

City of Seward, NE

Tuesday, June 30, 2015

Regular Session

Item G1

PRESENTATION BY AYARS & AYARS, INC AND DISCUSSION OF SEWARD/LINCOLN REGIONAL RAIL CAMPUS DEVELOPMENT - POSSIBLE PROJECT HOT MILL - Ayars & Ayars

Administrative Report: This presentation and discussion is follow-up to the presentation by Ayars & Ayars, Inc. at the June 2, 2015 City Council meeting. This work session is to provide an opportunity to learn more about the project and for additional discussion to occur. As a work session, there will be no action taken.

Staff Contact:

Project Hot Mill Basic Description for Seward City Council Work Session on June 30, 2015

Project Hot Mill has expressed interest in locating in the Seward/Lincoln Regional Rail Campus (<http://www.SewardRailCampus.com>). They are working with Ayars and Ayars, Inc. (<http://www.AyarsAyars.com/>) to construct their facility. They need rail, utilities, and road upgrades to the Rail Campus to make their project feasible. Here are some basic project details:

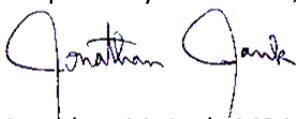
- Proposed investment of approximately \$100 million (building and equipment)
- Proposed job creation of 150 full-time employees (please see attached for a copy of an economic impact study that analyzes how this size of investment and job creation is estimated to influence the City of Seward)
- Estimated average wage rate is \$20.25 per hour plus benefits
- Based on Seward County's 2014 labor study, the average wage rate in the county is \$17.03 per hour (please see attached for a copy of the 2014 Seward County Labor Study; here is a link for online viewing: <http://www.sewardregional.com/wp-content/uploads/Seward-County-Labor-Study-2014.pdf>.)
- Estimated facility size is 868,000 square feet (approximately 50-70 acres of land)
- Desired completion date of May 2017
- Here is a brief YouTube video example of a hot piercing billet process – <https://www.youtube.com/watch?v=KyFWoW0UoH4>
- Cost estimates and timelines for building/developing the project will be discussed at the June 30 work session. Specifically, there will be experts available to answer questions about infrastructure (utilities, rail, roads, and general construction), city bonding capacities, incentives (local and state), permitting processes, and economic impact/labor studies.
- Here is the City of Seward's recent economic impact analysis of the Tenneco, Inc. expansion in November 2010, which created 100 new jobs and added an \$11.7 million investment. The City of Seward granted \$100,000 through their LB 840 fund to support this expansion project in February 2011. It shows positive economic growth and diversification between 2008 and 2014 (see below for details).

City of Seward Economic Impact Analysis between 2008 and 2014

- Net Taxable Sales Increased – \$13,400,625 (Source: Nebraska Non-motor Vehicle Sales Tax Collections by County and Selected Cities – Nebraska Department of Revenue)
- Sales Taxes Increased – \$726,826.36
- Taxable Value Increased – \$73,559,335 (Source: Nebraska Department of Revenue Property Assessment Division)
- Taxes Levied Went Down – \$3,832.80

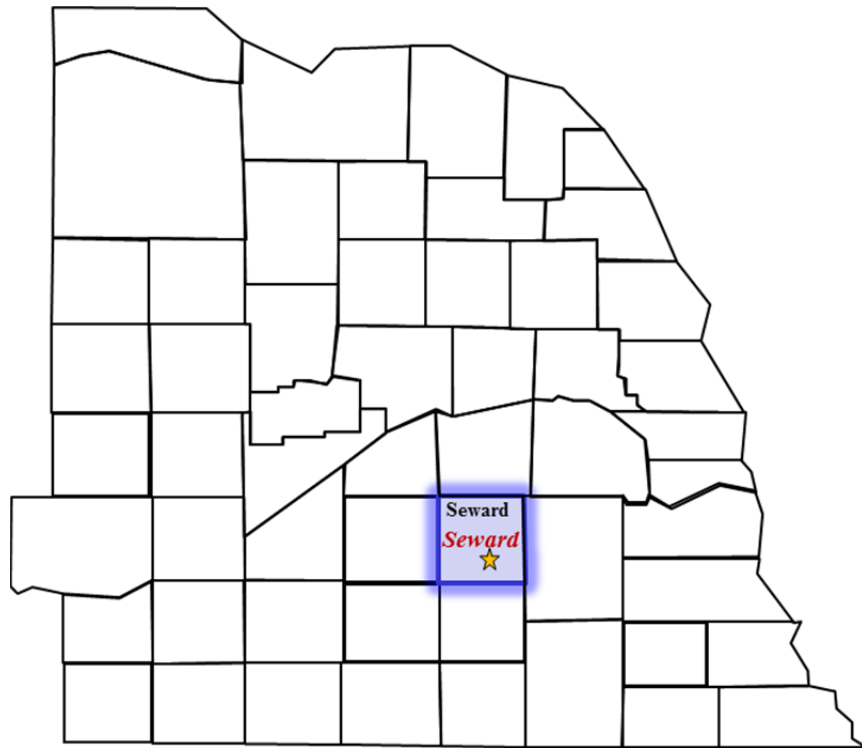
If there are additional questions before the June 30 work session, please address them to Jonathan Jank from Seward County Economic Development Corporation (402-643-0513 or Director@SewardRegional.com). He will work with an expert on the question topic to attempt to find and prepare an answer in preparation for the work session.

Respectfully Submitted,



Jonathan M. Jank, MBA | Executive Director
Seward County Economic Development Corporation

Economic Impact Assessment for a Proposed Manufacturing Facility Seward, Nebraska



June 2015

Prepared by:

Kenneth M. Lemke, Ph.D.
Economist
Economic Development Department
Nebraska Public Power District
1414 15th Street - Box 499
Columbus, Nebraska, 68602-0499

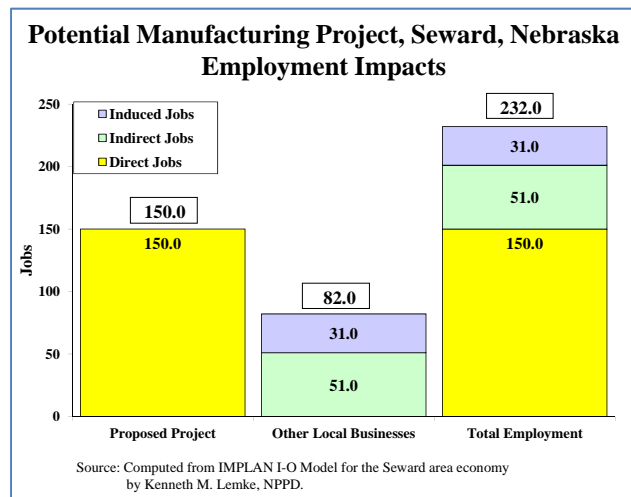
Telephone: (402) 563-5535 or (800) 282-6773
Email: kmlemke@nppd.com

Executive Summary

The economic impacts associated with the operation of a proposed manufacturing facility, in Seward, Nebraska, have been calculated utilizing a Micro IMPLAN input-output model for the Seward area economy. For the purposes of this analysis, the Seward Study Area is defined as Seward County in Nebraska. The positive employment and other economic effects associated with the proposed manufacturing facility are summarized in this Executive Summary.

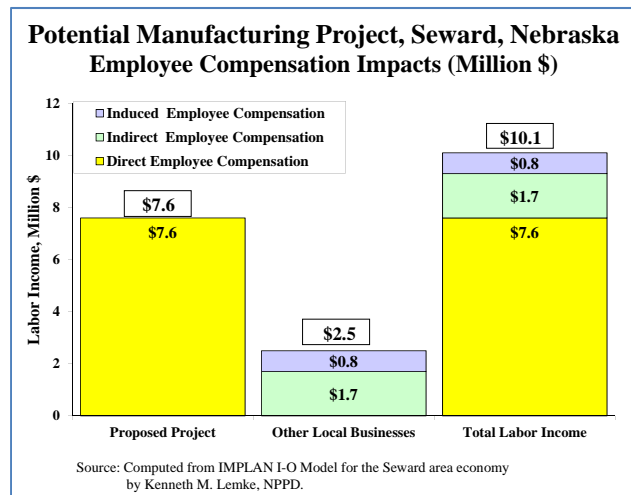
Employment Effects:

The annual employment directly related to the operation of the proposed manufacturing facility is 150.0 employees. When the secondary employment effects in other economic sectors are added, the total employment effects for the Seward area economy are estimated to be 232.0 jobs, including the 150.0 direct jobs and 82.0 secondary (51.0 indirect and 31.0 induced) jobs in other economic sectors.



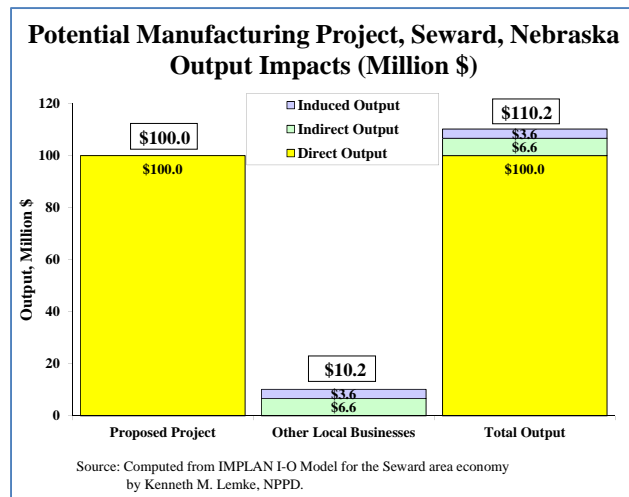
Employee Compensation:

The 150.0 employees at the proposed manufacturing facility would add an estimated \$7,600,000 in employee compensation to the Seward area economy. The total employee compensation effects are derived using the IMPLAN input-output model and are estimated to be \$10,100,000. This represents the estimate of the total annual labor income effects for the Seward area economy, including the direct and secondary (indirect and induced) labor income effects.



