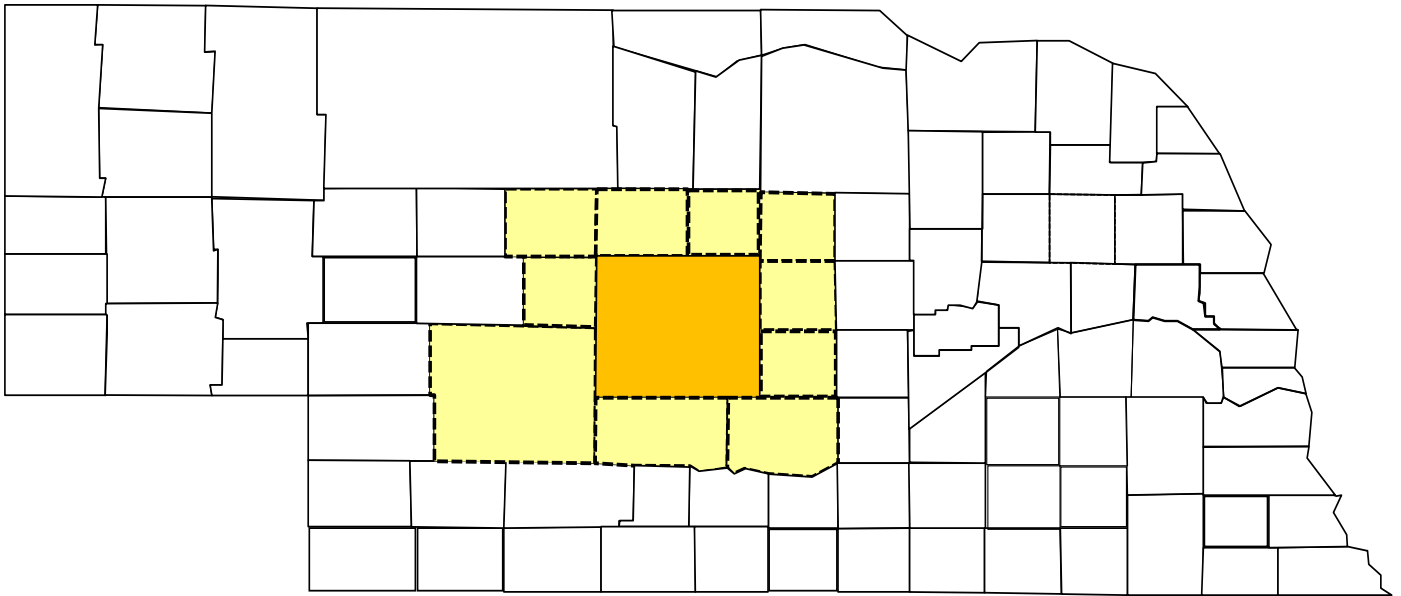


Economic and Demographic Trends

Custer County and the Surrounding Area



September 2016

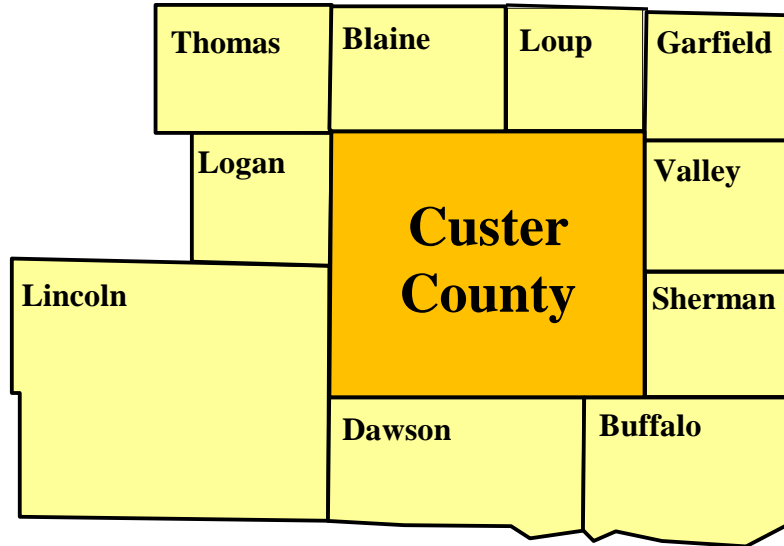
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Economic and Demographic Trends in Custer County and the Surrounding Area



This study provides data on labor force, employment, commuting patterns, population, migration, retail sales, and income for Custer 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 Custer County, other counties included in this area are Blaine, Buffalo, Dawson, Garfield, Lincoln, Logan, Loup, Sherman, Thomas, and Valley. The retail sales section also compares retail growth between Broken Bow 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 Custer 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 Custer County (regardless of their county of residence). These data indicate total nonfarm wage and salary employment in Custer County increased 17.7 percent (666 jobs) between 2006 and 2015.

Table 1 also provides employment data for Custer 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 (102.1 percent or 147 jobs). The Natural Resources & Mining sector recorded the largest actual employment increase between 2006 and 2015 (209 jobs or 67.0 percent).

Table 1

**Non-Farm Wage & Salary Employment Trends, Custer County, Nebraska
Selected Years: 2006–2015**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change 2006-2015	# Change 2006-2015
Non-farm Employment (W&S)	3,772	3,824	3,864	3,868	3,893	3,910	4,085	4,161	4,235	4,438	17.7	666
Total Private Industries	2,875	2,921	2,976	2,984	2,982	3,009	3,186	3,267	3,322	3,528	22.7	653
Goods Producing	931	941	951	969	1,000	1,042	1,120	1,193	1,236	1,388	49.1	457
Natural Resources & Mining	312	336	350	360	381	398	449	462	478	521	67.0	209
Construction	144	141	143	156	156	177	200	214	226	291	102.1	147
Manufacturing	475	465	458	453	463	467	472	518	532	576	21.3	101
Service Providing	1,944	1,980	2,025	2,015	1,982	1,967	2,066	2,074	2,086	2,140	10.1	196
Trade, Transportation & Utilities	686	691	695	713	719	699	729	737	736	763	11.2	77
Information	44	48	55	52	50	54	53	52	52	54	22.7	10
Financial Activities	164	169	165	164	165	170	177	193	196	204	24.4	40
Professional & Business Services	127	127	135	145	145	155	162	140	150	158	24.4	31
Education & Health Services	562	559	574	565	528	527	532	580	573	590	5.0	28
Leisure & Hospitality	305	338	348	315	314	296	309	297	309	318	4.3	13
Other Services, except Public	55	49	54	61	62	66	103	75	71	54	-1.8	-1
Government	897	903	888	884	911	901	899	894	913	910	1.4	13
Federal	59	60	59	56	64	54	52	50	47	43	-27.1	-16
State	63	65	64	65	67	63	62	61	64	61	-3.2	-2
Local	776	777	765	764	780	784	784	784	802	807	4.0	31

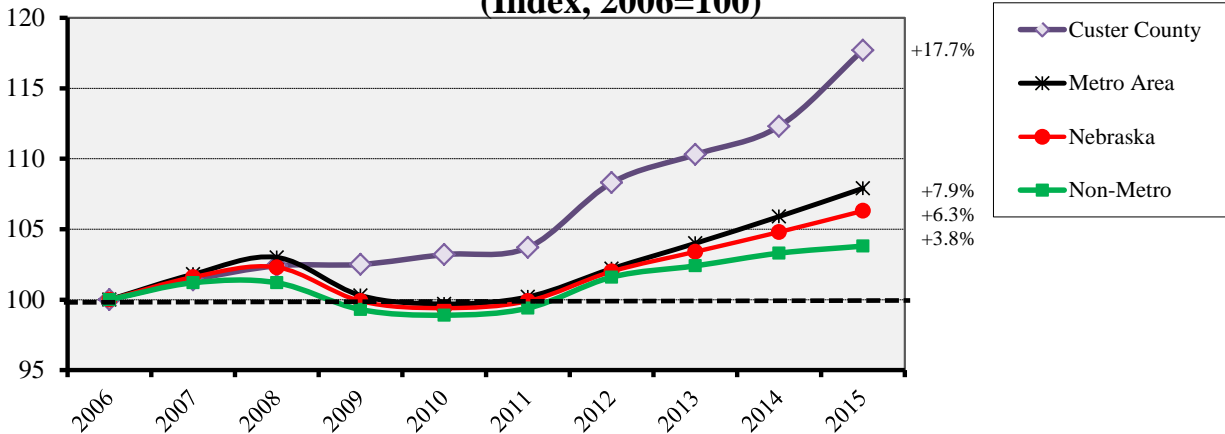
Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data, released June 2016
Labor Force & Work Force Summary, 2006-2015, Annually, Custer County (June 2016 data)

Chart 1 (next page) compares total nonfarm wage and salary employment growth in Custer 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 non-farm wage and salary employment in Custer County increased 17.7 percent (666 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

Nonfarm (W&S) Employment, Custer County, Nebraska, Metro, and Non-Metro Nebraska, 2006–2015 (Index, 2006=100)

