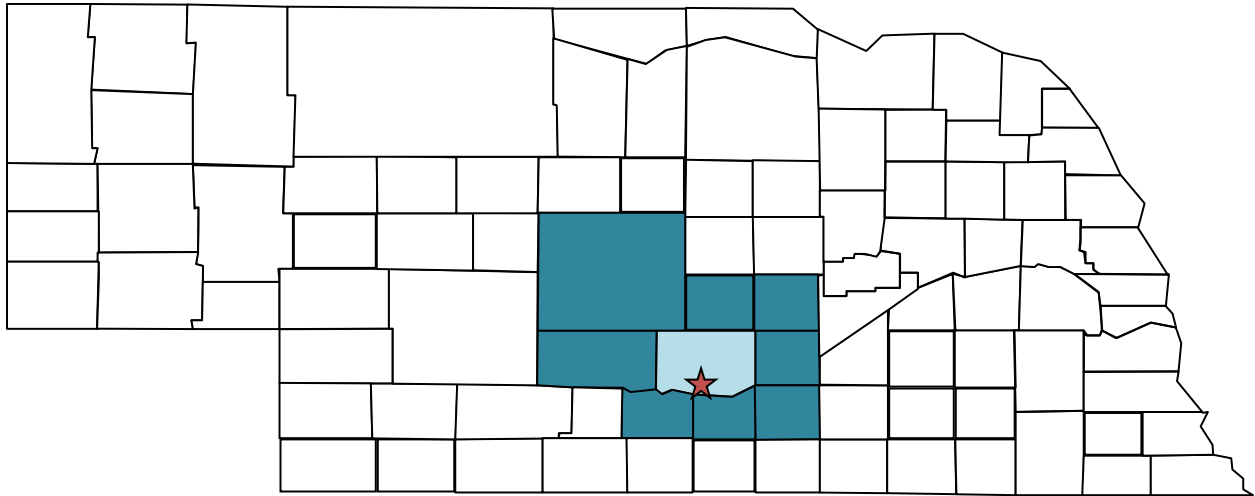


Economic and Demographic Trends

Kearney, Buffalo County, and the Surrounding Area



August 2015

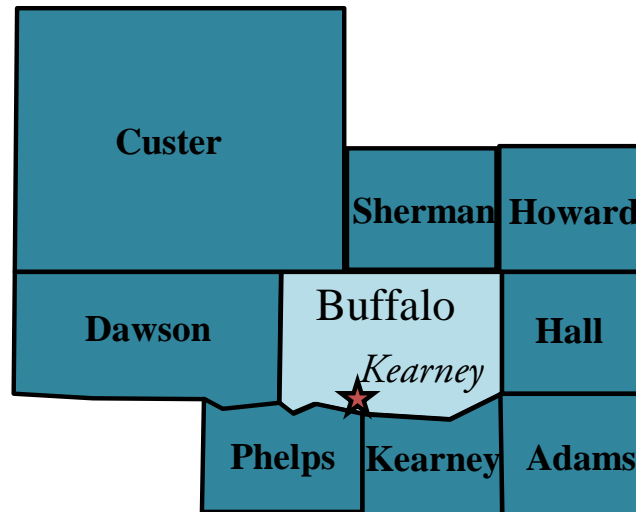
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Economic and Demographic Trends in Kearney, Buffalo County, and the Surrounding Area



This study provides data on labor force, employment, commuting patterns, population, migration, retail sales, and income for Buffalo County. For select measures, comparable data are provided for the surrounding area (selected counties and communities). The map featured above shows the general area for which selected comparable data are shown. In addition to Buffalo County, other counties included in this area are Adams, Custer, Dawson, Hall, Howard, Kearney, Phelps, and Sherman. The retail sales section also compares retail growth between Kearney and eight other similarly sized Nebraska communities.

Labor Force and Employment

Table 1 and Charts 1–5 (next pages) present nonfarm wage and salary data for Buffalo County for the period 2005–2014. Nonfarm employment is broken down into 11 sectors as defined by the Bureau of Labor Statistics and which are compliant with the North American Industrial Classification System (NAICS).

Nonfarm wage and salary employment consists of the following 11 sectors:

- Natural Resources & Mining
- Construction
- Manufacturing
- Trade, Transportation & Utilities
- Information
- Financial Activities
- Professional & Business Services
- Education & Health Services
- Leisure & Hospitality
- Other Services (except Public)
- Government

The measure of employment reported in Table 1 (below) is data on the number of people employed in the non-agriculture wage and salary sector in Buffalo County (regardless of their county of residence). These data indicate total nonfarm wage and salary employment in Buffalo County increased 7.6 percent (1,900 jobs) between 2005 and 2014.

Table 1 also provides employment data for Buffalo County by major economic sector for years 2005–2014. Of the sectors reporting complete data, the Professional & Business Services sector recorded the largest percentage increase in employment between 2005 and 2014 (33.9 percent or 614 jobs). The Trade, Transportation & Utilities sector recorded the largest actual employment increase between 2005 and 2014 (794 jobs or 15.5 percent).

Table 1

**Non-Farm Wage & Salary Employment Trends, Buffalo County, Nebraska
Selected Years: 2005-2014**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% Change 2005-2014	# Change 2005-2014
Non-farm Employment (W&S)	24,916	25,722	26,186	25,772	24,940	25,010	25,400	26,043	26,370	26,816	7.6	1,900
Total Private Industries	21,224	22,007	22,416	21,968	21,096	21,136	21,537	22,170	22,445	22,897	7.9	1,673
Goods Producing	5,603	5,901	5,835	5,452	4,727	4,840	4,986	5,079	5,233	5,133	-8.4	-470
Natural Resources & Mining	422	401	392	464	402	438	444	495	585	543	28.7	121
Construction	1,081	1,237	1,255	1,094	1,064	1,109	1,124	1,108	1,137	1,244	15.1	163
Manufacturing	4,100	4,263	4,189	3,894	3,260	3,294	3,418	3,476	3,511	3,346	-18.4	-754
Service Providing	15,621	16,106	16,581	16,516	16,369	16,296	16,551	17,091	17,212	17,764	13.7	2,143
Trade, Transportation & Utilities	5,122	5,350	5,482	5,571	5,617	5,448	5,641	5,768	5,669	5,916	15.5	794
Information	389	420	430	437	348	328	329	344	332	301	-22.6	-88
Financial Activities	810	854	861	863	849	811	813	817	818	813	0.4	3
Professional & Business Services	1,812	1,998	2,142	1,960	1,844	1,946	2,040	2,060	2,200	2,426	33.9	614
Education & Health Services	3,595	3,542	3,658	3,665	3,612	3,611	3,639	3,800	4,034	4,120	14.6	525
Leisure & Hospitality	2,957	3,021	3,052	3,025	3,107	3,089	3,064	3,151	3,184	3,236	9.4	279
Other Services, except Public	936	921	956	995	991	1,063	1,026	1,151	975	951	1.6	15
Government	3,691	3,715	3,770	3,804	3,845	3,874	3,863	3,873	3,925	3,919	6.2	228
Federal	164	159	163	168	160	166	149	137	132	134	-18.3	-30
State	1,333	1,308	1,331	1,334	1,351	1,362	1,361	1,397	1,430	1,410	5.8	77
Local	2,194	2,248	2,276	2,302	2,334	2,346	2,353	2,339	2,363	2,375	8.2	181

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data, released June 2015
Labor Force & Work Force Summary, 2005-2014, Annually, Buffalo County, Nebraska (June 2015 data)

Chart 1 (next page) compares total nonfarm wage and salary employment growth in Buffalo County with metropolitan, non-metropolitan, and Nebraska as a whole for the review period 2005–2014. Non-metropolitan Nebraska is defined as Nebraska minus the seven Lincoln and Omaha metropolitan counties of Cass, Douglas, Lancaster, Sarpy, Saunders, Seward, and Washington.

As this chart indicates, total non-farm wage and salary employment in Buffalo County increased 7.6 percent (1,900 jobs) from 2005 to 2014, compared to a 6.0 percent increase for Nebraska as a whole, a 6.9 percent increase in metropolitan Nebraska, and a 4.6 percent increase in non-metropolitan Nebraska.

Chart 1

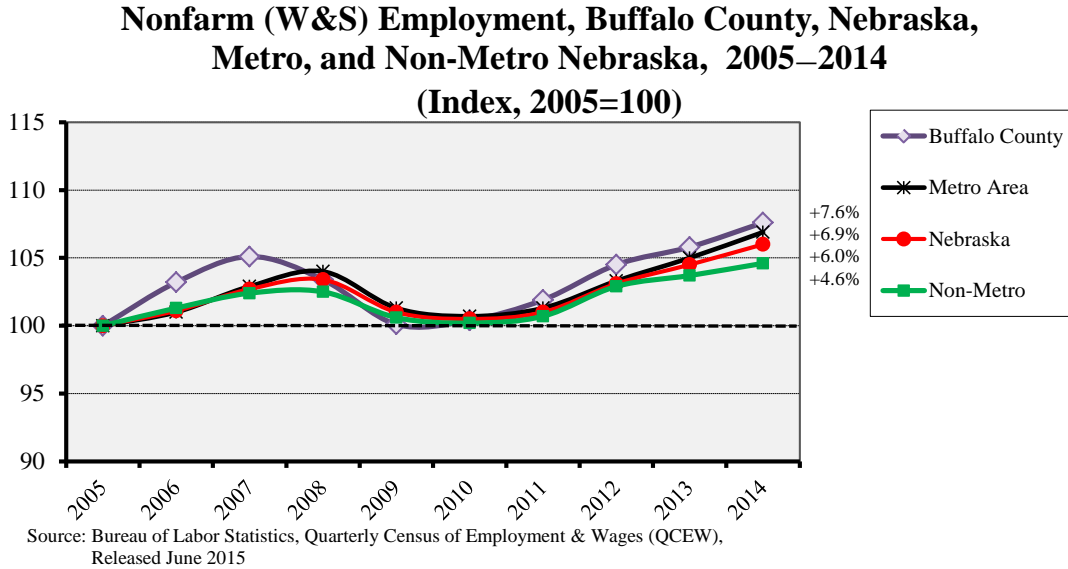
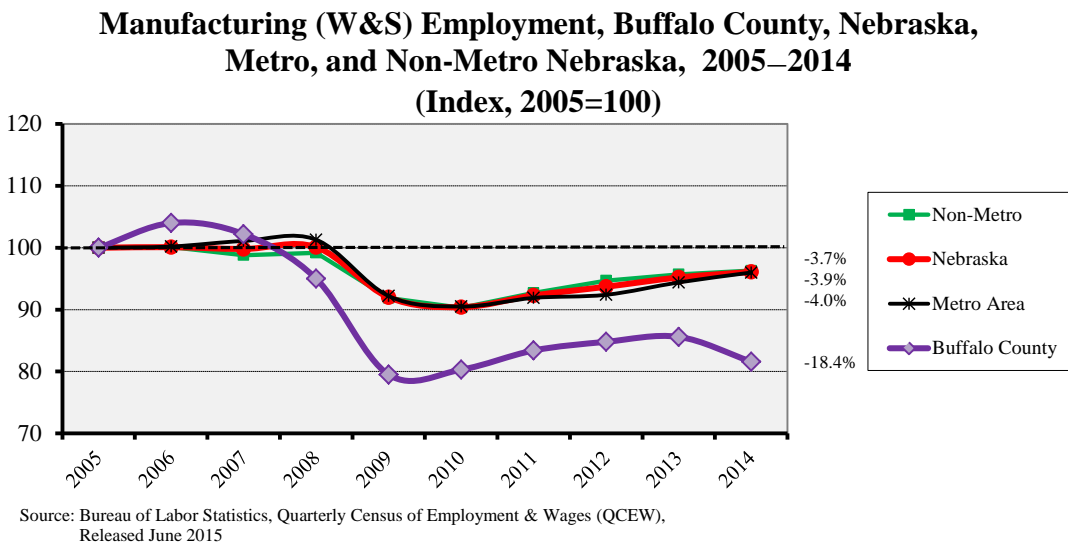


