	(2)	(14)
Other Scientific and Technical Consulting Services	28	1	1	↑ 6
Lessors of Other Real Estate Property	24	2	2	(1)

Note: Upward arrow (↑) indicates regional competitiveness.

## Top 15 Inputs by Dollars: Partners for Progress, NE

### Business and Financial Services Cluster

Industries	Estimated Input (\$ Thousands), 2013	% In-Region	% Out of Region
Insurance Agencies and Brokerages	\$6,570	31%	69%
Investment Advice	\$1,448	7%	93%
Commercial Banking	\$1,283	40%	60%
Third Party Administration of Insurance and Pension Funds	\$1,042	23%	77%
Portfolio Management	\$923	8%	92%
Corporate, Subsidiary, and Regional Managing Offices	\$847	2%	98%
Wired Telecommunications Carriers	\$649	17%	83%
Offices of Real Estate Agents and Brokers	\$639	13%	87%
Securities Brokerage	\$575	9%	91%
Offices of Lawyers	\$534	8%	92%
Administrative Management and General Management Consulting Services	\$529	10%	90%
Claims Adjusting	\$518	68%	32%
All Other Insurance Related Activities	\$511	10%	90%
Direct Property and Casualty Insurance Carriers	\$440	6%	94%
Data Processing, Hosting, and Related Services**	\$405	0%	100%

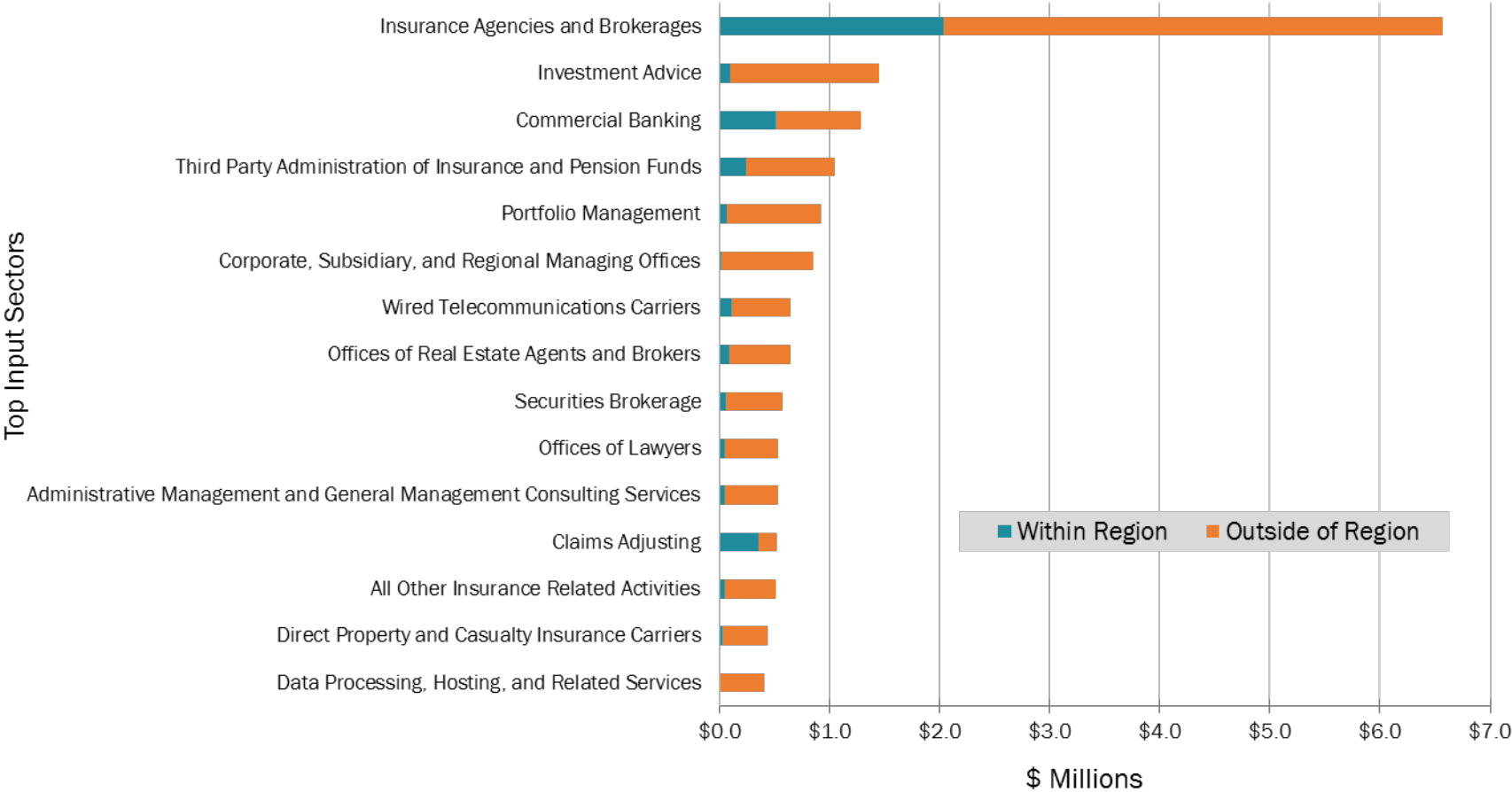
Note: \*\* industry sector is not present in the region.