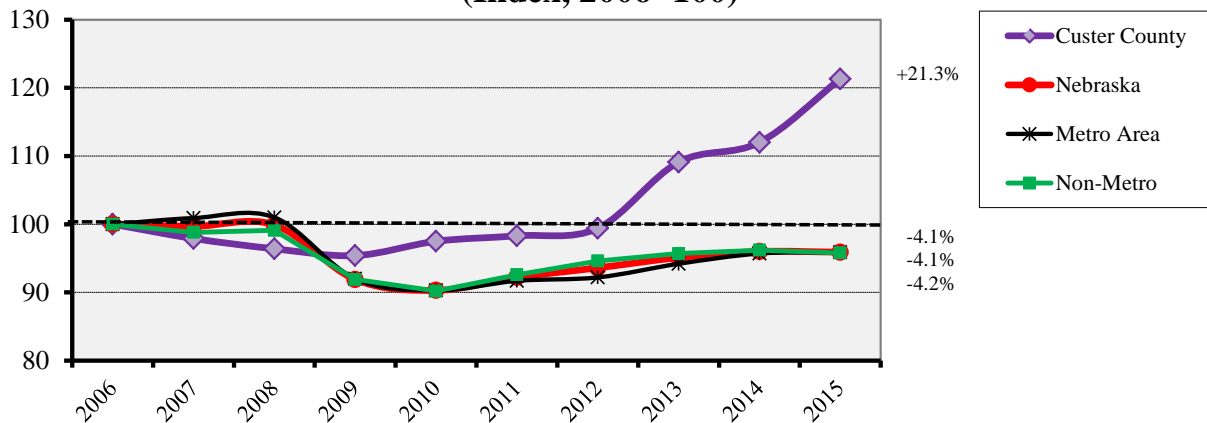


Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), Released June 2016

Chart 2 presents data on manufacturing wage and salary employment growth for Custer County, Nebraska, metropolitan, and non-metropolitan areas. The Manufacturing sector for Custer County recorded a 21.3 percent increase in employment (101 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

Manufacturing (W&S) Employment, Custer County, Nebraska, Metro, and Non-Metro Nebraska, 2006–2015 (Index, 2006=100)



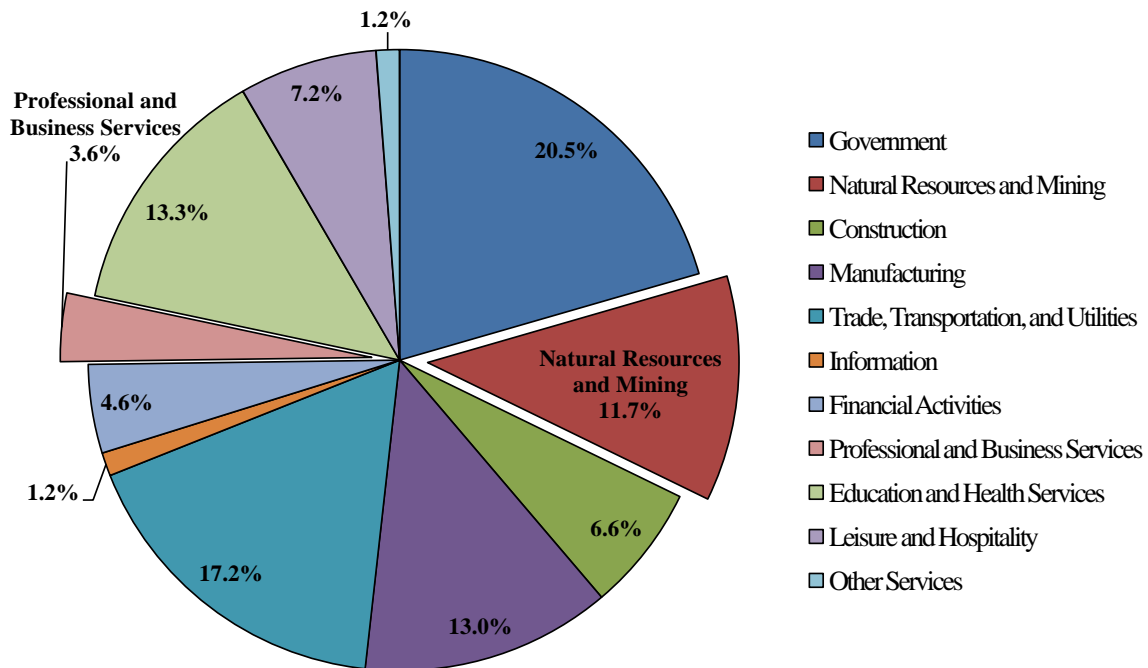
Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), Released June 2016

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 Custer County compared to the non-metropolitan and metropolitan distributions.

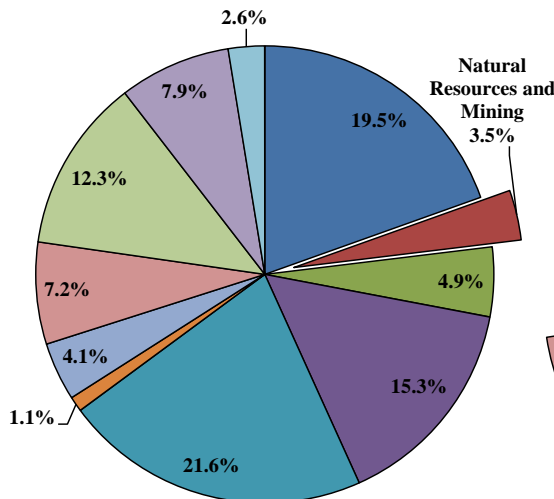
When comparing the Custer County employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Natural Resources and Mining sector which makes up 11.7 percent of the county workforce (521 employees) compared to 3.5 percent for non-metropolitan Nebraska; a difference of 8.2 percent. Comparing Custer County to the overall metropolitan distribution, the largest deviation is found in the Professional and Business Services sector (3.6 percent Custer County vs. 15.3 percent metropolitan Nebraska; a difference of 11.7 percent).

Charts 3, 4, 5

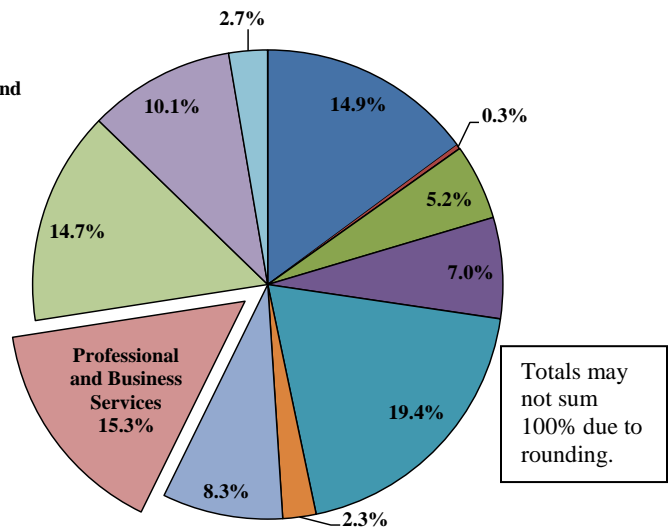
Nonfarm Wage & Salary Employment by Major Economic Sector, Custer County, 2015



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 Statistics, Bureau of Labor Statistics

The next table (Table 2) shows labor force information for Custer 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 Custer County residents participating in the labor force between 2006 and 2015 (3.2 percent or 199 people).

The number of those unemployed in Custer County decreased by 4.8 percent (7 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 Custer County unemployment rate was 2.2 percent in 2015; 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, Custer County, Nebraska
Selected Years: 2006–2015**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change 2006-15	# Change 2006-15
Labor Force	6,131	6,005	6,060	6,196	5,986	6,048	6,112	6,169	6,144	6,330	3.2	199
Unemployment	147	128	146	205	220	206	175	172	148	140	-4.8	-7
Unemployment Rate	2.4	2.1	2.4	3.3	3.7	3.4	2.9	2.8	2.4	2.2	(N/A)	(N/A)
Employment	5,984	5,877	5,914	5,991	5,766	5,842	5,937	5,997	5,996	6,190	3.4	206

(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 Custer 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 Custer County are from 2014.

Table 3 (pages 6–7) examines the Work Destination area for Custer County from three perspectives: by state, by county, and by place (city). In Table 3, the Census identified 4,800 county labor force participants holding primary jobs. As Table 3 shows, 98.7 percent of Custer County’s labor force participants are employed within the state of Nebraska. Approximately 56.2 percent of Custer County workers remain within Custer County for employment with 43.8 percent leaving the county borders for work (next page). Looking deeper to the locality level, the table also shows the top locations where Custer County labor force participants are employed (next page).

Table 3

Work Destination Report

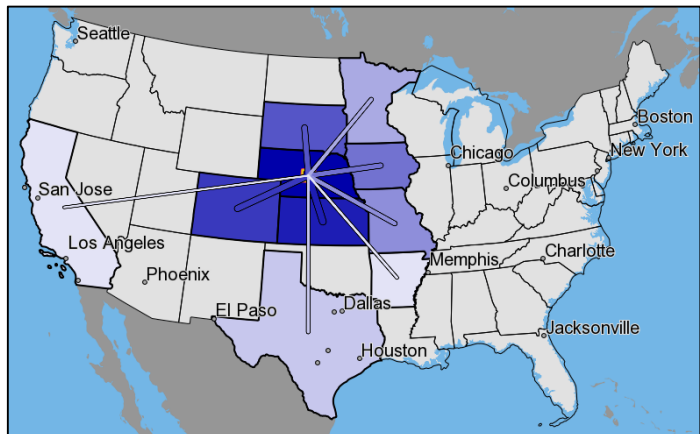
Where Workers are Employed Who Live in the Selection Area
2014

	Count	Share
Total Primary Jobs	4,800	100.0%

By States

Job Counts by States Where Workers are Employed
2014

	Count	Share
Nebraska	4,737	98.7%
Kansas	13	0.3%
Colorado	11	0.2%
South Dakota	10	0.2%
Iowa	7	0.1%
Missouri	4	0.1%
Minnesota	3	0.1%
Texas	2	0.0%
Arkansas	1	0.0%
California	1	0.0%
All Other Locations	11	0.2%