Chart 2 presents data on manufacturing wage and salary employment growth for Buffalo County, Nebraska, metropolitan, and non-metropolitan areas. The Manufacturing sector for Buffalo County recorded an 18.4 percent decrease in employment (754 jobs) between 2005 and 2014. This compares to a 3.7 percent decrease in employment for non-metropolitan Nebraska; a 3.9 percent decrease for Nebraska as a whole; and a 4.0 percent decrease for metropolitan Nebraska over the same period.

Chart 2

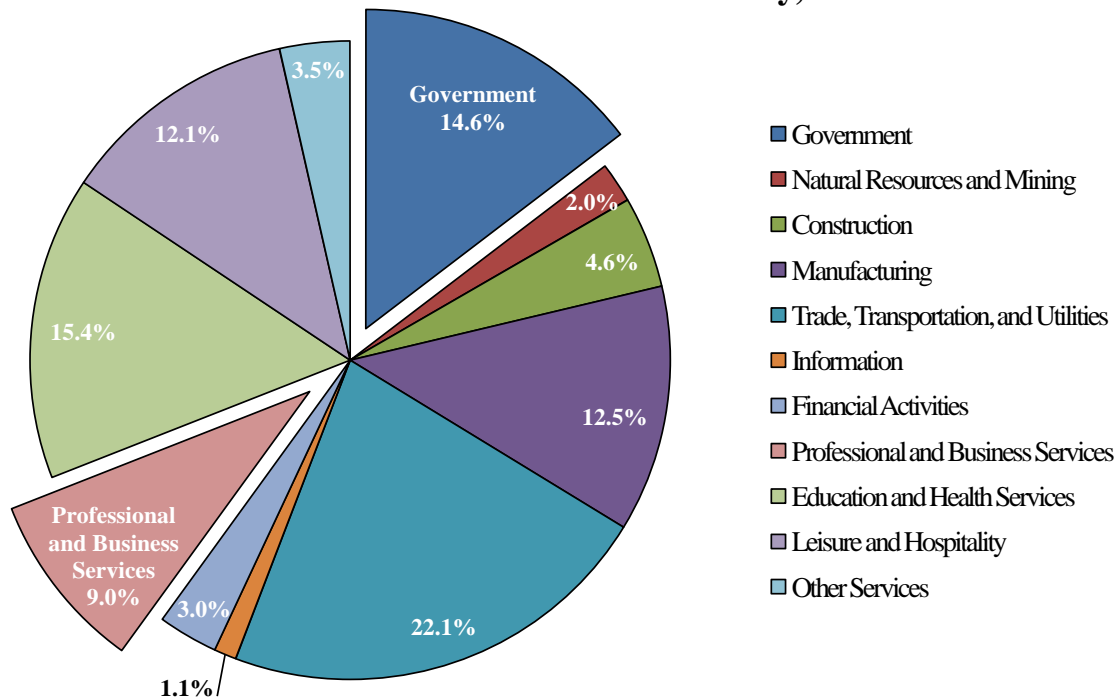


The next series of pie charts (Charts 3, 4 & 5) display the distribution of non-farm wage and salary (W&S) employment by major economic sector in Buffalo County compared to the non-metropolitan and metropolitan distributions.

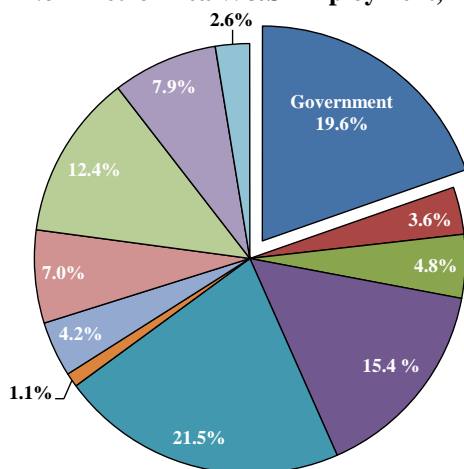
When comparing the Buffalo employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Government sector which makes up 14.6 percent of the county workforce (3,919 employees) compared to 19.6 percent for non-metropolitan Nebraska; a difference of 5.0 percent. Comparing Buffalo County to the overall metropolitan distribution, the largest deviation is found in the Professional and Business Services sector (9.0 percent Buffalo County vs. 15.1 percent metropolitan Nebraska; a difference of 6.1 percent).

Charts 3, 4, 5

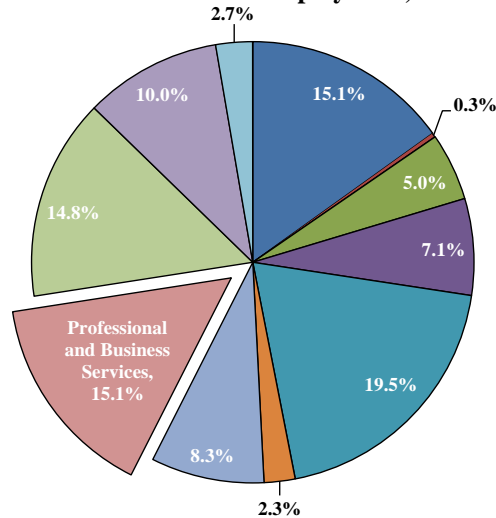
Nonfarm Wage & Salary Employment by Major Economic Sector Buffalo County, 2014



Non-Metro Area W&S Employment, 2014



Metro Area W&S Employment, 2014



* Pie chart sums may not total 100% due to rounding.
Source: U.S. Dept. of Labor, Bureau of Labor Statistics

The next table (Table 2) shows labor force information for Buffalo County for the time period 2005–2014. In the case of the labor force information (labor force, unemployment, and total employment), these data are measured based on the county of residence of the labor force participants (regardless of where they work). As the labor force and total employment data indicate, there was an increase in the number of Buffalo County residents participating in the labor force between 2005 and 2014 (2.3 percent or 628 people).

The number of those unemployed in Buffalo County decreased by 0.9 percent (7 people) between 2005 and 2014. Persons are classified as unemployed if they do not have a job, have actively looked for work in the prior four weeks, and are currently available for work. The Buffalo County unemployment rate was 2.7 percent in 2014; below that for metropolitan Nebraska (3.4 percent), below Nebraska as a whole (3.3 percent), and below non-metropolitan Nebraska (3.3 percent).

Table 2

**Labor Force & Employment Trends, Buffalo County, Nebraska
Selected Years: 2005–2014**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% Change 2005-14	# Change 2005-14
Labor Force	27,034	27,534	28,128	28,011	27,517	27,787	28,701	29,344	29,435	27,662	2.3	628
Unemployment	764	608	623	690	1,004	953	945	886	896	757	-0.9	-7
Unemployment Rate	2.8	2.2	2.2	2.5	3.6	3.4	3.3	3.0	3.0	2.7	(N/A)	(N/A)
Employment	26,270	26,926	27,505	27,321	26,513	26,834	27,756	28,458	28,539	26,905	2.4	635

(N/A) Data not available

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, Annual Data, released March 2015

Residence and Work Flow Patterns

The next series of tables show residence (Work Destination) and workflow (Home Destination) patterns for the city of Kearney in Buffalo County. A Work Destination report looks at where residents in a selected area are working (where they are commuting to work). A Home Destination report looks at the area from which a county is pulling employees to fill positions. These data are from the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) program. This program uses a variety of statistical and computing techniques to combine federal and state administrative data on employers and employees with core Census Bureau censuses and surveys while protecting the confidentiality of people and firms that provide the data. The most current data available for Kearney are from 2012.

Table 3 (pages 6–7) examines the Work Destination area for Kearney from three perspectives: by state, by county, and by place (city). In Table 3, the Census identified 13,257 city labor force participants holding primary jobs. As Table 3 shows, 99.7 percent of Kearney’s labor force participants are employed within the state of Nebraska. Approximately 74.3 percent of Kearney workers remain within Buffalo County for employment with 25.7 percent leaving the county borders for work (next page). Looking deeper to the locality level, the table also shows the top locations where Kearney labor force participants are employed (next page).

