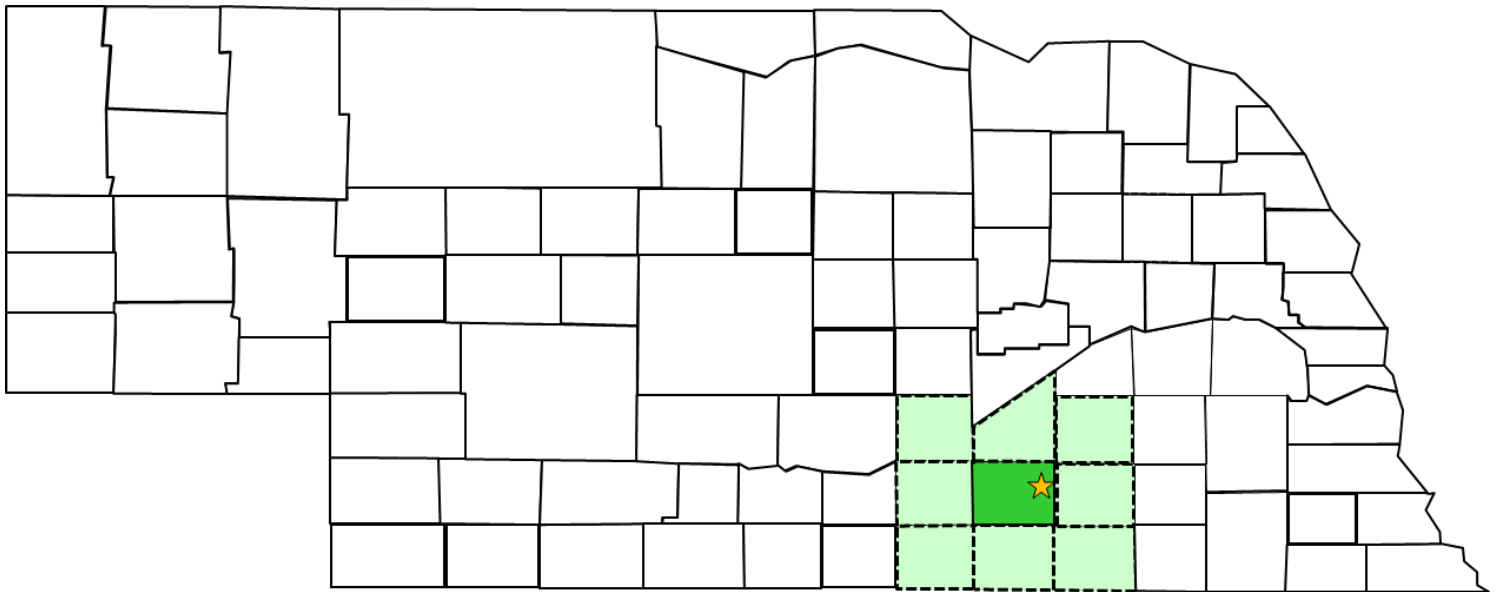


Economic and Demographic Trends

Sutton, Clay County, and the Surrounding Area



April 2017

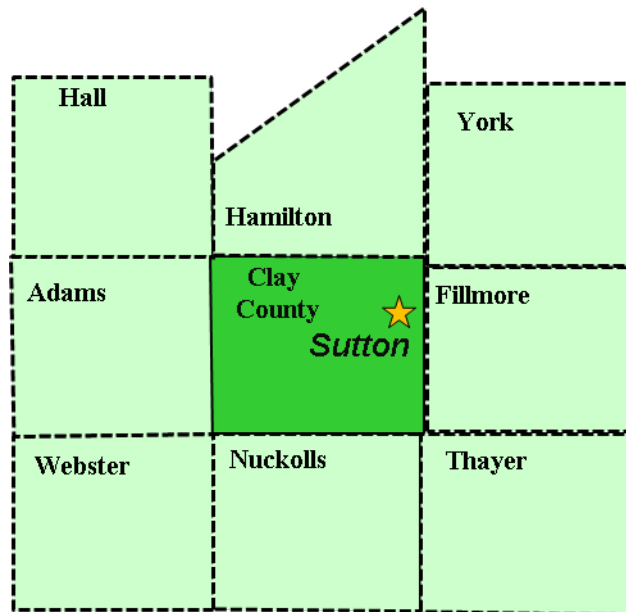
Prepared by: Ken Lemke, PhD
Nebraska Public Power District
Economic Development Department
PO Box 499, 1414 15th Street
Columbus, NE 68602-0499
(402) 563-5535
klemke@nppd.com

Available Online @ econdev.nppd.com



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Economic and Demographic Trends in Sutton, Clay County, and the Surrounding Area



This study provides data on labor force, employment, commuting patterns, population, migration, retail sales, and income for Clay 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 Clay County, other counties included in this area are Adams, Fillmore, Hall, Hamilton, Nuckolls, Thayer, Webster, and York. The retail sales section also compares retail growth between Sutton 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 Clay County for the period 2006–2015. 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 Clay County (regardless of their county of residence). These data indicate total nonfarm wage and salary employment in Clay County increased 4.4 percent (107 jobs) between 2006 and 2015.

Table 1 also provides employment data for Clay County by major economic sector for years 2006–2015. Of the sectors reporting complete data, the Construction sector recorded the largest percentage increase in employment between 2006 and 2015 (63.9 percent or 76 jobs). The Construction sector also recorded the largest actual employment increase between 2006 and 2015 (76 jobs or 63.9 percent).

Table 1

**Nonfarm Wage & Salary Employment Trends, Clay County, Nebraska
Selected Years: 2006–2015**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change 2006-2015	# Change 2006-2015
Nonfarm Employment (W&S)	2,407	2,467	2,519	2,430	2,435	2,465	2,468	2,529	2,586	2,514	4.4	107
Total Private Industries	1,631	1,697	1,765	1,683	1,681	1,727	1,741	1,809	1,855	1,782	9.3	151
Goods Producing	645	648	711	643	657	720	705	786	806	765	18.6	120
Natural Resources & Mining	174	163	178	187	170	184	168	191	225	231	32.8	57
Construction	119	133	149	148	158	153	172	187	195	195	63.9	76
Manufacturing	352	352	383	308	330	383	365	408	385	340	-3.4	-12
Service Providing	986	1,049	1,054	1,040	1,024	1,007	1,036	1,023	1,049	1,017	3.1	31
Trade, Transportation & Utilities	528	558	556	555	572	577	575	554	565	558	5.7	30
Information	11	(D)	(D)	12	10	12	(D)	(D)	(D)	14	27.3	3
Financial Activities	92	94	92	91	88	89	88	89	89	91	-1.1	-1
Professional & Business Services	26	N/A	32	36	33	31	(D)	(D)	(D)	38	46.2	12
Education & Health Services	238	249	251	234	230	224	228	249	241	203	-14.7	-35
Leisure & Hospitality	55	72	80	81	58	50	51	46	57	59	7.3	4
Other Services, except Public	36	35	(D)	31	32	26	50	47	51	54	50.0	18
Government	776	770	754	747	754	738	727	720	731	732	-5.7	-44
Federal	175	172	166	157	160	160	154	153	156	152	-13.1	-23
State	164	(D)	(D)	(D)	(D)	(D)	(D)	(D)	(D)	148	-9.8	-16
Local	437	(D)	(D)	(D)	(D)	(D)	(D)	(D)	(D)	432	-1.1	-5

(D) - Data withheld to avoid disclosure of individual reporting units

■ - Estimates provided by Ken Lenke, PhD, Nebraska Public Power District Economist

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data, released June 2016
Labor Force & Work Force Summary, 2006-2015, Annually, Sutton County, June 2016 data

Chart 1 (next page) compares total nonfarm wage and salary employment growth in Clay County with metropolitan, non-metropolitan, and Nebraska as a whole for the review period 2006–2015. 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 nonfarm wage and salary employment in Clay County increased 4.4 percent (107 jobs) from 2006 to 2015, compared to a 6.3 percent increase for Nebraska as a whole, a 7.9 percent increase in metropolitan Nebraska, and a 3.8 percent increase in non-metropolitan Nebraska.

