

NEBRASKA WORKFORCE

TRENDS

NEBRASKA
DEPARTMENT OF LABOR

OCT 2016



Fast Facts - HALLOWEEN
Map Facts - EMPLOYMENT AND WAGES
Feature - LARGEST INDUSTRIES IN NEBRASKA

CREDITS

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FAST FACTS: HALLOWEEN

Jennifer Gildersleeve, Research Analyst

117.3 MILLION

Potential stops for trick-or-treaters (number of occupied housing units in Q2 2015) in the United States.

744,159

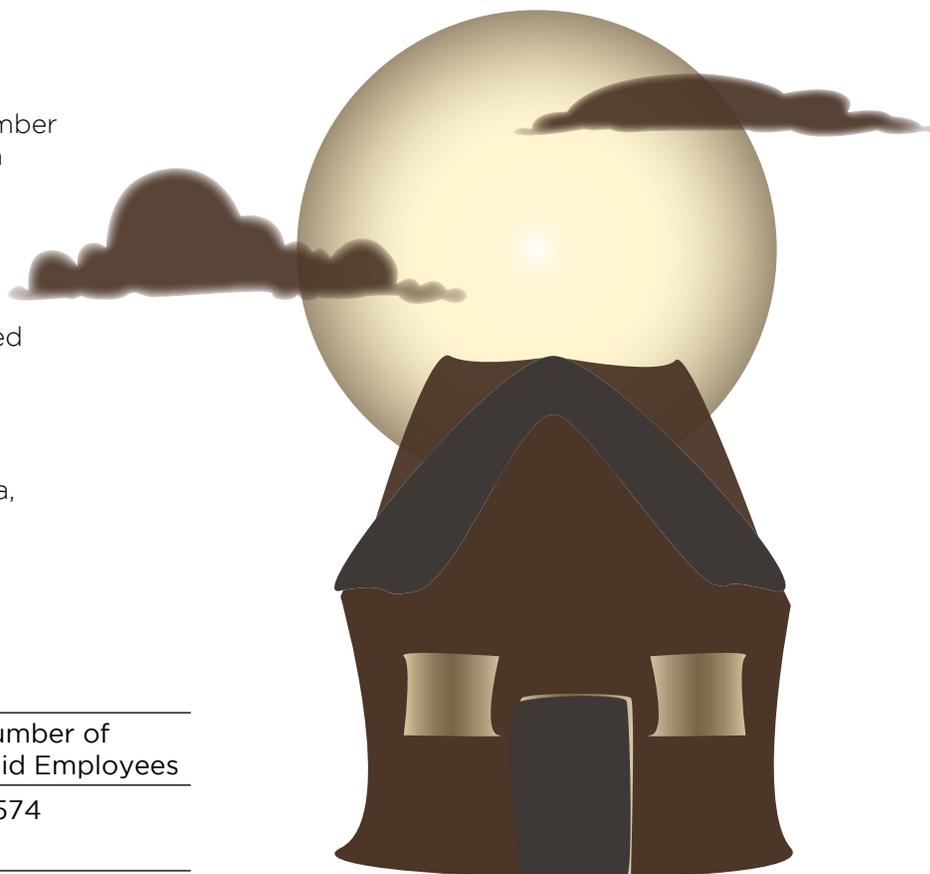
Potential stops for trick-or-treaters (number of occupied housing units in Q2 2015) in Nebraska.

41.2 MILLION

Estimated number of potential trick-or-treaters (children ages 5-14) in the United States, 2014.

261,950

Estimated number of potential trick-or-treaters (children ages 5-14) in Nebraska, 2014.



COSTUME RENTAL & FORMAL WEAR ESTABLISHMENTS

	Establishments	Number of Paid Employees
United States	1,148	6,574
Nebraska	13	*

* Data unavailable

COSTUME-RELATED OCCUPATIONS, EMPLOYMENT & WAGES - NEBRASKA, Q1 2016

Occupation	Employment	Median Wage
Umpires, Referees, and Other Sports Officials	40	*
Musicians and Singers	180	\$16.61
Photographers	450	\$12.01
Physicians and Surgeons, All Other	1,630	\$64.16
Registered Nurses	20,600	\$27.87
Firefighters	1,100	\$25.14
Police and Sheriff's Patrol Officers	3,460	\$26.18
Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	810	\$8.83
Chefs and Head Cooks	460	\$21.40
Farmworkers, Farm, Ranch, and Aquacultural Animals	1,080	\$12.87

HALLOWEEN TREATS



1,337

U.S. manufacturing establishments that produced chocolate and cocoa products in 2012

37,400

Employees

\$14.9 BILLION

Value of sales, shipments, revenue



3,215

Stores in the U.S. that sell candy and other confectionary products in 2012

19,821

Employees

\$1.8 BILLION

Value of sales

441

U.S. manufacturing establishments that produced non-chocolate confectionary products in 2012