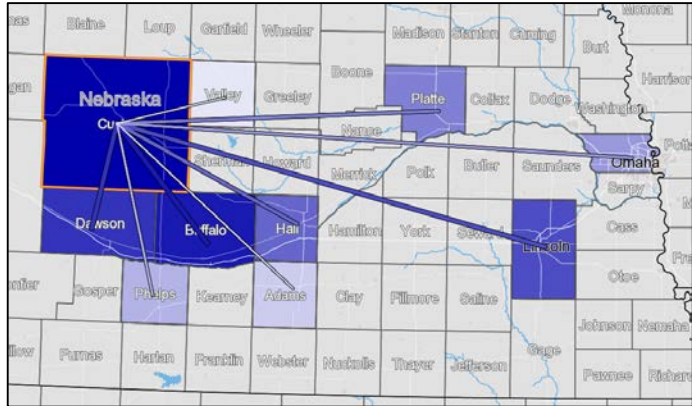


Source: U.S. Census Bureau, LED Origin-Destination Data Base, Sept. 2016

Table 3 (continued)

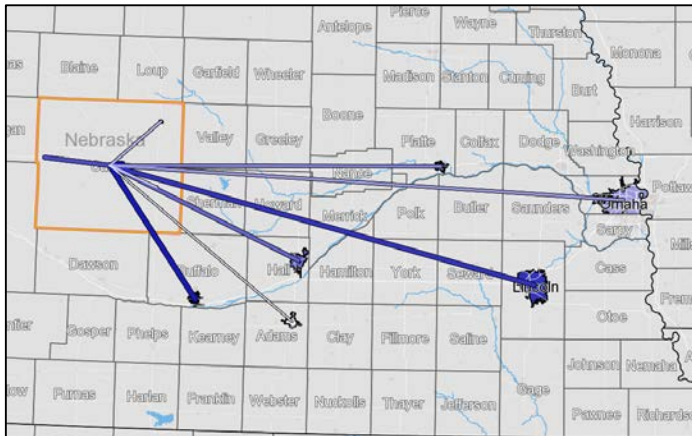
By Counties
Job Counts by Counties Where Workers are Employed
2014

	Count	Share
Custer County, NE	2,699	56.2%
Buffalo County, NE	276	5.8%
Dawson County, NE	211	4.4%
Lancaster County, NE	185	3.9%
Hall County, NE	153	3.2%
Platte County, NE	139	2.9%
Douglas County, NE	136	2.8%
Phelps County, NE	103	2.1%
Adams County, NE	88	1.8%
Valley County, NE	82	1.7%
All Other Locations	728	15.2%



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

	Count	Share
Broken Bow city, NE	1,451	30.2%
Kearney city, NE	200	4.2%
Lincoln city, NE	179	3.7%
Arnold village, NE	170	3.5%
Grand Island city, NE	138	2.9%
Columbus city, NE	135	2.8%
Omaha city, NE	127	2.6%
Sargent city, NE	103	2.1%
Ansley village, NE	93	1.9%
Hastings city, NE	72	1.5%
All Other Locations	2,132	44.4%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, Sept. 2016

People also travel from other locations to work in Custer County—this is the Home Destination report or the labor shed area. Table 4 (pages 8–9) depicts the home locations of those employed within Custer County. The Census identified 3,982 primary jobs within Custer County. As Table 4 indicates, 97.6 percent of these jobs are held by Nebraska residents. Approximately 67.8 percent of Custer County 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

2014

	Count	Share
Total Primary Jobs	3,982	100.0%

By States

Job Counts by States Where Workers Live 2014

	Count	Share
Nebraska	3,885	97.6%
Kansas	20	0.5%
South Dakota	12	0.3%
Illinois	11	0.3%
Colorado	8	0.2%
Iowa	6	0.2%
Missouri	5	0.1%
Texas	5	0.1%
California	4	0.1%
Florida	3	0.1%
All Other Locations	23	0.6%



By Counties

Job Counts by Counties Where Workers Live 2014

	Count	Share
Custer County, NE	2,699	67.8%
Dawson County, NE	141	3.5%
Sherman County, NE	89	2.2%
Valley County, NE	68	1.7%
Lincoln County, NE	63	1.6%
Buffalo County, NE	60	1.5%
Adams County, NE	57	1.4%
Hall County, NE	45	1.1%
Blaine County, NE	38	1.0%
Loup County, NE	34	0.9%
All Other Locations	688	17.3%

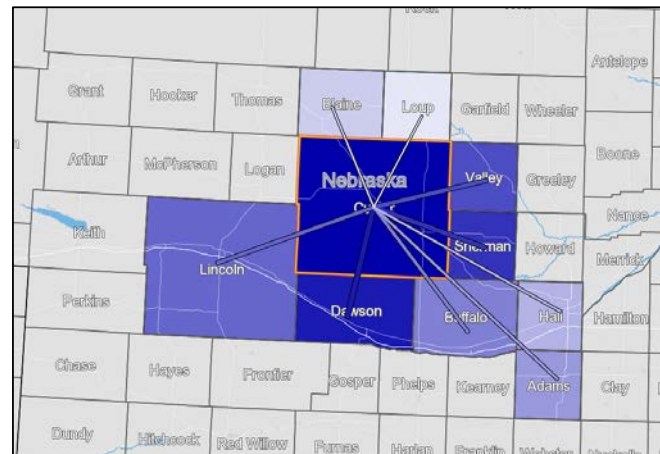
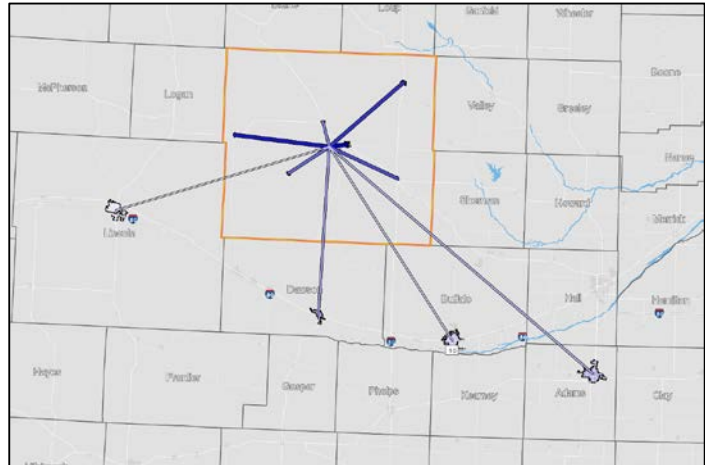


Table 4 (continued)

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

	Count	Share
Broken Bow city, NE	1,149	28.9%
Arnold village, NE	105	2.6%
Sargent city, NE	103	2.6%
Ansley village, NE	98	2.5%
Callaway village, NE	91	2.3%
Merna village, NE	81	2.0%
Lexington city, NE	65	1.6%
Hastings city, NE	45	1.1%
Kearney city, NE	39	1.0%
North Platte city, NE	36	0.9%
All Other Locations	2,170	54.5%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, Sept. 2016

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

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	3,982	100.0%	3,819	100.0%	3,744	100.0%
Living in the Selection Area	4,800	120.5%	4,515	118.2%	4,593	122.7%
Net Job Inflow (+) or Outflow (-)	-818	-	-696	-	-849	-

In-Area Labor Force Efficiency (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	4,800	100.0%	4,515	100.0%	4,593	100.0%
Living and Employed in the Selection Area	2,699	56.2%	2,456	54.4%	2,471	53.8%
Living in the Selection Area but Employed Outside	2,101	43.8%	2,059	45.6%	2,122	46.2%

In-Area Employment Efficiency (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	3,982	100.0%	3,819	100.0%	3,744	100.0%
Employed and Living in the Selection Area	2,699	67.8%	2,456	64.3%	2,471	66.0%
Employed in the Selection Area but Living Outside	1,283	32.2%	1,363	35.7%	1,273	34.0%

Table 5 (continued)

Outflow Job Characteristics (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	2,101	100.0%	2,059	100.0%	2,122	100.0%
Workers Aged 29 or younger	602	28.7%	540	26.2%	545	25.7%
Workers Aged 30 to 54	960	45.7%	974	47.3%	1,041	49.1%
Workers Aged 55 or older	539	25.7%	545	26.5%	536	25.3%
Workers Earning \$1,250 per month or less	525	25.0%	553	26.9%	571	26.9%
Workers Earning \$1,251 to \$3,333 per month	818	38.9%	873	42.4%	928	43.7%
Workers Earning More than \$3,333 per month	758	36.1%	633	30.7%	623	29.4%
Workers in the "Goods Producing" Industry Class	546	26.0%	461	22.4%	482	22.7%
Workers in the "Trade, Transportation, and Utilities" Industry Class	610	29.0%	614	29.8%	585	27.6%
Workers in the "All Other Services" Industry Class	945	45.0%	984	47.8%	1,055	49.7%

Inflow Job Characteristics (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	1,283	100.0%	1,363	100.0%	1,273	100.0%
Workers Aged 29 or younger	294	22.9%	301	22.1%	280	22.0%
Workers Aged 30 to 54	667	52.0%	685	50.3%	637	50.0%
Workers Aged 55 or older	322	25.1%	377	27.7%	356	28.0%
Workers Earning \$1,250 per month or less	247	19.3%	344	25.2%	313	24.6%
Workers Earning \$1,251 to \$3,333 per month	507	39.5%	562	41.2%	511	40.1%
Workers Earning More than \$3,333 per month	529	41.2%	457	33.5%	449	35.3%
Workers in the "Goods Producing" Industry Class	474	36.9%	483	35.4%	419	32.9%
Workers in the "Trade, Transportation, and Utilities" Industry Class	290	22.6%	316	23.2%	315	24.7%
Workers in the "All Other Services" Industry Class	519	40.5%	564	41.4%	539	42.3%