Chart 1

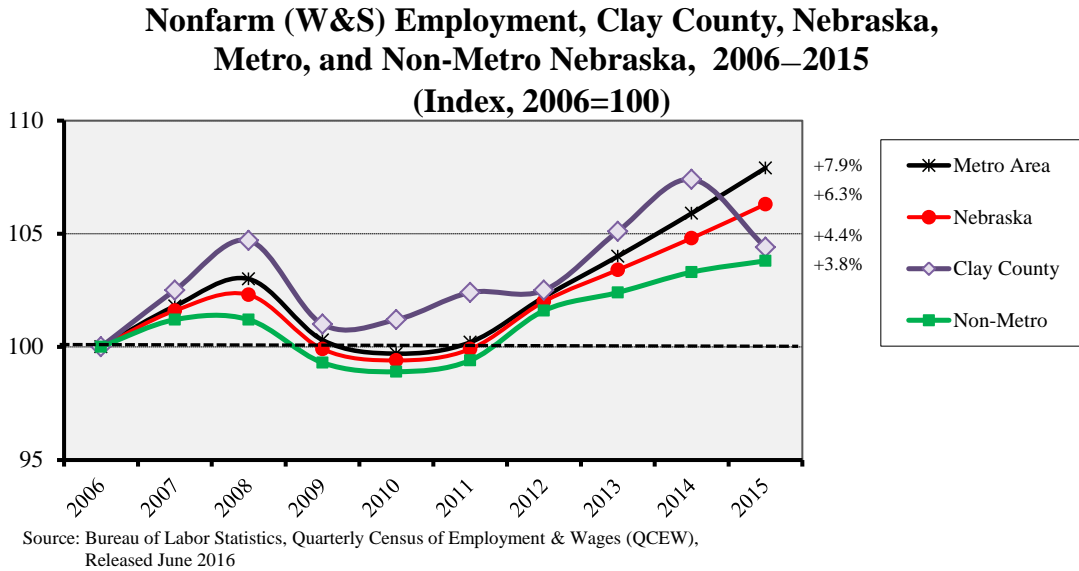
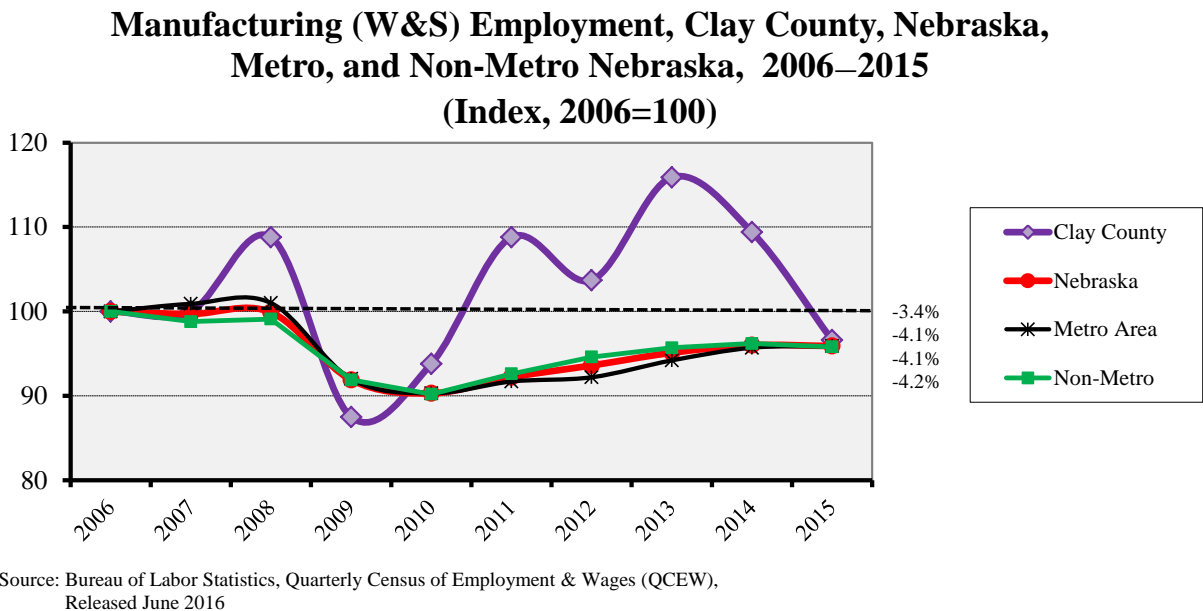


Chart 2 presents data on manufacturing wage and salary employment growth for Clay County, Nebraska, metropolitan, and non-metropolitan areas. The Manufacturing sector for Clay County recorded a 3.4 percent decrease in employment (12 jobs) between 2006 and 2015. This compares to a 4.2 percent decrease in employment for non-metropolitan Nebraska; a 4.1 percent decrease for Nebraska as a whole; and a 4.1 percent decrease for metropolitan Nebraska over the same period.

Chart 2

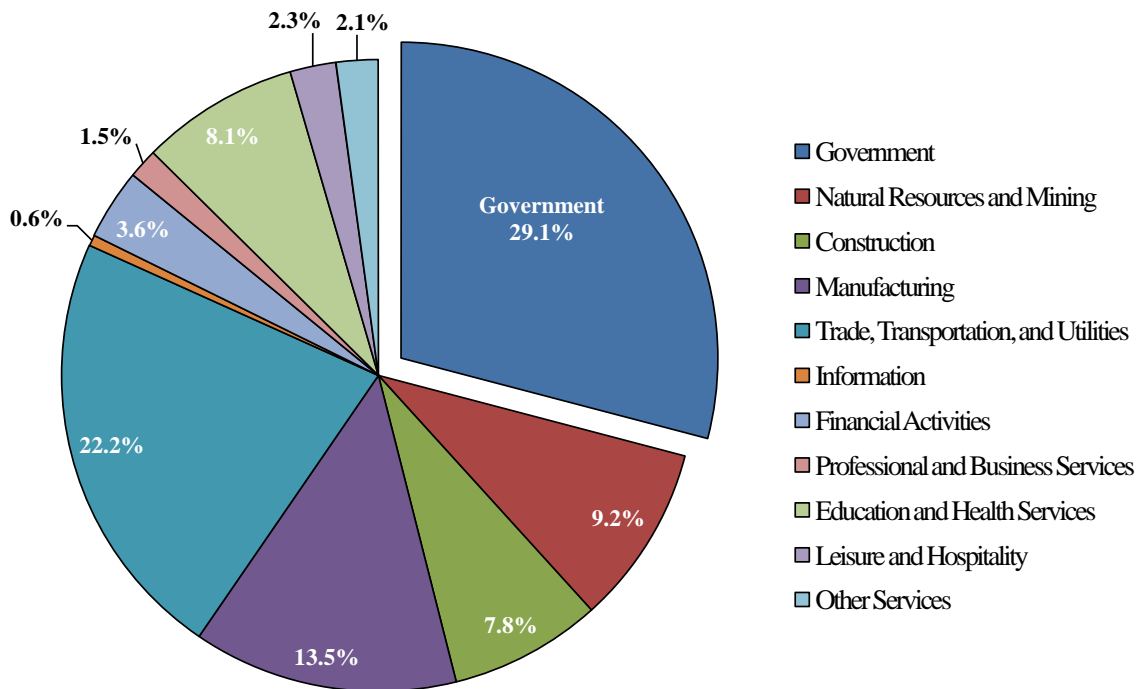


The next series of pie charts (Charts 3, 4 & 5) display the distribution of nonfarm wage and salary (W&S) employment by major economic sector in Clay County compared to the non-metropolitan and metropolitan distributions.

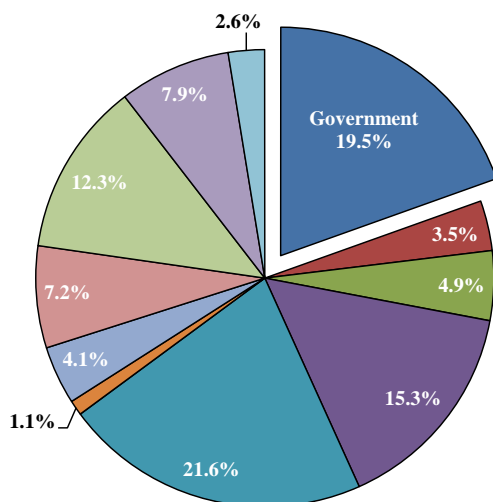
When comparing the Clay County employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Government sector which makes up 29.1 percent of the county workforce (732 employees) compared to 19.5 percent for non-metropolitan Nebraska; a difference of 9.6 percent. Comparing Clay County to the overall metropolitan distribution, the largest deviation is also found in the Government sector (29.1 percent Clay County vs. 14.9 percent metropolitan Nebraska; a difference of 14.2 percent).