19,267

Employees

\$7.7 BILLION

Value of sales, shipments, revenue

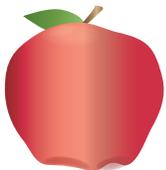


50,900

Acres of pumpkins harvested in the U.S. in 2013

\$149.9 MILLION

Estimated total production value



\$1.1 BILLION

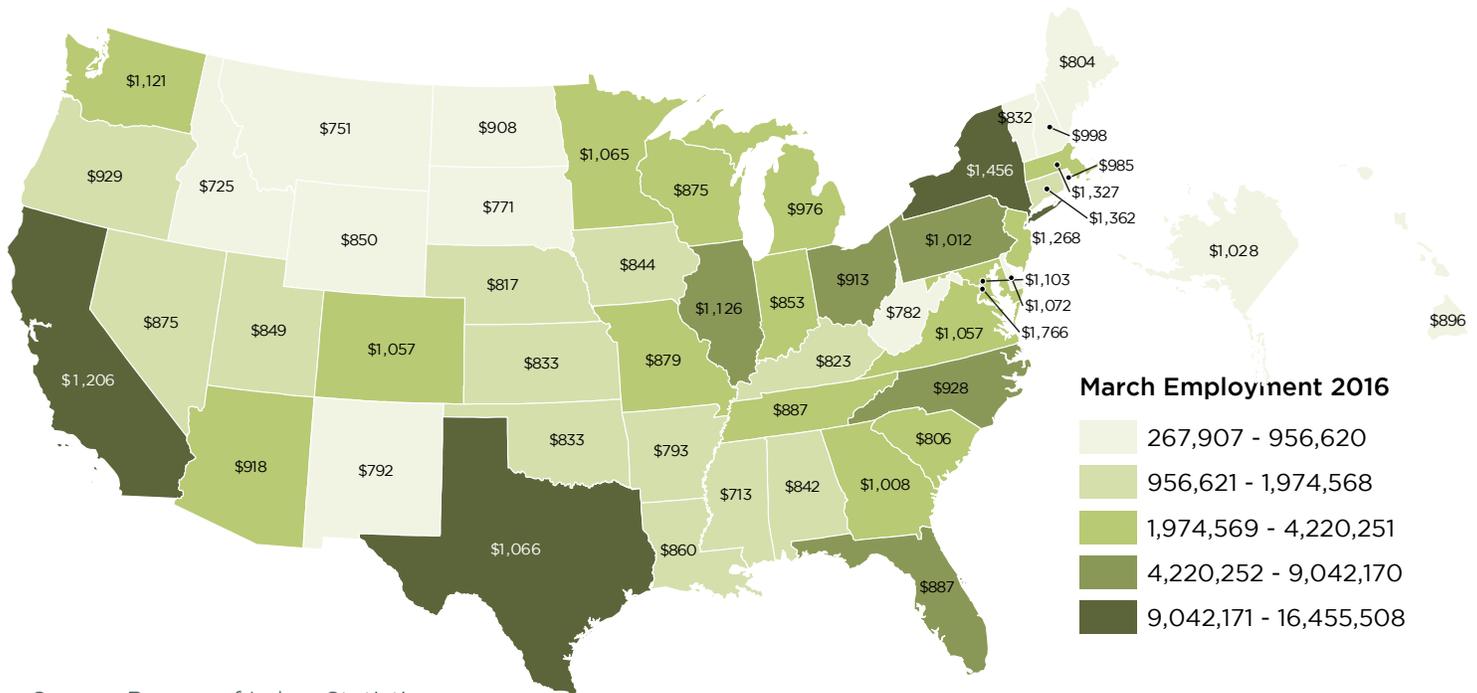
Dollar value of U.S. fresh apples exported in 2014

SOURCES:

1. US Census Bureau, Facts for Features: Halloween. October 26,2015. <http://www.census.gov/newsroom/facts-for-features/2015/cb15-ff21.html>
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MAP FACTS: EMPLOYMENT AND WAGES

Dillon Cornett, Research Analyst



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

March Employment 2016

- 267,907 - 956,620
- 956,621 - 1,974,568
- 1,974,569 - 4,220,251
- 4,220,252 - 9,042,170
- 9,042,171 - 16,455,508

Label shows state average weekly wage in Q1 2016

In September, the Bureau of Labor Statistics (BLS) released data from the Quarterly Census of Employment and Wages (QCEW) for the first quarter of 2016. QCEW is the only Bureau of Labor Statistics (BLS) program that releases quarterly and annual counts of establishments, employment, and wages (all by detailed industry) at the national, state, and county levels. The QCEW program calculates employment using a count of the number of filled jobs - not the number of employed individuals. QCEW data from the first quarters of 2015 and 2016 can be used to examine over-the-year trends at the national, state, and Nebraska county levels.

From March 2015 to March 2016, U.S. employment increased by 2.7 million (2.0 percent) and reached a total of 140.1 million. BLS reports that employment increased in 318 of the 344 largest U.S. counties (counties with 75,000 or more filled jobs). In Nebraska, Douglas and Lancaster counties were the lone counties with employment of 75,000 or more. In March 2016, Douglas County employment reached 332,760, while Lancaster County employment totaled 166,631. Both large Nebraska counties saw 2 percent increases in their respective employment levels from March 2015 to March 2016.