Table 3

Work Destination Report **Where Workers are Employed Who Live in the Selection Area**

2012

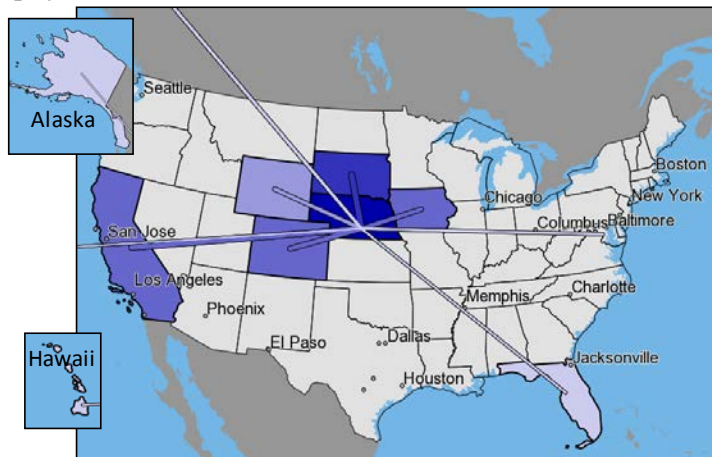
	Count	Share
Total Primary Jobs	13,257	100.0%

By States

Job Counts by States Where Workers are Employed

2012

	Count	Share
Nebraska	13,220	99.7%
South Dakota	7	0.1%
California	4	0.0%
Colorado	4	0.0%
Iowa	4	0.0%
Wyoming	3	0.0%
Alaska	1	0.0%
District of Columbia	1	0.0%
Florida	1	0.0%
Hawaii	1	0.0%
All Other Locations	11	0.1%

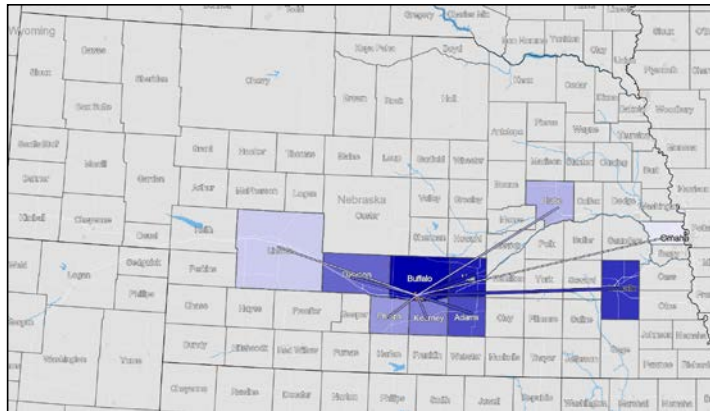


Source: U.S. Census Bureau, LED Origin-Destination Data Base, August 2015

Table 3 (continued)

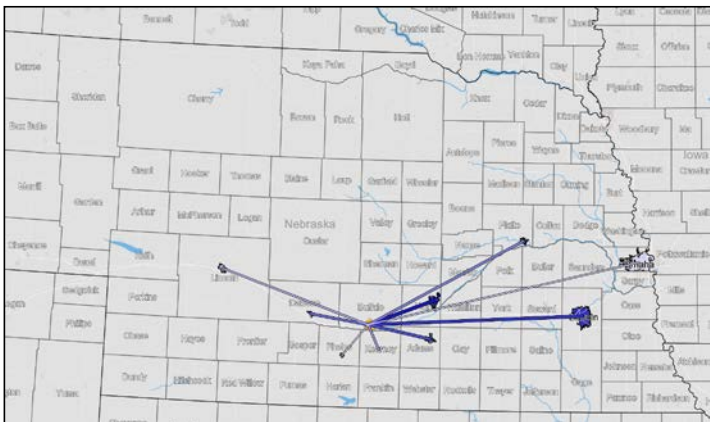
By Counties
Job Counts by Counties Where Workers are Employed

	2012	
	Count	Share
Buffalo County, NE	9,845	74.3%
Hall County, NE	789	6.0%
Lancaster County, NE	512	3.9%
Adams County, NE	311	2.3%
Dawson County, NE	255	1.9%
Kearney County, NE	225	1.7%
Phelps County, NE	142	1.1%
Platte County, NE	110	0.8%
Lincoln County, NE	100	0.8%
Douglas County, NE	98	0.7%
All Other Locations	870	6.6%



By Places (top 10)
Job Counts by Places (Cities, CDPs, etc.) Where Workers are Employed

	2012	
	Count	Share
Kearney city, NE	8,360	63.1%
Grand Island city, NE	709	5.3%
Lincoln city, NE	489	3.7%
Hastings city, NE	288	2.2%
Lexington city, NE	128	1.0%
Columbus city, NE	97	0.7%
Minden city, NE	93	0.7%
North Platte city, NE	86	0.6%
Omaha city, NE	85	0.6%
Holdrege city, NE	79	0.6%
All Other Locations	2,843	21.4%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, August 2015

People also travel from other locations to work in Kearney—this is the Home Destination report or the labor shed area. Table 4 (pages 8–9) depicts the home locations of those employed within Kearney. The Census identified 17,785 primary jobs within Kearney. As Table 4 indicates, 97.9 percent of these jobs are held by Nebraska residents. Approximately 61.6 percent of Kearney workers live within the county borders and the top localities show the distribution of employee residents around the area (next page).

Table 4

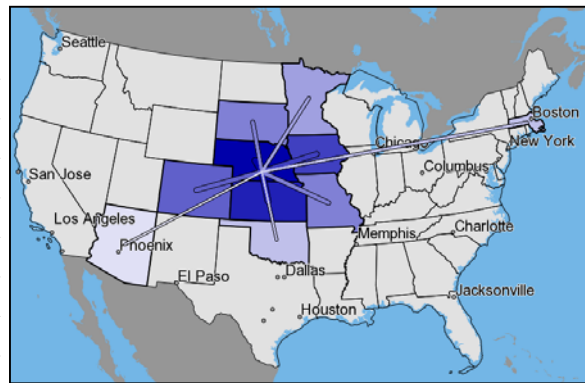
Home Destination Report Where Workers Live Who are Employed in the Selection Area 2012

	Count	Share
Total Primary Jobs	17,785	100.0%

By States

Job Counts by States Where Workers Live 2012

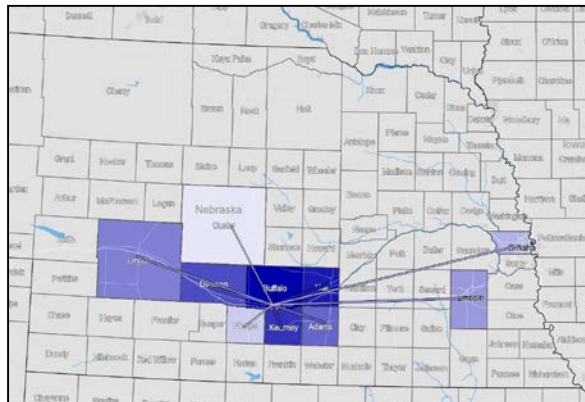
	Count	Share
Nebraska	17,413	97.9%
Kansas	140	0.8%
Iowa	54	0.3%
Colorado	44	0.2%
Missouri	17	0.1%
South Dakota	17	0.1%
Minnesota	14	0.1%
Massachusetts	8	0.0%
Oklahoma	8	0.0%
Arizona	6	0.0%
All Other Locations	64	0.4%



By Counties

Job Counts by Counties Where Workers Live 2012

	Count	Share
Buffalo County, NE	10,959	61.6%
Hall County, NE	727	4.1%
Kearney County, NE	632	3.6%
Dawson County, NE	473	2.7%
Adams County, NE	416	2.3%
Lincoln County, NE	405	2.3%
Lancaster County, NE	359	2.0%
Douglas County, NE	303	1.7%
Phelps County, NE	301	1.7%
Custer County, NE	220	1.2%
All Other Locations	2,990	16.8%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, August 2015

Table 4 (continued)

**By Places (top 10)
Job Counts by Places (Cities, CDPs, etc.) Where Workers Live**

2012		
	Count	Share
Kearney city, NE	8,360	47.0%
Grand Island city, NE	560	3.1%
Hastings city, NE	346	1.9%
Lincoln city, NE	317	1.8%
North Platte city, NE	282	1.6%
Minden city, NE	216	1.2%
Omaha city, NE	202	1.1%
Gibbon city, NE	173	1.0%
Lexington city, NE	170	1.0%
Elm Creek village, NE	160	0.9%
All Other Locations	6,999	39.4%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, August 2015

The next table (Table 5, pages 9–10) shows an inflow/outflow report for the Kearney labor force. The data show labor force and employment size, efficiency, and other characteristics. These data were also obtained from the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) section and help identify characteristics of labor force movement for Kearney.

Table 5

Inflow/Outflow Report

Selection Area Labor Market Size (Primary Jobs)

	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	17,785	100.0%	18,083	100.0%	16,589	100.0%
Living in the Selection Area	13,257	74.5%	13,049	72.2%	12,803	77.2%
Net Job Inflow (+) or Outflow (-)	4,528	-	5,034	-	3,786	-

In-Area Labor Force Efficiency (Primary Jobs)

	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	13,257	100.0%	13,049	100.0%	12,803	100.0%
Living and Employed in the Selection Area	8,360	63.1%	8,558	65.6%	7,793	60.9%
Living in the Selection Area but Employed Outside	4,897	36.9%	4,491	34.4%	5,010	39.1%

In-Area Employment Efficiency (Primary Jobs)

	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	17,785	100.0%	18,083	100.0%	16,589	100.0%
Employed and Living in the Selection Area	8,360	47.0%	8,558	47.3%	7,793	47.0%
Employed in the Selection Area but Living Outside	9,425	53.0%	9,525	52.7%	8,796	53.0%

Table 5 (continued)

Outflow Job Characteristics (Primary Jobs)	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	4,897	100.0%	4,491	100.0%	5,010	100.0%
Workers Aged 29 or younger	1,422	29.0%	1,497	33.3%	1,610	32.1%
Workers Aged 30 to 54	2,516	51.4%	2,140	47.7%	2,497	49.8%
Workers Aged 55 or older	959	19.6%	854	19.0%	903	18.0%
Workers Earning \$1,250 per month or less	1,089	22.2%	1,110	24.7%	1,179	23.5%
Workers Earning \$1,251 to \$3,333 per month	2,200	44.9%	1,994	44.4%	2,276	45.4%
Workers Earning More than \$3,333 per month	1,608	32.8%	1,387	30.9%	1,555	31.0%
Workers in the "Goods Producing" Industry Class	1,421	29.0%	1,375	30.6%	1,640	32.7%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,156	23.6%	1,111	24.7%	1,228	24.5%
Workers in the "All Other Services" Industry Class	2,320	47.4%	2,005	44.6%	2,142	42.8%

Inflow Job Characteristics (Primary Jobs)	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	9,425	100.0%	9,525	100.0%	8,796	100.0%
Workers Aged 29 or younger	2,985	31.7%	2,983	31.3%	2,883	32.8%
Workers Aged 30 to 54	4,413	46.8%	4,605	48.3%	4,279	48.6%
Workers Aged 55 or older	2,027	21.5%	1,937	20.3%	1,634	18.6%
Workers Earning \$1,250 per month or less	3,012	32.0%	2,912	30.6%	2,788	31.7%
Workers Earning \$1,251 to \$3,333 per month	3,733	39.6%	3,738	39.2%	3,617	41.1%
Workers Earning More than \$3,333 per month	2,680	28.4%	2,875	30.2%	2,391	27.2%
Workers in the "Goods Producing" Industry Class	1,095	11.6%	1,083	11.4%	806	9.2%
Workers in the "Trade, Transportation, and Utilities" Industry Class	2,691	28.6%	2,611	27.4%	2,387	27.1%
Workers in the "All Other Services" Industry Class	5,639	59.8%	5,831	61.2%	5,603	63.7%