Charts 3, 4, 5

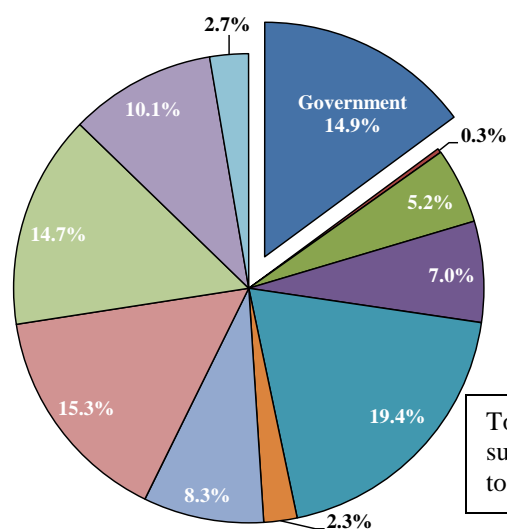
Nonfarm Wage & Salary Employment by Major Economic Sector Clay County, 2015



Non-Metro Area W&S Employment, 2015



Metro Area W&S Employment, 2015



Totals may not sum 100% due to rounding.

Source: U.S. Dept. of Labor, Bureau of Labor Statistics

The next table (Table 2) shows labor force information for Clay County for the time period 2006–2015. 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 Clay County residents participating in the labor force between 2006 and 2015 (10.4 percent or 321 people).

The number of those unemployed in Clay County increased by 5.3 percent (5 people) between 2006 and 2015. 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 Clay County unemployment rate was 2.9 percent in 2015; slightly below that for metropolitan Nebraska (3.0 percent), below Nebraska as a whole (3.0 percent), and below non-metropolitan Nebraska (3.0 percent).

Table 2

**Labor Force & Employment Trends, Clay County, Nebraska
Selected Years: 2006–2015**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change 2006-15	# Change 2006-15
Labor Force	3,095	3,111	3,119	3,033	3,433	3,483	3,487	3,507	3,467	3,416	10.4	321
Unemployment	94	86	100	132	147	144	129	121	113	99	5.3	5
Unemployment Rate	3.0	2.8	3.2	4.4	4.3	4.1	3.7	3.5	3.3	2.9	(N/A)	(N/A)
Employment	3,001	3,025	3,019	2,901	3,286	3,339	3,358	3,386	3,354	3,317	10.5	316

(N/A) - Data not available

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, Annual Data, released March 2016

Residence and Work Flow Patterns

The next series of tables show residence (Work Destination) and workflow (Home Destination) patterns for Clay 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 Clay County are from 2014.

Table 3 (pages 6–7) examines the Work Destination area for City of Sutton from three perspectives: by state, by county, and by place (city). In Table 3, the Census identified 652 city labor force participants holding primary jobs. As Table 3 shows, 96.2 percent of Sutton’s labor force participants are employed within the state of Nebraska. Approximately 29.8 percent of Sutton workers remain within Clay County for employment with 70.2 percent leaving the city borders for work (next page). The top ten incorporated places where Sutton labor force participants are employed are also shown on the following page.

Table 3

Work Destination Report

Where Workers are Employed Who Live in the Selection Area

2014

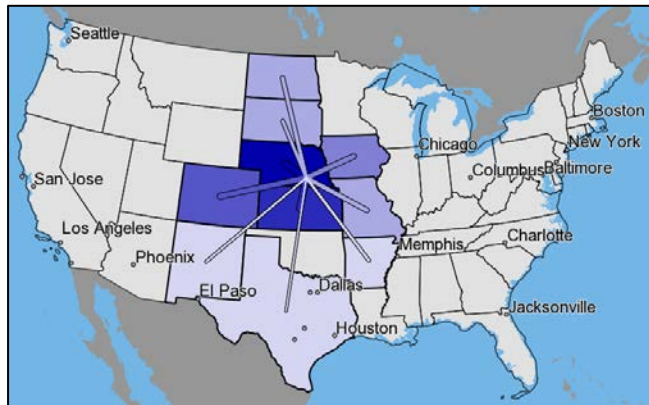
	Count	Share
Total Primary Jobs	652	100.0%

By States

Job Counts by States Where Workers are Employed

2014

	Count	Share
Nebraska	627	96.2%
Kansas	9	1.4%
Colorado	4	0.6%
Iowa	3	0.5%
Missouri	2	0.3%
North Dakota	2	0.3%
South Dakota	2	0.3%
Arkansas	1	0.2%
New Mexico	1	0.2%
Texas	1	0.2%
All Other Locations	0	0.0%

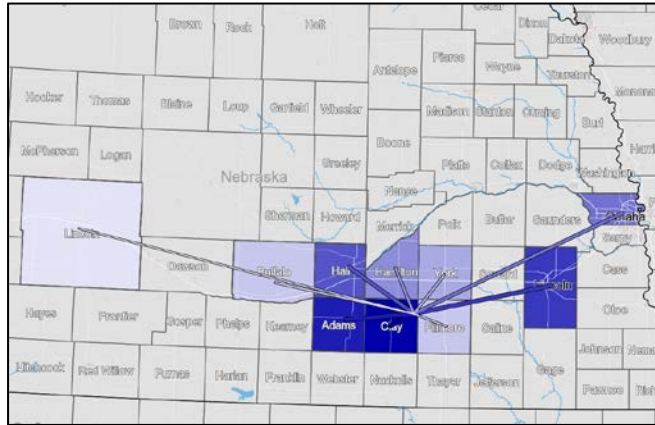


Source: U.S. Census Bureau, LED Origin-Destination Data Base, April 2017

Table 3 (continued)

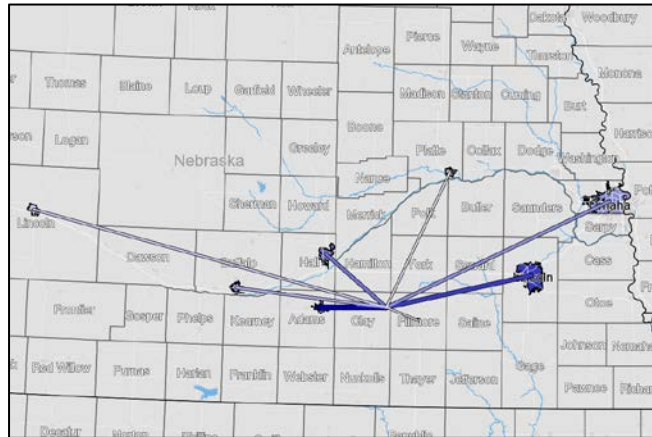
By Counties
Job Count by Counties Where Workers are Employed
2014

	Count	Share
Clay County, NE	194	29.8%
Adams County, NE	126	19.3%
Lancaster County, NE	54	8.3%
Hall County, NE	35	5.4%
Douglas County, NE	29	4.4%
Hamilton County, NE	20	3.1%
York County, NE	16	2.5%
Buffalo County, NE	13	2.0%
Fillmore County, NE	13	2.0%
Lincoln County, NE	12	1.8%
All Other Locations	140	21.5%



By Places (top 10)
Job Counts by Places (Cities, CDPs, etc.) Where Workers are Employed
2014

	Count	Share
Hastings city, NE	98	15.0%
Sutton city, NE	93	14.3%
Lincoln city, NE	50	7.7%
Harvard city, NE	44	6.7%
Grand Island city, NE	33	5.1%
Omaha city, NE	27	4.1%
Kearney city, NE	12	1.8%
North Platte city, NE	11	1.7%
Columbus city, NE	10	1.5%
Geneva city, NE	10	1.5%
All Other Locations	264	40.5%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, April 2017

People also travel from other locations to work in the City of Sutton—this is the Home Destination report or the labor shed area. Table 4 (pages 8–9) depicts the home locations of those employed within Sutton. The Census identified 664 primary jobs within Sutton. As Table 4 indicates, 97.1 percent of these jobs are held by Nebraska residents. Approximately 46.1 percent of Sutton workers live within the Clay 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

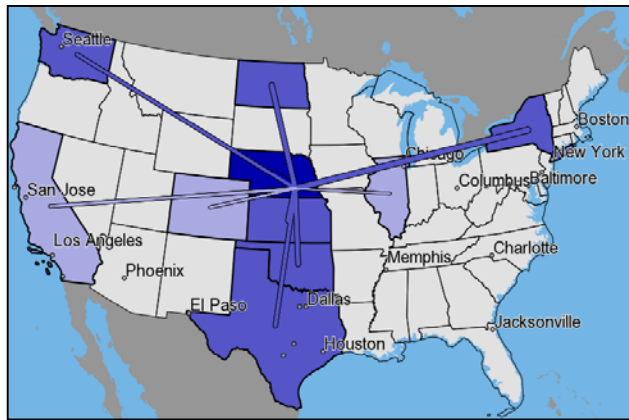
2014

	Count	Share
Total Primary Jobs	664	100.0%

Job Counts by States Where Workers Live

2014

	Count	Share
Nebraska	645	97.1%
Kansas	2	0.3%
New York	2	0.3%
North Dakota	2	0.3%
Oklahoma	2	0.3%
Texas	2	0.3%
Washington	2	0.3%
California	1	0.2%
Colorado	1	0.2%
Illinois	1	0.2%
All Other Locations	4	0.6%