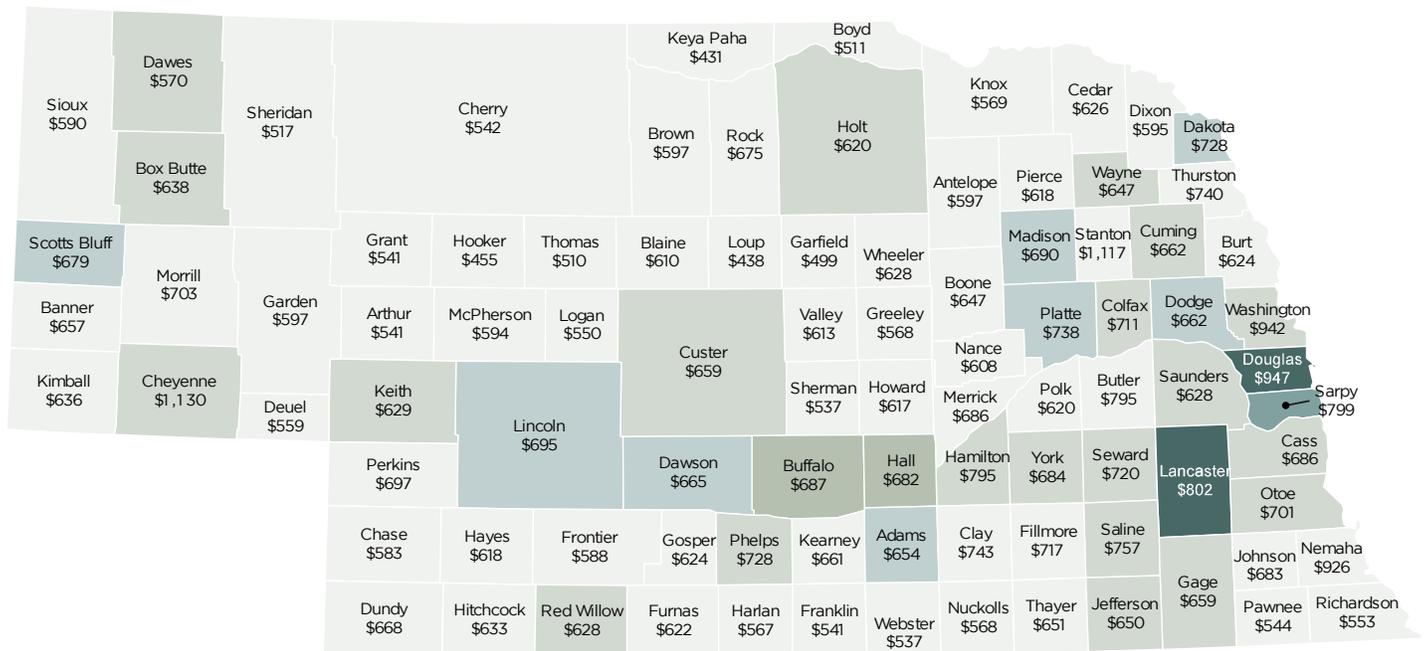
Nationally, the average weekly wage decreased 0.5 percent to \$1,043 in the first quarter of 2016. Since 1978, there have been only seven instances of a decline in the average weekly wage. Average weekly wages for half of the 344 largest counties had over-the-year decreases (167 counties), while 164 counties experienced over-the-year increases in the average weekly wage. Average weekly wages in Douglas County decreased from \$960 in the first quarter of 2015 to \$947 in 2016 (a 1.4 percent over-the-year decrease). In Lancaster County, over-the-year average weekly wages increased from \$797 to \$802 from 2015 to 2016 (a 0.6 percent increase).

The map above displays the states with the greatest employment counts in March of 2016 as well as the average weekly wage for each state. The states with the highest employment levels were California (16.5 million), Texas (11.6 million), and New York (9.0 million). The largest increase in over-the-year employment, by percent change, occurred in Utah (3.8 percent increase), followed by Florida (3.5 percent increase), and Idaho (3.5 percent increase). The states with the greatest decreases in over-the-year employment, by percent change, were North Dakota (6.2 percent decrease), Wyoming (3.7 percent decrease), and Alaska (1.4 percent decrease).

EMPLOYMENT & WAGES BY COUNTY, FIRST QUARTER 2016



Label shows state average weekly wage in Q1 2016



March Employment 2016



Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages

The state with the highest average weekly wage in the first quarter of 2016 was New York (\$1,456), followed by Connecticut (\$1,362) and Massachusetts (\$1,327). The states with the largest over-the-year weekly wage increase, by percent change, were Washington (3.0 percent increase), Georgia (1.9 percent increase) and Hawaii (1.7 percent increase). Conversely, the largest over-the-year decreases in average weekly wage occurred in North Dakota (7.6 percent decrease), Wyoming (4.7 percent decrease) and Oklahoma (4.1 percent decrease).