Interior Flow Job Characteristics (Primary Jobs)	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	2,699	100.0%	2,456	100.0%	2,471	100.0%
Workers Aged 29 or younger	590	21.9%	504	20.5%	515	20.8%
Workers Aged 30 to 54	1,305	48.4%	1,275	51.9%	1,281	51.8%
Workers Aged 55 or older	804	29.8%	677	27.6%	675	27.3%
Workers Earning \$1,250 per month or less	751	27.8%	648	26.4%	717	29.0%
Workers Earning \$1,251 to \$3,333 per month	1,061	39.3%	998	40.6%	1,033	41.8%
Workers Earning More than \$3,333 per month	887	32.9%	810	33.0%	721	29.2%
Workers in the "Goods Producing" Industry Class	756	28.0%	681	27.7%	669	27.1%
Workers in the "Trade, Transportation, and Utilities" Industry Class	491	18.2%	458	18.6%	464	18.8%
Workers in the "All Other Services" Industry Class	1,452	53.8%	1,317	53.6%	1,338	54.1%

The Distance/Direction Report depicted in Table 6 and Figure 1 shows the number (count) and percentage (share) of primary job holders living in Custer County and the distance they travel to work. Looking at Table 6, the count of primary job holders living within Custer County is greater in 2014 compared to 2012. The distribution of miles traveled to work has remained relatively stable since 2012. Figure 1 shows the location and concentration of these workplaces.

Table 6

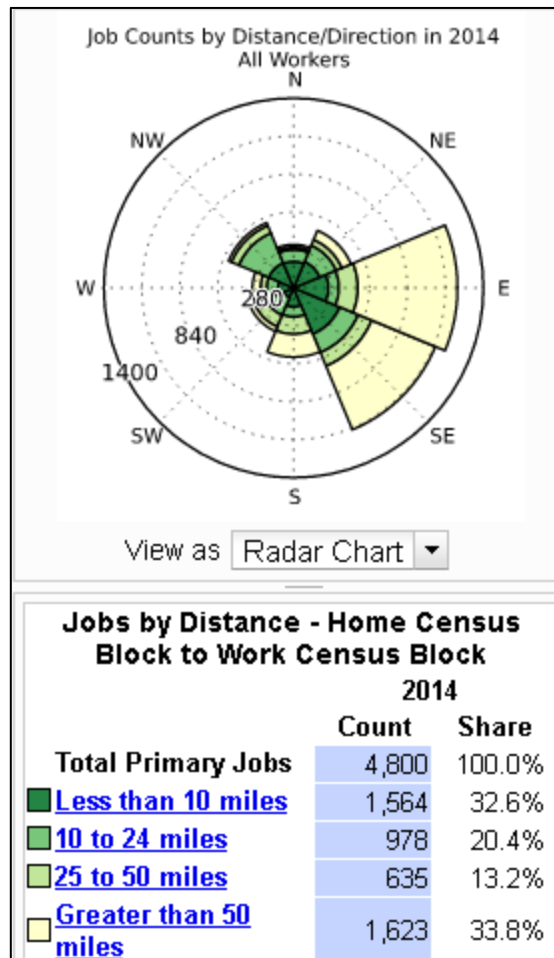
Distance/Direction Report - Home to Work Census Block

Job Counts in Work Blocks by Distance Only

	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	4,800	100.0%	4,515	100.0%	4,593	100.0%
Less than 10 miles	1,564	32.6%	1,434	31.8%	1,398	30.4%
10 to 24 miles	978	20.4%	889	19.7%	934	20.3%
25 to 50 miles	635	13.2%	579	12.8%	635	13.8%
Greater than 50 miles	1,623	33.8%	1,613	35.7%	1,626	35.4%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, Sept. 2016

Figure 1



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, Sept. 2016

Table 7 and Figure 2 show the number (count) and percentage (share) of people employed within Custer County and the distance to their homes. Looking at Table 7, the number of primary jobs held within Custer County has increased since 2012. The data also show the majority of Custer County 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

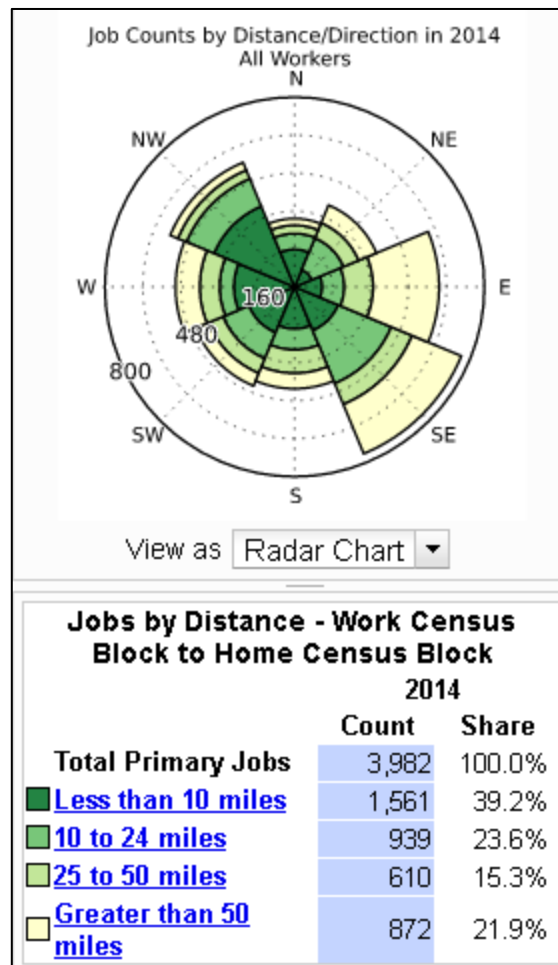
Distance/Direction Report - Work to Home Census Block

Job Counts in Home Blocks by Distance Only

	2014		2013		2012	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	3,982	100.0%	3,819	100.0%	3,744	100.0%
Less than 10 miles	1,561	39.2%	1,432	37.5%	1,396	37.3%
10 to 24 miles	939	23.6%	862	22.6%	892	23.8%
25 to 50 miles	610	15.3%	669	17.5%	628	16.8%
Greater than 50 miles	872	21.9%	856	22.4%	828	22.1%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, Sept. 2016

Figure 2



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, Sept. 2016

Population and Migration Trends

The following tables (Tables 8 and 9) present population trend data for Custer County and the surrounding area. As Table 8 indicates, Custer County's population experienced an average annual decrease of 0.6 percent between 1970 and 2010 for a total decrease of 22.4 percent or 3,153 people. This population decrease compares to an average annual increase of 0.5 percent, 23.0 percent total, for Nebraska as a whole. Custer County reported an average annual 0.2 percent decrease in population from 2010 to 2015 (133 people total).

Table 8

**County Population 1970–2015
Custer County and the Surrounding Area**

Location	---Year---						Avg. Annual % Change	Avg. Annual % Change
	1970	1980	1990	2000	2010	2015	1970-2010	2010-2015
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,896,190	0.5	0.8
Custer County	14,092	13,877	12,270	11,793	10,939	10,806	-0.6	-0.2
Blaine County	847	867	675	583	478	487	-1.4	0.4
Buffalo County	31,222	34,797	37,447	42,259	46,102	48,863	1.0	1.2
Dawson County	19,771	22,304	19,940	24,365	24,326	23,886	0.5	-0.4
Garfield County	2,411	2,363	2,141	1,902	2,049	2,028	-0.4	-0.2
Lincoln County	29,538	36,455	32,508	34,632	36,288	35,656	0.5	-0.4
Logan County	991	983	878	774	763	777	-0.7	0.4
Loup County	854	859	683	712	632	585	-0.7	-1.5
Sherman County	4,725	4,226	3,718	3,318	3,152	3,091	-1.0	-0.4
Thomas County	954	973	851	729	647	684	-1.0	1.1
Valley County	5,783	5,633	5,169	4,647	4,260	4,154	-0.8	-0.5

Source: U.S. Bureau of the Census, Census of Population, May 2016

Table 9 data reveals the population of Custer County's incorporated places as a whole experienced an average annual population decrease of 0.3 percent from 1970 to 2010 and an average annual decrease of 0.3 percent from 2010 to 2015 for a total decrease of 12.8 percent (963 people) from 1970 to 2015. Broken Bow, the county's largest city, reported a 4.9 percent decrease in population (183 people) between 1970 and 2015. The unincorporated areas outside of the selected communities experienced a 35.5 percent decrease (2,323 people) during the period 1970–2015.