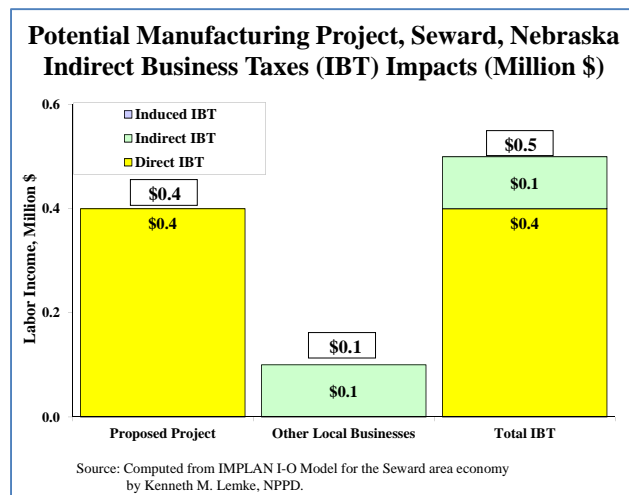
Total Output Effects:

The total annual value of output directly associated with the proposed manufacturing facility, is estimated to be \$100,000,000. The estimate of direct impacts is based on data from the Seward County IMPLAN model. When the secondary output effects are added, it is estimated the total output effects associated with the proposed manufacturing facility total \$110,200,000, including the direct and secondary (indirect and induced) output impacts.



Indirect Business Taxes (IBT) Effects

Annual IBT directly associated with the proposed project are estimated to be \$400,000. Secondary IBT effects (indirect and induced) are estimated to total \$100,000, and total IBT are estimated to be \$500,000.



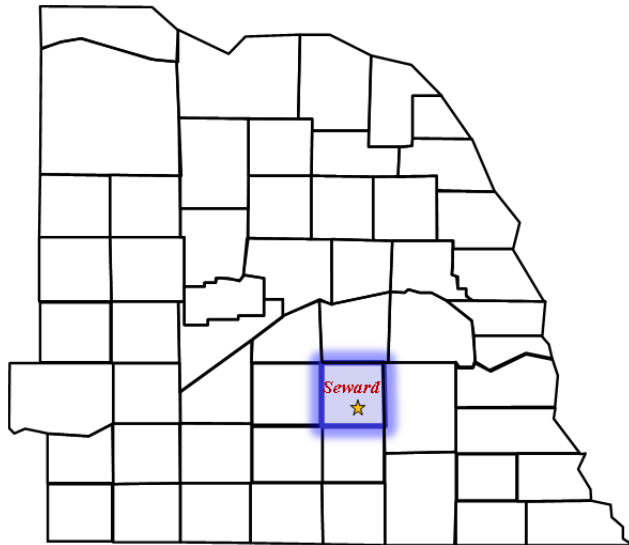
Economic Impact Assessment Proposed Manufacturing Facility, Seward, Nebraska

Introduction

This report presents the estimated economic impact associated with the operation of the proposed manufacturing facility, in Seward (Seward County), Nebraska. The methodology utilizes a computerized input-output model constructed for the Seward Study Area economy that is defined, for the purposes of this analysis, as Seward County in Nebraska. This model was developed with the 2013 Micro IMPLAN database and input-output modeling software. The IMPLAN database consists of 21 economic and demographic variables for 536 industrial sectors for each of the more than 3,000 counties in the United States. Some of these variables include employment, payments to labor, payments to other factors of production, and output by industry sector, as well as government and household purchases.

The IMPLAN database and computer modeling software has been utilized to construct an input-output model for the Seward area, which identifies inter-industry linkages within the area economy. From this model, multipliers are developed (employment, labor income, output, and indirect business taxes (IBT)) which are applied to assess the total estimated employment and other economic effects associated with the operation of the facility.

Figure One
Proposed Manufacturing Project
Study Area, Seward, Nebraska



Direct Economic Effects

Data about the operation of the proposed manufacturing facility were provided by Seward County Economic Development. As the data presented in Table One indicate, the proposed manufacturing facility would directly increase local employment by about 150.0 jobs and increase annual employee compensation by \$7,600,000.

Table One
Direct Effects Associated with
Proposed Manufacturing Facility
Seward, Nebraska Area^(a)

Employees (F.T.E. Number)	150
Employee Compensation	\$7,600,000

^(a) The Seward Area includes Seward County in Nebraska.

Source: Data provided by Seward County Economic Development.

The IMPLAN I-O modeling software and database contains economic sectors that could be representative of the economic activities associated with the proposed manufacturing facility. Following discussions with Seward County Economic Development, the IMPLAN sector most likely to reflect the type of activities at the proposed production facility was selected. Due to confidentiality requirements, the name and IMPLAN number of that sector are not disclosed in this report.

Economic Impact Analysis

As previously stated, to analyze the potential economic effects associated with the operation of the proposed manufacturing facility, an input-output model was developed for the Seward Study Area economy using the IMPLAN database and input-output modeling software. Also, as previously noted, an IMPLAN sector was selected and utilized to model the types of economic activities associated with this facility.

Table Two presents the output, employment, employee compensation, and IBT multipliers estimated from the IMPLAN input-output model for the Seward Study Area economy and the facility. These multipliers were applied to the direct economic effects estimated for the facility to obtain the estimated total employment and economic impacts associated with the facility.

Table Two
Proposed Manufacturing Facility
Input-Output Multipliers
Seward, Study Area^(a)

Multipliers*	Direct	Indirect	Induced	Total	Multipliers^(b)	
					Type I^(c)	Type SAM^(d)
Output (Million \$)	1.0000	0.0660	0.0360	1.1020	1.0660	1.1020
Employment	1.5000	0.5100	0.3101	2.3201	1.3400	1.5467
Employee Compensation (Million \$)	0.0760	0.0170	0.0080	0.1010	1.2237	1.3290
Indirect Business Taxes (IBT)	10.0040	2.5010	0.0000	12.5050	1.2500	1.2500

* Direct, Indirect, Induced, and Total effects are per million dollars of output.

^(a) The Seward Area includes Seward County in Nebraska.

^(b) The multipliers are calculated using the data from proposed manufacturing facility and the IMPLAN model for the Seward Study Area.

^(c) Type I = (Direct + Indirect) / Direct.

^(d) Type SAM = (Direct + Indirect + Induced) / Direct.

Source: Calculated for the Seward Study Area economy using the Micro IMPLAN database and computer software.

Estimated Economic Effects Associated with the Operation of the Proposed Manufacturing Facility

As the data provided in Table One suggest, the analysis of the economic effects associated with the operation of the proposed manufacturing facility starts with the direct impacts the facility would produce. Table One provides basic data on employment and employee compensation associated with the types of economic activities the operation of this facility would generate. Using these estimates, in conjunction with the multiplier values that were derived from the IMPLAN I-O model for the Seward area economy (see Table Two), estimates of the total employment and other economic effects estimated for the project have been prepared and are displayed in Table Three.

Table Three
Estimated Economic Impacts Associated with the
Proposed Manufacturing Project

Employment Effects	
Direct Employment (FTE)	150.0
Indirect Employment (0.3400 of Direct)	51.0
Induced Employment (0.2067 of Direct)	31.0
Total Employment	232.0
Employee Compensation Effects (Million \$)	
Direct Employee Compensation	\$7.6
Indirect Employee Compensation (0.2237 of Direct)	\$1.7
Induced Employee Compensation (0.1053 of Direct)	\$0.8
Total Employee Compensation Effects	\$10.1
Output Effects (Million \$)	
Direct Output	\$100.0
Indirect, Output (0.066 of Direct)	\$6.6
Induced, Output (0.036 of Direct)	\$3.6
Total Output	\$110.2
Indirect Business Taxes Effects	
Direct Indirect Business Taxes	\$0.4
Indirect, Indirect Business Taxes (0.2500 of Direct)	\$0.1
Induced, Indirect Business Taxes (0.0000 of Direct)	\$0.0
Total Indirect Business Taxes	\$0.5

Source: Computed from the data presented in Tables One and Two and from the IMPLAN input-output model constructed for the Seward Study Area economy.

- Employment Effects

As indicated in Table One, the annual employment directly related to the operation of the proposed manufacturing facility is 150.0 employees. The direct, induced, and total employment effects resulting from the increase in economic activity associated with the operations of the facility are presented in Table Three. As these data indicate, it is estimated the total employment effects associated with the operation of the facility results in an increase of 232.0 jobs (150.0 direct and 82 indirect and induced jobs).

- Employee Compensation Effects

The increase in employment and economic activity resulting from the operation of the facility results in a significant increase in employee compensation for the Seward area economy. The direct effect on total employee compensation presented in Table One is \$7,600,000. As the data in Table Three indicate, when the multiplier values provided in Table Two are applied to the direct employee compensation, the total employee compensation for the project are estimated to be \$10,100,000.

- Total Output Effects

Total output directly associated with the operation of proposed manufacturing facility, is estimated at \$100,000,000 annually. As the data presented in Table Three show, the total output effects of the project, including the direct, indirect, and induced effects, are estimated to be \$110,200,000.

- IBT Effects

Total IBT associated with the operation of proposed manufacturing facility, is estimated at \$400,000 annually. This value is net of estimated incentives the project is assumed to receive from the Nebraska Advantage Act. As the data presented in Table Three show, the total IBT effects of the project, including the direct, indirect, and induced effects, are estimated to be \$500,000.

- Retail Sales Effects

The proposed manufacturing facility also has additional positive effects on the Seward area economy, including increased sales tax revenues. This section of the report considers the estimated positive effect of the facility on retail sales in the Seward area.

Table Four presents data on total personal income and non motor vehicle taxable retail sales for the Seward area economy for the period, 2004–2013. Also shown is the relationship between total personal income and total retail sales for this period. As the data presented in Table Four indicate, retail sales for the Seward Study Area have averaged 20.16 percent of the total personal income during this period. Statewide, non motor vehicle retail sales averaged 36.51 percent of the total personal income during the same 2004–2013 period.

Table Four
Total Personal Income and Retail Sales,
Seward Study Area^(a), 2004–2013

Year	Total Personal Income	Total Retail Sales	Retail Sales as % of Tot. Pers. Inc.
	(\$1,000)	(\$1,000)	(%)
2004	526,347	118,045	22.43
2005	532,680	120,587	22.64
2006	547,868	122,304	22.32
2007	609,331	131,705	21.61
2008	663,196	129,400	19.51
2009	655,338	127,433	19.45
2010	665,568	135,218	20.32
2011	746,310	139,921	18.75
2012	803,565	147,572	18.36
2013	832,824	154,934	18.60
Average, 2004–2013			20.16

^(a) The Seward Study Area includes Seward County in Nebraska..

Sources: Total personal income: U.S. Dept. of Commerce, Bureau of Economic Analysis; Retail Sales Data: Nebraska Dept. of Revenue.