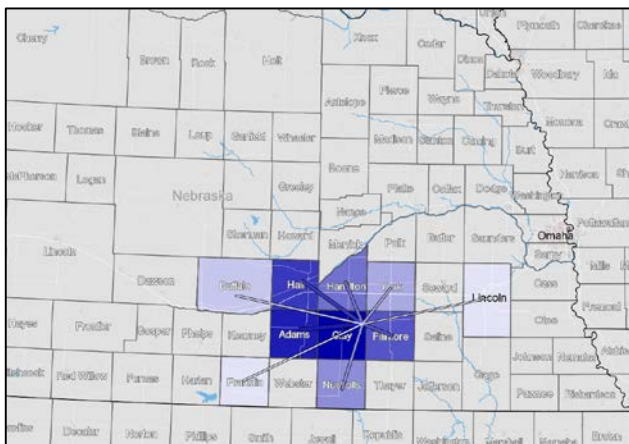


By Counties

Job Counts by Counties Where Workers

2014

	Count	Share
Clay County, NE	306	46.1%
Adams County, NE	117	17.6%
Hall County, NE	41	6.2%
Fillmore County, NE	28	4.2%
Hamilton County, NE	25	3.8%
Nuckolls County, NE	16	2.4%
York County, NE	15	2.3%
Buffalo County, NE	9	1.4%
Franklin County, NE	6	0.9%
Lancaster County, NE	6	0.9%
All Other Locations	95	14.3%

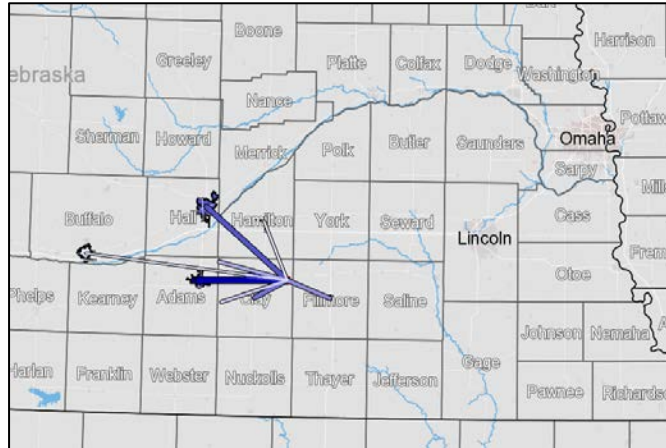


Source: U.S. Census Bureau, LED Origin-Destination Data Base, April 2017

Table 4 (continued)

**By Places (top 10)
Job Counts by Places (Cities, CDPs, etc.) Where Workers Live
2014**

	Count	Share
Hastings city, NE	100	15.1%
Sutton city, NE	93	14.0%
Harvard city, NE	84	12.7%
Grand Island city, NE	35	5.3%
Clay Center city, NE	11	1.7%
Geneva city, NE	10	1.5%
Trumbull village, NE	9	1.4%
Glensvil village, NE	8	1.2%
Aurora city, NE	7	1.1%
Kearney city, NE	7	1.1%
All Other Locations	300	45.2%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, April 2017

The next table (Table 5, pages 9–10) shows an inflow/outflow report for the Sutton 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 the City of Sutton.

Table 5

Inflow/Outflow Report

Selection Area Labor Market Size (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	664	100.0%	676	100.0%	734	100.0%
Living in the Selection Area	652	98.2%	582	86.1%	571	77.8%
Net Job Inflow (+) or Outflow (-)	12	-	94	-	163	-

In-Area Labor Force Efficiency (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	652	100.0%	582	100.0%	571	100.0%
Living and Employed in the Selection Area	93	14.3%	94	16.2%	104	18.2%
Living in the Selection Area but Employed Outside	559	85.7%	488	83.8%	467	81.8%

In-Area Employment Efficiency (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	664	100.0%	676	100.0%	734	100.0%
Employed and Living in the Selection Area	93	14.0%	94	13.9%	104	14.2%
Employed in the Selection Area but Living Outside	571	86.0%	582	86.1%	630	85.8%

Table 5 (continued)

Outflow Job Characteristics (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	559	100.0%	488	100.0%	467	100.0%
Workers Aged 29 or younger	130	23.3%	135	27.7%	131	28.1%
Workers Aged 30 to 54	265	47.4%	250	51.2%	224	48.0%
Workers Aged 55 or older	164	29.3%	103	21.1%	112	24.0%
Workers Earning \$1,250 per month or less	131	23.4%	119	24.4%	107	22.9%
Workers Earning \$1,251 to \$3,333 per month	249	44.5%	220	45.1%	223	47.8%
Workers Earning More than \$3,333 per month	179	32.0%	149	30.5%	137	29.3%
Workers in the "Goods Producing" Industry Class	117	20.9%	91	18.6%	102	21.8%
Workers in the "Trade, Transportation, and Utilities" Industry	151	27.0%	132	27.0%	111	23.8%
Workers in the "All Other Services" Industry Class	291	52.1%	265	54.3%	254	54.4%

Inflow Job Characteristics (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	571	100.0%	582	100.0%	630	100.0%
Workers Aged 29 or younger	129	22.6%	128	22.0%	153	24.3%
Workers Aged 30 to 54	270	47.3%	291	50.0%	291	46.2%
Workers Aged 55 or older	172	30.1%	163	28.0%	186	29.5%
Workers Earning \$1,250 per month or less	106	18.6%	128	22.0%	140	22.2%
Workers Earning \$1,251 to \$3,333 per month	276	48.3%	283	48.6%	314	49.8%
Workers Earning More than \$3,333 per month	189	33.1%	171	29.4%	176	27.9%
Workers in the "Goods Producing" Industry Class	211	37.0%	204	35.1%	227	36.0%
Workers in the "Trade, Transportation, and Utilities" Industry	158	27.7%	166	28.5%	185	29.4%
Workers in the "All Other Services" Industry Class	202	35.4%	212	36.4%	218	34.6%

Interior Flow Job Characteristics (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	93	100.0%	94	100.0%	104	100.0%
Workers Aged 29 or younger	23	24.7%	16	17.0%	19	18.3%
Workers Aged 30 to 54	38	40.9%	46	48.9%	58	55.8%
Workers Aged 55 or older	32	34.4%	32	34.0%	27	26.0%
Workers Earning \$1,250 per month or less	38	40.9%	22	23.4%	33	31.7%
Workers Earning \$1,251 to \$3,333 per month	28	30.1%	37	39.4%	44	42.3%
Workers Earning More than \$3,333 per month	27	29.0%	35	37.2%	27	26.0%
Workers in the "Goods Producing" Industry Class	17	18.3%	19	20.2%	22	21.2%
Workers in the "Trade, Transportation, and Utilities" Industry	22	23.7%	24	25.5%	26	25.0%
Workers in the "All Other Services" Industry Class	54	58.1%	51	54.3%	56	53.8%

Source: U.S. Census Bureau, LED Origin-Destination Data Base, April 2017

Table 7 and Figure 2 show the number (count) and percentage (share) of people employed within Sutton and the distance to their homes. Looking at Table 7, the number of primary jobs held within Sutton has decreased since 2012 and 2013. The data also show the majority of Sutton employees continue to travel less than 25 miles from work to home. Figure 2 shows the concentration of job counts by distance and direction.