Table 9

**County Population 1970–2015
Custer County Communities and Unincorporated Areas**

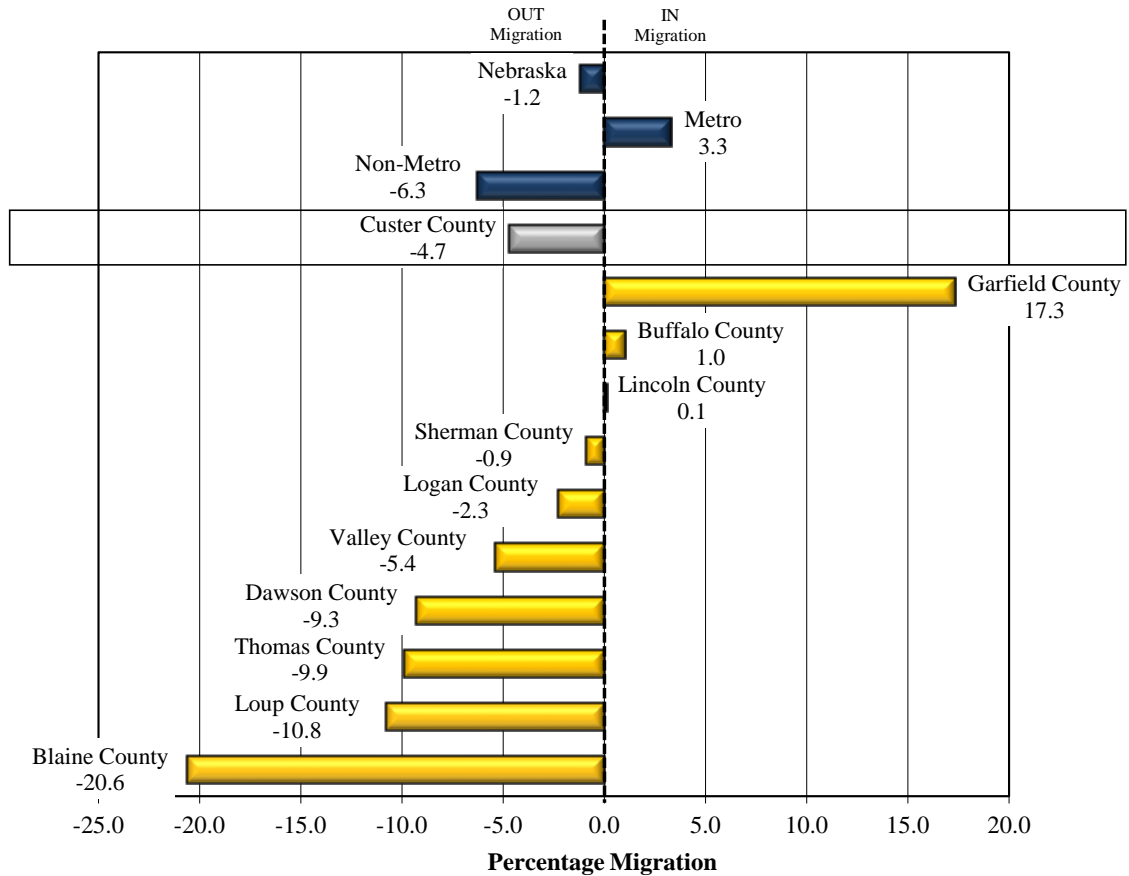
Location	---Year---						Avg. Annual % Change	Avg. Annual % Change
	1970	1980	1990	2000	2010	2015	1970-2010	2010-2015
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,896,190	0.5	0.8
Custer County	14,092	13,877	12,270	11,793	10,939	10,806	-0.6	-0.2
Anselmo	180	187	189	159	145	143	-0.5	-0.3
Ansley	631	644	555	520	441	426	-0.9	-0.7
Arnold	752	813	679	630	597	580	-0.6	-0.6
Berwyn	110	104	122	134	83	82	-0.7	-0.2
Broken Bow	3,734	3,979	3,781	3,491	3,559	3,551	-0.1	0.0
Callaway	523	579	582	637	539	522	0.1	-0.6
Comstock	155	168	135	110	93	92	-1.3	-0.2
Mason City	196	196	160	178	171	168	-0.3	-0.4
Merna	322	389	377	391	363	362	0.3	-0.1
Oconto	155	176	147	141	151	149	-0.1	-0.3
Sargent	789	828	710	649	525	509	-1.0	-0.6
Total Incorporated Places	7,547	8,063	7,437	7,040	6,667	6,584	-0.3	-0.3
Unincorporated Areas	6,545	5,814	4,833	4,753	4,272	4,222	-1.1	-0.2

Source: U.S. Bureau of the Census, Census of Population, May 2016

The next two charts (Chart 6 & 7) graphically depict the migration patterns for Nebraska, Custer 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, Custer County experienced a net out-migration of 554 people or 4.7 percent of its 2000 population.

Chart 6

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

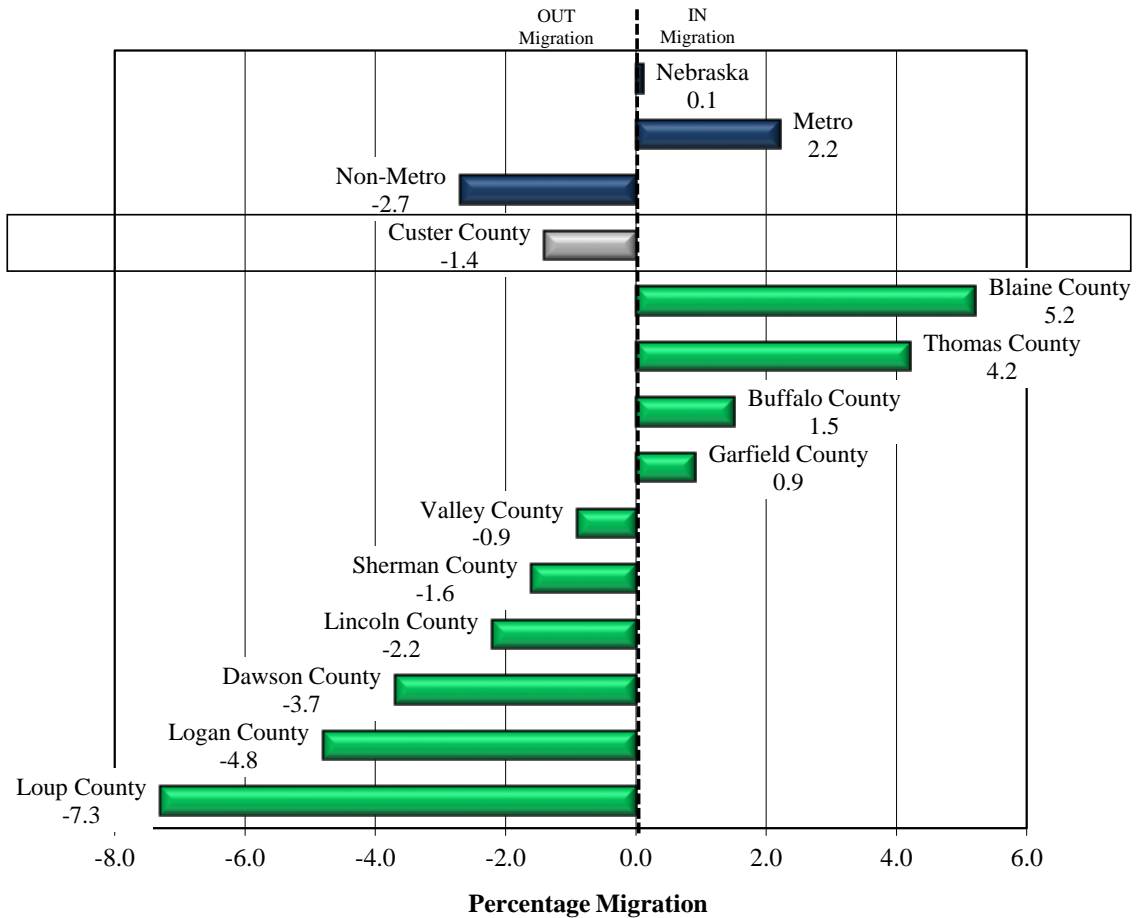


Source: U.S. Census Bureau, County population and estimated components of population change, July 2016

Looking at the years 2010–2015 (Chart 7), Custer County experienced a net out-migration of 156 people or 1.4 percent of its 2010 population.

Chart 7

2010–2015 Net Migration as Percent of 2010 Population Custer County and the Surrounding Area



Source: U.S. Census Bureau, County population and estimated components of population change, July 2016

The next two tables (Tables 10 and 11) provide detail on migration patterns. Data reported in these tables are 2009–2013, 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 67.1 percent of the 566 people moving into Custer County moved from other Nebraska locations (380 people). Data also reveal 168 people (29.7 percent) migrated into the county from other states.

Table 10

**Custer County, Nebraska 2009–2013, Five-Year Estimate
Inflow Into County**

	Number	Percent
Movers within the United States	1,306	98.6
Within Same County	758	57.3
Different County, Same State	380	28.7
Different State	168	12.7
Movers from Abroad	18	1.4
Total Movement	1,324	

Source: American Community Survey, County-to-County Migration
Flows, 2009-2013 data, accessed May 2016

**Reported Counties and Other Areas
(where people moved from)**

State	County	Number
Arizona	Pinal County	74
Nebraska	Buffalo County	57
Nebraska	Lincoln County	49
Nebraska	Cherry County	44
Nebraska	Valley County	33
Nebraska	Keith County	25
Nebraska	Loup County	23
Nebraska	Lancaster County	22
Nebraska	Dawes County	21
New Hampshire	Merrimack County	16
South Dakota	Beadle County	16
Europe	-	16
Nebraska	Cuming County	15
Nebraska	Saline County	15
Nebraska	Adams County	14
Nebraska	Wayne County	14
Missouri	Camden County	13
Missouri	Clay County	11
Nebraska	Dawson County	9
Nebraska	Hall County	8
Nebraska	Phelps County	8
West Virginia	Jefferson County	7
Nebraska	Douglas County	6
Nebraska	Scotts Bluff County	6
Michigan	Oakland County	4

Source: American Community Survey, County-to-County Migration
Flows, 2009-2013 data, accessed May 2016

The 2009–2013, five-year estimates in Table 11 reveal 79.4 percent of the 811 people migrating out of Custer County remained in the state of Nebraska (644 people). Data show 167 Custer County residents (20.6 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

Custer County, Nebraska, 2009–2013, Five-Year Estimate Outflow From County

	Number	Percent
Movers within the United States	1,569	100.0
Within Same County	758	48.3
Different County, Same State	644	41.0
Different State	167	10.6
Movers to Puerto Rico	0	0
Total Movement	1,569	

