



2022

Nebraska Space Use Survey: The Influence of the COVID-19 Pandemic

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September 28, 2022
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Executive Summary

This study, which was funded in part through a cooperative agreement with the U.S. Small Business Administration, examines the impact of the COVID-19 Pandemic on remote work and space needs for businesses in select Nebraska service sectors. Those service sectors include finance, information, professional and technical services, business services, and educational support services. Goods-producing businesses, wholesale and retail trade, transportation businesses, and health care businesses are not included in the study. Data about attitudes towards remote work and changing space needs was gathered based on a survey of businesses, the *Nebraska Commercial Real Estate Survey*. A total of 1,599 Nebraska businesses in covered industries were surveyed during the June through September 2022 period. A total of 302 surveys were returned for a response rate of 18.9 percent.

Among businesses in the industries covered in the survey, respondents emphasize a need for in-person space even though they have become more comfortable with remote work and remote work has become more common. Further, survey results do not find evidence of a decline in office space use. Nearly 90 percent of Nebraska businesses in covered industries have not changed the amount of office space they use since the onset of the COVID-19 Pandemic, while 7.3 percent have increased it and 3.7 percent have reduced it. In the coming 12 months, 10.6 percent anticipate increasing office space while 3.0 percent expect to decrease space.

Notable findings are listed below.

- Businesses in covered commercial industries on balance have become more comfortable with remote work since the onset of the COVID-19 Pandemic. In particular, 27.6 percent have become more comfortable while just 13.3 percent have become less comfortable.
- While more comfortable with remote work, businesses in covered commercial industries see great value in in-person work. Businesses agree or strongly agree that in-person work is vital to the business's operation both now (78.8 percent) and in the future (77.0 percent), with more than half strongly agreeing.
- Half of businesses in covered commercial industries believe it is vital to maintain office space for remote workers on occasions when they come to the office. In particular, 52.1 percent agree or strongly agree that it is important to maintain office space for remote workers and 51.5 percent agree or strongly agree that their business plans to do so.
- As managers and workers have learned more about the remote work option, remote or hybrid work has become more common. Since the onset of the COVID-19 Pandemic, the average share of employees in remote or hybrid work rose from 10.7 percent to 16.5 percent among covered commercial businesses. However, employers do not expect any change in the share of remote and hybrid employees over the next year.

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1. Introduction

The COVID-19 Pandemic provided some employers and workers their first experience with remote work. Service industry workers in particular had the opportunity to continue working from home, avoiding the job loss experienced by workers in sectors such as hospitality.

This study examines the impact of the COVID-19 Pandemic on remote work for workers and space needs for employers in the portions of the service sector of Nebraska. The service sector is defined to include finance, information, professional and technical services, business services, and educational support services. Goods-producing businesses, wholesale and retail trade, transportation businesses, and health care businesses are not included in the study. Data was gathered based on a survey of businesses, the *Nebraska Commercial Real Estate Survey*. A copy of the survey form is listed in Appendix 1. Information about the University of Nebraska-Lincoln Bureau of Business Research and the report authors is provided in Appendix 2.

A total of 1,599 Nebraska businesses in covered industries were surveyed during the June through September 2022 period. There were two rounds of surveys. A list of 17,917 businesses in covered industries was gathered from the information service Data Axle Genie. That source provides estimated employment for each business in its population and a stratified sample was drawn with 450 businesses each with employment of 1 to 4, 5 to 19, and 20 to 99. All businesses with estimated employment of 100 or more also were included in the stratified sample. A total of 302 surveys were returned for a response rate of 18.9 percent. Counts of the number of return surveys and the population of businesses in each employment size category were used to develop weights for each returned survey. Weights were applied to survey responses to estimate frequencies for Nebraska businesses in covered industries.

As seen in Appendix 1, the survey asks about business preferences for in-person space¹ versus remote work as well as the share of work force full-time in the office, full time remote, and hybrid before the Pandemic, Currently, and 12 months in the future. The survey will show trends in remote work over time since the onset of the COVID-19 Pandemic. The survey also asks about changes in the quantity of office space over time.