The map above displays Nebraska county employment and the average weekly wage earned in each county in March 2016. The counties with the most employed individuals in March 2016, other than Douglas and Lancaster, were Sarpy (67,270), Hall (34,552), and Buffalo (26,711) counties. The largest increase in over-the-year employment, by percent change, occurred in Pawnee County (11.3 percent increase), followed

by Frontier County (10.1 percent increase). The largest decrease in over-the-year employment occurred in Banner County (13.8 percent decrease) followed by Keya Paha County (12.4 percent decrease).

Cheyenne County had the highest average weekly wage of Nebraska counties in the first quarter of 2016 (\$1,130), followed by Stanton County (\$1,117). The largest increase in over-the-year average weekly wage, by percent change, occurred in Grant County (12.7 percent increase) followed by Hamilton County (12.6 percent increase). Finally, the largest over-the-year average weekly wage decrease, by percent change, occurred in Thomas County (22.8 percent decrease), followed by Wheeler (17.5 percent decrease) and Kimball (17.3 percent decrease).

SOURCES:

1. Bureau of Labor Statistics. County Employment and Wages. [Online] September 7, 2016. <http://www.bls.gov/news.release/pdf/cewqtr.pdf>.
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AUGUST

Kermit Spade
Research Analyst

OMAHA JOBS ADDED*

375

OMAHA AREA OPENINGS

BUSINESS CATEGORY	NAME, TYPE OF BUSINESS, JOBS ADDED		
 FOOD & ENTERTAINMENT	Fuel Fit Kitchen	Healthy Meals	8
	<hr/>		
 RETAIL/SALES	The Fold	Women's Apparel	3
	Paper Kite	Baby Gifts	2
<hr/>			
 HEALTH	Midlands Family Urgent Care	Healthcare	15
<hr/>			
 OTHER	Papio Roofing	Roofing/Siding	12

OMAHA AREA EXPANSIONS

US Cold Storage	Cold Storage Facility	60
Root Cos	Marketing Group	3
The New Blk	Advertising Agency	6
Advent	Technology/Legal Firm	8
Agape Red	Staffing Agency	17
Markel Corp.	Insurance	230
Hello Holiday	Women's Apparel	6
JCPenney (added appliances)	Department Store	5

* Number of jobs is an estimate.

LINCOLN AREA OPENINGS & EXPANSIONS

BUSINESS CATEGORY **NAME, JOBS ADDED**



FOOD & ENTERTAINMENT

Eat Fit Go Healthy Foods



RETAIL/SALES

Russ's Market (Expansion)



HEALTH

Access Family Medicine

Planet Fitness



OTHER

Rogers Jewelers

Lincoln Lutheran Middle/High School (Expansion)

McGill Restoration

STATEWIDE OPENINGS & EXPANSIONS

SOUTHEAST

BEATRICE

L&R Unique Crafters

NEBRASKA CITY

First Class Flowers

YORK

Perks Restaurant

NORTHEAST

NORFOLK

La Macarena Store - Expansion

WEST POINT

United Pet Products

PANHANDLE

MITCHELL

Ayala's on the Fairway

SOURCES:

Lincoln Chamber of Commerce

Midlands Business Journal

NDOL Staff

Omaha World Herald

Strictly Business

LARGEST INDUSTRIES IN NEBRASKA

Kermit Spade, Research Analyst

Nebraska has a diverse economy made up of many different industries. What are the largest industries? How are they measured? How do they change over time? There are a variety of ways to answer these questions. One of the primary ways to measure the size of an industry is to examine the employment levels, or how many people work in an industry. Two such measures are Current Employment Statistics (CES) and the Quarterly Census of Employment and Wages (QCEW), both compiled by the US Department of Labor. It is important to note that data for the agriculture industry is not fully included in the QCEW data and is not included at all in the CES counts.

CES EMPLOYMENT BY INDUSTRY, JULY 2016



TRADE, TRANSPORTATION, & UTILITIES

205,042

GOVERNMENT

163,801

EDUCATIONAL & HEALTH SERVICES

151,967

PROFESSIONAL & BUSINESS SERVICES

121,285

MANUFACTURING

97,607

LEISURE & HOSPITALITY

97,057

FINANCE

73,221

CONSTRUCTION

52,534

OTHER SERVICES

37,138

INFORMATION

17,335

NATURAL RESOURCES & MINING

1,050

Source: Current Employment Statistics

QCEW EMPLOYMENT BY INDUSTRY, Q4 2015

Industry	Employment
Education and Health Services	232,995
Trade, Transportation, and Utilities	210,509
Professional and Business Services	1119,011
Manufacturing	97,156
Leisure and Hospitality	88,686
Financial Activities	65,156
Construction	50,134
Government	49,133
Other Services, Except Government	25,432
Information	17,802
Natural Resources and Mining	14,782