Source: American Community Survey, County-to-County Migration
Flows, 2009-2013 data, accessed May 2016

Reported Counties (where people moved to)

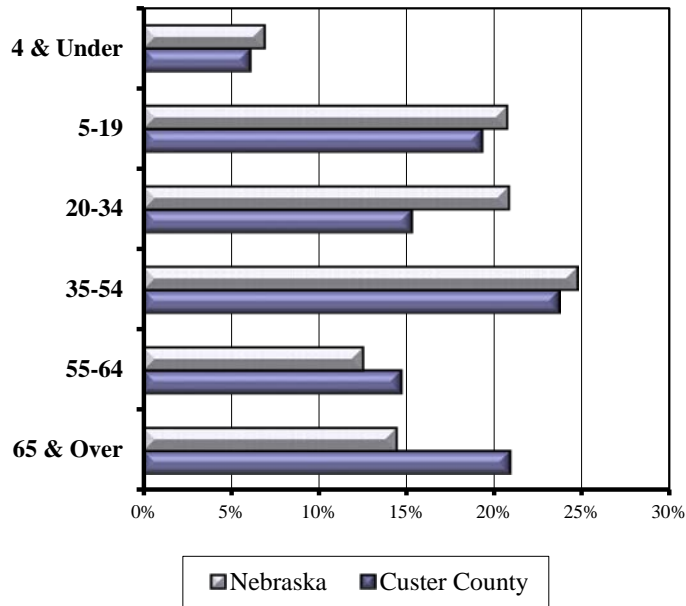
State	County	Number
Nebraska	Buffalo County	143
Nebraska	Dawson County	101
Nebraska	Adams County	67
Kansas	Dickinson County	50
Nebraska	Lancaster County	48
Nebraska	Blaine County	28
Arizona	Pima County	27
Nebraska	Merrick County	27
Nebraska	Gosper County	25
Nebraska	Kearney County	25
California	Los Angeles County	21
Nebraska	Stanton County	18
Nebraska	Dawes County	16
Nebraska	Howard County	16
Kansas	Graham County	15
Nebraska	Keith County	15
Nebraska	Saunders County	14
Nebraska	Lincoln County	13
Nebraska	Harlan County	12
Nebraska	Saline County	12
Idaho	Cassia County	10
Minnesota	Polk County	10
Nebraska	Garfield County	10
Colorado	Larimer County	9
Nebraska	Douglas County	9

Source: American Community Survey, County-to-County Migration
Flows, 2009-2013 data, accessed May 2016

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 Custer County. The population of Custer County is significantly older in age than Nebraska as a whole. The median age for Custer County residents in 2014 was 43.9 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 Custer 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 Custer County and Nebraska

	2014 Population		Percent	
	Nebraska	Custer County	Nebraska	Custer County
4 & Under	130,178	657	6.9%	6.1%
5-19	389,683	2,068	20.7%	19.3%
20-34	391,432	1,640	20.8%	15.3%
35-54	464,329	2,541	24.7%	23.7%
55-64	234,892	1,581	12.5%	14.7%
65 & Over	270,989	2,241	14.4%	20.9%
Total	1,881,503	10,728	100.0%	100.0%
Median Age	36.2	43.9		

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

Table 13 shows additional median ages as estimated by the American Community Survey for communities within Custer 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

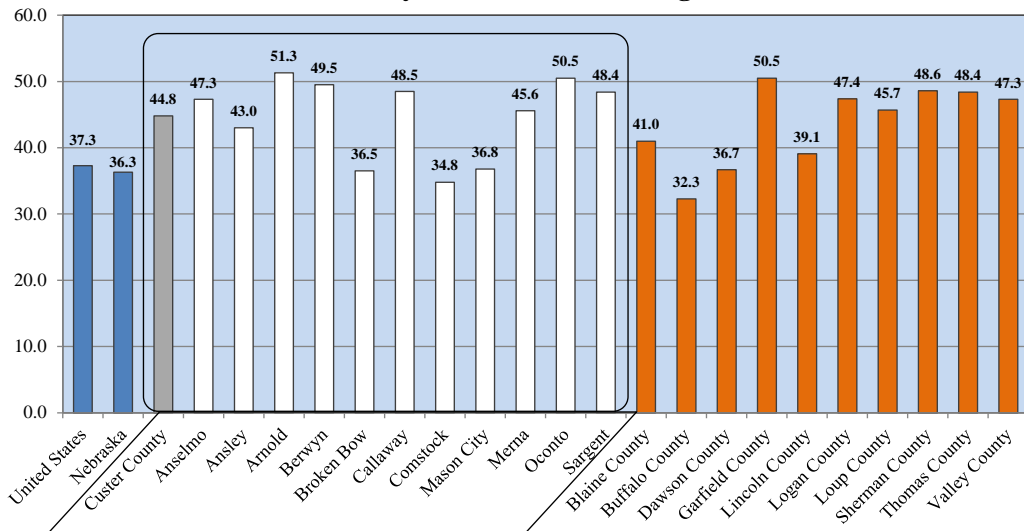
**Median Age by Location and Gender
Five-Year Estimate, 2009–2013
Custer County and the Surrounding Area**

	Median Age		
	Total	Male	Female
United States	37.3	36.0	38.7
Nebraska	36.3	35.0	37.5
Custer County	44.8	42.6	46.3
Anselmo	47.3	47.0	47.3
Ansley	43.0	37.9	47.0
Arnold	51.3	47.9	52.7
Berwyn	49.5	47.5	51.0
Broken Bow	36.5	34.3	40.7
Callaway	48.5	45.6	53.8
Comstock	34.8	48.5	28.5
Mason City	36.8	30.6	39.8
Merna	45.6	42.9	46.7
Oconto	50.5	50.6	49.8
Sargent	48.4	46.1	50.3
Blaine County	41.0	40.9	42.1
Buffalo County	32.3	31.0	33.5
Dawson County	36.7	35.7	37.8
Garfield County	50.5	49.9	51.1
Lincoln County	39.1	38.4	40.1
Logan County	47.4	47.3	48.0
Loup County	45.7	43.5	47.8
Sherman County	48.6	46.9	49.3
Thomas County	48.4	45.7	48.9
Valley County	47.3	47.7	47.1

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, Five-Year Estimate, 2009–2013
Custer 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 Custer 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, Custer County, and Surrounding Counties

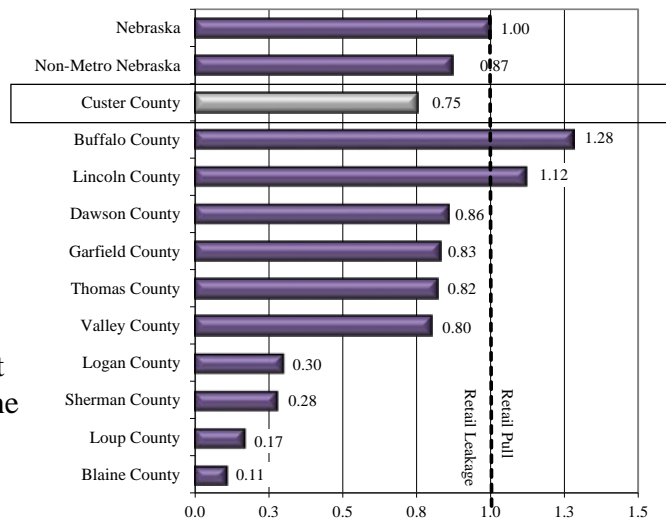
	2015 Population	2015 Retail Sales (x \$1,000)	2015 Per Cap Sales (\$)	2015 Pull Factor
Nebraska	1,896,190	23,132,070	12,199	1.00
Non-Metro Nebraska	780,080	8,265,546	10,596	0.87
Custer County	10,806	98,875	9,150	0.75
Blaine County	487	642	1,319	0.11
Buffalo County	48,863	763,594	15,627	1.28
Dawson County	23,886	249,545	10,447	0.86
Garfield County	2,028	20,474	10,095	0.83
Lincoln County	35,656	488,760	13,708	1.12
Logan County	777	2,813	3,621	0.30
Loup County	585	1,209	2,066	0.17
Sherman County	3,091	10,415	3,369	0.28
Thomas County	684	6,853	10,019	0.82
Valley County	4,154	40,427	9,732	0.80

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

Chart 10

Reviewing the pull factors at the county level indicates Custer County experiences net retail leakages. The 2015 pull factor of 0.75 indicates, on a per capita basis, retail sales in Custer County are 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 Custer County (0.75) with the pull factor for the non-metropolitan area of Nebraska (0.87) indicates per capita retail sales in Custer County are 13.6 percent below the average per capita retail sales in the non-metropolitan area of Nebraska.

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



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

Table 15 and Chart 11 compare the 2015 pull factors for selected area communities. The community of Broken Bow’s pull factor of 1.83 indicates that, on a per capita basis, non-motor vehicle retail sales in Broken Bow are approximately 83.0 percent greater than the state’s average per capita sales.