Interior Flow Job Characteristics (Primary Jobs)	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	8,360	100.0%	8,558	100.0%	7,793	100.0%
Workers Aged 29 or younger	2,378	28.4%	2,464	28.8%	2,384	30.6%
Workers Aged 30 to 54	4,133	49.4%	4,372	51.1%	3,839	49.3%
Workers Aged 55 or older	1,849	22.1%	1,722	20.1%	1,570	20.1%
Workers Earning \$1,250 per month or less	2,276	27.2%	2,233	26.1%	2,132	27.4%
Workers Earning \$1,251 to \$3,333 per month	3,439	41.1%	3,592	42.0%	3,418	43.9%
Workers Earning More than \$3,333 per month	2,645	31.6%	2,733	31.9%	2,243	28.8%
Workers in the "Goods Producing" Industry Class	1,044	12.5%	1,052	12.3%	827	10.6%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,576	18.9%	1,555	18.2%	1,334	17.1%
Workers in the "All Other Services" Industry Class	5,740	68.7%	5,951	69.5%	5,632	72.3%

Source: U.S. Census Bureau, LED Origin-Destination Data Base, August 2015

The Distance/Direction Report depicted in Table 6 and Figure 1 shows the number (count) and percentage (share) of primary job holders living in Kearney and the distance they travel to work. Looking at Table 6, the count of primary job holders living within Kearney is greater in 2012 compared to 2010. The distribution of miles traveled to work has also slightly shifted since 2010. Figure 1 shows the location and concentration of these workplaces.

Table 6

Distance/Direction Report - Home to Work Census Block

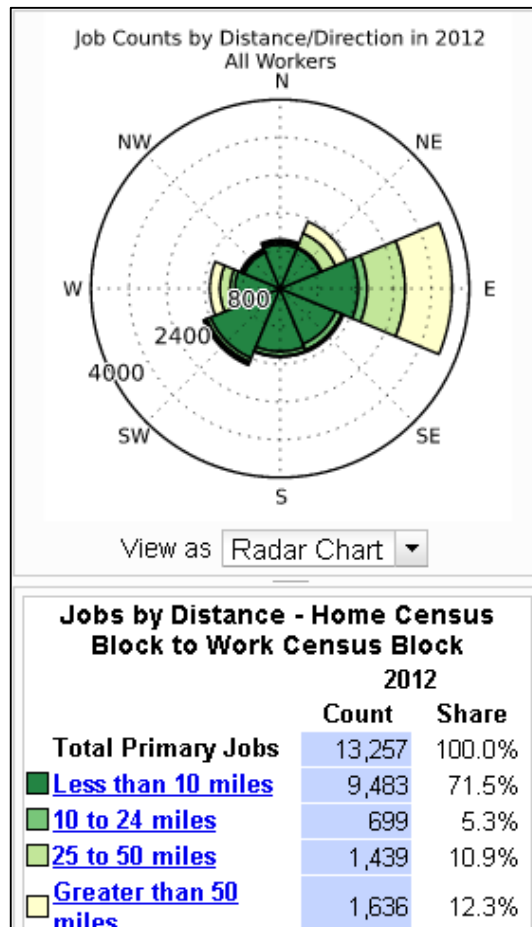
Lives within study area - distance to work

Job Counts in Work Blocks by Distance Only

	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	13,257	100.0%	13,049	100.0%	12,803	100.0%
Less than 10 miles	9,483	71.5%	9,463	72.5%	9,095	71.0%
10 to 24 miles	699	5.3%	639	4.9%	639	5.0%
25 to 50 miles	1,439	10.9%	1,362	10.4%	1,414	11.0%
Greater than 50 miles	1,636	12.3%	1,585	12.1%	1,655	12.9%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, August 2015

Figure 1



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, August 2015

Table 7 and Figure 2 show the number (count) and percentage (share) of people employed within Kearney and the distance to their homes. Looking at Table 7, the number of primary jobs held within Kearney has increased since 2010. The data also show the majority of Kearney employees continue to travel less than 10 miles from work to home. Figure 2 shows the concentration of job counts by distance and direction.

Table 7

Distance/Direction Report - Work to Home Census Block

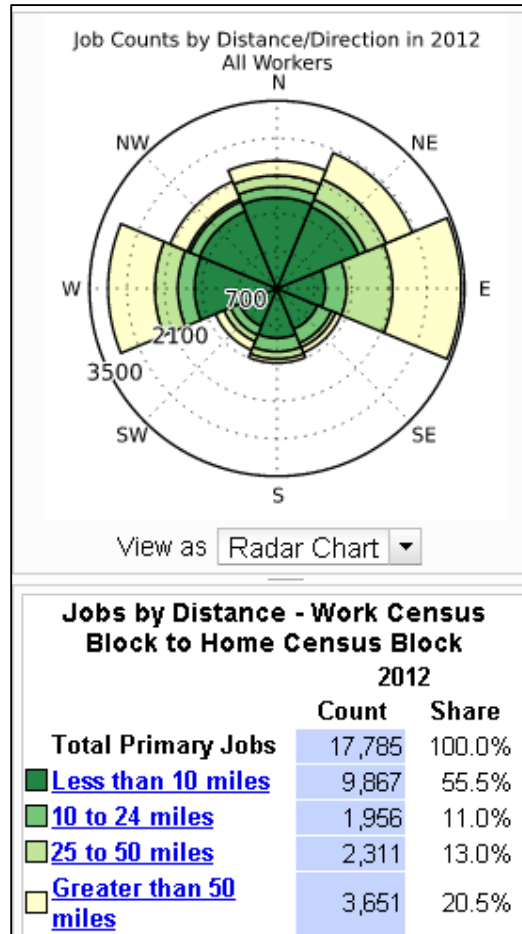
Work within study area - distance to home

Job Counts in Home Blocks by Distance Only

	2012		2011		2010	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	17,785	100.0%	18,083	100.0%	16,589	100.0%
Less than 10 miles	9,867	55.5%	10,111	55.9%	9,327	56.2%
10 to 24 miles	1,956	11.0%	2,101	11.6%	2,147	12.9%
25 to 50 miles	2,311	13.0%	2,222	12.3%	1,949	11.7%
Greater than 50 miles	3,651	20.5%	3,649	20.2%	3,166	19.1%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, August 2015

Figure 2



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, August 2015

Population and Migration Trends

The following tables (Tables 8 and 9) present population trend data for Buffalo County and the surrounding area. As Table 8 indicates, Buffalo County's population experienced an average annual increase of 1.0 percent between 1970 and 2010 for a total increase of 47.7 percent or 14,880 people. This population increase compares to an average annual increase of 0.5 percent, 23.0 percent total, for Nebraska as a whole. Buffalo County reported an average annual 1.1 percent increase in population from 2010 to 2014 (2,122 people total).

Table 8

County Population 1970-2014 Buffalo County and the Surrounding Area

Location	---Year---						Avg. Annual	Avg. Annual
	1970	1980	1990	2000	2010	2014	% Change 1970-2010	% Change 2010-2014
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,881,503	0.5	0.7
Buffalo County	31,222	34,797	37,447	42,259	46,102	48,224	1.0	1.1
Adams County	30,553	30,656	29,625	31,151	31,364	31,457	0.1	0.1
Custer County	14,092	13,877	12,270	11,793	10,939	10,728	-0.6	-0.5
Dawson County	19,771	22,304	19,940	24,365	24,326	24,096	0.5	-0.2
Hall County	42,851	47,690	48,925	53,534	58,607	61,492	0.8	1.2
Howard County	6,807	6,773	6,057	6,567	6,274	6,362	-0.2	0.3
Kearney County	6,707	7,053	6,629	6,882	6,489	6,644	-0.1	0.6
Phelps County	9,553	9,769	9,715	9,747	9,188	9,187	-0.1	0.0
Sherman County	4,725	4,226	3,718	3,318	3,152	3,074	-1.0	-0.6

Source: U.S. Bureau of the Census, Census of Population, May 2015

Table 9 data reveals the population of Buffalo County's incorporated places as a whole experienced an average annual population increase of 1.0 percent from 1970 to 2010 and an average annual increase of 1.1 percent from 2010 to 2014 for a total increase of 54.5 percent (17,002 people) from 1970 to 2014. Kearney, the county's largest city, reported a 69.3 percent increase in population (13,288 people) between 1970 and 2014. The unincorporated areas outside of the selected communities experienced a 43.6 percent decrease (2,904 people) during the period 1970–2014.