Table 7

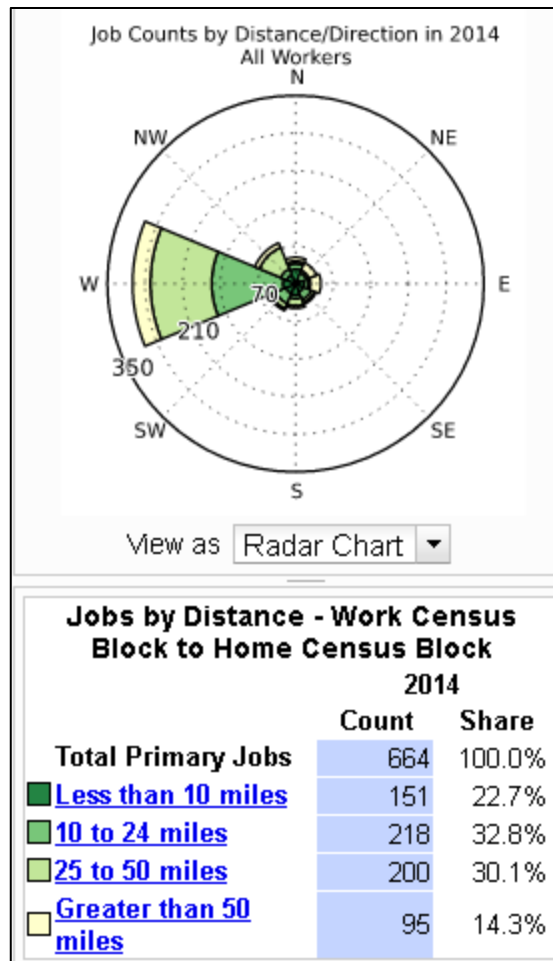
Distance/Direction Report - Work to Home Census Block

Job Counts in Home Blocks by Distance Only

	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	664	100.0%	676	100.0%	734	100.0%
Less than 10 miles	151	22.7%	129	19.1%	145	19.8%
10 to 24 miles	218	32.8%	209	30.9%	224	30.5%
25 to 50 miles	200	30.1%	186	27.5%	207	28.2%
Greater than 50 miles	95	14.3%	152	22.5%	158	21.5%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, April 2017

Figure 2



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, April 2017

The next two tables (Tables 10 and 11) provide detail on migration patterns. Data reported in these tables are 2011–2015, 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 the current population one-year or older is 131 less than the number of people living in Clay County one-year ago. This indicates Clay County experienced a net decrease in its population age one and older and in-migration was less than out-migration plus the number of deaths.

Table 10

**Clay County, Nebraska, 2011–2015 Five-Year Estimate
Population Change Due to Migration and Mortality**

Current population one-year or older	6,293
Number of people living in the area one-year ago	6,424
Population change due to migration and mortality	-131

Source: American Community Survey, Geographic Mobility By Selected Characteristics In The United States & Geographical Mobility In The Past Year By Age For Residence 1 Year Ago In The United States accessed March 2017.

The 2011–2015, five-year estimates in Table 11 reveal a net loss of 155 people from other Nebraska counties and a net gain of 23 people from other states for a total net loss of 132 people one-year or older. As shown in Table 11, net gains occurred in the age groups Age 25 to 44 (gain of 14), and net losses in age groups Age 1 to 17, (loss of 2), Age 18 to 24, (loss of 100), Age 45 to 64, (loss of 33), Age 65 and over, (loss of 11).

Table 11 also shows the net gains and losses by educational attainment for persons aged 25 and older. There was a gain in residents with a high school (HS) diploma or less, (gain of 43), and a loss of residents with a bachelor's degree, associate's degree, or some college (loss of 63), and graduate or professional degree, (loss of 10).

Table 11

**Clay County, Nebraska, 2011–2015, Five-Year Estimate
Population Change Due to Migration and Mortality**

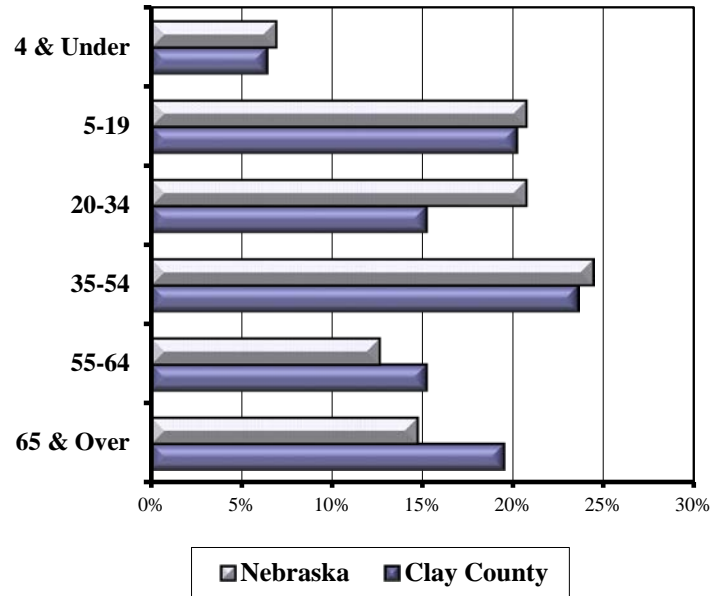
-- Part A: By Age Group --							
Age Group	Moved to Different Nebraska County	Moved From Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	Moved From State	Net Gain From Other States	Net Gain From Nebraska Counties and Other States
Age 1 to 17	94	73	-21	0	19	19	-2
Age 18 to 24	156	84	-72	39	11	-28	-100
Age 25 to 44	118	118	0	21	35	14	14
Age 45 to 64	62	8	-54	6	27	21	-33
Age 65 and over	32	24	-8	3	0	-3	-11
Total	462	307	-155	69	92	23	-132
-- Part B: By Educational Attainment --							
Educational Attainment	Moved to Different Nebraska County	Moved From Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	Moved From State	Net Gain From Other States	Net Gain From Nebraska Counties and Other States
HS diploma or less	48	66	18	1	26	25	43
Bachelor's or some college	155	81	-74	16	27	11	-63
Grad. or Prof. degree	9	3	-6	13	9	-4	-10
Total	212	150	-62	30	62	32	-30

Source: American Community Survey, *Geographic Mobility By Selected Characteristics In The United States*; *Geographical Mobility In The Past Year By Age For Residence 1 Year Ago Source In The United States*; *Geographical Mobility In The Past Year By Educational Attainment For Current Residence In The United States* & *Geographical Mobility In The Past Year By Educational Attainment For Residence 1 Year Ago In The United States*; accessed March 2017.

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 Clay County. The population of Clay County is significantly older in age than Nebraska as a whole. The median age for Clay County residents in 2015 was 43.0 years of age compared to 36.3 years of age for residents of Nebraska as a whole.

Chart 8

Age Distribution of the Population, 2015 Clay County and Nebraska



Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," July 2016

Table 12

Age Distribution of the Population, 2015 Clay County and Nebraska

	2015 Population		Percent	
	Nebraska	Clay County	Nebraska	Clay County
4 & Under	130,631	402	6.9%	6.4%
5-19	392,651	1,274	20.7%	20.2%
20-34	392,362	958	20.7%	15.2%
35-54	463,120	1,489	24.4%	23.6%
55-64	238,715	957	12.6%	15.2%
65 & Over	278,711	1,229	14.7%	19.5%
Total	1,896,190	6,309	100%	100%
Median Age	36.3	43.0		

Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," July 2016

Table 13 shows additional median ages as estimated by the American Community Survey for communities within Clay County and the surrounding counties both as a total and by gender. These are five-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
Five-Year Estimate, 2011–2015
Clay County and the Surrounding Area**

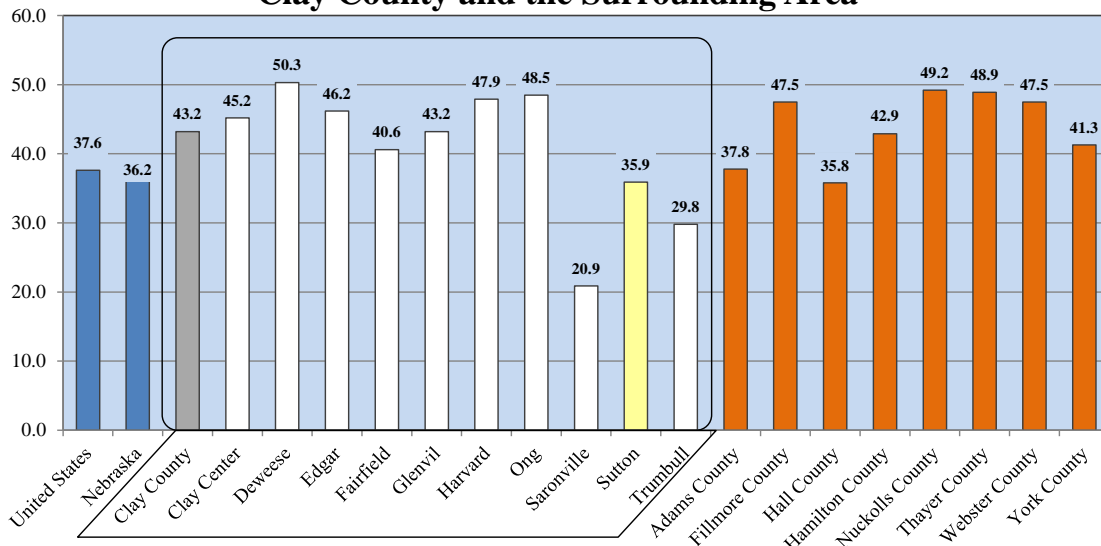
	Median Age		
	Total	Male	Female
United States	37.6	36.2	38.9
Nebraska	36.2	35.1	37.5
Clay County	43.2	42.5	43.7
Clay Center	45.2	44.0	45.6
Deweese	50.3	56.5	26.6
Edgar	46.2	42.3	46.8
Fairfield	40.6	39.7	40.8
Glenvil	43.2	44.5	39.0
Harvard	47.9	46.5	49.0
Ong	48.5	46.4	52.8
Saronville	20.9	21.0	20.9
Sutton	35.9	33.8	37.0
Trumbull	29.8	31.8	23.5
Adams County	37.8	35.5	39.6
Fillmore County	47.5	46.2	49.1
Hall County	35.8	34.8	37.1
Hamilton County	42.9	40.9	44.3
Nuckolls County	49.2	48.0	50.9
Thayer County	48.9	47.6	50.9
Webster County	47.5	45.5	49.0
York County	41.3	38.2	43.6