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# Top 15 Inputs by Dollars: Partners for Progress, NE

## Business and Financial Services Cluster

Leakage Analysis, 2013



section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non -QCEW, self-employed and extended proprietors).

## Top Occupations: Partners for Progress, NE

### Business and Financial Services Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Insurance Sales Agents	218	32%	\$17.2	High school diploma or equivalent
Personal Financial Advisors	131	39%	\$22.5	Bachelor's degree
Real Estate Sales Agents	128	39%	\$11.3	High school diploma or equivalent
Securities, Commodities, and Financial Services Sales Agents	82	26%	\$18.3	Bachelor's degree
Accountants and Auditors	50	(14%)	\$25.4	Bachelor's degree
Insurance Claims and Policy Processing Clerks	48	45%	\$15.3	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	44	10%	\$13.3	High school diploma or equivalent
Property, Real Estate, and Community Association Managers	43	48%	\$14.6	High school diploma or equivalent
Management Analysts	34	(19%)	\$27.6	Bachelor's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	30	20%	\$13.3	High school diploma or equivalent
Lawyers	28	(15%)	\$27.2	Doctoral or professional degree
First-Line Supervisors of Non-Retail Sales Workers	26	18%	\$13.8	High school diploma or equivalent
Office Clerks, General	25	25%	\$11.0	High school diploma or equivalent
Real Estate Brokers	24	41%	\$17.7	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

#### section 03

## Shift-Share Analysis by Top Industry Sectors: Partners for Progress, NE

### Manufacturing Supercluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Totalizing Fluid Meter and Counting Device Manufacturing	525	39	-82	↑ 50
Farm Machinery and Equipment Manufacturing	197	12	22	10
Industrial Truck, Tractor, Trailer, and Stacker Machinery Manufacturing	92	4	8	↑ 26
Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	44	3	2	↑ 5
Saw Blade and Hand tool Manufacturing	32	2	-5	↑ 5
Construction Machinery Manufacturing	29	0	0	↑ 29
Machine Shops	13	1	3	-10
Railroad Rolling Stock Manufacturing	11	0	0	↑ 11

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows insufficient jobs for Iron and Steel Forging; and All Other Miscellaneous Fabricated Metal Product Manufacturing. Other sectors in manufacturing supercluster do not exist in the region.

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## Top 15 Inputs by Dollars: Partners for Progress, NE Manufacturing Supercluster