Table 9

County Population 1970–2014 Buffalo County Communities and Unincorporated Areas

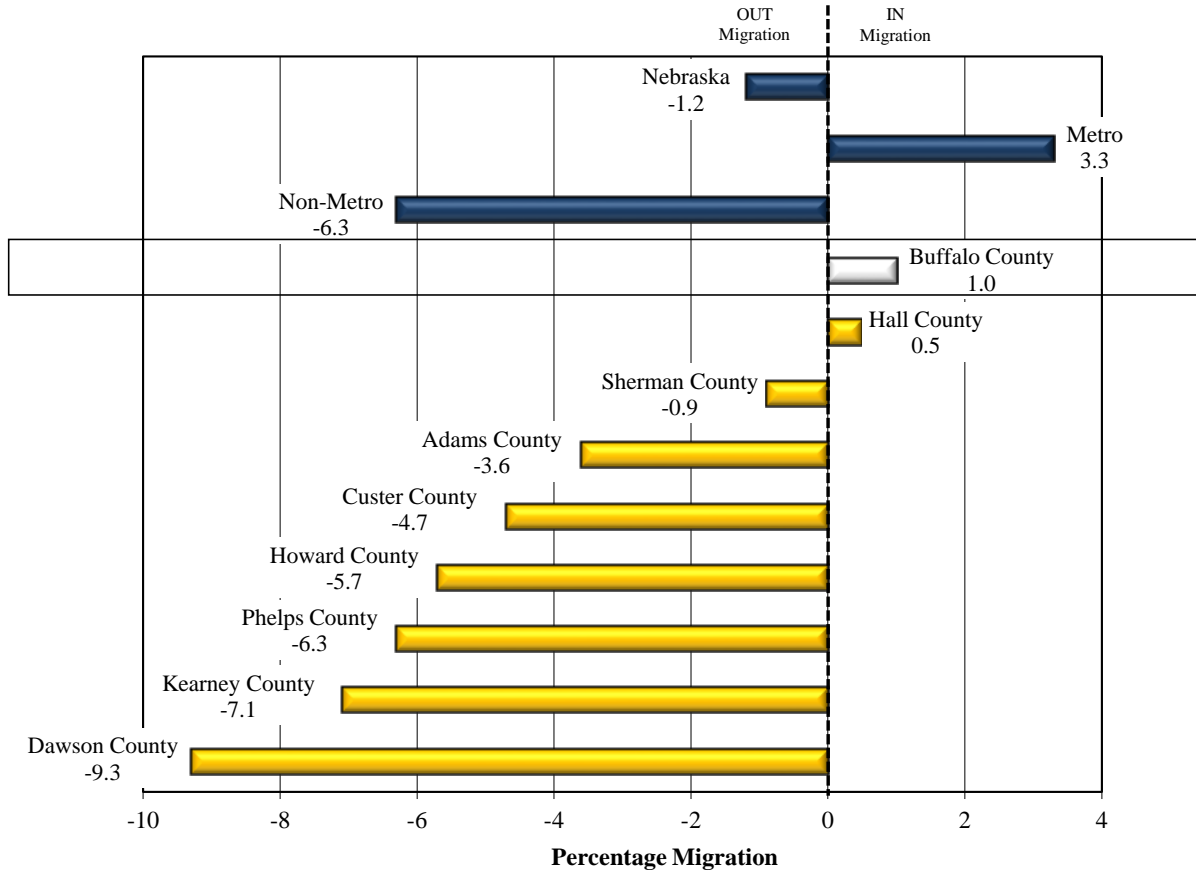
Location	---Year---						Avg. Annual	Avg. Annual
	1970	1980	1990	2000	2010	2014	% Change 1970-2010	% Change 2010-2014
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,881,503	0.5	0.7
Buffalo County	31,222	34,797	37,447	42,259	46,102	48,224	1.0	1.1
Amherst	259	269	229	277	248	251	-0.1	0.3
Elm Creek	798	862	852	894	901	955	0.3	1.5
Gibbon	1,388	1,531	1,525	1,759	1,833	1,885	0.7	0.7
Kearney	19,181	21,158	24,915	27,431	30,787	32,469	1.2	1.3
Miller	130	147	130	156	136	138	0.1	0.4
Pleasanton	261	349	374	360	341	345	0.7	0.3
Ravenna	1,356	1,296	1,371	1,341	1,360	1,364	0.0	0.1
Riverdale	155	204	215	213	182	184	0.4	0.3
Shelton	1,028	1,046	956	1,140	1,059	1,063	0.1	0.1
Total Incorporated Places	24,556	26,862	30,567	33,571	36,847	38,654	1.0	1.2
Unincorporated Areas	6,666	7,935	6,880	8,688	9,255	9,570	0.8	0.8

Source: U.S. Bureau of the Census, Census of Population, May 2015

The next two charts (Chart 6 & 7) graphically depict the migration patterns for Nebraska, Buffalo County, and the surrounding area as a percentage of the previous decade. Net migration is the change in population after factoring the natural increase for an area (births minus deaths). For the 2000–2010 decade, Buffalo County experienced a net in-migration of 440 people or 1.0 percent of its 2000 population.

Chart 6

2000–2010 Net Migration as Percent of 2000 Population Buffalo County and the Surrounding Area

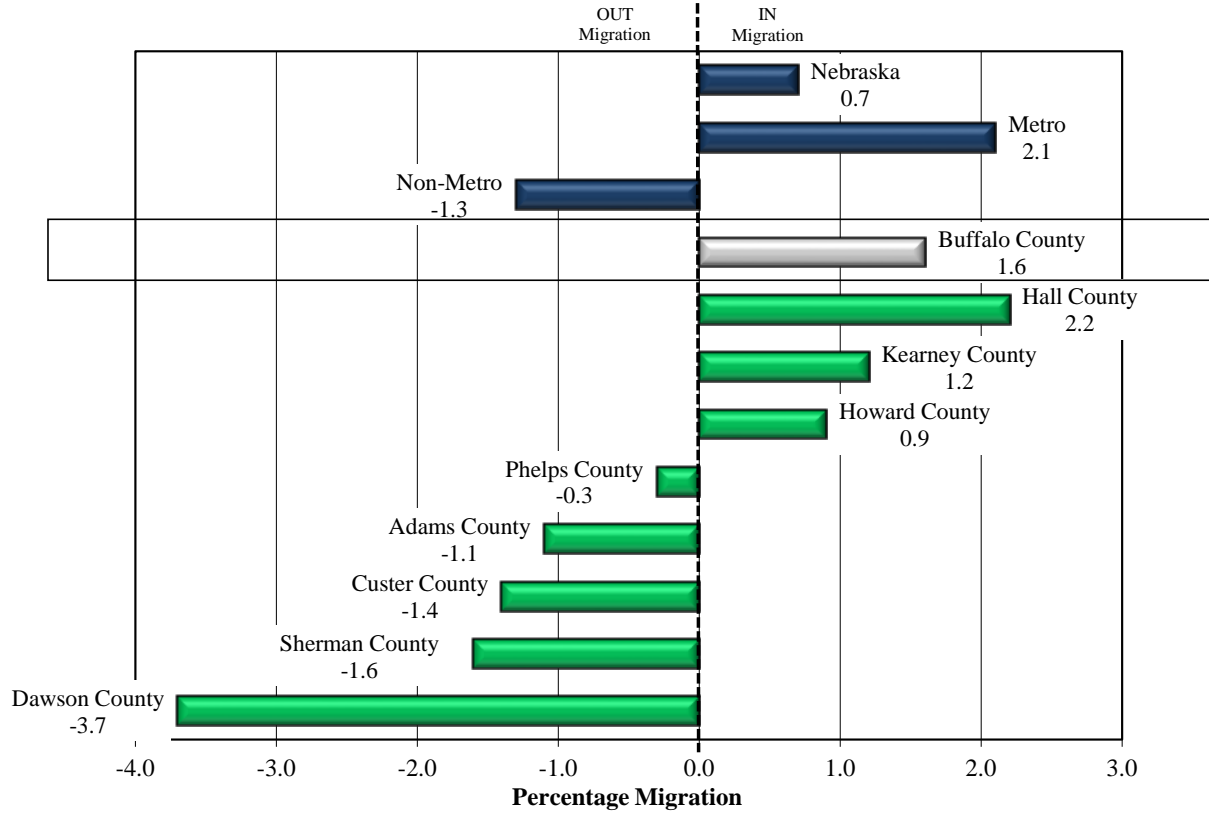


Source: U.S. Census Bureau, County population and estimated components of population change, May 2015

Looking at the years 2010–2014 (Chart 7), Buffalo County experienced a net in-migration of 720 people or 1.6 percent of its 2010 population.

Chart 7

2010–2014 Net Migration as Percent of 2010 Population Buffalo County and the Surrounding Area



Source: U.S. Census Bureau, County population and estimated components of population change, May 2015

The next two tables (Tables 10 and 11) provide detail on migration patterns. Data reported in these tables are 2008–2012, five-year estimates, which are the latest multiyear estimates available. Multiyear estimates from the American Community Survey are “period” estimates that represent data collected over a period of time (as opposed to “point-in-time” estimates, such as the decennial census, that approximate the characteristics of an area on a specific date). Migration patterns are influenced by employment opportunities, cost-of-living, and quality-of-life factors.

Table 10 data show 68.5 percent of the 4,216 people moving into Buffalo County moved from other Nebraska locations (2,887 people). Data also reveal 1,061 people (25.2 percent) migrated into the county from other states and 6.3 percent migrated from another country.

Table 10

Buffalo County, Nebraska, 2008–2012, Five-Year Estimate
Inflow Into County

	Number	Percent
Movers within the United States	9,159	97.2
Within Same County	5,211	55.3
Different County, Same State	2,887	30.6
Different State	1,061	11.3
Movers from Abroad	268	2.8
Total Movement	9,427	

Source: American Community Survey, County-to-County Migration
Flows, 2008-2012 data, accessed July 2015

Reported Counties
(where people moved from)

State	County	Number
Nebraska	Lancaster County	430
Nebraska	Douglas County	291
Nebraska	Kearney County	260
Nebraska	Hall County	225
Nebraska	Lincoln County	167
Asia	-	157
Nebraska	Dawson County	148
Nebraska	Custer County	136
Nebraska	Adams County	135
Colorado	Arapahoe County	104
Nebraska	Sherman County	102
Minnesota	Faribault County	87
Nebraska	Hitchcock County	81
Nebraska	Phelps County	81
Nebraska	Howard County	78
Arizona	Maricopa County	69
Colorado	Weld County	63
Europe	-	58
Nebraska	Cass County	48
Colorado	Adams County	47
New Mexico	Sandoval County	45
Illinois	Cook County	44
Idaho	Ada County	41
Nebraska	Dixon County	38
Nebraska	Gosper County	38

Source: American Community Survey, County-to-County Migration
Flows, 2008-2012 data, accessed July 2015

The 2008–2012, five-year estimates in Table 11 reveal 66.6 percent of the 3,291 people migrating out of Buffalo County remained in the state of Nebraska (2,192 people). Data show 1,099 Buffalo County residents (33.4 percent) also moved to other states during this time period. Employment, housing, and educational opportunities located in these counties play a major role in this migration pattern.