2. Characteristics of Responding Businesses

The characteristics of responding businesses are summarized in Tables 1 through 3. As seen in Table 1, approximately 55 percent of respondents are single location businesses. The remaining respondents are businesses with multiple locations. However, most respondents provided answers on behalf of a single location, whether it is the primary location or the branch location. Only 16.3 percent of respondents provided information combined for both the primary and

¹ BOMA International, Yardi and Brightline Strategies, *COVID-19 Commercial Real Estate Impact Study, Q2 2021*.

branch locations. Of responding business, 11.1 percent operate their business out of their home. Responding businesses also had an average of 37,172 square feet of office space.

Table 1
Types of Responding Businesses (Unweighted)

Type of Business	Count	Percentage
Business with only a single location	162	54.9%
Business with multiple locations - answering on behalf of primary location	48	16.3%
Business with multiple locations - answering on behalf of branch location	33	11.2%
Business with multiple locations - answering on behalf of primary and branch locations	48	16.3%
Other please describe below	4	1.4%

Source: Nebraska Commercial Real Estate Survey

Table 2 shows the employment of responding businesses which operate their business outside of their home. Among respondents, 40.9 percent were small businesses with 0 to 9 employees. In most cases, that was the number employees at a single-location business, at either the primary location or a branch location of a multilocation business. Further, 23.4 percent were smaller businesses with 10 to 24 workers, while 12.3 percent had between 25 and 49 workers. Therefore, just over three-quarters of responding businesses had fewer than 50 employees.

Another 7.8 percent of responding businesses had between 50 and 99 workers. The remaining 15.6 percent of responding businesses had 100 or more employees: 6.7 percent had between 100 and 249 employees, 2.6 percent had between 250 and 499 workers and 3.0 percent had between 500 and 999 workers. There were one thousand or more employees in 3.3 percent of the responding businesses.

Table 2
Reported Employment among Responding Businesses (Unweighted)

Employment Category	Count	Percentage
0-9	110	40.9%
10-24	63	23.4%
25-49	33	12.3%
50-99	21	7.8%
100-249	18	6.7%
250-499	7	2.6%
500-999	8	3.0%
1,000 or more employees	9	3.3%

Source: Nebraska Commercial Real Estate Survey

Approximately 62 percent of responding businesses were located in either the Nebraska portions of the Omaha Metropolitan area or in the Lincoln Metropolitan area. Specifically, 40.7 percent of responding businesses were in the five Nebraska counties of the Omaha Metropolitan area while 21.5 percent of respondents were from the two counties of the Lincoln

Metropolitan area. The remaining 37.7 percent of respondents were from the balance of the state, which are primarily non-metropolitan counties.

The survey also asked several other questions related to space ownership (Table 3). Fifty-eight percent of responding businesses reported owning the building in which its office space is located. Among those businesses, 67.3 percent reported that they do not lease their office space to other tenants. These responses indicate that a significant share of responding businesses would find it challenging, at least in the short run, to alter the amount of office space that it utilizes.

Table 3
Responding Business Building Ownership and Leasing (Unweighted)

Do you Own Your Building?	Count	Percentage	Do you Lease Space to Other Business?	Count	Percentage
Yes	156	58.2%	Yes	50	32.7%
No	112	41.8%	No	103	67.3%