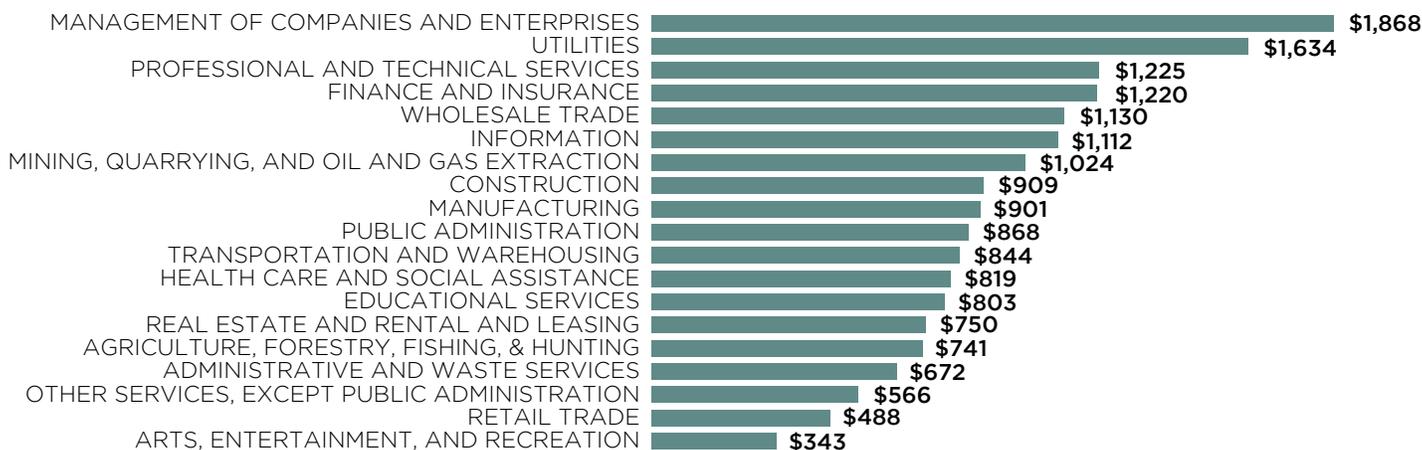
Source: Quarterly Census of Employment and Wages

Looking at CES data, the industry with the largest employment numbers was trade, transportation and utilities, which had 205,042 filled jobs.³ Rounding out the top five were government (163,801), educational and health services (151,967), professional and business services (121,285) and manufacturing (97,607).³

QCEW data shows slightly different employment levels among Nebraska's industries. The table above displays the QCEW average employment levels for 2015. Here we see that health care and social assistance is at the top of the list and government drops way down.⁴ The reason for this is because CES counts any government employment in the government industry, whereas QCEW splits out the education portion of government employment and counts it in the educational services industry.

QCEW data also shows the average weekly wage of each industry. The industry with the highest weekly wage in 2015 was management of companies and enterprises at \$1,868 per week.⁴

QCEW AVERAGE WEEKLY WAGE BY INDUSTRY 2015



Source: Quarterly Census of Employment and Wages

Rounding out the top 5 were the utilities industry (\$1,634), professional and technical services industry (\$1,225), finance and insurance industry (\$1,220) and wholesale trade industry (\$1,130).⁴

Another way to measure the size of an industry is GDP, or gross domestic product. GDP is defined by the Bureau of Economic Analysis (BEA) as “the market value of goods and services produced by the labor and property” of the industry.¹ In the first quarter of 2016, the largest industries in Nebraska in terms of GDP were government, at \$12.2 billion and manufacturing (\$12.1 billion).² Rounding out the top 5 industries in Nebraska by GDP are real estate and rental and leasing (\$9.9 billion), finance and insurance (\$8.7 billion) and health care and social assistance (\$7.7 billion). Agriculture comes in seventh at \$6.5 billion.²