Table 11

**Buffalo County, Nebraska, 2008–2012, Five-Year Estimate
Outflow From County**

	Number	Percent
Movers within the United States	8,502	100.0
Within Same County	5,211	61.3
Different County, Same State	2,192	25.8
Different State	1,099	12.9
Movers to Puerto Rico	0	0
Total Movement	8,502	

Source: American Community Survey, County-to-County Migration
Flows, 2008-2012 data, accessed July 2015

**Reported Counties
(where people moved to)**

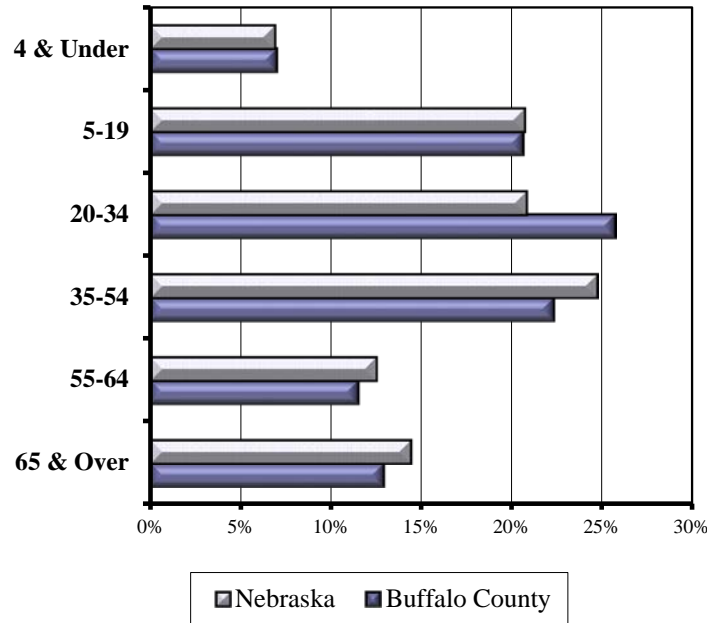
State	County	Number
Nebraska	Lancaster County	440
Nebraska	Kearney County	207
Nebraska	Lincoln County	178
Nebraska	Douglas County	152
Nebraska	Adams County	145
Nebraska	Hall County	122
Nebraska	Hamilton County	120
Texas	Hutchinson County	108
Nebraska	Red Willow County	106
Iowa	Scott County	103
Kansas	Saline County	79
Nebraska	Dawson County	79
Texas	Bell County	67
Nebraska	Franklin County	63
Nebraska	Furnas County	63
Iowa	Polk County	58
Colorado	Weld County	55
Nebraska	Custer County	54
Nebraska	Keith County	48
Nebraska	Gosper County	45
Nebraska	Sarpy County	44
Nebraska	Dawes County	43
Missouri	Nodaway County	34
Kansas	Washington County	33
Kentucky	Christian County	33

Source: American Community Survey, County-to-County Migration
Flows, 2008-2012 data, accessed July 2015

The following chart and table (Chart 8; Table 12) compare the U.S. Census Bureau’s age distribution of population for Nebraska as a whole and Buffalo County. The population of Buffalo County is significantly younger in age than Nebraska as a whole. The median age for Buffalo County residents in 2014 was 32.6 years of age compared to 36.2 years of age for residents of Nebraska as a whole.

Chart 8

Age Distribution of the Population, 2014 Buffalo County and Nebraska



Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," July 2015

Table 12

Age Distribution of the Population, 2014 Buffalo County and Nebraska

	2013 Population		Percent	
	Nebraska	Buffalo County	Nebraska	Buffalo County
4 & Under	130,178	3,361	6.9%	7.0%
5-19	389,683	9,950	20.7%	20.6%
20-34	391,432	12,378	20.8%	25.7%
35-54	464,329	10,777	24.7%	22.3%
55-64	234,892	5,537	12.5%	11.5%
65 & Over	270,989	6,221	14.4%	12.9%
Total	1,881,503	48,224	100%	100%
Median Age	36.2	32.6		

Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," June 2014

Table 13 shows additional median ages as estimated by the American Community Survey for communities within Buffalo County and the surrounding counties both as a total and by gender. These are 5-year estimates and differ from the U.S. Census Bureau’s single year distributions. Chart 9 graphically depicts the median age distribution for the study area.

Table 13

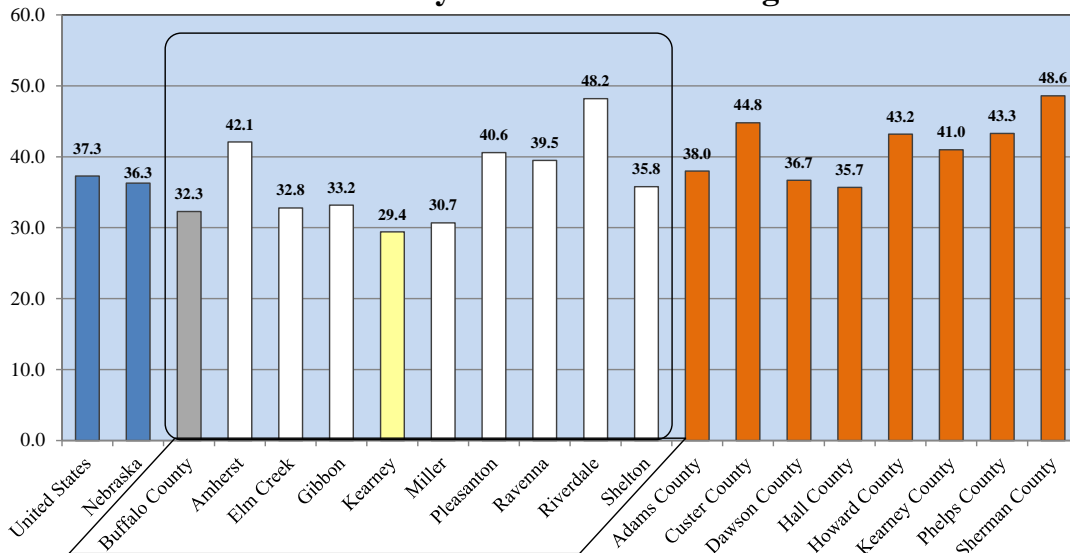
Median Age by Location and Gender
5-Year Estimate, 2009–2013
Buffalo County and the Surrounding Area

	Median Age		
	Total	Male	Female
United States	37.3	36.0	38.7
Nebraska	36.3	35.0	37.5
Buffalo County	32.3	31.0	33.5
Amherst	42.1	43.3	36.8
Elm Creek	32.8	30.4	33.8
Gibbon	33.2	33.2	33.4
Kearney	29.4	28.6	30.6
Miller	30.7	33.4	30.4
Pleasanton	40.6	40.1	41.8
Ravenna	39.5	38.2	44.4
Riverdale	48.2	42.7	51.6
Shelton	35.8	37.3	35.1
Adams County	38.0	35.8	39.4
Custer County	44.8	42.6	46.3
Dawson County	36.7	35.7	37.8
Hall County	35.7	34.8	37.1
Howard County	43.2	40.5	45.8
Kearney County	41.0	39.9	43
Phelps County	43.3	41.3	44.8
Sherman County	48.6	46.9	49.3

Data Set: 2009-2013 American Community Survey 5-Year Estimates
 Source: U.S. Census Bureau, 2009-2013 American Community Survey, March 2015

Chart 9

Median Age by Location, 5-Year Estimate, 2009–2013
Buffalo County and the Surrounding Area



Data Set: 2009-2013 American Community Survey 5-Year Estimates
 Source: U.S. Census Bureau, 2009-2013 American Community Survey, March 2015

Retail Sales

Table 14 and Chart 10 show the retail sales (non-motor vehicle) pull factors for Buffalo County and the surrounding area for 2014. The pull factor is computed by dividing the per capita taxable, non-motor vehicle (NMV) retail sales by the state average per capita NMV retail sales. A pull factor of one indicates an area has per capita NMV retail sales equal to the state. A value greater than one indicates an area is drawing retail sales from other areas. Conversely, a pull factor with a value less than one indicates the subject area is losing potential retail activity to other places or, in other words, is experiencing retail sales leakage. This simple calculation does not factor in income levels or purchasing power within an area.

Table 14

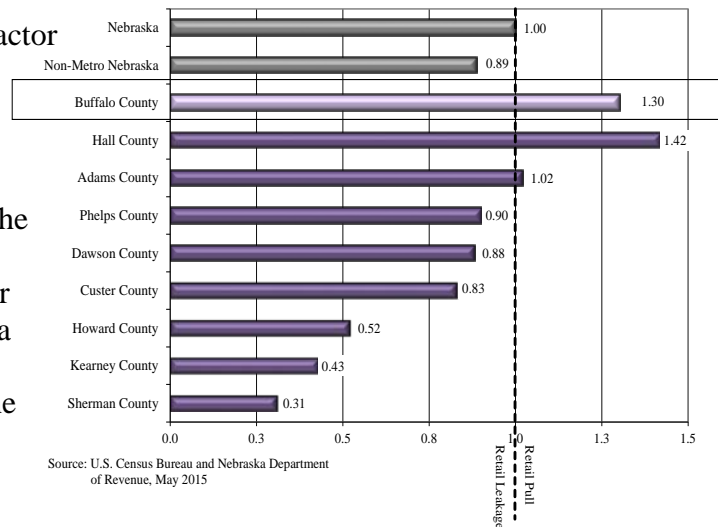
2014 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska, Buffalo County, and Surrounding Counties

	2014 Population	2014 Retail Sales (x \$1,000)	2014 Per Cap Sales (\$)	2014 Pull Factor
Nebraska	1,855,487	23,068,893	12,261	1.00
Non-Metro Nebraska	781,665	8,496,437	10,887	0.89
Buffalo County	47,644	769,046	15,947	1.30
Adams County	31,384	391,585	12,448	1.02
Custer County	10,788	108,635	10,126	0.83
Dawson County	24,100	261,368	10,847	0.88
Hall County	60,335	1,072,666	17,444	1.42
Howard County	6,305	40,333	6,340	0.52
Kearney County	6,534	34,880	5,250	0.43
Phelps County	9,216	101,792	11,080	0.90
Sherman County	3,124	11,676	3,798	0.31

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2015

Chart 10

2014 Retail Sales (NMV) Pull Factors, Nebraska, Buffalo County & Surrounding Counties



Reviewing the pull factors at the county level indicates Buffalo County experiences net positive retail injections. The 2014 pull factor of 1.30 indicates, on a per capita basis, retail sales in Buffalo County are above the state's average per capita sales. Distance from other large trade centers plays a major role in this phenomenon. The comparison of the pull factor for Buffalo County (1.30) with the pull factor for the non-metropolitan area of Nebraska (0.89) indicates per capita retail sales in Buffalo County are 46.5 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

Table 15 and Chart 11 compare the 2014 pull factors for selected area communities. The community of Kearney’s pull factor of 1.82 indicates that, on a per capita basis, non-motor vehicle retail sales in Kearney are approximately 82.0 percent greater than the state’s average per capita sales.