Source: Nebraska Commercial Real Estate Survey

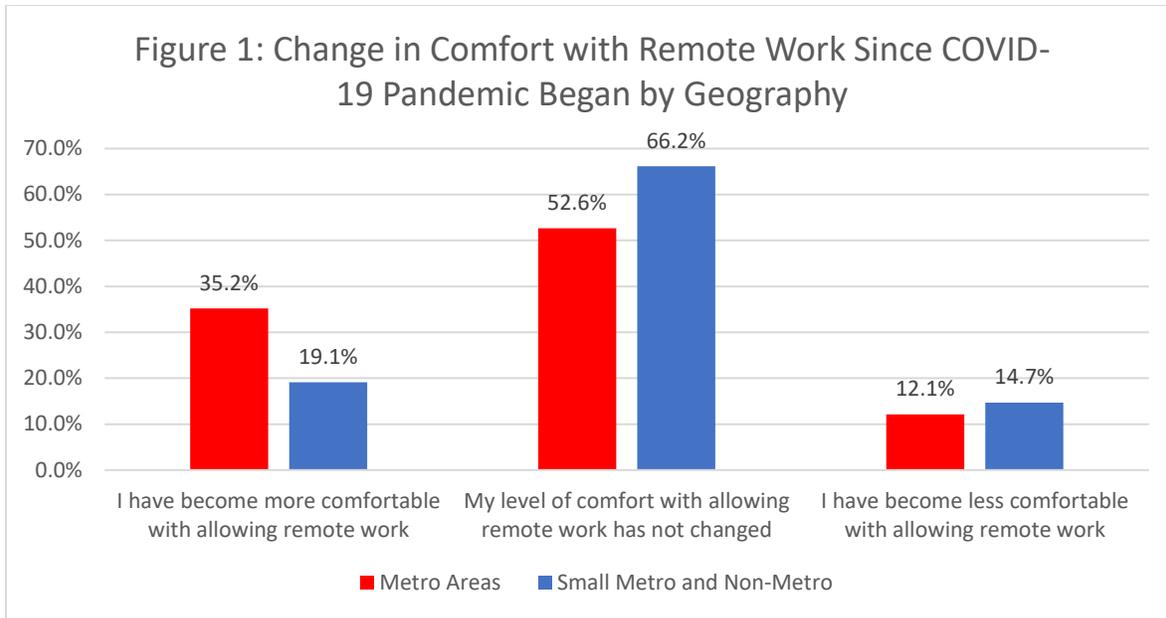
3. Business Opinions About In-Person Work

Businesses in covered commercial industries have become more comfortable with remote work in recent years, since the onset of the COVID-19 Pandemic. As seen in Table 4, an estimated 27.6 percent of businesses have become more comfortable allowing remote work since the COVID-19 Pandemic began versus 13.3 percent which have become less comfortable. The likelihood of a change in comfort varies between regions of the state, as is evident in Figure 1. An estimated 35.2 percent of covered commercial businesses located in the Omaha or Lincoln metropolitan areas have become more comfortable with remote work since the onset of the Pandemic and just 12.1 percent less comfortable. By contrast, 19.1 percent of covered commercial businesses from small metropolitan (Grand Island MSA and Nebraska counties in the Sioux City, IA MSA) and non-metropolitan areas have become more comfortable with remote work. This is only slightly more than the 14.7 percent which have become less comfortable.

Table 4
Change in Comfort with Remote work Since the COVID-19 Pandemic Began

Employment Categories	Frequency (Percentage)
I have Become More Comfortable in Allowing Remote Work	27.6%
My Level of Comfort with Allowing Remote Work has not Changed	59.0%
I have Become Less Comfortable with Allowing Remote Work	13.3%