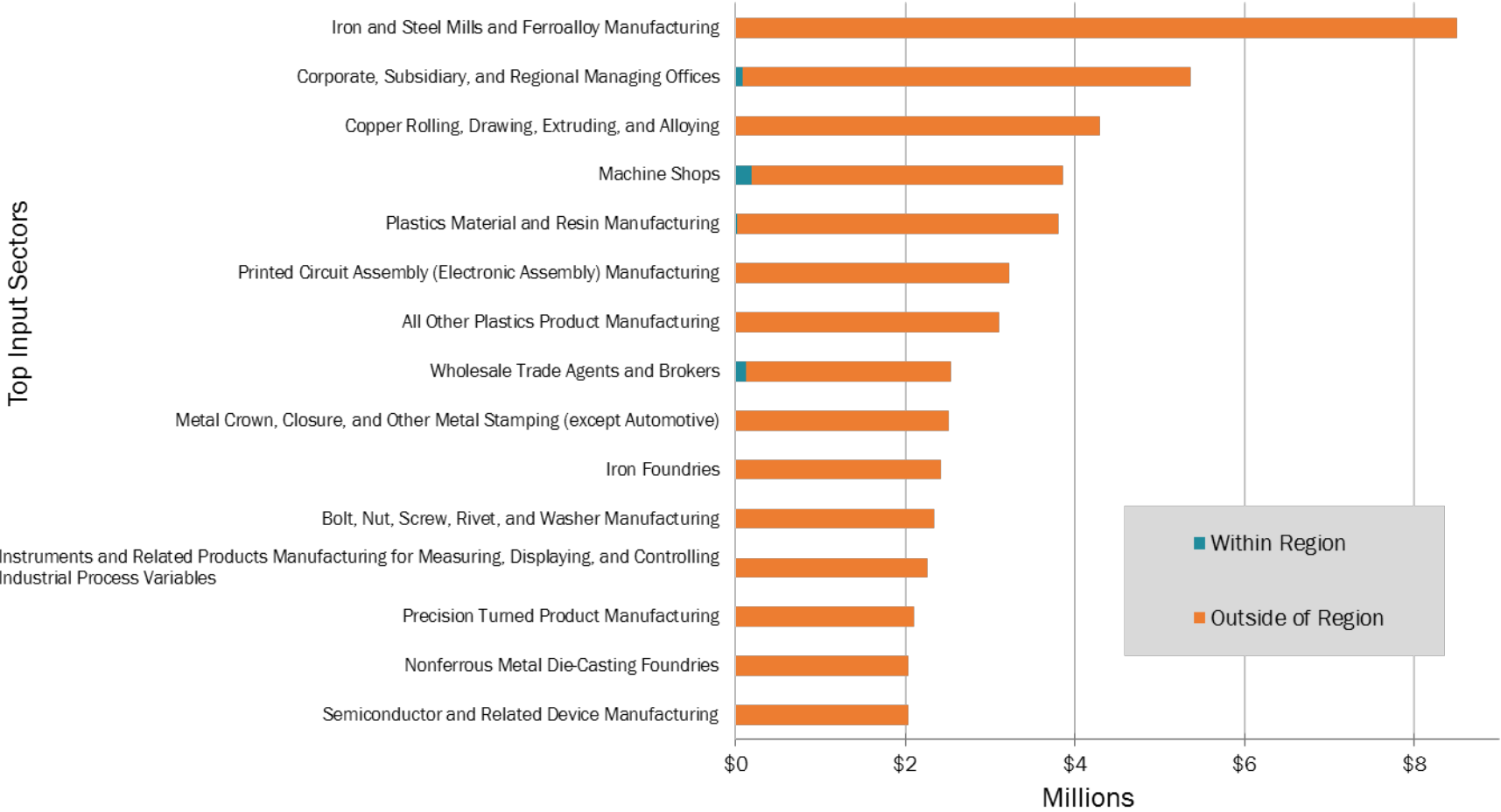
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Iron and Steel Mills and Ferroalloy Manufacturing **	\$8.5	0%	100%
Corporate, Subsidiary, and Regional Managing Offices	\$5.4	2%	98%
Copper Rolling, Drawing, Extruding, and Alloying **	\$4.3	0%	100%
Machine Shops	\$3.9	5%	95%
Plastics Material and Resin Manufacturing	\$3.8	0%	100%
Printed Circuit Assembly (Electronic Assembly) Manufacturing **	\$3.2	0%	100%
All Other Plastics Product Manufacturing **	\$3.1	0%	100%
Wholesale Trade Agents and Brokers	\$2.5	5%	95%
Metal Crown, Closure, and Other Metal Stamping (except Automotive) **	\$2.5	0%	100%
Iron Foundries **	\$2.4	0%	100%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing**	\$2.3	0%	100%
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables **	\$2.3	0%	100%
Precision Turned Product Manufacturing **	\$2.1	0%	100%
Nonferrous Metal Die-Casting Foundries **	\$2.0	0%	100%
Semiconductor and Related Device Manufacturing **	\$2.0	0%	100%

Note: \*\* industry sector is not present in the region.

### section 03

# Top 15 Inputs by Dollars: Partners for Progress, NE Manufacturing Supercluster

Leakage Analysis, 2013



section 03

Source: EMSI Class of Worker 2014.4 (QCEW, non -QCEW, self-employed and extended proprietors).