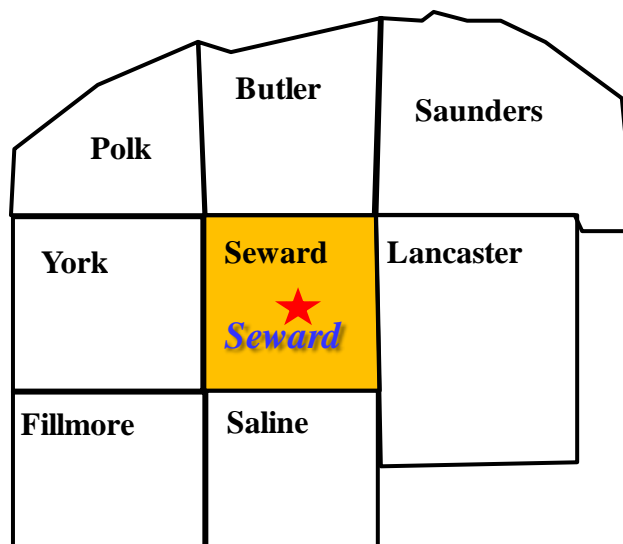
To estimate the level of non motor taxable retail sales associated with the operation of the proposed manufacturing facility, it is assumed that area retail sales increase by 20.16 percent (the statewide value) of the estimated increase in total employee compensation associated with the business. The estimated annual increase in total retail sales for the Seward County area economy is \$2,036,000 annually (\$10,100,000 estimated increase in total employee compensation x 0.2016)..

If further information about this analysis is desired or if the reader has questions about any aspect of this report, please contact:

**Kenneth M. Lemke, Ph.D.
Economist
Nebraska Public Power District
1414 15th Street - Box 499
Columbus, NE 68602-0499**

**Telephone: (402) 563-5535 or (800) 282-6773
Email: kmlemke@nppd.com**

Labor Supply Factors and Labor Availability for the City of Seward (Seward County) Labor Area



September 2014

Prepared by:

Kenneth M. Lemke, Ph.D.
Economist
Nebraska Public Power District
1414 15th Street - P.O. Box 499
Columbus, Nebraska 68602-0499
(800) 282-6773, Ext. 5535
E-Mail: kmlemke@nppd.com
Web Site: econdev.nppd.com

Labor Supply Factors and Labor Availability for the City of Seward (Seward County) Labor Area

Executive Summary

The information provided in this report indicates that a prospective new employer providing job opportunities with competitive wages and benefits and offering career opportunities would be a welcome addition to the employment base in the City of Seward Labor Area. The response to such employment opportunities would be substantial, and as this report shows, there is a sizeable labor force and population base living within the City of Seward Labor Area. Pertinent findings of the report include:

- Population in the City of Seward Labor Area (Seward County plus the seven contiguous counties) totaled 382,638 people in 2013, with the Seward County population totaling 17,089. Population in Seward County grew by 2.0 percent during the period 2010–2013, compared to a population increase of 3.3 percent for the eight-county City of Seward Labor Area as a whole.
- The City of Seward Labor Area labor force totaled 215,221 in 2013, with 207,557 residents employed in jobs either within or outside the area. A total of 192,569 persons were employed in nonfarm wage and salary jobs¹ within the area.
- In 2011, 1,677 primary jobs (56.2 percent) held by residents of the City of Seward and 4,536 primary jobs (62.8 percent) held by Seward County residents were located outside Seward County. This confirms a large number of Seward County residents are commuting to jobs in other counties.
- Average annual wages for all nonfarm wage and salary employees in the City of Seward Labor Area were \$1,303 less than the Nebraska average. Within the labor area, Lancaster County had the highest average wage, \$39,553 or \$415 below the the Nebraska average. In Seward County, average annual salaries were \$4,422 less than the state average.

The basic conclusion of this report, which follows from the data and analysis presented, is that the City of Seward Labor Area and Seward County would be able to provide a significant number of dedicated and skilled workers to meet the needs of additional employers in the area. While this report has not estimated a precise number of people that may be available for a prospective new employer in the City of Seward area, it is anticipated that if attractive working conditions with competitive wages and employee benefits were offered, a prospective new employer would be able to select their workforce from a substantial pool of applicants.

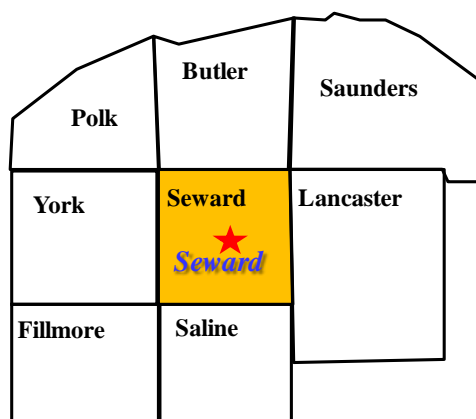
¹ Nonfarm wage and salary employment data are derived from businesses subject to State unemployment insurance laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees program. Nonfarm wage and salary employment data includes 99.7 percent of all wage and salary civilian employment. Self-employed workers, unpaid family workers, workers in certain not-for-profit organizations, and several other small (primarily seasonal) worker categories are not included.

Labor Supply Factors and Labor Availability for the City of Seward (Seward County) Labor Area

This report presents selected labor-related and demographic data that provide insights into the labor supply situation in City of Seward (Seward County) and the surrounding area.

In reviewing the data presented in this report, it will be evident that the City of Seward Labor Area has a sizeable pool of labor to provide for the labor requirements of additional employers in the area, both in the near term and over the long run. Data presented in this report includes tables on labor force, employment, and population for Seward County and for the surrounding counties that make up the potential laborshed area for City of Seward. Figure One includes a map outlining the geographic area which has been defined as the City of Seward Labor Area.

Figure One
Seward Labor Area



An important resource for new or expanding businesses is a readily available supply of workers. Whether an employer requires 5 or 500 workers, they need to have confidence there will be a sufficient number of workers available to meet their labor requirements. This report is provided as a key analytical tool to identify and quantify the number and selected characteristics of workers available in the City of Seward Labor Area.

Available labor supply is defined as the number of persons who would potentially apply for employment when a job becomes available. Potential workers are categorized into two groups; those currently employed who would consider other employment opportunities and those who do not currently have a job.

One factor contributing to the available supply of workers is the willingness of workers already employed to change jobs. Factors influencing this decision are related to wages, fringe benefits, hours, and working conditions. Generally, workers are more inclined to change jobs when the wages and benefits for the potential new job are better and/or when they are optimistic about the economy.

Factors contributing to the available supply of people without jobs include the unemployment rate, labor force participation, and migration. To be classified as unemployed, an individual must have been actively looking for work in the last four weeks, unless they were expecting recall from a layoff or waiting to start a job within 30 days.

There are also potential workers that are classified as not presently in the labor force. These individuals may not be participating in the labor force as employed or unemployed

workers for various reasons. They may be unable to work because of school or family responsibilities or they may have an illness that has prevented them from becoming part of the labor force. There may also be workers who have not been able to find employment in the past and have become discouraged or who are no longer actively seeking employment because they perceive there are no attractive job opportunities available in the area. Retired persons are also classified as not in the labor force, although this population group often can provide substantial labor resources for selected business operations. Within the group of persons not currently in the labor force, and therefore not actively seeking employment, are many individuals who would accept a job with attractive working conditions, competitive wages, and employee benefits if one became available.

Population migration is another factor that affects the available labor supply of potential workers who are not presently employed (and may not be seeking work within the local labor market). Persons without jobs and who perceive that there are no job opportunities available locally are the most likely to leave (migrate out) the area for employment opportunities elsewhere.

Labor Force and Employment

Table One provides data showing labor force and employment trends for the City of Seward Labor Area and for Seward County for selected years from 2008 to 2013. Data in Table One (Part A and Part B) provide two alternate measures of employment for two distinct areas. Data presented in Table One, Part A include labor force, unemployment, employment, and nonfarm wage and salary employment data for the entire City of Seward Labor Area (see Figure One). As these data indicate, the total labor force and total employment for the laborshed area as a whole both increased, with the area labor force growing by 3.8 percent between 2008 and 2013 and total employment growing by 3.2 percent during the same period.

Table One
Labor Force and Employment, City of Seward Labor Area^(a), 2008–2013
Part A

Labor Force and Employment City of Seward Labor Area^(a), 2008–2013							% Chg. 2008–2013
(Place of Residence)	2008	2009	2010	2011	2012	2013	
Labor Force^(b)	207,436	205,406	206,538	209,192	213,371	215,221	3.8
Unemployment (#)	6,379	9,024	8,816	8,503	7,711	7,664	20.1
Unemployment Rate (%)	3.1	4.4	4.3	4.1	3.6	3.6	(N/A)
Employment	201,057	196,382	197,722	200,689	205,660	207,557	3.2
(Place of Work)							
Nonfarm Employment^(c)	188,579	184,259	183,528	184,865	189,411	192,569	2.1

Table One continued on following page; notes and sources on following page.

Table One — Continued
Part B
Labor Force and Employment by Industry
Seward County, NE

(Place of Residence)	2008	2009	2010	2011	2012	2013	% Chg. 2008–2013
Labor Force ^(b)	9,112	8,780	8,824	8,785	8,995	9,122	0.1
Unemployment (#)	292	363	350	335	301	337	15.4
Unemployment Rate (%)	3.2	4.1	4.0	3.8	3.3	3.7	(N/A)
Employment	8,820	8,417	8,474	8,450	8,694	8,785	-0.4
(Place of Work)							
Nonfarm Employment ^(c)	5,704	5,666	5,775	5,976	6,183	6,354	11.4
Goods Producing	1,558	1,548	1,534	1,691	1,842	1,957	25.6
Manufacturing	958	933	948	1,109	1,188	1,172	22.3
Natural Resources	262	320	293	289	341	397	51.5
Construction	338	295	293	293	313	388	14.8
Service Providing	3,034	2,983	3,090	3,172	3,210	3,245	7.0
Trans., Warehousing & Utilities	1,075	1,107	1,134	1,103	1,138	1,156	7.5
Information	47	46	47	50	55	55	17.0
Financial Activities	244	238	243	237	232	231	-5.3
Professional & Business Services	254	206	212	250	236	242	-4.7
Education & Health Services	849	854	909	930	920	960	13.1
Leisure and Hospitality	436	398	405	452	455	459	5.3
Other Services, except Public	131	134	140	150	174	143	9.2
Total Government	1,112	1,135	1,152	1,114	1,131	1,152	3.6
Federal Government	58	58	56	53	52	52	-10.3
State Government	44	49	47	35	43	44	0.0
Local Government	1,010	1,028	1,049	1,026	1,036	1,056	4.6

^(a) The Seward Labor Area includes Seward and the contiguous counties (Butler, Fillmore, Lancaster, Polk, Saline, Saunders, and York).