Source: Nebraska Commercial Real Estate Survey



Source: Nebraska Commercial Real Estate Survey

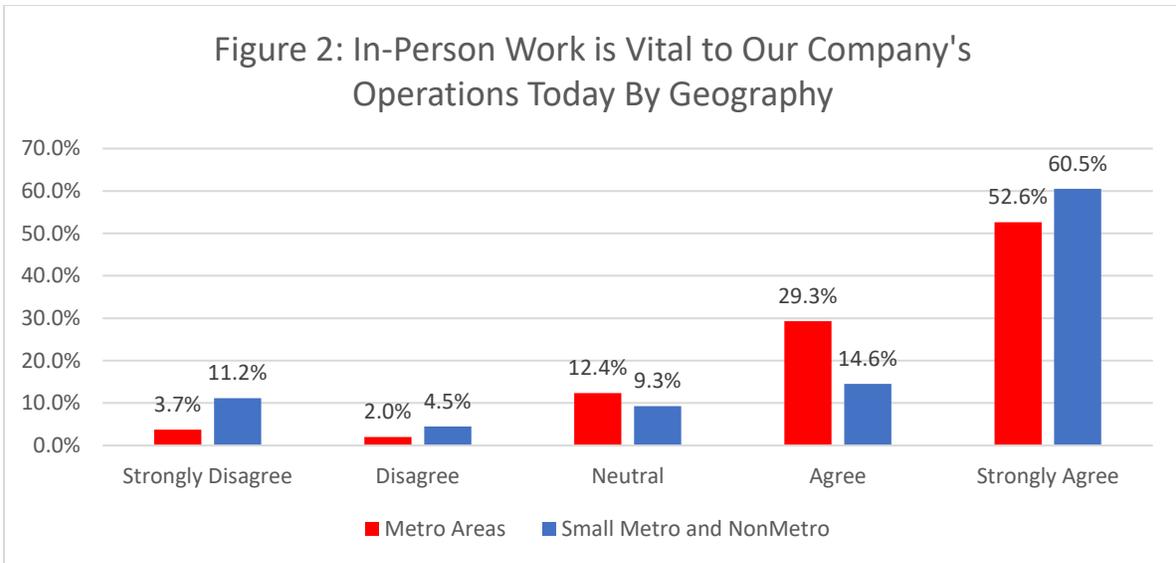
Nebraska businesses in covered commercial industries continue to see great value from in-person work and believe it is important to maintain office space for remote workers for times that they are present in the office. As seen in Table 5, an estimated 78.6 percent of covered businesses agree or strongly agree that in-person work is vital to the company’s operations today and 77.0 percent agree or strongly agree it will be vital in the future. In both cases, more than half strongly agree.

Table 5
In-Person Work is Vital to Our Company’s Operations

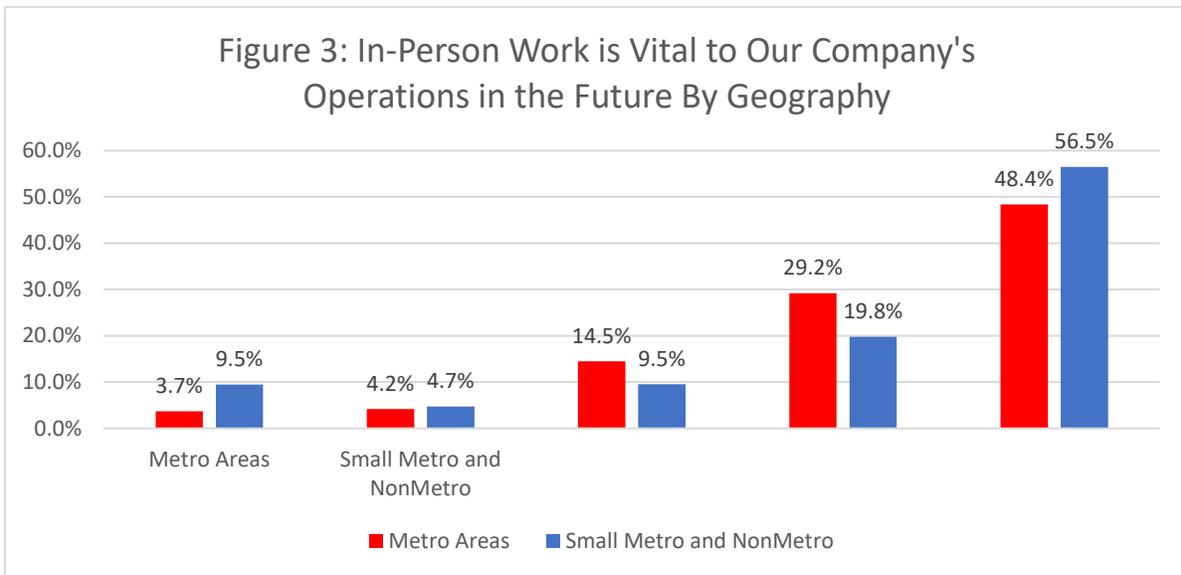
Opinion	Today	In the Future
Strongly Disagree	7.1%	6.3%
Disagree	3.1%	4.4%
Neutral	11.0%	12.3%
Agree	22.6%	24.9%
Strongly Agree	56.2%	52.1%