NEBRASKA GDP BY INDUSTRY, Q1 2016

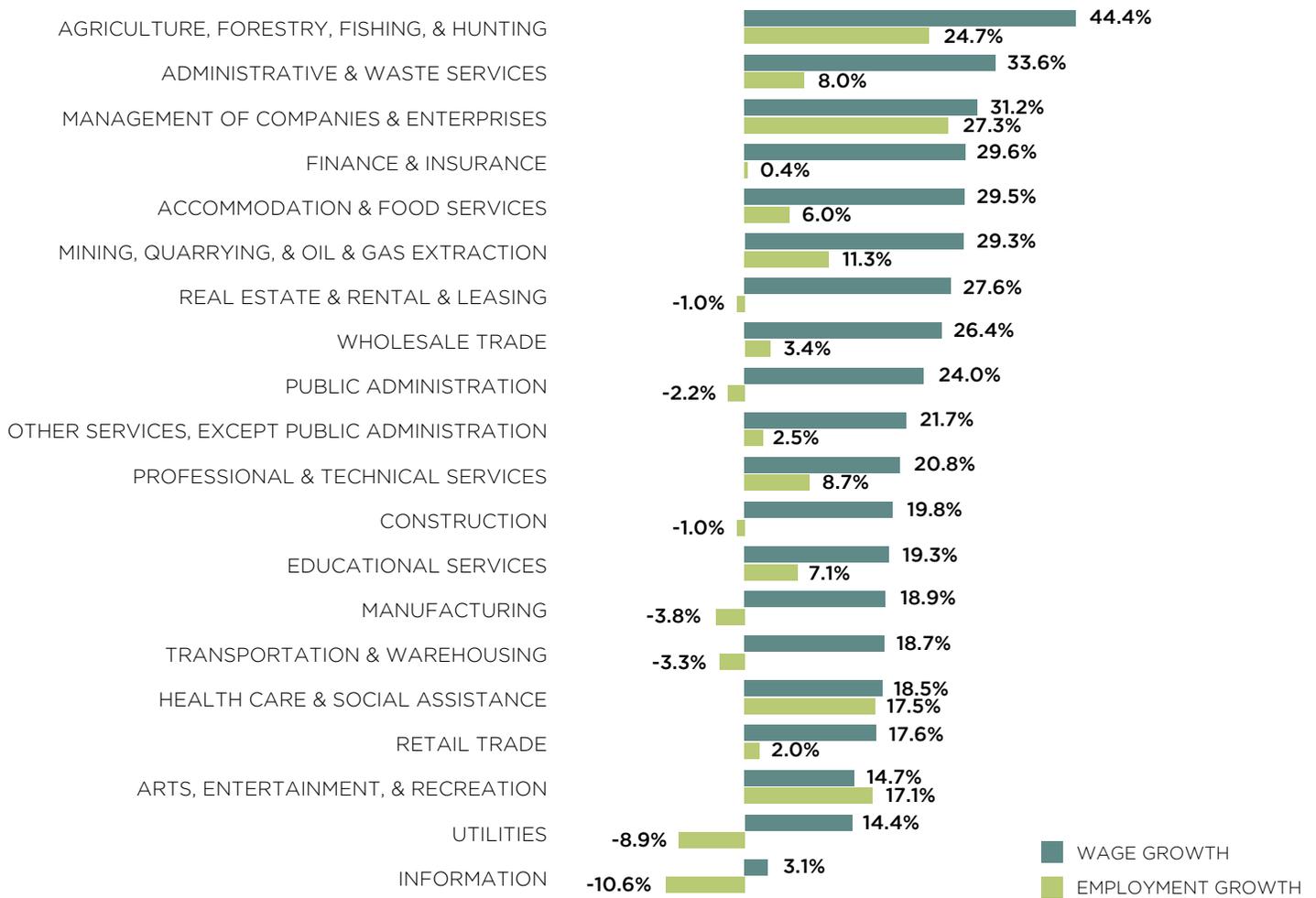
Industry	Millions of Chained 2009 Dollars
Government	\$12,157
Manufacturing	\$12,061
Real Estate and Rental and Leasing	\$9,912
Finance and Insurance	\$8,713
Health Care and Social Assistance	\$7,725

Source: Bureau of Economic Analysis

The manufacturing and government industries have been the top industries in Nebraska in terms of GDP since at least 2007.² They have traded places for the top spot several times during this time period.² Since the first quarter of 2007, the GDP of the manufacturing industry has grown 16.5 percent, while government, Nebraska’s largest industry in terms of GDP, has only grown 3.4 percent over the same period.² Real estate and rental and leasing has grown 30.4 percent, finance and insurance grew 22.0 percent and healthcare and social assistance 27.6 percent.² While agriculture is not one of Nebraska’s top five industries, it is worth mentioning that it grew 53.3% from 2007 to 2016.²

The industry that experienced the most relative growth in terms of GDP from 2007 to 2016 was management of companies and enterprises, which grew 64.1 percent over the time period.² Other industries with high growth over the same time period were agriculture, forestry fishing and hunting (53.3%) and administrative and waste management services (52.0%).² Additionally, these three industries also experienced the top three relative wage growths among industries. From 2007 to 2015, wages in the agriculture, forestry, fishing and hunting industry increased 44.4 percent.⁴ Wages in the administrative and waste services sector increased 33.6 percent and wages in the management of companies and enterprises sector increased 31.2 percent during this same time period.⁴

2007 - 2015 QCEW WAGE & EMPLOYMENT GROWTH BY INDUSTRY



Source: Quarterly Census of Employment and Wages

The industries with the greatest employment growth from 2007 to 2015 were management of companies and enterprises; agriculture, forestry, fishing and hunting; health care and social assistance; arts, entertainment and recreation; and mining, quarrying, and oil and gas extraction. All of these industries had over 10 percent employment growth from 2007 to 2015. The information; utilities; manufacturing; transportation and warehousing; and public

administration industries all experienced employment declines over the same time period.

Nebraska has a rich and diverse economy. It has weathered a great recession and most industries continue to grow. Wages are also on the rise across all industries and most are increasing employment as well.