Data Set: 2009-2013 American Community Survey 5-Year Estimates

Source: U.S. Census Bureau, 2011-2015 American Community Survey, March 2015

Chart 9

**Median Age by Location, Five-Year Estimate, 2011–2015
Clay County and the Surrounding Area**



Source: U.S. Census Bureau, 2011-2015 American Community Survey, July 2016
Data Set: 2011-2015 American Community Survey 5-Year Estimates

Retail Sales

Table 14 and Chart 10 show the retail sales (non-motor vehicle) pull factors for Clay County and the surrounding area for 2015. 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

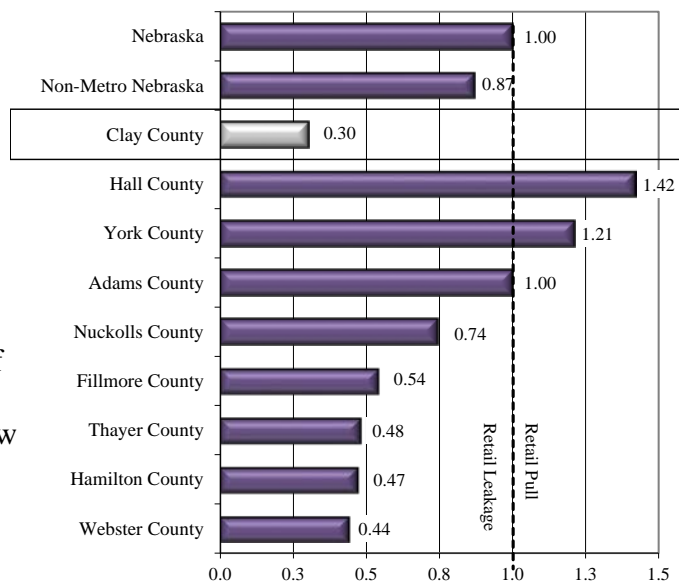
2015 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska, Clay County, and Surrounding Counties

	2015 Population	2015 Retail Sales (x \$1,000)	2015 Per Cap Sales (\$)	2015 Pull Factor
Nebraska	1,896,190	23,132,070	12,199	1.00
Non-Metro Nebraska	780,080	8,265,546	10,596	0.87
Clay County	6,309	23,002	3,646	0.30
Adams County	31,587	386,186	12,226	1.00
Fillmore County	5,619	36,821	6,553	0.54
Hall County	61,680	1,068,595	17,325	1.42
Hamilton County	9,190	52,721	5,737	0.47
Nuckolls County	4,329	38,961	9,000	0.74
Thayer County	5,163	30,438	5,895	0.48
Webster County	3,625	19,622	5,413	0.44
York County	13,806	203,538	14,743	1.21

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Chart 10

2015 Retail Sales (NMV) Pull Factors Nebraska, Clay County & Surrounding Counties



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Reviewing the pull factors at the county level indicates Clay County experiences net retail leakages. The 2015 pull factor of 0.30 indicates, on a per capita basis, retail sales in Clay County are considerably below 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 Clay County (0.30) with the pull factor for the non-metropolitan area of Nebraska (0.87) indicates per capita retail sales in Clay County are 65.6 percent below the average per capita retail sales in the non-metropolitan area of Nebraska.

Table 15 and Chart 11 compare the 2015 pull factors for selected area communities. The community of Sutton's pull factor of 0.75 indicates that, on a per capita basis, non-motor vehicle retail sales in Sutton are approximately 25.0 percent less than the state's average per capita sales.

Table 15

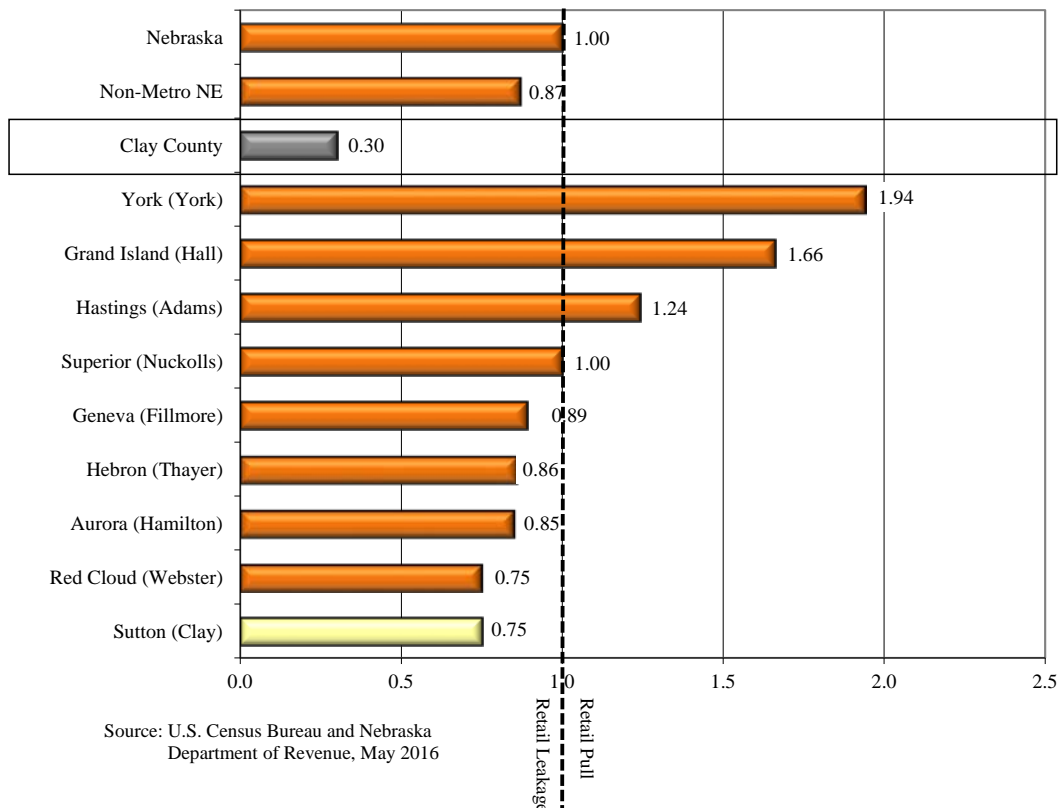
2015 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska, Clay County, and Selected Study Area Communities

	2015 Population	2015 Retail Sales (x \$1,000)	2015 Per Cap Sales (\$)	2015 Pull Factor
Nebraska	1,896,190	23,132,070	12,199	1.00
Non-Metro Nebraska	780,080	8,265,546	10,596	0.87
Clay County	6,309	23,002	3,646	0.30
Sutton (Clay)	1,440	13,130	9,118	0.75
Hastings (Adams)	24,924	375,957	15,084	1.24
Geneva (Fillmore)	2,131	23,021	10,803	0.89
Grand Island (Hall)	51,440	1,040,283	20,223	1.66
Aurora (Hamilton)	4,496	46,488	10,340	0.85
Superior (Nuckolls)	1,884	23,051	12,235	1.00
Hebron (Thayer)	1,543	16,271	10,545	0.86
Red Cloud (Webster)	963	8,852	9,192	0.75
York (York)	7,864	186,258	23,685	1.94

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Chart 11

2015 Retail Sales (NMV) Pull Factors Nebraska, Clay County & Selected Study Area Communities



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Table 16 (sorted by population) and Chart 12 (sorted by pull factor) further breakdown the 2015 pull factors into the communities reporting retail sales figures within Clay County. As this table indicates, the community of Deweese had the strongest pull factor (1.06) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 0.30 for Clay County in 2015.