Source: Nebraska Commercial Real Estate Survey

Business opinions about in-person work varies somewhat with geography within Nebraska. As seen in Figure 2, the share of businesses which either agree or strongly agree that in-person work is vital for their company today is larger in the Omaha and Lincoln areas. However, businesses in small metro and non-metropolitan areas are more likely to strongly agree. There is even less difference between the opinions of metro areas and small metro and non-metro areas regarding whether in-person work will be vital in the future, as seen in Figure 3.



Source: Nebraska Commercial Real Estate Survey



Source: Nebraska Commercial Real Estate Survey

Half of businesses also believe office space is important for remote workers on occasions when they come to work in the office. As seen in Table 6, survey results indicate that 52.1 percent of Nebraska businesses in covered commercial industries agree or strongly agree that it is important to maintain office space for remote workers. Results in Table 7 show that 51.5 percent of business agree or strongly agree that the office plans to do so.

Table 6

Frequency with Which Organizations Believe it is Important to Have In-Person Space Available for Remote Workers Who Want to Enter the Office Occasionally

Opinion	Frequency (Percentage)
Strongly Disagree	7.2%
Disagree	8.8%
Neutral	31.9%
Agree	34.0%
Strongly Agree	18.1%

Source: Nebraska Commercial Real Estate Survey

Table 7

Frequency with Which Organizations Plan to Maintain In-Person Space for Remote Workers Who Want to Enter the Office Occasionally

Opinion	Frequency (Percentage)
Strongly Disagree	13.6%
Disagree	6.4%
Neutral	28.5%
Agree	34.0%
Strongly Agree	17.5%

Source: Nebraska Commercial Real Estate Survey

Looking at Tables 4 through 7 collectively, businesses in covered commercial industries emphasized a need for in-person work and in-person space even as the firms have become more comfortable with allowing remote work. Experiences during the COVID-19 Pandemic may have changed attitudes about remote work, but it is unclear this change in attitude will influence the need for commercial office space. Trends in commercial office space use within covered industries is the subject of the next section.

4. Trends in Commercial Space Use

Table 8 provides information about the current, recent, and expected future remote work patterns in Nebraska businesses within covered commercial industries. Table 8 presents the estimated share of employees per covered business who work full-time in the office versus in some type of remote work (hybrid or fully remote). Analysis is conducted for three periods: pre-Covid 19, Currently at the time of completing the survey, and Twelve Months in the future.

Table 8

Percentage of Employees Working in the Office vs Remote Over Time

	Pre-Covid 19	Currently	In 12 Months
Full Time in Office	89.3%	83.5%	83.2%
Workforce Split between Remote Work and Office	6.9%	10.2%	10.4%
Full Remote Work	3.8%	6.3%	6.4%

Source: Nebraska Commercial Real Estate Survey

Results in Table 8 show that on average the vast majority of employees in a covered commercial business have been or will be working full time in the office during all three periods. However, there has been a notable increase in the share of employees working remotely since the onset of the COVID-19 Pandemic. The average share of hybrid work, which is work split between remote work and the office, rose from 6.9 percent before COVID-19 to 10.2 percent currently. The average share of full remote work rose from 3.8 percent to 6.3 percent. The other notable result is that these higher shares are expected to be maintained 12 months in the future. The trend towards a larger share of employees working remotely will neither be reversed nor expanded further, according to survey respondents.