^(b) The labor force data are measured based on the county of residence, irrespective of the county of employment.

^(c) The Nonfarm Employment data are for wage and salary employment and are based on the place (county) where the individual is employed, irrespective of the county of residence.

Source: U.S. Bureau of Labor Statistics, www.bls.gov/cew/.

The second employment measure presented for the City of Seward Labor Area, nonfarm wage and salary employment increased from 188,579 in 2008 to 192,569 in 2013, an increase of 2.1 percent. In the case of the labor force data (labor force, unemployment, and employment), the respective measures are based on the county of residence. The nonfarm wage and salary employment data are measured based on the county of employment, irrespective of the place of residence of the workers.

The labor force and employment measures presented for Seward County (Table One, Part B) above indicate that the total labor force in the county grew by 0.1 percent between 2008 and 2013, with total employment (of people residing in Seward County, irrespective of their county of employment) declining by 0.4 percent during this period. It is also of interest to note that unemployment increased by 15.4 percent, from 292 in 2008 to 337 in 2013.

As previously noted, the second employment measure presented for Seward County, nonfarm wage and salary employment, is based on the county where the person is employed irrespective of their county of residence. Nonfarm wage and salary employment in Seward County grew by 11.4 percent between 2008 and 2013. Data presented in Table One, Part B show that the fastest growing employment sector in Seward County during the 2008–2013 review period was the Natural Resources and Mining sector, recording a 51.5 percent increase between 2008 and 2013. Other economic sectors experiencing significant growth in employment between 2008 and 2013 include Manufacturing (22.3 percent), Information (17.0 percent), and Construction (14.8 percent). In the case of the Total Government Sector, employment in the State Government Sector was unchanged, while Federal Government Sector employment declined by 10.3 percent and Local Government Sector employment grew by 4.6 percent.

A review of the employment data reported for the City of Seward Labor Area (Table Two) indicates differences between the nonfarm wage and salary employment reported in each of the counties and the total employment of persons living in these respective areas. In the case of the entire City of Seward Labor Area, nonfarm wage and salary employment was reported to be 192,569 in 2013, which was significantly less (14,988) than the reported total employment of persons living within the eight-county City of Seward Labor Area.

Table Two
Labor Force, Employment, and Nonfarm Wage and Salary Employment,
City of Seward Labor Area, 2013

County	Labor Force 2013 ^(a)	Total Employment 2013 ^(a)	Nonfarm	Total Employment Minus NF W&S Employment	Agricultural Employment 2012 ^(c)
			Wage & Salary Employment 2013 ^(b)		
Seward	9,122	8,785	6,354	2,431	879
Butler	5,087	4,923	2,592	2,331	750
Fillmore	3,350	3,244	2,236	1,008	523
Lancaster	167,515	161,617	160,358	1,259	1,522
Polk	3,108	3,004	1,470	1,534	523
Saline	8,665	8,338	6,877	1,461	652
Saunders	10,994	10,542	4,928	5,614	1,093
York	7,380	7,104	7,754	-650	567
Labor Area	215,221	207,557	192,569	14,988	6,509

^(a) Labor force and employment data are measured based on the county of residence.

^(b) Nonfarm Employment data are for wage and salary employment and are based on the place (county) where the individual is employed, irrespective of the county of residence.

^(c) Agricultural employment data are for 2012.

Sources: Labor Data - U.S. Bureau of Labor Statistics, www.bls.gov/lau/#data.

Farm Employment Data - U.S. Bureau of Economic Analysis, Regional Accounts Data
www.bea.gov/regional/reis/.

There are two major reasons for differences in the total employment and nonfarm employment values. First, nonfarm wage and salary employment excludes self-employed workers, unpaid family workers, workers in certain not-for-profit organizations, and several other small (primarily seasonal and farm) worker categories—these workers are included in estimates of total employment. Second estimates of nonfarm wage and salary

employment is based on the area where the jobs (businesses) are located while estimates of total employment are based on the area where workers live.

Table Two also includes information on agricultural employment, which includes farm proprietors. As shown in Table Two, 6,509 people in the City of Seward Labor Area were employed in agriculture in 2012, the last year that agricultural employment data were available. It is important to note, that for Nebraska as a whole, approximately 32.0 percent of farm operators also have a full-time job off the farm and 49.0 percent work off the farm, either in full- or part-time employment.

The number of nonfarm wage and salary workers in the City of Seward Labor Area is shown by major industry sector and by county in Table Three. The reader is reminded that nonfarm wage and salary workers are counted in the county where they are employed. Individuals with more than one job are counted at each establishment (and in each county) where they work. Table Three provides information about the number of workers in the labor area by county and major industry category.

Table Three
Nonfarm Wage and Salary Employment, by Industry Sector
City of Seward Labor Area, by County, 2013

County	Nat. Res. & Mining	Manuf.	Const.	Trade, Trans. & Util.	Ed. & Health Svc.	Leis. & Hosp.	Fin. Act.	Other Svc.	Govt.
Seward	397	1,172	388	1,156	960	459	231	439	1,152
Butler	155	632	101	448	289	75	96	145	651
Fillmore	115	194	205	458	206	88	135	119	716
Lancaster	403	12,449	7,062	31,041	23,592	16,432	11,920	25,589	31,870
Polk	157	16	74	343	191	52	48	70	519
Saline	41	2,744	50	1,047	695	318	154	354	1,474
Saunders	142	283	478	913	498	504	234	355	1,522
York	510	842	289	1,560	1,204	844	383	906	1,218
Labor Area	1,920	18,332	8,647	36,966	27,635	18,772	13,201	27,977	39,122
Nebraska	14,443	96,462	44,175	189,214	129,831	85,744	62,446	152,194	158,121

Percent of Total Nonfarm Wage & Salary Employment

	Nat. Res. & Mining	Manuf.	Const.	Trade, Trans. & Util.	Ed. & Health Svc.	Leis. & Hosp.	Fin. Act.	Other Svc.	Govt.
Labor Area	1.0	9.5	4.5	19.2	14.4	9.7	6.9	14.5	20.3
Nebraska	1.5	10.3	4.7	20.3	13.9	9.2	6.7	16.3	17.0

* Values are estimates by Dr. Ken Lemke, Nebraska Public Power District.

Source: U.S. Bureau of Labor Statistics, www.bls.gov/cew/.

In addition to displaying the number of workers by major industry sector, Table Three also compares the percentage distribution of workers by industry in the City of Seward Labor Area with the distribution for the State of Nebraska. As these data show, the industry distribution of employment for the City of Seward Labor Area is significantly different than that for Nebraska as a whole.

The most significant deviations between Nebraska and the City of Seward Labor Area occur in the Education and Health Services sector employment, with 14.4 percent of nonfarm wage and salary workers in the City of Seward area employed in that sector,

compared to 13.9 percent for Nebraska. Conversely, only 14.5 percent of nonfarm wage and salary workers in the City of Seward Labor Area are employed in the Other Services sector, compared to 16.3 percent for Nebraska as a whole.

Table Four, Part A provides data showing labor cost comparisons, by county, for all private wage and salary workers for the City of Seward Labor Area. It is important to remember that the wage and salary employment is reported by county of employment and does not provide an indication of the average weekly and annual wage for residents of the respective counties. Obviously, labor cost is an important consideration in any analysis of the labor availability in an area. Pay data for workers covered by unemployment insurance laws in Nebraska are the source of the labor cost information. Average annual pay is calculated by dividing the total payroll for wage and salary workers by the average annual number of employees.

A review of the data in Table Four, Part A indicates that average annual salaries in Seward County (\$35,546 for all wage and salary employees for all private industries) are lower than for the City of Seward Labor Area as a whole and two of the other counties that make up the area. Also, Seward County average annual salaries are \$4,422 (11.1 percent) less than the state average. Average annual salaries for the City of Seward Labor Area (\$38,665) were \$1,303 (3.3 percent) less than the Nebraska average. These data suggest, of course, there would be a positive labor supply response in Seward County to the creation of additional employment opportunities with competitive wages and benefits.

Table Four
Average Pay by Industry Groups, City of Seward Labor Area & Nebraska, 2013

Part A			
Average Annual Pay and Average Weekly Wages by Industry Groups			
All Covered^(a) Wage and Salary Workers, All Industries			
County	Average Employment	Average Weekly Wages	Average Annual Wages
Seward	6,354	\$684	\$35,546
Butler	2,592	\$637	\$33,099
Fillmore	2,236	\$645	\$33,536
Lancaster	160,358	\$761	\$39,553
Polk	1,470	\$592	\$30,762
Saline	6,877	\$703	\$36,538
Saunders	4,928	\$597	\$31,042
York	7,754	\$662	\$34,415
Labor Area	192,569	\$742	\$38,665
Nebraska	932,629	\$769	\$39,968

Table Four continued on following page.

Table Four — Continued

Part B
Average Annual Pay All Covered^(a) Wage and Salary Workers
By Selected Industry Groups

County	Goods-Producing	Manufacturing	Construction	Service-Providing	Trade, Transportation, and Utilities	Financial Activities	Professional and Business Services	Leisure and Hospitality
Seward	\$40,574	\$49,583	\$35,288	\$31,367	\$34,898	\$52,185	\$36,560	\$9,556
Butler	\$37,116	\$37,904	\$35,245	\$29,103	\$29,277	\$39,198	\$40,173	\$8,472
Fillmore	\$45,371	\$39,235	\$43,203	\$29,535	\$32,624	\$44,146	\$30,014	\$8,424
Lancaster	\$46,553	\$49,640	\$42,581	\$36,060	\$33,332	\$51,612	\$45,718	\$13,377
Polk	\$34,111	\$15,689	\$30,686	\$29,240	\$35,028	\$36,850	\$25,563	\$7,288
Saline	\$46,242	\$46,809	\$25,248	\$28,016	\$30,925	\$42,063	\$38,117	\$8,740
Saunders	\$37,904	\$40,351	\$37,312	\$27,265	\$31,124	\$43,892	\$42,071	\$10,400
York	\$44,515	\$49,104	\$40,453	\$29,837	\$32,327	\$39,923	\$36,532	\$12,426
Nebraska	\$43,187	\$44,131	\$43,364	\$38,399	\$34,416	\$55,744	\$52,851	\$13,893

^(a) Includes employers that are subject to Nebraska Employment Security Laws.