Table 16

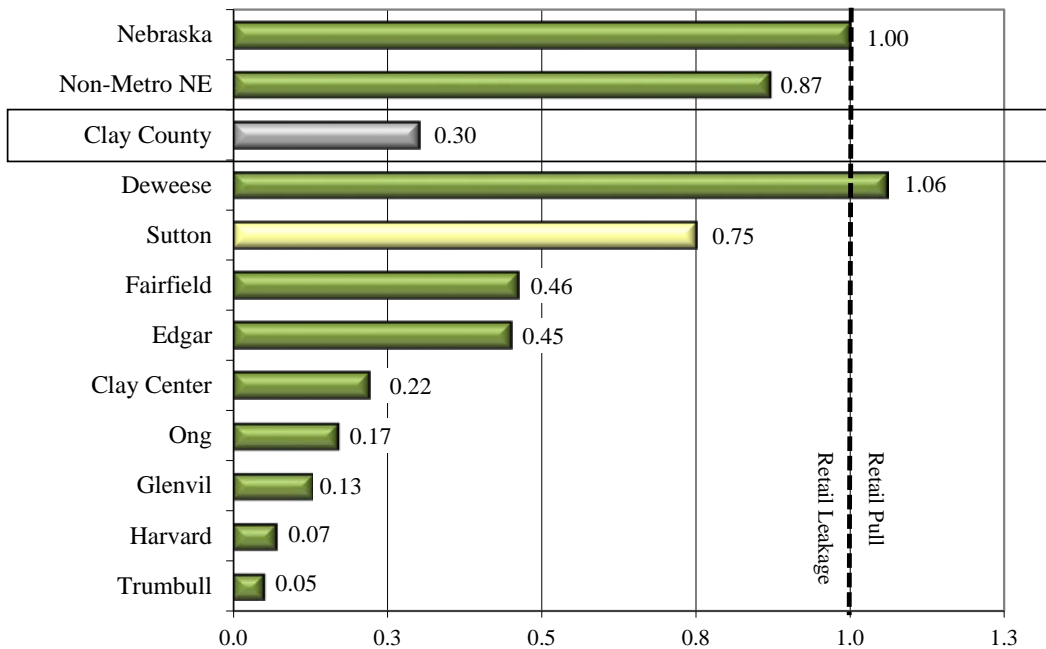
2015 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska and Available Clay County Area Communities

	2015 Population	2015 Retail Sales (x \$1,000)	2015 Per Cap Sales (\$)	2015 Pull Factor
Nebraska	1,896,190	23,132,070	12,199	1.00
Non-Metro Nebraska	780,080	8,265,546	10,596	0.87
Clay County	6,309	23,002	3,646	0.30
Sutton	1,440	13,130	9,118	0.75
Harvard	982	840	856	0.07
Clay Center	730	1,931	2,645	0.22
Edgar	481	2,621	5,450	0.45
Fairfield	373	2,098	5,625	0.46
Glenvil	298	465	1,561	0.13
Trumbull	198	115	580	0.05
Deweese	65	837	12,871	1.06
Ong	61	124	2,026	0.17

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Chart 12

2015 Retail Sales (NMV) Pull Factors, Nebraska and Available Clay County Communities



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Table 17 (sorted by population) and Chart 13 (sorted by pull factor) show the 2015 pull factors for Nebraska, Sutton, and eight other similarly sized communities selected from around the state. Hartington’s pull factor of 2.30 leads the group for 2015 thus indicating Hartington has greater retail pull.

Table 17

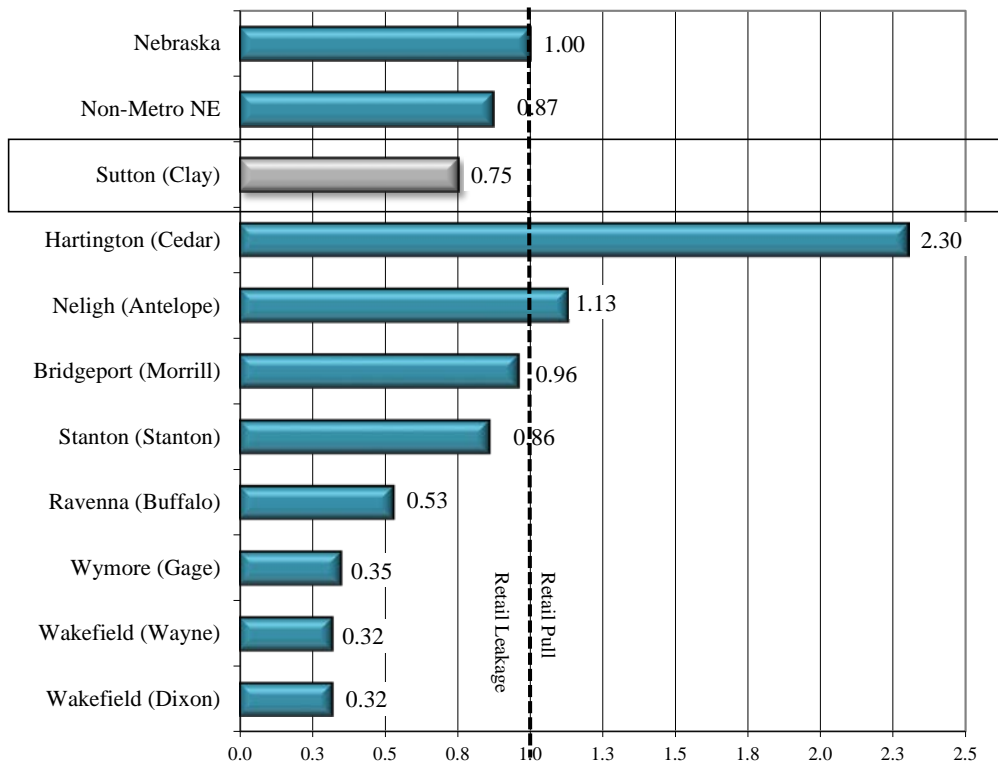
2015 Retail Sales (Non-Motor Vehicle) Pull Factors Sutton & Other Similarly Sized Nebraska Communities

	2015 Population	2015 Retail Sales (x \$1,000)	2015 Per Cap Sales (\$)	2015 Pull Factor
Nebraska	1,896,190	23,132,070	12,199	1.00
Non-Metro Nebraska	780,080	8,265,546	10,596	0.87
Sutton (Clay)	1,440	13,130	9,118	0.75
Ravenna (Buffalo)	1,373	8,925	6,500	0.53
Wakefield (Dixon)	1,403	5,493	3,915	0.32
Wakefield (Wayne)	1,403	5,493	3,915	0.32
Wymore (Gage)	1,414	6,041	4,272	0.35
Hartington (Cedar)	1,506	42,301	28,088	2.30
Stanton (Stanton)	1,519	15,893	10,462	0.86
Bridgeport (Morrill)	1,521	17,798	11,702	0.96
Neligh (Antelope)	1,527	21,136	13,842	1.13

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Chart 13

2015 Retail Sales (NMV) Pull Factors Sutton & Other Similarly Sized Nebraska Communities

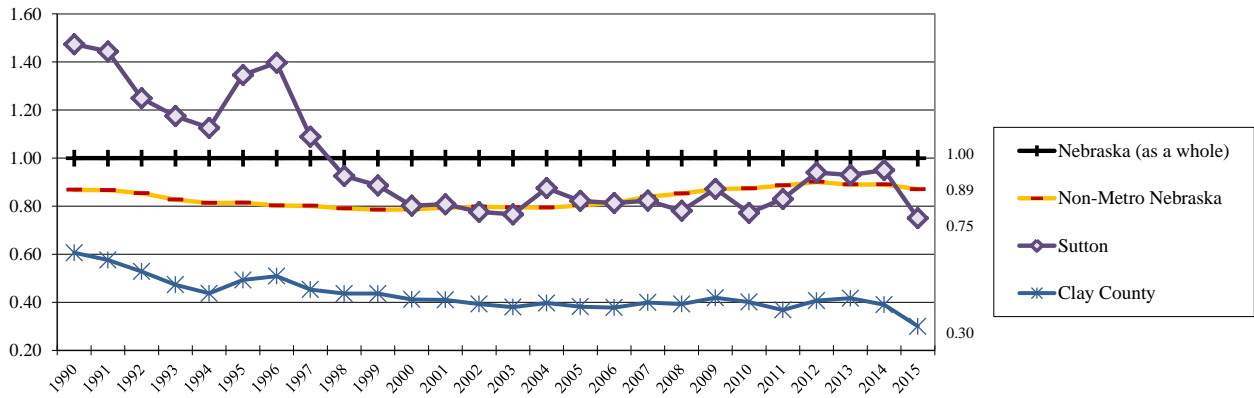


Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

Chart 14 illustrates the pull factor trend for Sutton, Clay County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2015. In examining the time line, the city of Sutton shows retail pull fluctuating well above the state average at the beginning of the study period then dropping below the state average in 1998 and staying below throughout the remainder of the study period, ending at 0.75. Data within Clay County (as a whole) shows the pull factor similar to the non-metropolitan county average flow but considerably lower throughout the time period.