Tables 9 through 12 show trends in office space use among businesses in covered commercial industries. Table 9 reports the frequency of changes in office space use in covered Nebraska businesses since the onset of the COVID-19 Pandemic. Results show that 89.6 percent of covered business have not changed the quantity of office space since the Pandemic began. Further, 7.3 percent have increased office space during the period while 3.7 percent decreased office space. The COVID-19 Pandemic may have caused muted growth in office space use² but it has not led to a decline in use.

² This is the inaugural survey of commercial space use by the UNL Bureau of Business Research. Therefore, there is no true baseline for comparison of changes in space use from the period before the COVID-19 Pandemic. However, it is notable that only 7.3 percent of businesses report expanding office space since the COVID-19 Pandemic (Table 9) while 10.6 percent plan to expand office space use in the next 12 months (Table 11). This is not a true control comparison (since plans for the next 12 months may also have been influenced by the Pandemic) but it may suggest that demand for office space use may have been muted in the 2.5 years since the onset of the COVID-19 Pandemic.

Table 9

Frequency With Which Businesses Have Changed Office Space since the Onset of the COVID-19 Pandemic

Change in Office Space	Frequency (Percent)
Square footage has increased by more than 50%	1.8%
Square footage has increased by 10% to 50%	3.6%
Square footage has increased by less than 10%	1.9%
No change in Square Footage	89.6%
Square footage has declined by less than 10%	1.6%
Square footage has declined by 10% to 50%	2.0%
Square footage has declined by 50% to 100%	0.1%
Unsure/Need More Info	1.2%

Source: Nebraska Commercial Real Estate Survey

A similar pattern is observed among businesses located in the Omaha and Lincoln metropolitan areas as well as businesses located in the small metro and non-metro areas of Nebraska. In both regions, roughly twice as many businesses saw an increase in square footage rather than a decrease. For businesses located in the two metropolitan areas, 10.6 percent saw an increase and 5.4 percent saw a decrease. For businesses in small metropolitan and non-metro areas, 3.5 percent saw an increase in office space and 1.7 percent saw a decrease.

Table 10

Frequency with Which Businesses Have Changed Office Space since the Onset of the COVID-19 Pandemic: Businesses in Metro Areas and Businesses in Small Metro and Non-Metro Areas

	Metro Areas	Small Metro and Non-Metro Areas
Square footage increased by less than 10%	3.3%	0.0%
Square footage increased by 10% to 50%	5.2%	1.8%
Square footage increased by more than 50%	2.1%	1.7%
No change in Square Footage	81.8%	94.7%
Square footage decreased by less than 10%	3.0%	0.0%
Square footage decreased by 10% to 50%	2.2%	1.7%
Square footage decreased by 50% to 100%	0.2%	0.0%
Unsure/Need more info	2.2%	0.1%

Source: Nebraska Commercial Real Estate Survey

Table 11 reports the frequency with which covered commercial businesses in Nebraska will change their office space use in the next 12 months. The table shows that 86.4 percent of covered businesses expect no change in the square footage of office space use. Further, 10.6 percent of businesses expect to increase office space use over the next 12 months while only 3.0 percent expect to reduce it. Changes in attitudes about remote work since the COVID-19 Pandemic do not appear to be reducing plans for future office space use.

Table 11

Frequency with Which Businesses Expect to Change Office Space Use over the next 12 Months

Change in Office Space	Frequency (Percent)
Square footage to increase by more than 10%	2.5%
Square footage to increase by 10% to 50%	6.3%
Square footage to increase by more than 50%	1.8%
No change in Square Footage	86.4%
Square footage to decline by less than 10%	1.0%
Square footage to decline by 10% to 50%	1.6%
Square footage to decline by 50% to 100%	0.4%
Unsure/Need More Info	0.0%

Source: Nebraska Commercial Real Estate Survey

Table 12 shows future space needs for businesses in covered commercial industries located in Nebraska’s two largest metropolitan areas and its small metro and non-metro areas. Small metropolitan and non-metropolitan are more likely to anticipate an increase in office space. In all, 13.3 percent of covered businesses located in small metro or non-metro areas expect to expand their office space over the next 12 months versus 8.3 percent in the Omaha or Lincoln areas. Approximately 3 percent of businesses expect to reduce office space in each geography.