## Top Occupations: Partners for Progress, NE

### Manufacturing Supercluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Electrical and Electronic Equipment Assemblers	76	1%	\$16.1	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	65	44%	\$15.0	High school diploma or equivalent
Team Assemblers	60	18%	\$13.5	High school diploma or equivalent
Machinists	56	22%	\$18.7	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	42	11%	\$15.2	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	32	10%	\$20.9	Postsecondary non-degree award
Mechanical Engineers	27	17%	\$34.6	Bachelor's degree
Computer-Controlled Machine Tool Operators, Metal and Plastic	21	24%	\$15.8	High school diploma or equivalent
Electrical Engineers	21	11%	\$37.8	Bachelor's degree
Bookkeeping, Accounting, and Auditing Clerks	20	11%	\$13.3	High school diploma or equivalent
Industrial Machinery Mechanics	18	20%	\$16.4	High school diploma or equivalent
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	18	13%	\$20.5	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	18	20%	\$12.1	Less than high school
General and Operations Managers	17	6%	\$41.5	Bachelor's degree
Architectural and Engineering Managers	13	8%	\$62.3	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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## Shift-Share Analysis by Top Industry Sectors: Partners for Progress, NE Advanced Materials

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Regional Performance, 2009-2014
Totalizing Fluid Meter and Counting Device Manufacturing	525	39	-82	↑ 50
Pharmaceutical Preparation Manufacturing	17	4	-6	-38
Plastics Material and Resin Manufacturing	14	0	0	↑ 12
Machine Shops	13	1	3	-10

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows insufficient jobs for All Other Miscellaneous Fabricated Metal Product Manufacturing; Soap and Other Detergent Manufacturing; Pottery, Ceramics, and Plumbing Fixture Manufacturing; Iron and Steel Forging; and Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology) in Advanced Materials Clusters. The remainder of the sectors do not exist.

### section 03

## Top 15 Inputs by Dollars: Partners for Progress, NE

### Advanced Materials

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Plastics Material and Resin Manufacturing	\$4.3	1%	99%
Corporate, Subsidiary, and Regional Managing Offices	\$4.2	1%	99%
Copper Rolling, Drawing, Extruding, and Alloying **	\$3.9	0%	100%
Printed Circuit Assembly (Electronic Assembly) Manufacturing **	\$3.0	0%	100%
Machine Shops	\$2.6	3%	97%
Iron and Steel Mills and Ferroalloy Manufacturing **	\$2.6	0%	100%
All Other Plastics Product Manufacturing **	\$2.4	0%	100%
Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables **	\$2.3	0%	100%
Nonferrous Metal Die-Casting Foundries **	\$1.9	0%	100%
All Other Basic Organic Chemical Manufacturing **	\$1.9	0%	100%
Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals **	\$1.8	0%	100%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing **	\$1.8	0%	100%
Semiconductor and Related Device Manufacturing **	\$1.7	0%	100%
Precision Turned Product Manufacturing **	\$1.6	0%	100%
Iron Foundries **	\$1.6	0%	100%