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AUGUST UNEMPLOYMENT DATA

Byron Lefler, Research Analyst

LINCOLN MSA (not seasonally adjusted)

August Unemployment Rate: 3.0%
 August Total Non-farm: 186,300
 Manufacturing: 13,592
 Largest OTM Increases:
 Leisure and Hospitality: 608 (3.4%)
 Education & Health Services: 90 (0.3%)

OMAHA MSA (not seasonally adjusted)

August Unemployment Rate: 3.5%
 August Total Non-farm: 500,551
 Manufacturing: 32,478
 Largest OTM Increases:
 Trade, Transportation, and Utilities: 1,313 (1.4%)
 Professional & Business Services: 250 (0.3%)

GRAND ISLAND MSA

(not seasonally adjusted)
 August Unemployment Rate: 3.3%
 August Total Non-farm: 42,593
 Change (OTM): -166 (-0.39%)
 Change (OTY): 741 (1.77%)

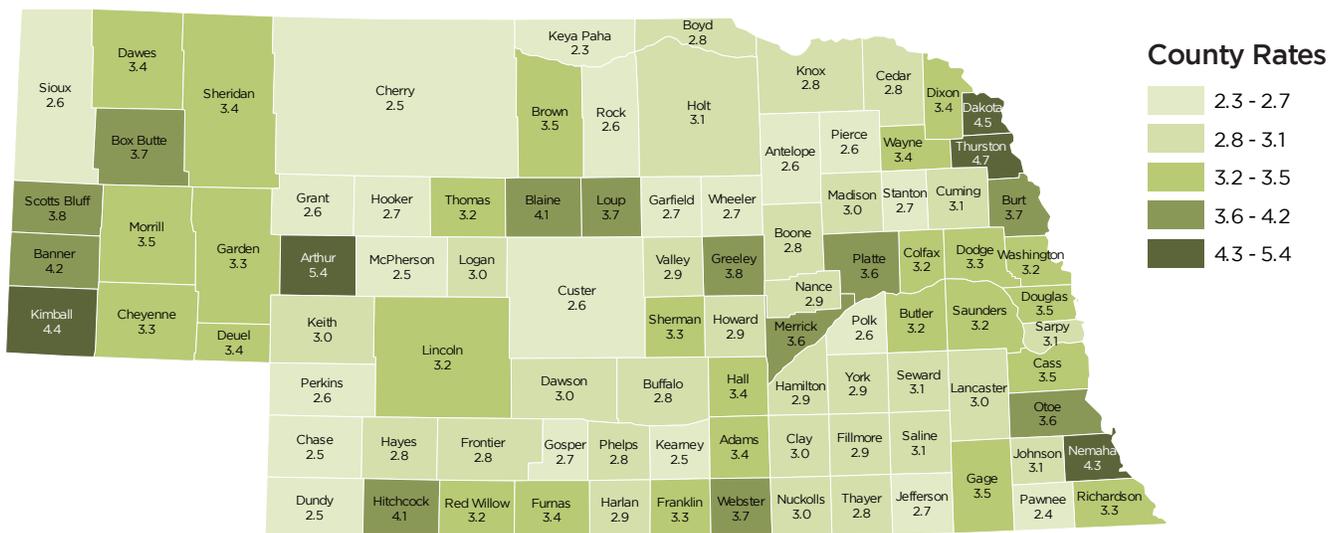
NEBRASKA (not seasonally adjusted)

August Total Non-farm: 1,017,899
 Manufacturing: 97,328
 Nebraska (smoothed seasonally adjusted)
 August Unemployment Rate: 3.2%
 Change (OTM): 0.1
 Change (OTY): 0.2

Economic Regions (not seasonally adjusted)

Central: 3.0%
 Mid Plains: 3.1%
 Northeast: 3.3%
 Panhandle: 3.6%
 Sandhills: 2.9%
 Southeast: 3.2%

AUGUST UNEMPLOYMENT RATES BY COUNTY*



Sources:

1. Bureau of Labor Statistics Current Employment Statistics Program (CES)
2. Bureau of Labor Statistics Local Area Unemployment Statistics (LAUS)