Table 12

Frequency with Which Businesses Expect to Change Office Space Use over the next 12 Months:
Businesses in Metro Areas and Businesses in Small Metro and Non-Metro Areas

	Metro Areas	Small Metro and Non-Metro Areas
Square footage to increase by more than 10%	0.8%	4.5%
Square footage to increase by 10% to 50%	7.1%	5.4%
Square footage to increase by more than 50%	0.4%	3.4%
No change in Square Footage	88.5%	83.9%
Square footage to decline by less than 10%	1.8%	0.0%
Square footage to decline by 10% to 50%	1.4%	1.7%
Square footage to decline by 50% to 100%	0.0%	0.9%
Unsure/Need More Info	0.1%	0.0%

**Appendix 1. University of Nebraska – Lincoln
Bureau of Business Research**

Nebraska Commercial Real Estate Survey

Instructions: The UNL Bureau of Business Research is conducting a survey on business attitudes and plans regarding office space. Data will be used to understand how organizations expect their use of office space to change over the next year, and how use has changed since early 2020 (before the onset of the COVID-19 Pandemic). Please answer the following questions below. Responses will remain anonymous and will only be presented in summary form by the researchers.

Part 1: Business Demographics: Please provide the following information about your business

1) We understand that some businesses have multiple locations. Which of the below best describes your situation:

- Business with only single location
 - Business with multiple locations – answering on behalf of primary location
 - Business with multiple locations – answering on behalf of a branch location
 - Business with multiple locations – answering on behalf of primary and branch locations
 - Other please describe below
-
-

2) Does your business operate out of your home? **(If the answer to this question is yes, please return the survey – there is no need to answer the remaining questions.)**

- Yes No

3) How many square feet of office space does your business currently have? _____

4) Which category represents the total number of employees in your business (including remote workers) (by category)

- | | |
|--|--|
| <input type="checkbox"/> 0-9 employees | <input type="checkbox"/> 100-249 employees |
| <input type="checkbox"/> 10-24 employees | <input type="checkbox"/> 250-499 employees |
| <input type="checkbox"/> 25-49 employees | <input type="checkbox"/> 500-999 employees |
| <input type="checkbox"/> 50-99 employees | <input type="checkbox"/> 1,000 or more employees |

5) What is your industry? _____

6) Does your business own the building in which your office space is located?

- Yes
- No

7) (If yes) Does your office building/property manager lease space to other tenants?

- Yes
- No

Part 2: Please provide your opinion regarding the questions below.

Please tell us whether you agree or disagree with the following statements:

8) In-person space is vital to Our Company's Operations *today*.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<input type="checkbox"/>				

9) In-person space will be vital to Our Company's Operations *in the future*.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<input type="checkbox"/>				

10) It is important to have in-person space available for remote workers who want to enter the office occasionally.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<input type="checkbox"/>				

11) Our organization plans to maintain in-person space for remote workers who want to enter the office occasionally.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<input type="checkbox"/>				

12) Have you become more comfortable with allowing remote work since the COVID-19 Pandemic began in early 2020?

- I have become more comfortable with allowing remote work
- My level of comfort with allowing remote work has not changed
- I have become less comfortable with allowing remote work

Part 3: Work Setting: Please provide information about your workplace policies and space needs in the past two years and expectations about the future.

13) Thinking about the percentages of your workforce who are in the office vs. working remotely (i.e., teleworking and/or in the field) – what percentage falls into the below categories? Please provide the proportions of each work situation for pre-COVID-19 (January/February 2020), Currently, and your preferences for 12 months from now.