Table 15

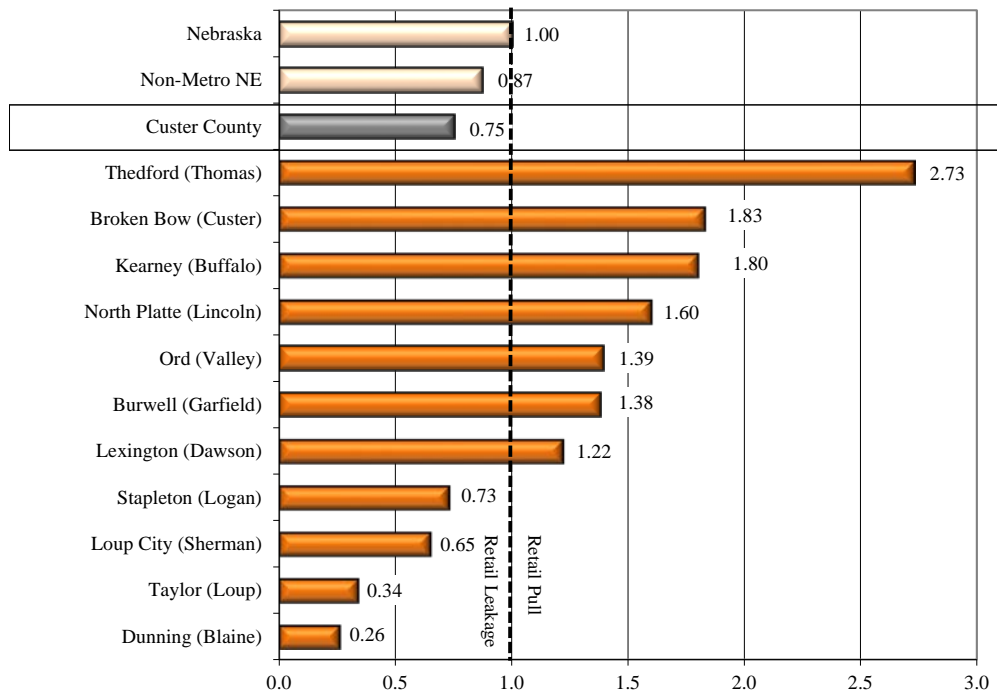
**2015 Retail Sales (Non-Motor Vehicle) Pull Factors
Nebraska, Custer County, and Selected Study Area Communities**

	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
Custer County	10,806	98,875	9,150	0.75
Broken Bow (Custer)	3,551	79,465	22,378	1.83
Dunning (Blaine)	106	341	3,215	0.26
Kearney (Buffalo)	33,021	724,929	21,954	1.80
Lexington (Dawson)	10,075	149,345	14,823	1.22
Burwell (Garfield)	1,211	20,427	16,868	1.38
North Platte (Lincoln)	24,194	473,283	19,562	1.60
Stapleton (Logan)	311	2,782	8,946	0.73
Taylor (Loup)	177	728	4,114	0.34
Loup City (Sherman)	1,012	7,985	7,890	0.65
Theford (Thomas)	200	6,667	33,334	2.73
Ord (Valley)	2,061	34,885	16,926	1.39

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

Chart 11

**2015 Retail Sales (NMV) Pull Factors, Nebraska,
Custer 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 Custer County. As this table indicates, the community of Broken Bow had the strongest pull factor (1.83) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 0.75 for Custer County in 2015.

Table 16

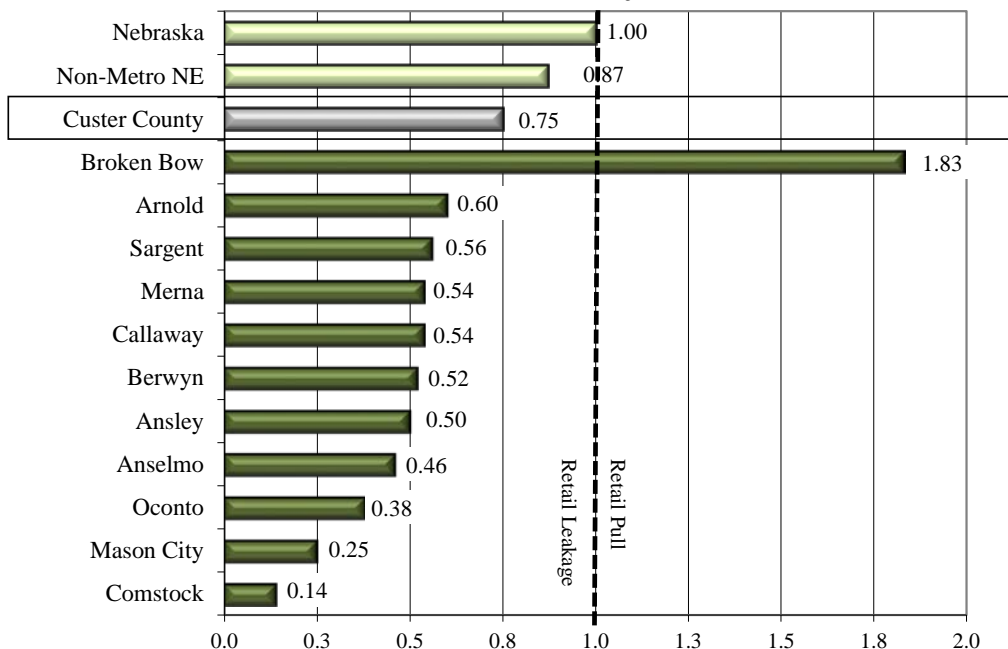
2015 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska and Available Custer County Area Communities

	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
Custer County	10,806	98,875	9,150	0.75
Broken Bow	3,551	79,465	22,378	1.83
Arnold	580	4,260	7,344	0.60
Callaway	522	3,463	6,634	0.54
Sargent	509	3,508	6,891	0.56
Ansley	426	2,597	6,095	0.50
Merna	362	2,398	6,625	0.54
Mason City	168	506	3,012	0.25
Oconto	149	698	4,682	0.38
Anselmo	143	798	5,582	0.46
Comstock	92	157	1,702	0.14
Berwyn	82	519	6,324	0.52

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

Chart 12

2015 Retail Sales (NMV) Pull Factors, Nebraska and Available Custer 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, Broken Bow, and eight other similarly sized communities selected from around the state. Broken Bow's pull factor of 1.83 leads the group for 2015 thus indicating Broken Bow has greater retail pull.

Table 17

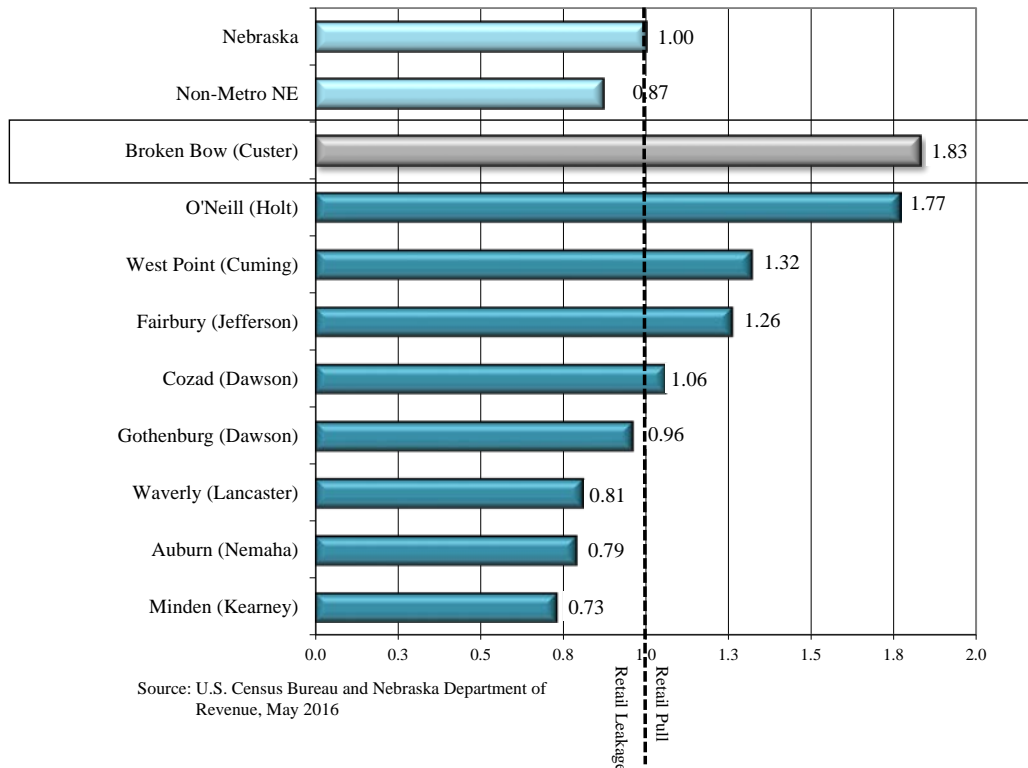
2015 Retail Sales (Non-Motor Vehicle) Pull Factors Broken Bow & Other Similarly Sized Nebraska Communities

	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
Broken Bow (Custer)	3,551	79,465	22,378	1.83
Minden (Kearney)	3,006	26,710	8,885	0.73
Auburn (Nemaha)	3,339	32,091	9,611	0.79
West Point (Cuming)	3,368	54,097	16,062	1.32
Gothenburg (Dawson)	3,514	41,318	11,758	0.96
O'Neill (Holt)	3,653	79,048	21,639	1.77
Waverly (Lancaster)	3,739	36,787	9,839	0.81
Fairbury (Jefferson)	3,751	57,788	15,406	1.26
Cozad (Dawson)	3,863	50,102	12,970	1.06