*Not seasonally adjusted

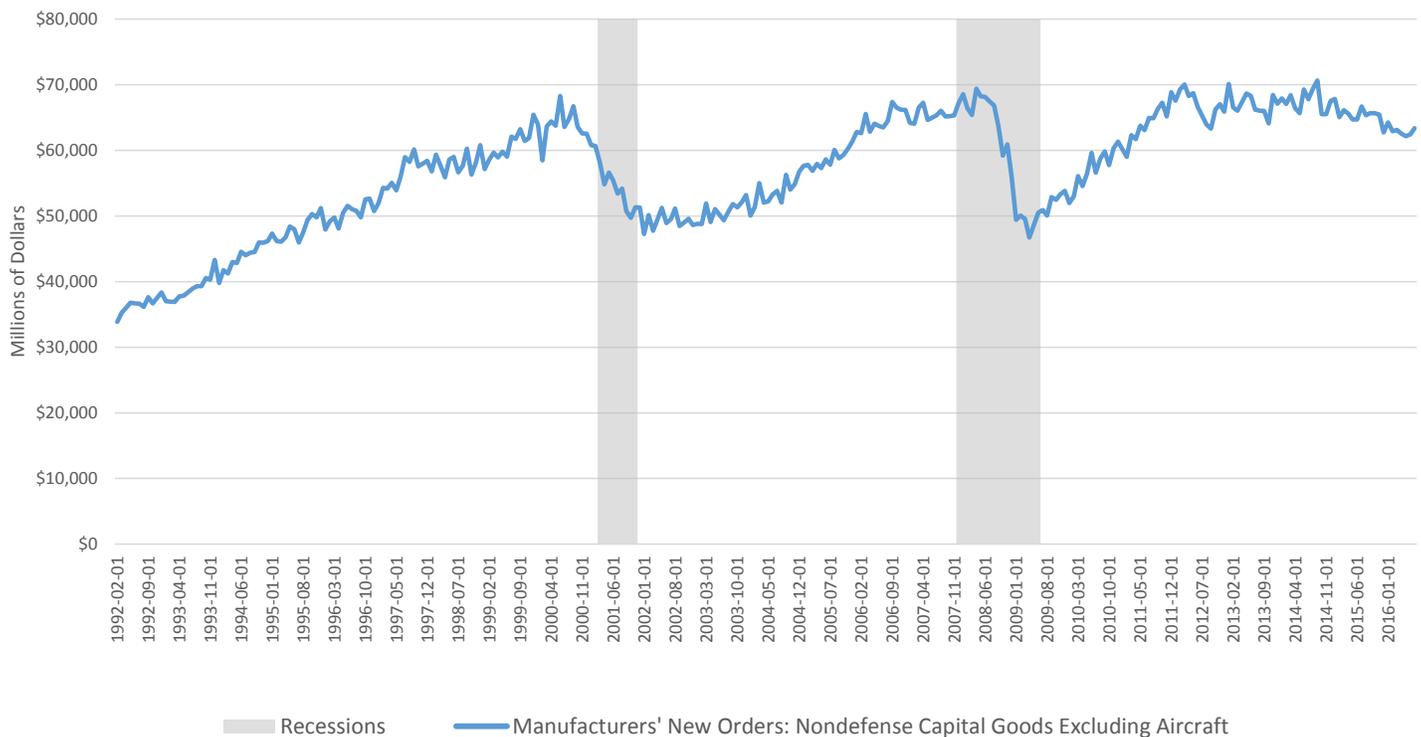
ECONOMIC INDICATORS **VALUE OF MANUFACTURERS' NEW ORDERS**

Kermit Spade, Research Analyst

In each new issue of Trends, the Economic Indicators section will feature a chart or graph focused on one of the economic indicators listed on the following page. This month, we'll be focusing on the Value of Manufacturers' New Orders.

According to the National Association of Securities Dealers Automated Quotations, "Capital Goods are goods used by firms to produce other goods." This could include office buildings, machinery or equipment. The Conference Board uses the Manufacturers New Orders time series as a leading economic indicator.

MANUFACTURERS' NEW ORDERS: NON-DEFENSE CAPITAL GOODS EXCLUDING AIRCRAFT



Source: NASDAQ. Glossary.

Change Over Last Quarter/Month

METRIC	CURRENT TIME PERIOD	UNITED STATES	MIDWEST REGION	NEBRASKA
Average Weekly Manufacturing Hours	August, 2016	-0.2	-	-0.3
Initial Unemployment Claims	August, 2016	+1.6%	-	-9.6%
Value of Manufacturers' New Orders for Consumer Goods	July, 2016	-0.4%	-	-
ISM Manufacturing: New Orders Index©	August, 2016	-13.7%	-	-
Value of Manufacturers' New Orders: Nondefense Capital Goods Excluding Aircraft	July, 2016	+1.5%	-	-
S&P 500©	August, 2016	+1.3%	-	-
Leading Economic Index	July, 2016	1.5%	-	0.9%
10-Year Treasury Constant Maturity Minus Federal Funds Rate	August, 2016	1.2%	-	-
University of Michigan, Consumer Sentiment Index	July, 2016	-0.2%	-	-
Consumer Price Index, not seasonally adjusted	August, 2016	+0.1%	+0.1%	-
Employment Cost Index	2nd Quarter, 2016	+0.6%	-	-
Producer Price Index: All Commodities	August, 2016	-0.6%	-	-
Unemployment Rate, seasonally adjusted	August, 2016	0.0%	-0.2%*	+0.1%*
Real GDP, billions of chained 2009 dollars	2nd Quarter, 2016	+1.1%	-	-
Net Taxable Sales	June, 2016	-	-	+20.6%
Barrel of Crude Oil, WTI-Cushing, Spot Price	August, 2016	+\$0.07	-	-
Current Account Balance (millions of dollars)	1st Quarter, 2015	-\$11,265		

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NEBRASKA WORKFORCE TRENDS

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