Table 15

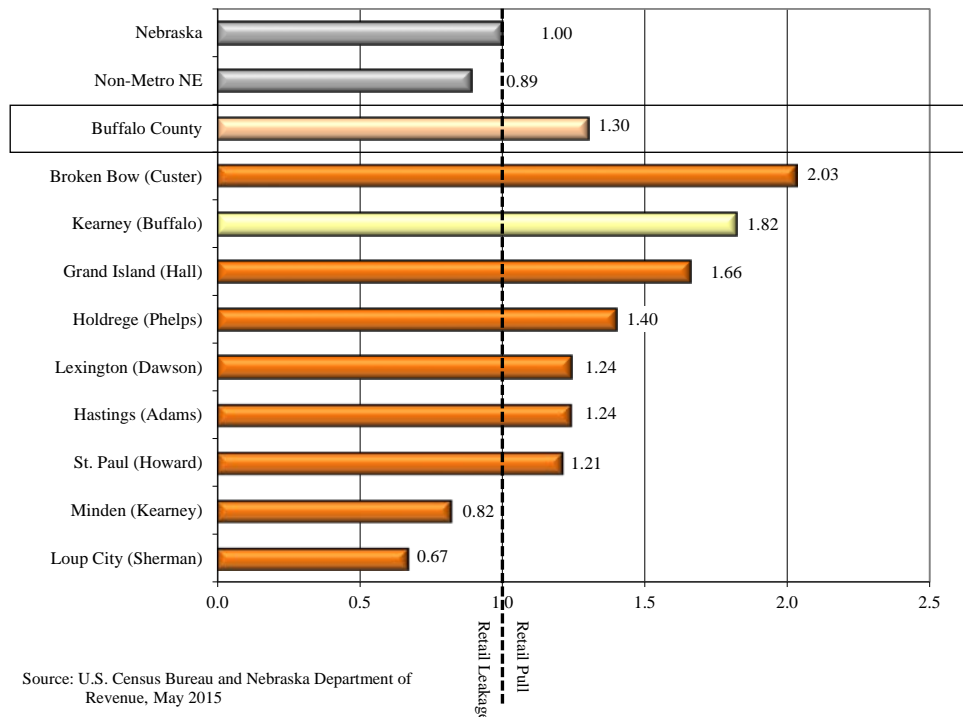
**2014 Retail Sales (NMV) Pull Factors
Nebraska, Buffalo County, and Selected Study Area Communities**

	2014 Population	2014 Retail Sales (x \$1,000)	2014 Per Cap Sales (\$)	2014 Pull Factor
Nebraska	1,855,487	23,068,893	12,261	1.00
Non-Metro Nebraska	781,665	8,496,437	10,887	0.89
Buffalo County	47,644	769,046	15,947	1.30
Kearney (Buffalo)	32,469	724,791	22,323	1.82
Hastings (Adams)	24,915	379,406	15,228	1.24
Broken Bow (Custer)	3,482	86,742	24,912	2.03
Lexington (Dawson)	10,146	153,687	15,148	1.24
Grand Island (Hall)	51,236	1,043,628	20,369	1.66
St. Paul (Howard)	2,335	34,628	14,830	1.21
Minden (Kearney)	3,029	30,492	10,067	0.82
Holdrege (Phelps)	5,508	94,855	17,221	1.40
Loup City (Sherman)	1,006	8,234	8,185	0.67

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2015

Chart 11

**2014 Retail Sales (NMV) Pull Factors,
Nebraska, Buffalo County & Selected Study Area Communities**



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2015

Table 16 (sorted by population) and Chart 12 (sorted by pull factor) further breakdown the 2014 pull factors into the communities reporting retail sales figures within Buffalo County. As this table indicates, the community of Kearney had the strongest pull factor (1.82) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 1.30 for Buffalo County in 2014.

Table 16

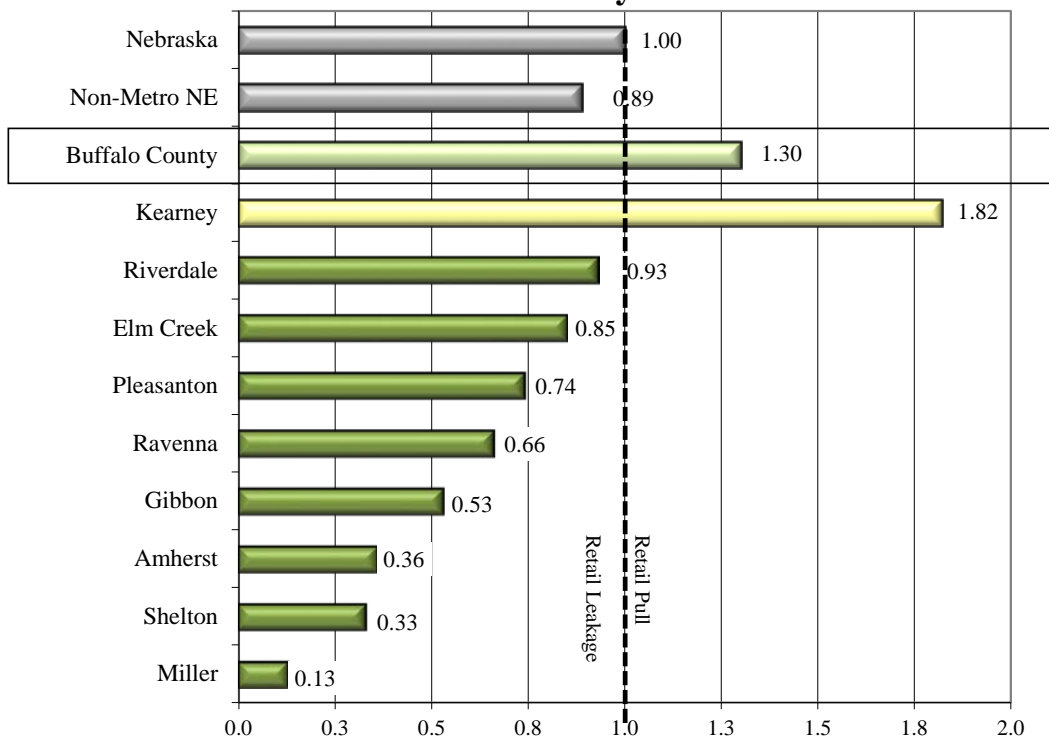
2014 Retail Sales (NMV) Pull Factors Nebraska and Available Buffalo County Area Communities

	2014 Population	2014 Retail Sales (x \$1,000)	2014 Per Cap Sales (\$)	2014 Pull Factor
Nebraska	1,855,487	23,068,893	12,261	1.00
Non-Metro Nebraska	781,665	8,496,437	10,887	0.89
Buffalo County	47,644	769,046	15,947	1.30
Kearney	32,469	724,791	22,323	1.82
Gibbon	1,885	12,304	6,527	0.53
Ravenna	1,364	10,979	8,049	0.66
Shelton	1,063	4,296	4,041	0.33
Elm Creek	955	9,916	10,383	0.85
Pleasanton	345	3,142	9,108	0.74
Amherst	251	1,114	4,438	0.36
Riverdale	184	2,106	11,446	0.93
Miller	138	219	1,589	0.13

Source: U.S. Census Bureau and the Nebraska Department of Revenue, May 2015

Chart 12

2014 Retail Sales (NMV) Pull Factors, Nebraska and Available Buffalo County Communities



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2015

Table 17 (sorted by population) and Chart 13 (sorted by pull factor) show the 2014 pull factors for Nebraska, Kearney, and eight other similarly sized communities selected from around the state. Norfolk’s pull factor of 1.91 leads the group for 2014 thus indicating Norfolk has greater retail pull.

Table 17

**2014 Retail Sales (NMV) Pull Factors
Kearney & Other Similarly Sized Nebraska Communities**

	2014 Population	2014 Retail Sales (x \$1,000)	2014 Per Cap Sales (\$)	2014 Pull Factor
Nebraska	1,855,487	23,068,893	12,261	1.00
Non-Metro Nebraska	781,665	8,496,437	10,887	0.89
Kearney (Buffalo)	32,469	724,791	22,323	1.82
North Platte (Lincoln)	24,327	459,449	18,886	1.54
Norfolk (Madison)	24,444	572,592	23,425	1.91
Hastings (Adams)	24,915	379,406	15,228	1.24
Fremont (Dodge)	26,500	422,951	15,960	1.30
Grand Island (Hall)	51,236	1,043,628	20,369	1.66
Bellevue (Sarpy)	53,936	388,246	7,198	0.59
Lincoln (Lancaster)	272,996	3,517,858	12,886	1.05
Omaha (Douglas)	446,599	8,757,888	19,610	1.60

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2015

Chart 13

**2014 Retail Sales (NMV) Pull Factors, Kearney
& Other Similary Sized Nebraska Communities**

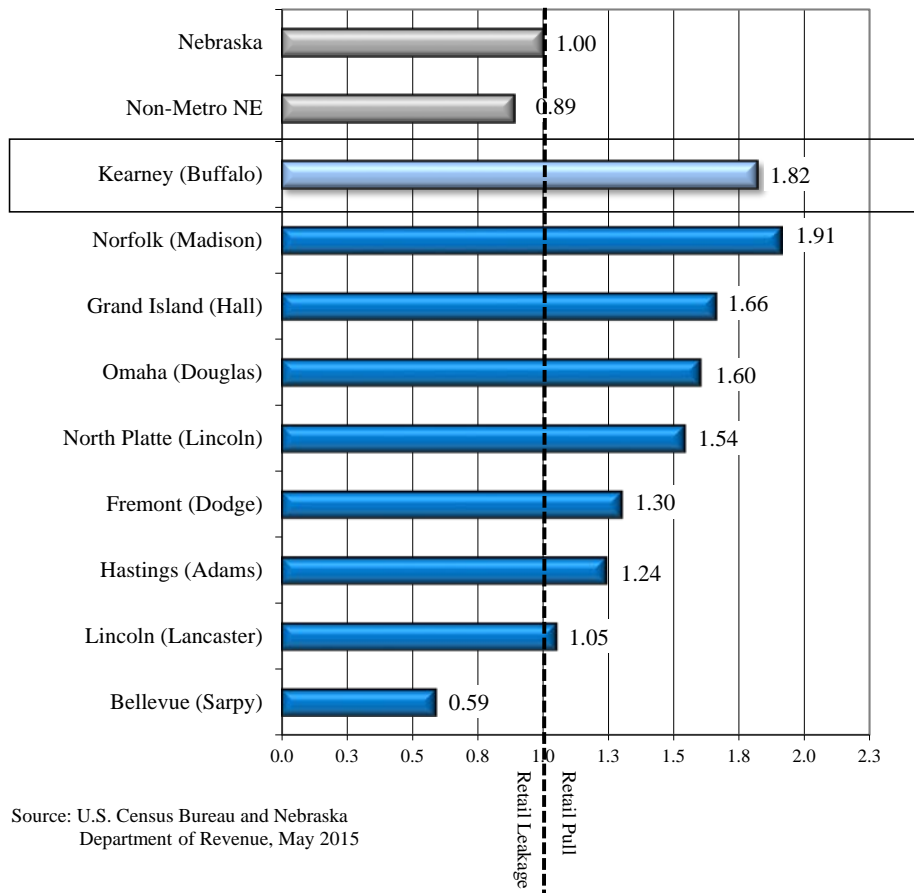
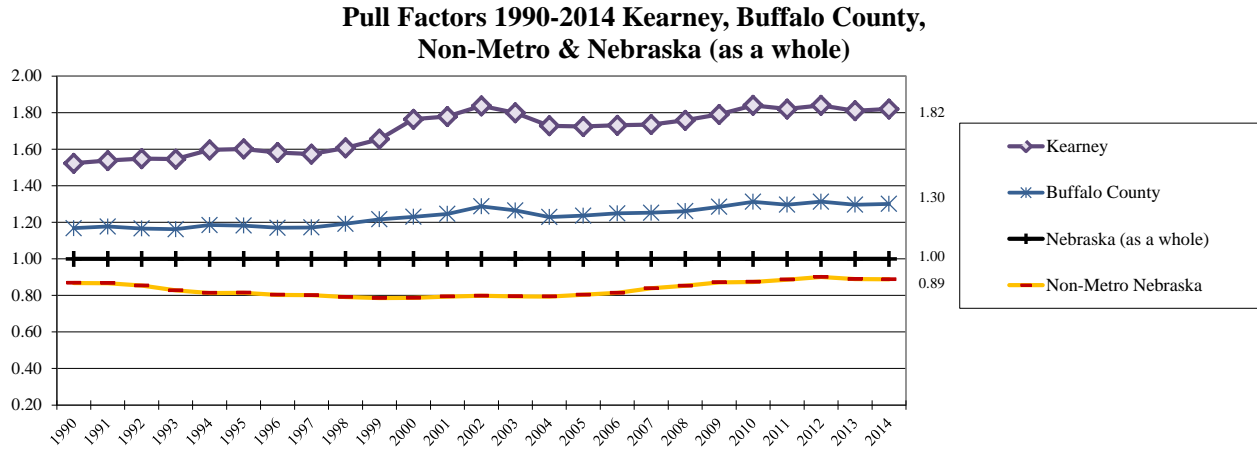