Source: U.S. Bureau of Labor Statistics, www.bls.gov/cew/.

Table Four, Part B provides average annual wages, by county and by major industry sector, for the counties that make up the City of Seward Labor Area. As the data in Table Four Part A indicate, the highest overall average annual wages in the area are for wage and salary workers employed in Lancaster County. The average annual wage for all wage and salary workers (working) in Lancaster County was \$39,553 in 2013 which was \$888 (2.3 percent) higher than the average for the City of Seward Labor Area as a whole, and \$415 (1.0 percent) less than the Nebraska average. A review of the industry specific data for average annual wages for Lancaster indicates that the high average annual wage results from the extremely high average wage in the construction.

Table Five provides information on entry, average, and experienced wages for selected occupations across all industry groups for businesses located in the Lincoln, NE MSA Region of Nebraska. Entry level and experienced wage rates represent the means of the lower third and upper two-thirds of the wage distribution, respectively.

Table Five
Entry, Average, and Experienced Hourly Wage Levels, Selected Occupations
Lincoln, NE MSA Region of Nebraska, 1st Quarter, 2014

Occupation	Average	Entry Level	Experienced
Education, Training, and Library Occupations	24.59	12.92	30.43
Healthcare Practitioners and Technical Occupations	32.85	16.66	40.94
Registered Nurses	27.03	20.95	30.08
Protective Service Occupations	19.41	11.26	23.48
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	26.89	15.28	32.70
Construction and Extraction Occupations	18.39	11.71	21.73
Installation, Maintenance, and Repair Occupations	20.62	13.15	24.35
Production Occupations	16.90	10.28	20.22
First-Line Supervisors of Production and Operating Workers	29.40	20.04	34.06
Team Assemblers	14.95	9.50	17.69
Welders, Cutters, Solderers, and Brazers	19.08	14.58	21.34
Inspectors, Testers, Sorters, Samplers, and Weighers	18.46	12.15	21.61
Transportation and Material Moving Occupations	18.10	9.65	22.33
Heavy and Tractor-Trailer Truck Drivers	24.04	20.00	26.07
Laborers and Freight, Stock, and Material Movers, Hand	12.26	8.76	14.00

Source: Nebraska Department of Labor, Office of Labor Market Information, Occupational Employment Statistics, July, 2014

Commuting Patterns

Table Six provides data from the 2011 U.S. Census, Local Employment Dynamics Program showing commuting patterns for workers living in the City of Seward Labor Area. Data in Table Six indicate, a significant number (and percentage) of workers in the area commuted outside of their county of residence for employment. Data for Seward County indicate that 4,536, or 62.8 percent of the employed workers, commuted to other counties for employment. For three of the other counties in the City of Seward Labor Area, the percentage of commuters was greater than for Seward County. In the case of Saunders County, 7,187, or 78.2 percent of employed workers commuted out of their county of residence for employment. Other counties with a high percentage of employed workers commuting to other counties for employment include Polk (74.6 percent), Butler (66.5 percent), Saline (55.1 percent), and Fillmore with 53.2 percent of employed workers commuting out of their county of residence for employment.

Table Six
Commuting Patterns, City of Seward Labor Area
Jobs Outside County of Residence, 2011

County	County Residents Working Outside County	
	Number	Percent
Seward	4,536	62.8
Butler	2,561	66.5
Fillmore	1,197	53.2
Lancaster	20,127	15.7
Polk	1,725	74.6
Saline	3,520	55.1
Saunders	7,187	78.2
York	2,627	28.6

Source: U.S. Bureau of the Census, *Local Employment Dynamics*
<http://lehdmap4.did.census.gov/themap4/>.

Table Seven provides further detail illustrating the willingness of workers in the City of Seward and Seward County to travel for employment. In 2011, residents of Seward County worked at a total of 7,224 jobs; a resident could work at more than one job. Of these 7,224 jobs, the largest number, 2,688 or 37.2% percent, were located in Seward County, while 2,564 or 35.5% percent were located in Lancaster County. Other counties with high numbers of workers from Seward County were Douglas (427 jobs), York (259 jobs), and Saline (201 jobs).

Also in 2011, residents of the City of Seward worked at a total of 2,982 jobs with the largest number, 1,305 or 43.8% percent located in Seward County. Other counties with large numbers of workers from the City of Seward included Lancaster (971 jobs), Douglas (192 jobs), York (71 jobs), and Saline (40 jobs).

Table Seven
Commuting Patterns, City of Seward Labor Area
Location of Jobs Held by the City of Seward and Seward County Residents, 2011

County Where Jobs are Located	Primary Jobs Held by City of Seward Residents	Percent City of Seward Residents' Primary Jobs	Primary Jobs Held by Seward County Residents	Percent Seward County Residents' Primary Jobs
Seward	1,305	43.8%	2,688	37.2%
Lancaster	971	32.6%	2,564	35.5%
Douglas	192	6.4%	427	5.9%
York	71	2.4%	259	3.6%
Saline	40	1.3%	201	2.8%
All Other Locations	403	13.5%	1,085	15.0%
Total Resident Jobs	2,982	100.0%	7,224	100.0%

Source: U.S. Bureau of the Census, *Local Employment Dynamics*, <http://lehdmap4.did.census.gov/themap4/>.

Table Eight provides data showing the willingness of workers in other counties to commute to the City of Seward and Seward County for employment. In 2011, 1,447 or 45.6 percent of the 3,174 primary jobs in the City of Seward were held by residents of other counties. Lancaster County was home to the greatest number of workers commuting into the City of Seward from outside Seward County, 368 or 11.6 percent. Other counties with large numbers of workers commuting into the City of Seward for their primary jobs included Saline, 120 or 3.8 percent; Butler, 112 or 3.5 percent; Douglas, 66 or 2.1 percent; and York, 65 or 2.0 percent.

Data in Table Eight indicate 2,792 (50.9 percent) of the 5,480 primary jobs in Seward County were held by workers commuting from other counties. In 2011, Lancaster County was home to the greatest number of workers commuting into Seward for primary jobs, 792 or 14.5 percent. Other counties with large numbers of workers commuting into Seward County for their primary jobs included, York, 188 or 3.4 percent; Saline, 187 or 3.4 percent; Butler, 140 or 2.6 percent; Douglas, 103 or 1.9 percent; and Fillmore, 75 or 1.4 percent.

Table Eight
Commuting Patterns, City of Seward Labor Area
Sources of the City of Seward and Seward County Workers, 2011

County Where Workers Live	Number of Primary Jobs in City of Seward	Percent of Primary Jobs in City of Seward	Number of Primary Jobs in Seward County	Percent of Primary Jobs in Seward County
Seward	1,727	54.4%	2,688	49.1%
Lancaster	368	11.6%	792	14.5%
York	65	2.0%	188	3.4%
Saline	120	3.8%	187	3.4%
Butler	112	3.5%	140	2.6%
Douglas	66	2.1%	103	1.9%
Fillmore	0	0.0%	75	1.4%
All Other Locations	716	22.6	1,307	23.9%
Total Primary Jobs	3,174	100.0	5,480	100.0

Source: U.S. Bureau of the Census, *Local Employment Dynamics*,
<http://lehdm4.did.census.gov/themap4/>.

Appendix A, *2014 Commuting Patterns Workers at Three, Large City of Seward, Nebraska Employers*, contains information from three large City of Seward employers about the residences of their workers. These data were collected in July of 2014 and indicate 63.6 percent of the workers lived within a 15-mile radius of the City of Seward and 97.4 percent lived within a 30 mile radius. The longest commute was from Cozad, a distance of about 150 miles.

Table Nine provides data for Seward County showing the number of primary jobs (Workforce) located in the county and the number of primary jobs held by county residents (Labor Force Employment) by industry in 2011. When the Workforce for an industry exceeds the Labor Force (positive values in the last column of Table Nine), the difference between these values represents the net number of jobs in Seward County held by workers commuting into the county from other areas. If the Workforce is less than the Labor Force (negative values in the last column of Table Nine), the difference represents the net number of jobs held outside of Seward County by county residents.

As data in Table Nine indicate, residents of Seward County were employed in 7,224 primary jobs in 2011, but there were 5,480 primary jobs within the area. This indicates residents commuted to at least 1,744 primary jobs outside the study area. It is important to note this is an estimate of net out-commuting and most certainly understates the actual number of primary jobs in other counties held by area residents.

Table Nine
Primary Jobs, Seward County, 2011
Resident Labor Force and Employers Workforce

Industry	Labor Force Employment (Employment of Area Residents)	Workforce (Area Jobs)	Net Number of Jobs Held by Workers Commuting Into Seward County^(a)
Agriculture, Forestry, Fishing and Hunting	113	147	34
Mining, Quarrying, and Oil and Gas Extraction	8	0	-8
Utilities	56	21	-35
Construction	385	274	-111
Manufacturing	1,185	1,139	-46
Wholesale Trade	336	283	-53
Retail Trade	684	475	-209
Transportation and Warehousing	357	326	-31
Information	71	53	-18
Finance and Insurance	349	213	-136
Real Estate and Rental and Leasing	53	24	-29
Professional, Scientific, and Technical Services	255	165	-90
Administration & Support, Waste Management and Remediation	199	93	-106
Management of Companies and Enterprises	62	8	-54
Educational Services	822	815	-7
Health Care and Social Assistance	956	661	-295
Arts, Entertainment, and Recreation	84	55	-29
Accommodation and Food Services	454	275	-179
Other Services (excluding Public Administration)	189	122	-67
Public Administration	606	331	-275
Total	7,224	5,480	-1,744

^(a) A negative value indicates the net number of primary jobs outside of the area held by City of Seward Labor Area residents.

Source: U.S. Bureau of the Census, *Local Employment Dynamics*, <http://lehdmap4.did.census.gov/themap4/>.