Work Situation	Pre-COVID-19	Currently	In 12 Months
Full time in office	_____%	_____%	_____%
Workforce split between remote work and office	_____%	_____%	_____%
Full remote work	_____%	_____%	_____%
Total	<u>100%</u>	<u>100%</u>	<u>100%</u>

14) Whether or not you have changed business locations, to what extent have you changed the total square footage of your business space since the Coronavirus/COVID-19 pandemic began around March 2020? (Select one)

- Square footage has increased by less than 10%
- Square footage has increased by 10% to 50%
- Square footage has increased by more than 50%
- No change in square footage
- Square footage has declined by less than 10%
- Square footage has declined by 10% to 50%
- Square footage has declined by 50% to 100%
- Unsure / Need more info

15) Given your current office space and future needs, what is your expectation over the next 12 months regarding the total square footage of your business space? (Select one)

- Expect square footage to increase by more than 50%
- Expect square footage to increase by 10% to 50%
- Expect square footage to increase by less than 10%
- Expect no change in square footage
- Expect square footage to decline by less than 10%
- Expect square footage to decline by 10% to 50%
- Expect square footage to decline by 50% to 100%
- Unsure / Need more info

16) Please list any barriers that prevent you from changing your total square footage of office space over the next 12 months.

17) Is there anything you would like to add about your space needs?

Appendix 2. About the University of Nebraska-Lincoln Bureau of Business Research

The Bureau of Business Research

The Bureau of Business Research is a leading source for analysis and information on the Nebraska economy. The Bureau conducts both contract and sponsored research on the economy of Nebraska and its communities including: 1) economic and fiscal impact analysis; 2) models of the structure and comparative advantage of the current economy; 3) economic, fiscal, and demographic outlooks, and 4) assessments of how economic policy affects industry, labor markets, infrastructure, and the standard of living. The Bureau also competes for research funding from federal government agencies and private foundations from around the nation and contributes to the academic mission of the University of Nebraska-Lincoln through scholarly publication and the education of students.

Key Personnel

Dr. Eric Thompson

Dr. Eric Thompson is the Director of the Bureau of Business Research and a Professor of Economics at the University of Nebraska-Lincoln. Dr. Thompson has conducted a broad group of economic impact studies including impact studies of Nebraska agriculture, Sandhill Cranes migration, the Nebraska childcare industry, the Omaha Zoo, the Nebraska horseracing industry, Husker Harvest Days, and the UNL Athletic Department. Dr. Thompson also works on demographic projections and analyses of economic development programs for Nebraska and cities in Nebraska. He also has conducted numerous economic impact studies for the Lincoln Department of Economic Development, the Omaha Chamber of Commerce, the Nebraska Department of Economic Development, various Nebraska industries, and Nebraska tourism attractions. Dr. Thompson's research has received support from the United States Department of Labor, the Robert Wood Johnson Foundation, the Center for Economic Analysis, the Nebraska Health, and Human Services System, as well as Lincoln, Omaha, and Nebraska organizations and agencies. In his previous employment, Dr. Thompson served as the Director of the Center for Business and Economic Research and a Research Associate Professor of Economics at the University of Kentucky. Dr. Thompson received his Ph.D. in agricultural economics from the University of Wisconsin-Madison in 1992. His research fields include regional economics, economic forecasting, and state and local economic development. His research has been published in *Regional Science and Urban Economics*, the *Journal of Regional Science*, the *American Journal of Agricultural Economics*, and the *Journal of Cultural Economics*.

Dr. Mitchel Herian

Dr. Mitchel Herian serves as a Project Director through the Bureau of Business Research, a faculty fellow at the University of Nebraska Public Policy Center, and an adjunct professor in the Political Science department at UNL. Dr. Herian has worked for agencies such as the U.S. Army,

the U.S. Air Force, the National Aeronautics and Space Administration (NASA), the Nebraska Supreme Court, the Nebraska Department of Education, and the Kansas Department of Corrections. His research has received support from agencies including the National Science Foundation and the National Institute of Justice. Dr. Herian's research has been published in a variety of peer reviewed journals including the *Journal of Public Administration Research and Theory*, *American Review of Public Administration*, *Policy Studies Journal*, *State and Local Government Review*, and *Ecology & Society*.