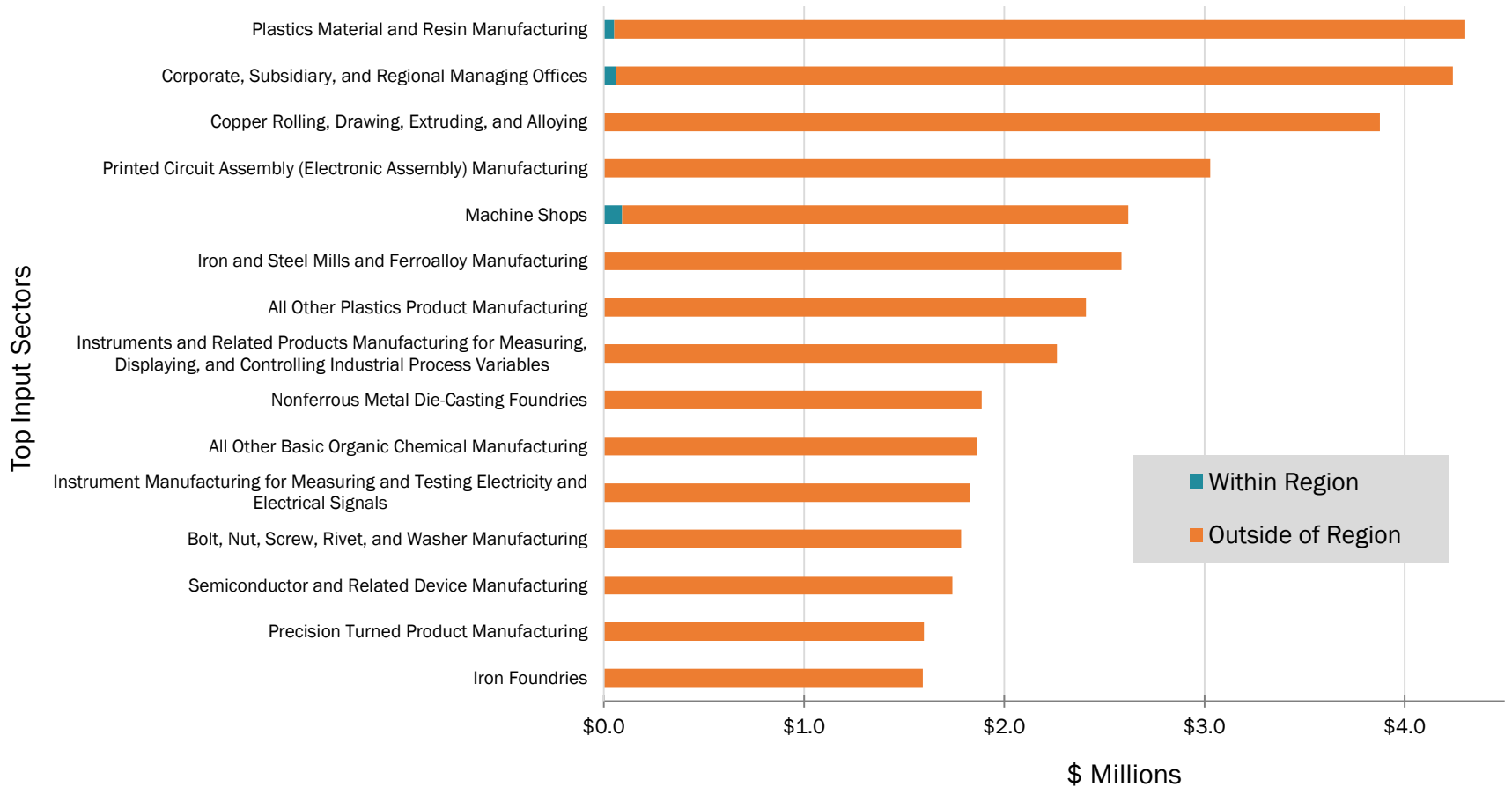
Note: \* indicates that industry sector has <10 jobs as per EMSI; \*\* indicates that industry sector is not present in the region

#### section 03

# Top 15 Inputs by Dollars: Partners for Progress, NE

## Advanced Materials

Leakage Analysis, 2013



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## Top Occupations: Partners for Progress, NE

### Advanced Materials

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Electrical and Electronic Equipment Assemblers	72	0%	\$16.1	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	31	-3%	\$15.2	High school diploma or equivalent
Team Assemblers	28	-3%	\$13.5	High school diploma or equivalent
Machinists	27	-4%	\$18.7	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	19	-14%	\$20.9	Postsecondary non-degree award
Electrical Engineers	19	6%	\$37.8	Bachelor's degree
Mechanical Engineers	17	0%	\$34.6	Bachelor's degree
Bookkeeping, Accounting, and Auditing Clerks	14	0%	\$13.3	High school diploma or equivalent
General and Operations Managers	13	0%	\$41.5	Bachelor's degree
Architectural and Engineering Managers	11	0%	\$62.3	Bachelor's degree
Welders, Cutters, Solderers, and Brazers	10	-9%	\$15.0	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI shows insufficient jobs for Secretaries and Administrative Assistants, Except Legal, Medical, and Executive; Engineering Technicians, Except Drafters, All Other; Mechanical Engineering Technicians; and Semiconductor Processors. The remainder of occupations do not exist.

#### section 03

# Report Contributors

This report was prepared by the Purdue Center for Regional Development, in partnership with the Southern Rural Development Center and USDA Rural Development, in support of the Stronger Economies Together program.



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This report was supported, in part, by grant from the USDA Rural Development through the auspices of the Southern Rural Development Center. It was produced in support of the Stronger Economies Together (SET) program.



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June 2015