Chart 14 illustrates the pull factor trend for Kearney, Buffalo County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2014. In examining the time line, the city of Kearney shows retail pull fluctuating well above the state average throughout the entire study period. Data within Buffalo County (as a whole) also shows the pull factor similar in fluctuation, although below, Kearney’s average throughout the time period.

Chart 14



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2015

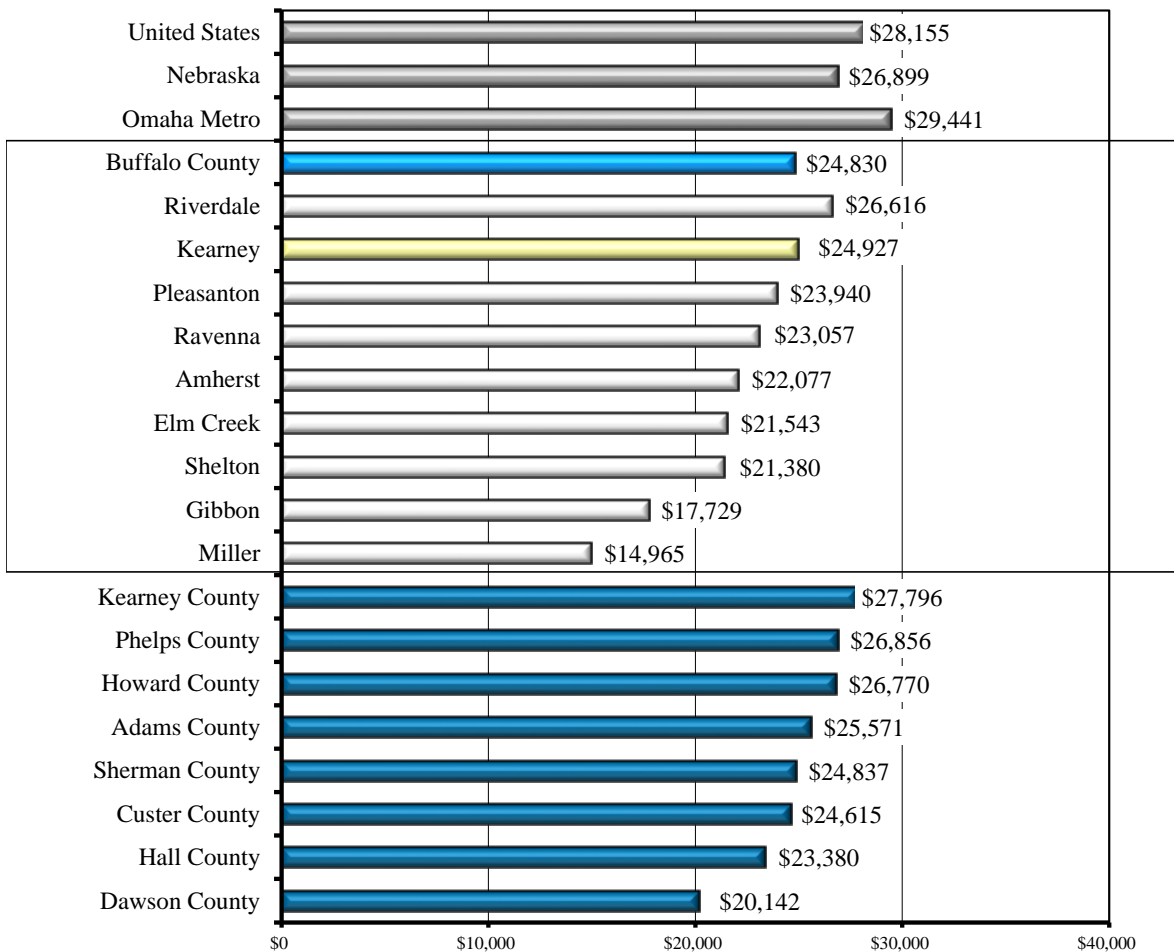
Per Capita Personal Income

Chart 15 examines the per capita personal income levels within the study area. The American Community Survey data allows us to look more closely at non-metropolitan areas in Nebraska. Information on income distribution comes from various sources including earnings, retirement income, and public assistance.

The 2009–2013, five-year data show per capita personal income for Buffalo County is estimated to be \$24,830 compared to \$26,899 for Nebraska as a whole.

Chart 15

Per Capita Income, 2009–2013 Five-Year Estimate Nebraska, Buffalo County & Surrounding Counties



Source: U.S. Census Bureau, 2013 inflation adjusted past 12-months, 2009-2013 American Community Survey, accessed June 2015.

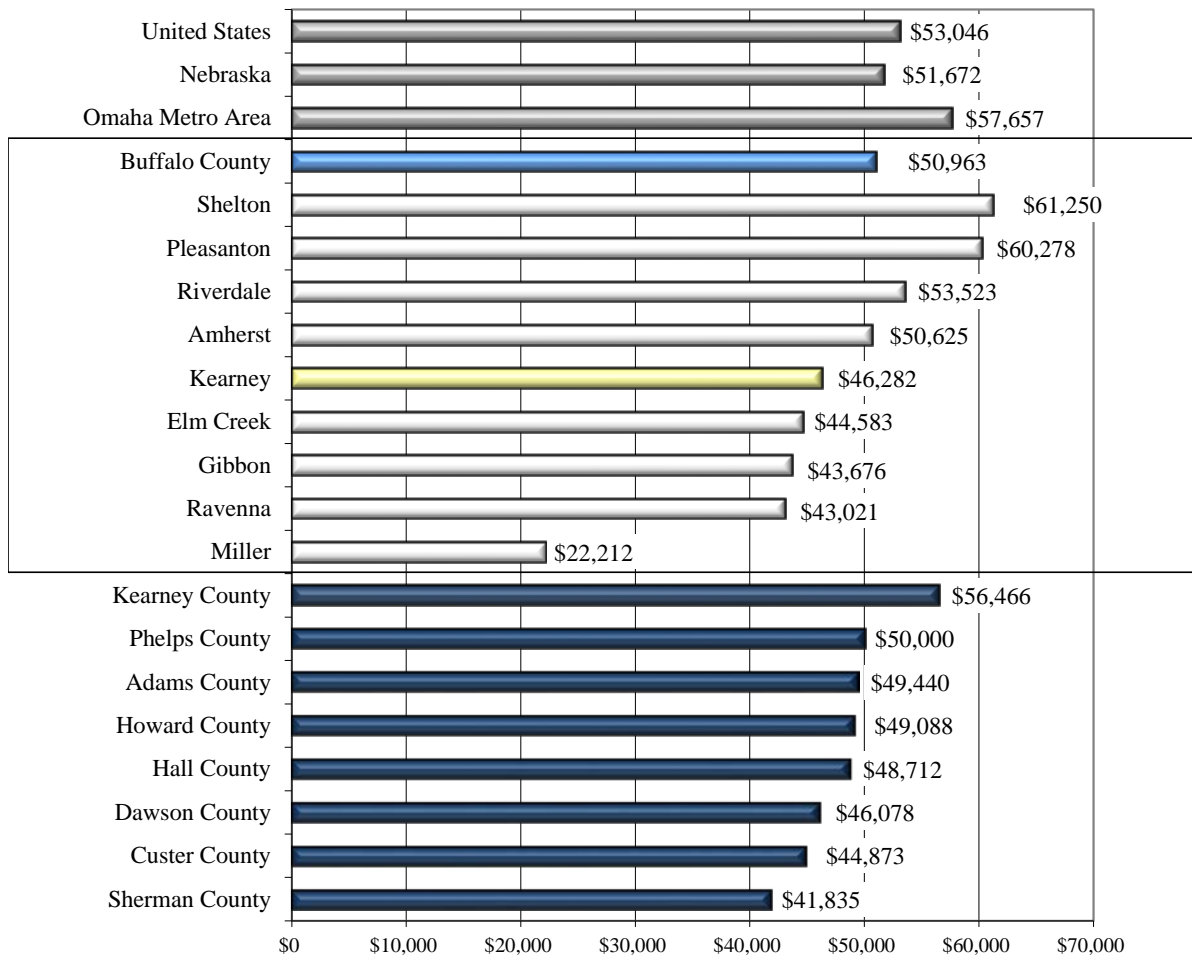
Median Household Income

Median household income provides a different perspective of income levels than median family or per capita income. Family income is defined as having two or more related people in a household. Household income (used in this study) can consist of multiple family members or can be represented by a single person.

The 2009–2013, five-year data show median household income for Buffalo County is estimated to be \$50,963 in 2012 compared to \$51,672 for Nebraska as a whole.

Chart 16

Median Household Income, 2009–2013 Five-Year Estimate Nebraska, Buffalo County & Surrounding Counties



Source: U.S. Census Bureau, 2009-2013 American Community Survey, accessed June 2015.