Population Trends

The data provided in Table Ten show population trends for the City of Seward Labor Area, by county, and for Nebraska for the period 1960–2013. As these data indicate, the population of the City of Seward Labor Area was 370,493 in 2010. The City of Seward Labor Area population grew by 54.8 percent from 1960 to 2010 and grew 3.3 percent from 2010 to 2013. Population in Seward County totaled 16,750 in 2010 and had grown by 23.3 percent from 1960 to 2010. From 2010 to 2013, the Seward County population increased by 2.0 percent, compared to the increase for the City of Seward Labor Area as a whole of 3.3 percent, and to the State rate of growth of 2.3 percent.

Table Ten
Population in the City of Seward Labor Area, by County, and Nebraska
Selected Years, 1960–2013

County	1960	1970	1980	1990	2000	2010	2013	% Chg. 1960–2010	% Chg. 2010–13
Seward	13,581	14,460	15,789	15,450	16,496	16,750	17,089	23.3	2.0
Butler	10,312	9,461	9,330	8,601	8,767	8,395	8,312	-18.6	-1.0
Fillmore	9,425	8,137	7,920	7,103	6,634	5,890	5,698	-37.5	-3.3
Lancaster	155,272	167,972	192,884	213,641	250,291	285,407	297,036	83.8	4.1
Polk	7,210	6,468	6,320	5,675	5,639	5,406	5,275	-25.0	-2.4
Saline	12,542	12,809	13,131	12,715	13,843	14,200	14,416	13.2	1.5
Saunders	17,270	17,018	18,716	18,285	19,830	20,780	20,929	20.3	0.7
York	13,724	13,685	14,798	14,428	14,598	13,665	13,883	-0.4	1.6
Labor Area	239,336	250,010	278,888	295,898	336,098	370,493	382,638	54.8	3.3
Nebraska	1,411,330	1,483,493	1,569,825	1,578,385	1,711,230	1,826,341	1,868,516	29.4	2.3

Sources: U.S. Bureau of the Census, *Census of Population, 1960-2010* and *Population Estimates 2013*.

Table Eleven shows the age distribution of the resident population. Obviously, the age distribution of the population is important when evaluating the potential labor supply in an area. A key variable is the number of people in the working age populations of the counties making up the City of Seward Labor Area. In 2013, there were 7,988 people in Seward County between the ages of 25 and 64, which represented 46.7 percent of the total population, compared to 49.8 percent of the population for the City of Seward Labor Area as a whole and 50.9 percent of the Nebraska population in this age range.

Table Eleven
Age Characteristics of the Population, City of Seward Labor Area,
by County, and Nebraska, 2013

County	0-14		15-24		25-44		45-64		65-Older		Median
	Number	% ^(a)	Number	% ^(a)	Number	% ^(a)	Number	% ^(a)	Number	% ^(a)	Age
Seward	3,295	19.3	3,020	17.7	3,575	20.9	4,413	25.8	2,786	16.3	37.6
Butler	1,608	19.3	954	11.5	1,656	19.9	2,417	29.1	1,677	20.2	44.3
Fillmore	915	16.1	678	11.9	1,076	18.9	1,728	30.3	1,301	22.8	47.5
Lancaster	58,619	19.7	54,791	18.4	79,392	26.7	69,352	23.3	34,882	11.7	33.0
Polk	1,016	19.3	553	10.5	1,075	20.4	1,588	30.1	1,043	19.8	44.9
Saline	2,910	20.2	2,579	17.9	3,252	22.6	3,573	24.8	2,102	14.6	36.0
Saunders	4,319	20.6	2,410	11.5	4,488	21.4	6,176	29.5	3,536	16.9	41.9
York	2,590	18.7	1,899	13.7	3,062	22.1	3,772	27.2	2,560	18.4	40.8
Labor Area	75,272	19.7	66,884	17.5	97,576	25.5	93,019	24.3	49,887	13.0	34.7
Nebraska	390,469	20.9	262,565	14.1	476,527	25.5	474,947	25.4	264,008	14.1	36.2

^(a) Percent of total population for each respective area.

Source: U.S. Bureau of the Census, *Population Estimates 2013*.

Information in Table Twelve shows recent changes in the racial (“White Alone” and “Other Than White Alone”) and ethnic (“Hispanic” and “Non-Hispanic”) composition for the resident populations of Seward County, the City of Seward Labor Area, and Nebraska statewide. As shown in Table Twelve, total Seward County population increased by 2.7 percent during the thirteen year period while the Hispanic population increased by 91.1 percent and the Other Than White Alone & Non-Hispanic population increased by 61.0 percent. Over the same period, Seward County Labor Area population increased by 12.7 percent while the while the Hispanic population increased by 126.5 percent and the Other Than White Alone & Non-Hispanic population increased by 54.0 percent. Statewide, population increased by 8.4 percent from 2000 to 2013, while the Hispanic population increased by 90.6 percent and the Other Than White Alone & Non-Hispanic population increased by 38.0 percent.

Table Twelve
Population by Selected Race and Ethnic Origin Characteristics
Seward, City of Seward Labor Area, and Nebraska Statewide, 2000–2013

Category	2000		2013		Change 2000 - 13	
	#	%	#	%	#	%
-- -Seward County-- -						
Total Population	16,491	100.0	16,935	100.0	444	2.7
Hispanic origin	179	1.1	342	2.0	163	91.1
White Alone, Non-Hispanic Origin	16,081	97.5	16,221	95.8	140	0.9
Other Than White Alone & Non-Hispanic	231	1.4	372	2.2	141	61.0
-- -City of Seward Labor Area-- -						
Total Population	336,205	100.0	378,854	100.0	42,649	12.7
Hispanic origin	10,253	3.0	23,218	6.1	12,965	126.5
White Alone, Non-Hispanic Origin	305,701	90.9	324,453	85.6	18,752	6.1
Other Than White Alone & Non-Hispanic	20,251	6.0	31,183	8.2	10,932	54.0
-- -Nebraska, Statewide-- -						
Total Population	1,711,230	100.0	1,855,525	100.0	144,295	8.4
Hispanic origin	94,419	5.5	179,970	9.7	85,551	90.6
White Alone, Non-Hispanic Origin	1,497,082	87.5	1,510,296	81.4	13,214	0.9
Other Than White Alone & Non-Hispanic	119,729	7.0	165,259	8.9	45,530	38.0

Source: U.S. Bureau of the Census, *Population Estimates 2000 & 2013*.

Table Thirteen provides information showing population, the natural increase (births minus deaths) and net migration for the period 2000–2010 for Nebraska, for Seward County and for the City of Seward Labor Area. As these data show, the City of Seward Labor Area as a whole had a small rate of net in-migration during the Census decade of the 2000s, while Seward, Butler, Fillmore, Polk, Saline, and York Counties experienced net out-migration. As indicated in the table, net in-migration for the City of Seward Labor Area as a whole accounted for a population growth of 9,599 people during the decade, contributing to a population increase equal 2.9 percent of the population. In the case of Seward County, net out-migration during the 2000s totaled 47 people, or 0.3 percent of the 2000 population.

Table Thirteen
Population, Births, Deaths, and Migration
Nebraska and the City of Seward Labor Area by County, 2000–2010

County	Population		2000–2010			Net Migration*, 2000–2010	
	2000	2010	Births	Deaths	Nat. Incr.	Number	% 2000 Pop.
Seward	16,496	16,750	1,928	1,627	301	-47	-0.3
Butler	8,767	8,395	964	1,007	-43	-329	-3.8
Fillmore	6,634	5,890	660	899	-239	-505	-7.6
Lancaster	250,291	285,407	40,520	17,227	23,293	11,823	4.7
Polk	5,639	5,406	618	634	-16	-217	-3.8
Saline	13,843	14,200	1,949	1,513	436	-79	-0.6
Saunders	19,830	20,780	2,518	1,821	697	253	1.3
York	14,598	13,665	1,762	1,395	367	-1,300	-8.9
Labor Area	336,098	370,493	50,919	26,123	24,796	9,599	2.9
Nebraska	1,711,263	1,826,341	262,095	150,343	111,752	3,326	0.2

* Net Migration from the Bureau of the Census estimates, includes residual component not shown separately.

Sources: Population (2000, 2010) - U.S. Bureau of the Census, *Census of Population, 2000, 2010*;

Births, Deaths, and Natural Increase – Nebraska Department of Health Vital Statistics Data;

Migration - computed using population and natural increase.

Table Fourteen provides information showing population, the natural increase (births minus deaths), and net migration for the 2010–2013 period. As these data show, the City of Seward Labor Area experienced net out-migration during this recent three-year period. As indicated in the table, out-migration for the City of Seward Labor Area as a whole accounted for population decline of 19,699 during the 2010–2013 period, contributing to a population decrease equal to 5.1 percent of the 2010 population. In the case of Seward County, net out-migration during this three-year period was 479, or 2.8 percent of the 2010 population.

Table Fourteen
Population, Births, Deaths, and Migration
Nebraska and the City of Seward Labor area, by County, 2010–2013

County	Population		2010–2013			Net Migration, 2010–2013*	
	2010	2013	Births	Deaths	Nat. Incr.	Number	% 2010 Pop.
Seward	17,089	16,750	663	523	140	-479	-2.8
Butler	8,312	8,395	291	308	-17	100	1.2
Fillmore	5,698	5,890	182	270	-88	280	4.9
Lancaster	297,036	285,407	13,051	6,043	7,008	-18,637	-6.3
Polk	5,275	5,406	165	206	-41	172	3.3
Saline	14,416	14,200	637	449	188	-404	-2.8
Saunders	20,929	20,780	827	589	238	-387	-1.8
York	13,883	13,665	557	431	126	-344	-2.5
Labor Area	382,638	370,493	16,373	8,819	7,554	-19,699	-5.1
Nebraska	1,868,516	1,826,341	83,616	48,032	35,584	-77,759	-4.2

* Net Migration from the Bureau of the Census estimates, includes residual component not shown separately.

Sources: Population (2010) - U.S. Bureau of the Census, *Census of Population, 2010*;

Population (2013) - U.S. Bureau of the Census, *Population Estimates 2013*

Competitive Employment and Career Opportunities

An employer providing jobs with competitive wages and benefits and offering career opportunities would be a welcome addition to the employment base in the City of Seward Labor Area and in Seward County. The expected response to such employment opportunities would be significant, and it is anticipated that there would be an adequate labor supply response for a prospective new employer offering competitive wages and benefits in the City of Seward area. The labor force, employment, and demographic data presented in this report illustrate quite clearly that there is a sufficiently large labor force and population base living within the City of Seward Labor Area, and that significant numbers of persons living in the area are commuting to other areas for employment.