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

Chart 13

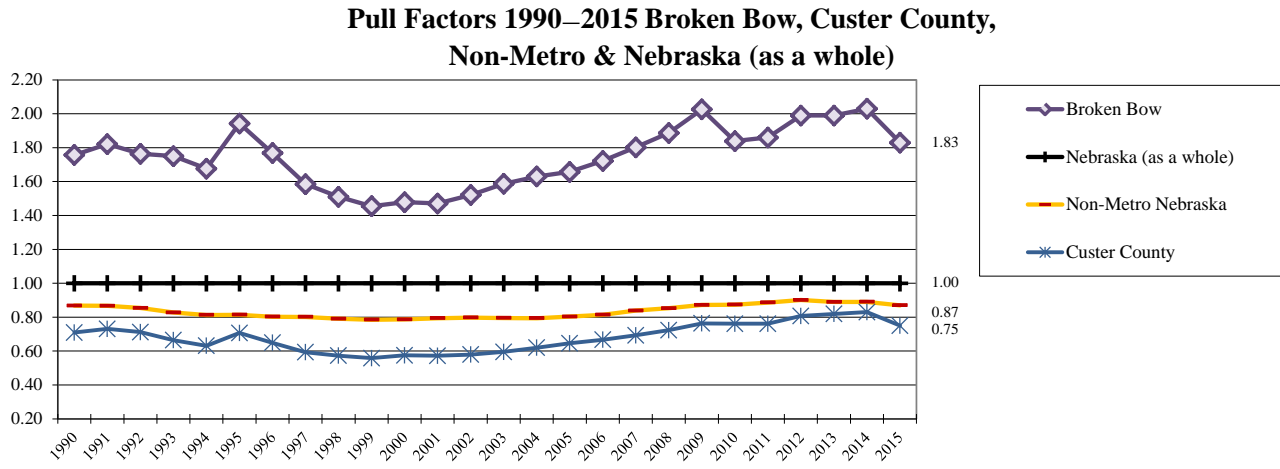
2015 Retail Sales (NMV) Pull Factors, Broken Bow & Other Similarly Sized Nebraska Communities



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

Chart 14 illustrates the pull factor trend for Broken Bow, Custer County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2015. In examining the time line, the city of Broken Bow shows retail pull fluctuating well above the state average throughout the entire study period. Data within Custer County (as a whole) shows the pull factor similar to the non-metropolitan county average and the Nebraska (as a whole) average throughout the time period although slightly below.

Chart 14



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

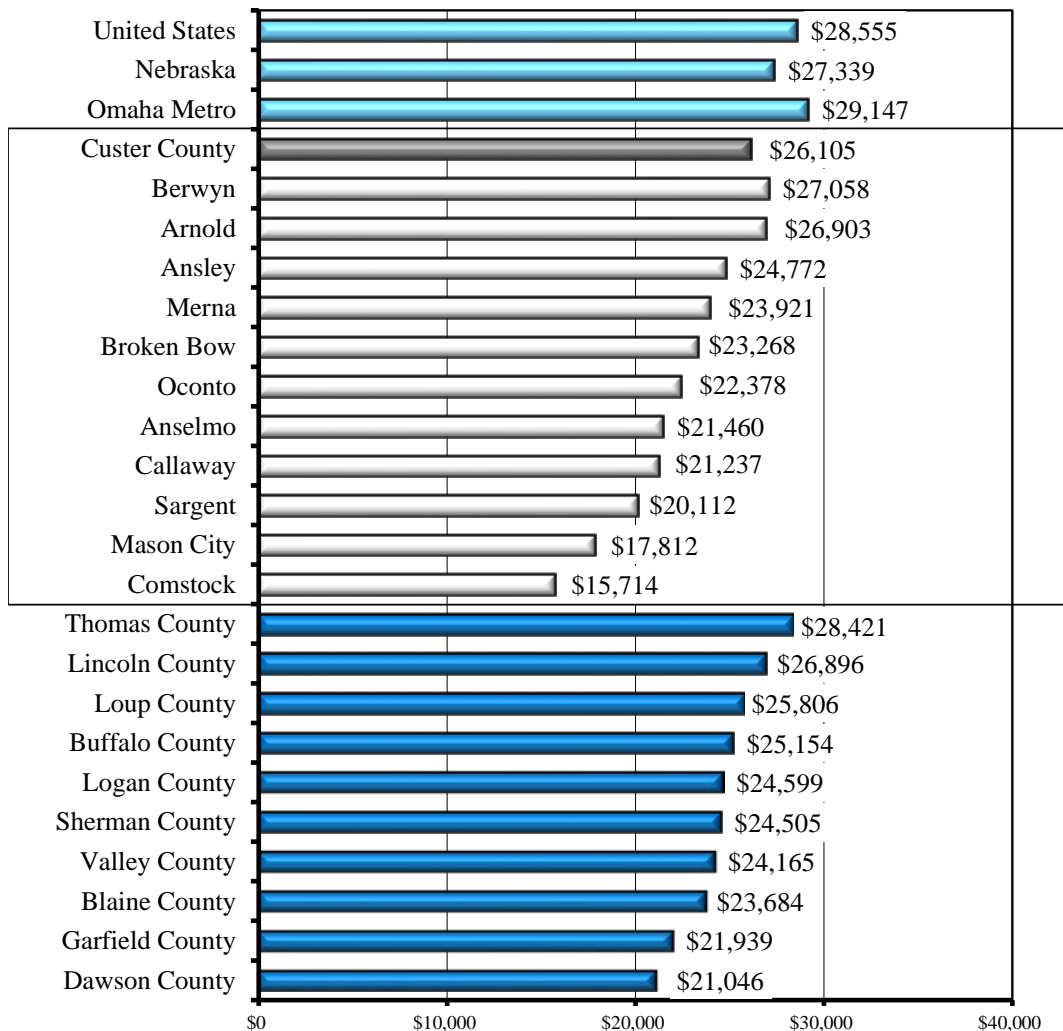
Per Capita Personal Income

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 2010–2014, five-year data show per capita personal income for Custer County is estimated to be \$26,105 compared to \$27,339 for Nebraska as a whole.

Chart 15

Per Capita Income, 2010–2014 Five-Year Estimate, Nebraska, Custer County & Surrounding Counties



Source: U.S. Census Bureau, 2013 inflation adjusted past 12-months, 2010-2014 American Community Survey, accessed May 2016.

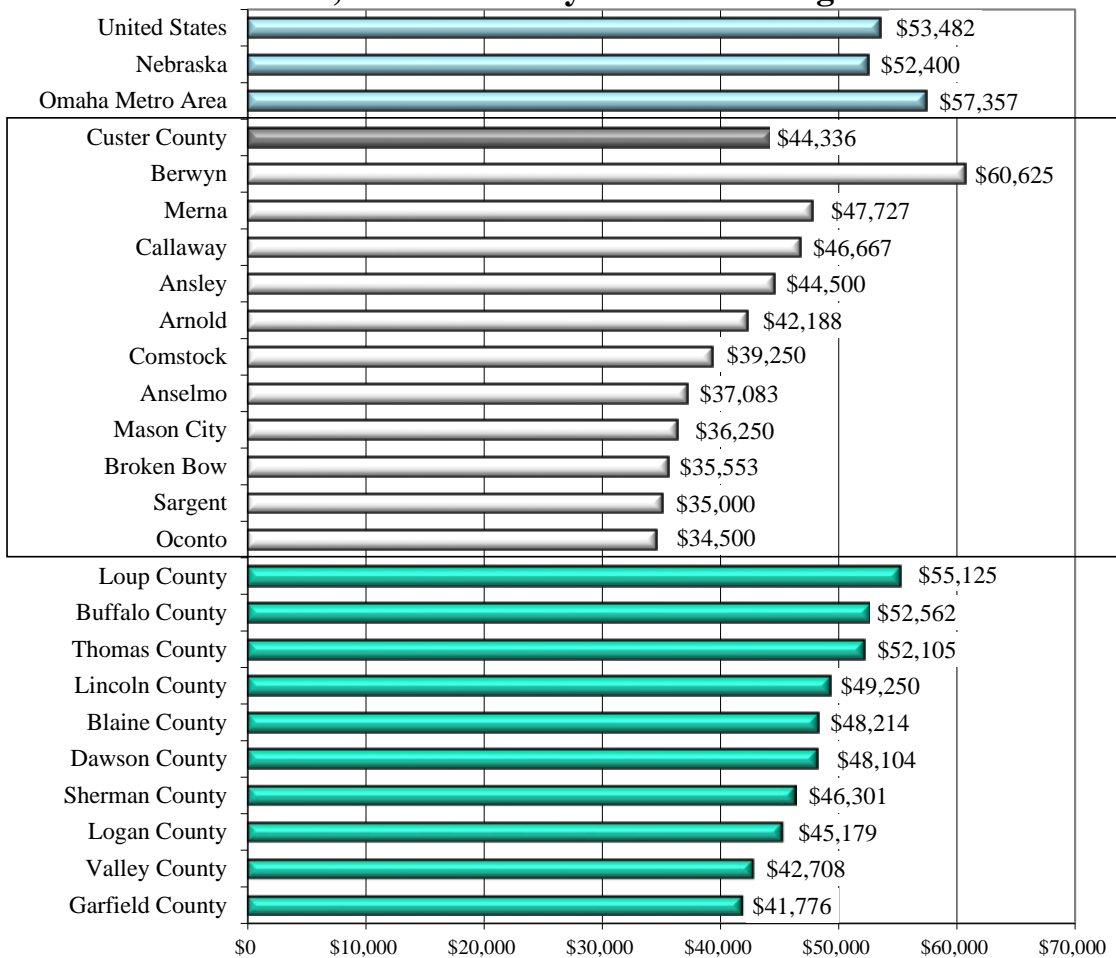
Median Household Income

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 2010–2014, five-year data show median household income for Custer County is estimated to be \$44,336 in 2012 compared to \$52,400 for Nebraska as a whole.

Chart 16

Median Household Income, 2010–2014 Five-Year Estimate Nebraska, Custer County & Surrounding Counties



Source: U.S. Census Bureau, 2010-2014 American Community Survey, accessed May 2016.