Chart 14

Pull Factors 1990-2015 Sutton, Clay County, Non-Metro & Nebraska (as a whole)



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

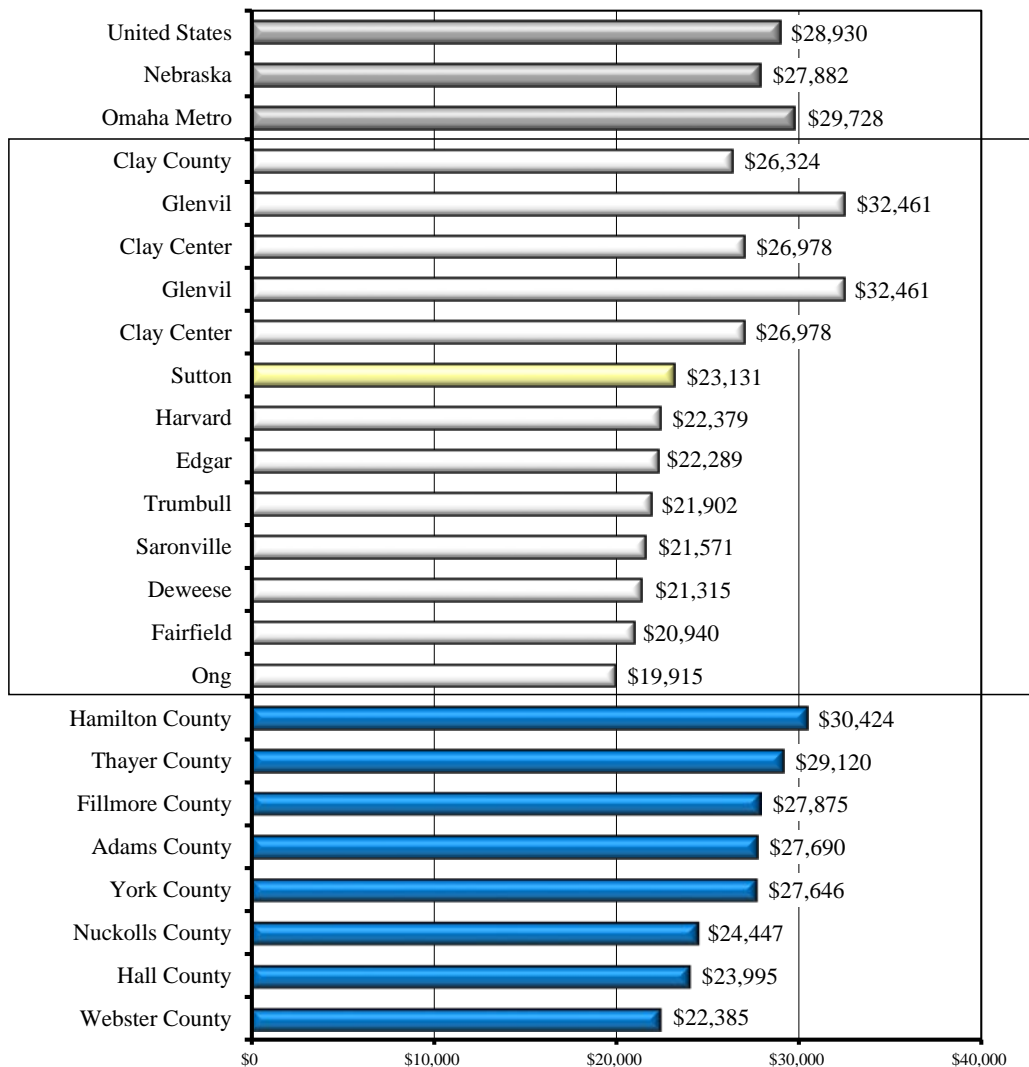
Per Capita Personal Income

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 2011–2015, five-year estimates show per capita personal income for Clay County is estimated to be \$26,324 compared to \$27,882 for Nebraska as a whole.

Chart 15

**Per Capita Income, 2011–2015 Five-Year Estimate,
Nebraska, Clay County & Surrounding Counties**



Source: U.S. Census Bureau, 2013 inflation adjusted past 12-months, 2011-2015 American Community Survey, accessed May 2016.

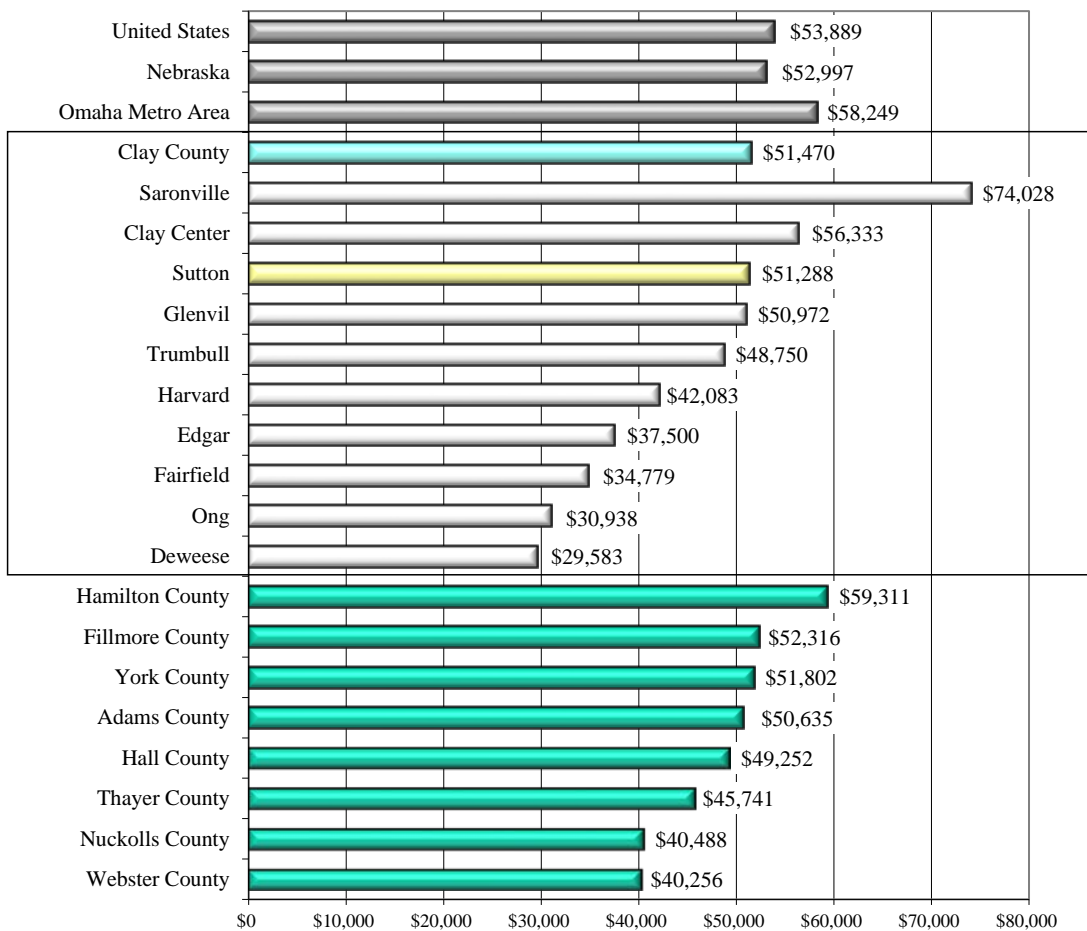
Median Household Income

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 2011–2015, five-year estimates show median household income for Clay County is estimated to be \$51,470 in 2015 compared to \$52,997 for Nebraska as a whole.

Chart 16

Median Household Income, 2011–2015 Five-Year Estimate Nebraska, Clay County & Surrounding Counties



Source: U.S. Census Bureau, 2011-2015 American Community Survey, accessed May 2016.