In conclusion, the data and analysis presented in this report indicate that the City of Seward Labor Area and Seward County would be able to provide a significant number of dedicated and skilled workers to meet the needs of additional employers in the area. While this report has not estimated a precise number of people that might be available to a prospective new employer in the City of Seward area, it is anticipated that if attractive working conditions with competitive wages and employee benefits were offered, a prospective new employer would be able to select their workforce from a substantial pool of applicants.

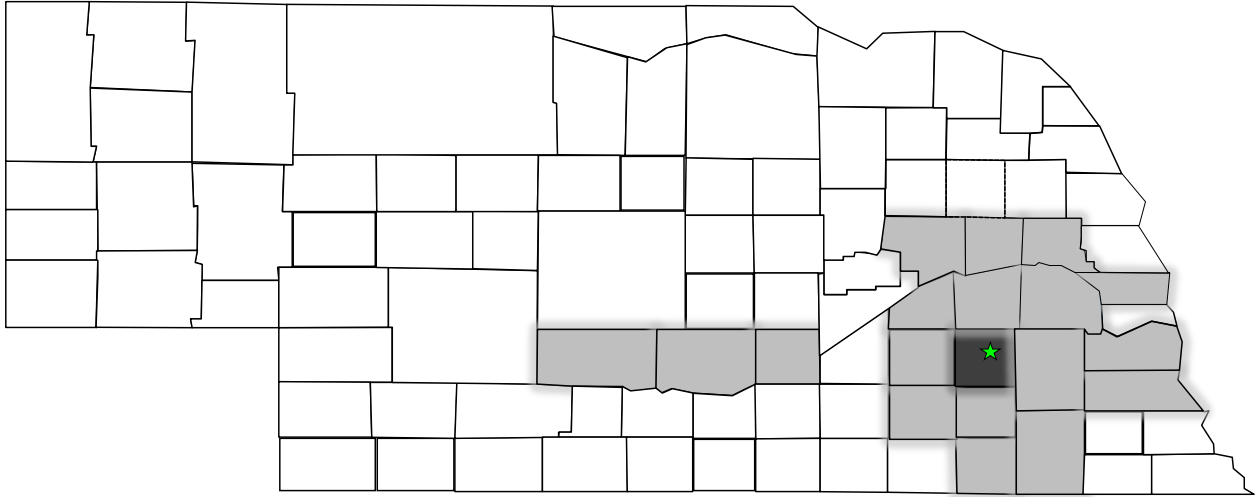
Questions concerning this report and the supporting data should be addressed to:

Kenneth M. Lemke, Ph.D.
Economist
Nebraska Public Power District
P.O. Box 499
Columbus, Nebraska 68602-0499
(402) 563-5535 or (800) 282-6773, Ext. 5535
E-Mail: kmlemke@nppd.com

APPENDICES:

- A. 2014 Commuting Patterns, Workers at Three, Large City of Seward, Nebraska Employers. Kenneth M. Lemke, Nebraska Public Power District. August 2014.

2014 Commuting Patterns Workers at Three, Large City of Seward, Nebraska Employers



August 2014

Prepared by:

Kenneth M. Lemke, Ph.D.

Economist

Nebraska Public Power District

1414 15th Street - P.O. Box 499

Columbus, Nebraska 68602-0499

(800) 282-6773, Ext. 5535

E-Mail: kmlemke@nppd.com

Web Site: econdev.nppd.com

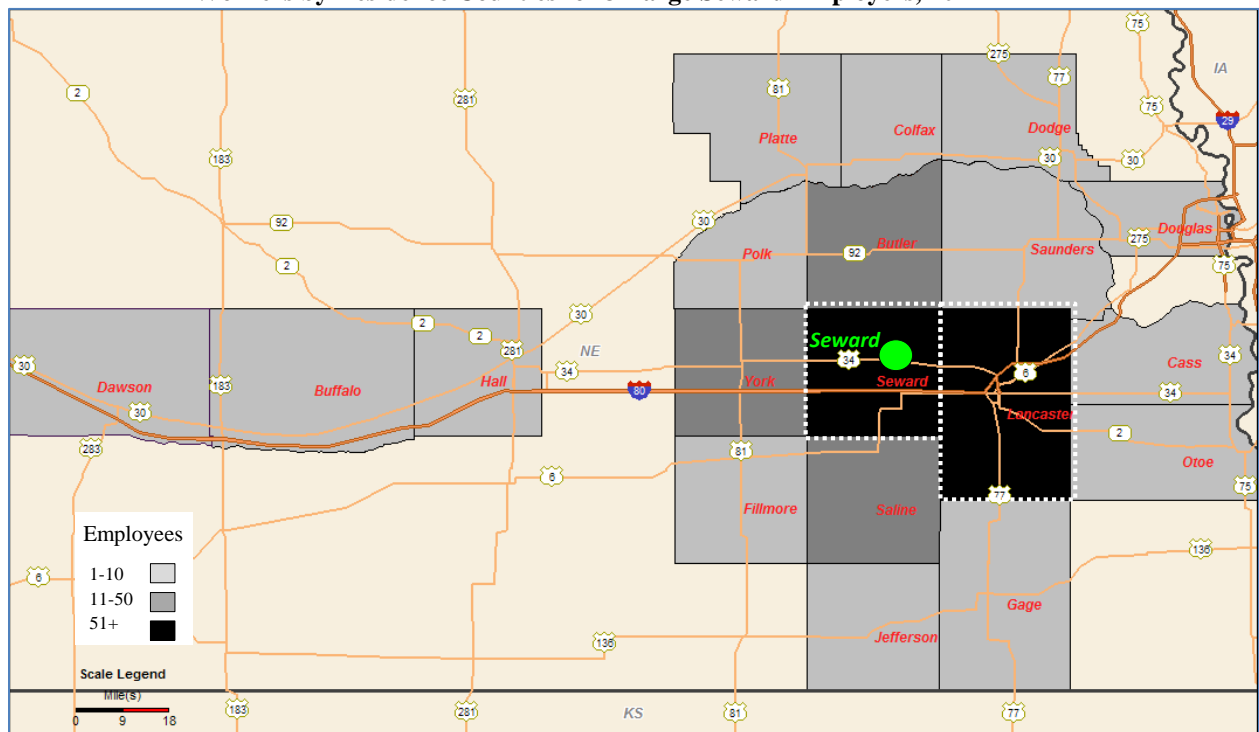
2014 Commuting Patterns

Workers at Three, Large City of Seward, Nebraska Employers

This study provides information on the 2014 Nebraska residence counties and communities (places) for 1,269 workers at three, large City of Seward employers. Concordia University, Hughes Brothers, Inc., and Tenneco Automotive-Walker, provided the mailing zip codes for each of their employees as of July 2014. In addition to the 1,269 employees with residences in Nebraska, there were 9 employees with residences outside Nebraska.

As shown in Figure One and Tables One and Two, the 1,269 workers have residences in 19 Nebraska counties. Seward County is the residence of 742, 58.5 percent, of the 1,269 workers. Other counties with large numbers of workers commuting to the City of Seward to work at the three employer sites include Lancaster, 290 or 22.9 percent; Butler, 98 or 7.7 percent; and Saline, 72 or 5.7 percent.

Figure One
Workers by Residence Counties for 3 Large Seward Employers, 2014



Source: Information compiled by Kenneth M. Lemke, Economist, Nebraska Public Power District, using data provided by Seward County Economic Development Corporation.

Table One
Number of Workers by Residence Counties for 3 Large Seward Employers, 2014

County	Workers	County	Workers
Seward	742	Hall	1
Buffalo	1	Jefferson	2
Butler	98	Lancaster	290
Cass	2	Otoe	2
Colfax	1	Platte	2
Dawson	1	Polk	1
Dodge	1	Saline	72
Douglas	5	Saunders	9
Fillmore	4	York	33
Gage	2	Total	1,269

Source: Information compiled by Kenneth M. Lemke, Economist, Nebraska Public Power District, using data provided by Seward County Economic Development Corporation.

Table Two provides information on the 2013 population of the 19 Nebraska counties where workers at the three Seward employers reside. The 2013 total estimated population of the 19 counties is 1,202,692 people. Douglas County with 537,256 people and Lancaster County with 297,036 people accounted for 44.7 and 24.7 percent respectively of the total population of the 19 counties. With a population of 17,089, Seward County accounted for 1.4 percent of the total population.

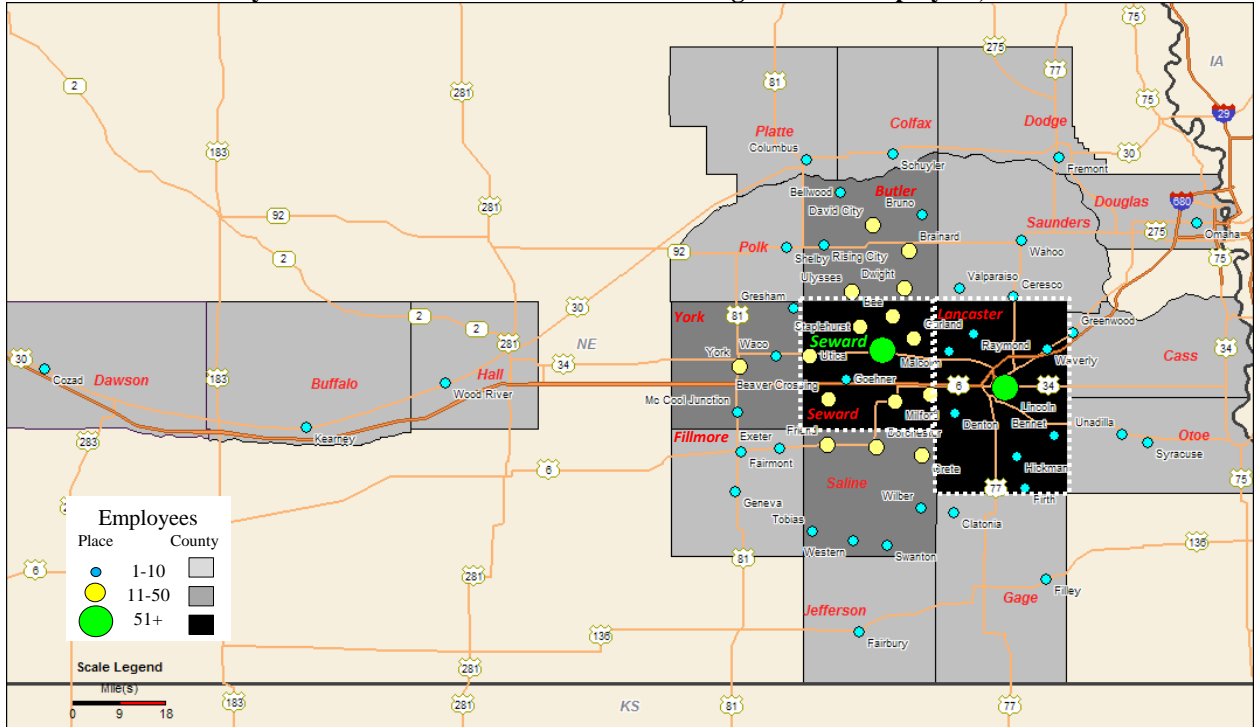
Table Two
2013 Population of Residence Counties for Workers at 3 Large Seward Employers

County	Population	County	Population
Seward	17,089	Hall	60,720
Buffalo	47,893	Jefferson	7,560
Butler	8,312	Lancaster	297,036
Cass	25,357	Otoe	15,752
Colfax	10,425	Platte	32,505
Dawson	24,207	Polk	5,275
Dodge	36,515	Saline	14,416
Douglas	537,256	Saunders	20,929
Fillmore	5,698	York	13,883
Gage	21,864	Total	1,202,692

Source: Information compiled by Kenneth M. Lemke, Economist, Nebraska Public Power District, using data provided by Seward County Economic Development Corporation and U.S. Census Population Estimates, V2013, www.census.gov/popest/data/counties/totals/2013/index.html.

As shown in Figure Two and Tables Three and Four, the 1,269 workers have residences in 58 Nebraska places. The City of Seward is the residence of 538, 42.4 percent, of the 1,269 workers. Other places with large numbers of workers commuting to the City of Seward to work at the three employers' sites include Lincoln, 274 or 21.6 percent; Milford, 47 or 3.7 percent; Staplehurst, 33 or 2.6 percent; Dwight, 32 or 2.5 percent; and Utica, 31 or 2.4 percent.

Figure Two
Workers by Residence Places and Counties for 3 Large Seward Employers, 2014



Source: Information compiled by Kenneth M. Lemke, Economist, Nebraska Public Power District, using data provided by Seward County Economic Development Corporation.

Table Three
Number of Workers by Residence Places for 3 Large Seward Employers, 2014

Place	Total	Place	Total	Place	Total
Seward	538	Filley	1	Schuyler	1
Beaver Crossing	28	Firth	1	Shelby	1
Bee	21	Fremont	1	Staplehurst	33
Bellwood	1	Friend	15	Swanton	2
Bennet	1	Garland	17	Syracuse	1
Brainard	13	Geneva	1	Tobias	1
Bruno	1	Goehner	5	Ulysses	27
Ceresco	2	Greenwood	2	Unadilla	1
Clatonia	1	Gresham	8	Utica	31
Columbus	2	Hickman	1	Valparaiso	6
Cozad	1	Kearney	1	Waco	8
Crete	23	Lincoln	274	Wahoo	1
David City	20	Malcolm	6	Waverly	1
Denton	3	Martell	1	Western	3
Dorchester	21	McCool Junction	2	Wilber	7
Dwight	32	Milford	47	Wood River	1
Elkhorn	1	Omaha	4	York	15
Exeter	2	Pleasant Dale	22	Total	1,269
Fairbury	2	Raymond	2		
Fairmont	1	Rising City	4		

Source: Information compiled by Kenneth M. Lemke, Economist, Nebraska Public Power District, using data provided by Seward County Economic Development Corporation.

Table Four provides information on the 2013 population of the 56 incorporated places included in the the 58 total places² providing workers to the three City of Seward employers. The 2013 total estimated population of the 56 incorporated places is 856,219 people. Omaha with 434,353 people and Lincoln with 268,738 people accounted for 50.7 and 31.4 percent respectively of the total population of the 56 incorporated places. With a population of 7,120, City of Seward accounted for 0.8 percent of the total population.

Table Four
2013 Population of Residence Places for Workers at 3 Large Seward Employers

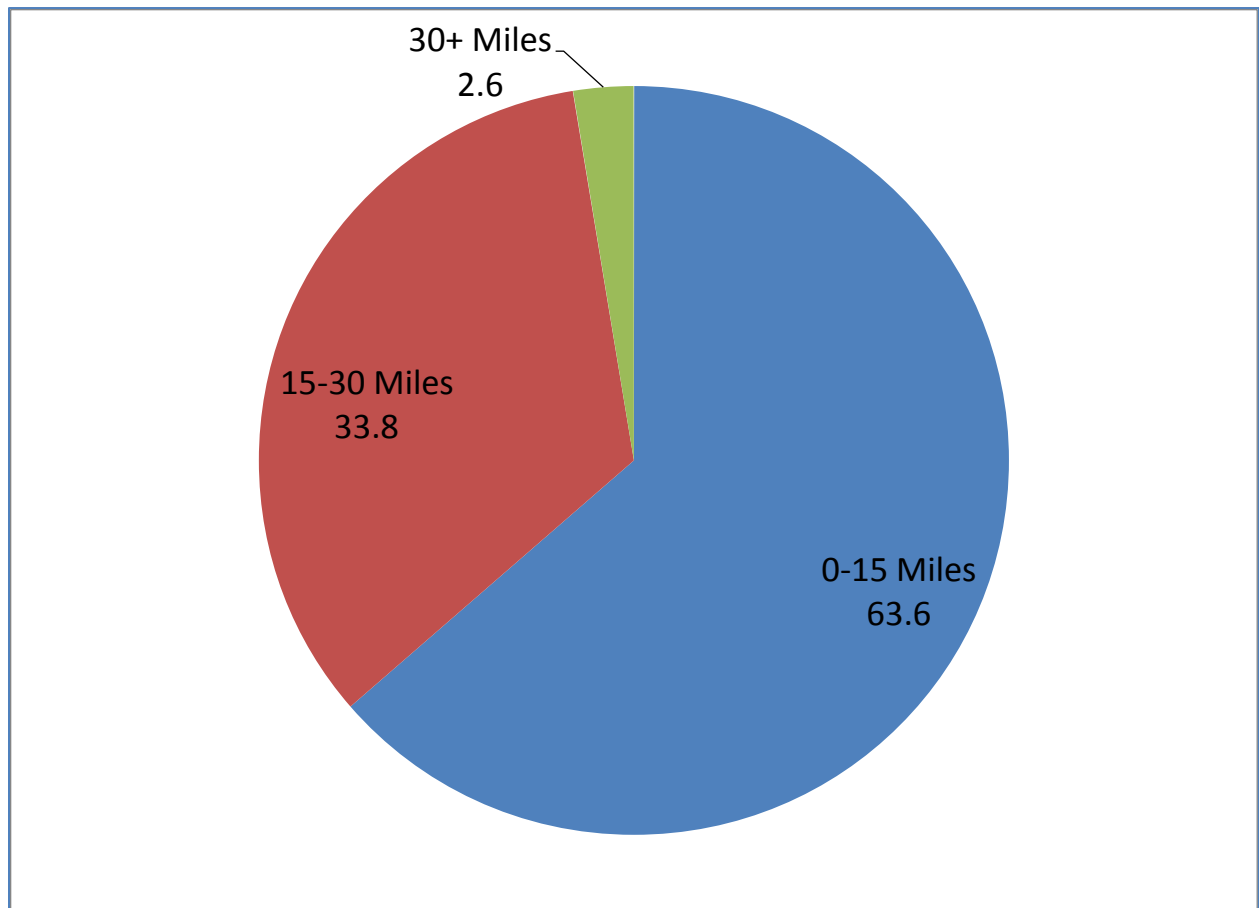
Place	Pop	Place	Pop	Place	Pop
Seward	7,120	Filley	130	Schuyler	6,143
Beaver Crossing	401	Firth	579	Shelby	698
Bee	190	Fremont	26,340	Staplehurst	242
Bellwood	424	Friend	1,023	Swanton	95
Bennet	814	Garland	211	Syracuse	1,949
Brainard	327	Geneva	2,152	Tobias	107
Bruno	98	Goehner	155	Ulysses	165
Ceresco	907	Greenwood	566	Unadilla	314
Clatonia	222	Gresham	224	Utica	857
Columbus	22,533	Hickman	1,840	Valparaiso	562
Cozad	3,934	Kearney	32,174	Waco	241
Crete	7,135	Lincoln	268,738	Wahoo	4,512
David City	2,900	Malcolm	395	Waverly	3,634
Denton	194	Martell	0	Western	237
Dorchester	585	McCool Junction	413	Wilber	1,871
Dwight	202	Milford	2,191	Wood River	1,361
Elkhorn	0	Omaha	434,353	York	7,961
Exeter	570	Pleasant Dale	212	Total	856,219
Fairbury	3,927	Raymond	180		
Fairmont	540	Rising City	371		

Source: Information compiled by Kenneth M. Lemke, Economist, Nebraska Public Power District, using data provided by Seward County Economic Development Corporation and U.S. Census Population Estimates, V2013,
<http://www.census.gov/popest/data/cities/totals/2013/index.html>.

As shown in Figure Three, 63.6 percent of the workers live within a 15-mile radius of the City of Seward and 97.4 percent live within a 30-mile radius. The longest commute, approximately 150 miles, was from Cozad in Dawson County.

Figure Three
Distribution of Workers' Residences for 3 Large Seward Employers
By Straight Line Distance to the City of Seward

² Elkhorn is part of the City of Omaha and Martell is an unincorporated place.



Source: Information compiled by Kenneth M. Lemke, Economist, Nebraska Public Power District, using data provided by Seward County Economic Development Corporation.

The information contained in this study shows that large employers in the City of Seward are able to attract workers from a large geographic area with a population base of more than one-million people. Most workers live within 30 miles of the City of Seward or within roughly 45 minutes travel time. However, a small number of workers travel much further than 30 miles to work in the City of Seward.

Questions concerning this report and the supporting data should be addressed to:

Kenneth M. Lemke, Ph.D.
Economist
Nebraska Public Power District
P.O. Box 499
Columbus, Nebraska 68602-0499
(402) 563-5535 or (800) 282-6773, Ext. 5535
E-Mail: kmlemke@nppd.com