

SEPTEMBER 2021 STUDY

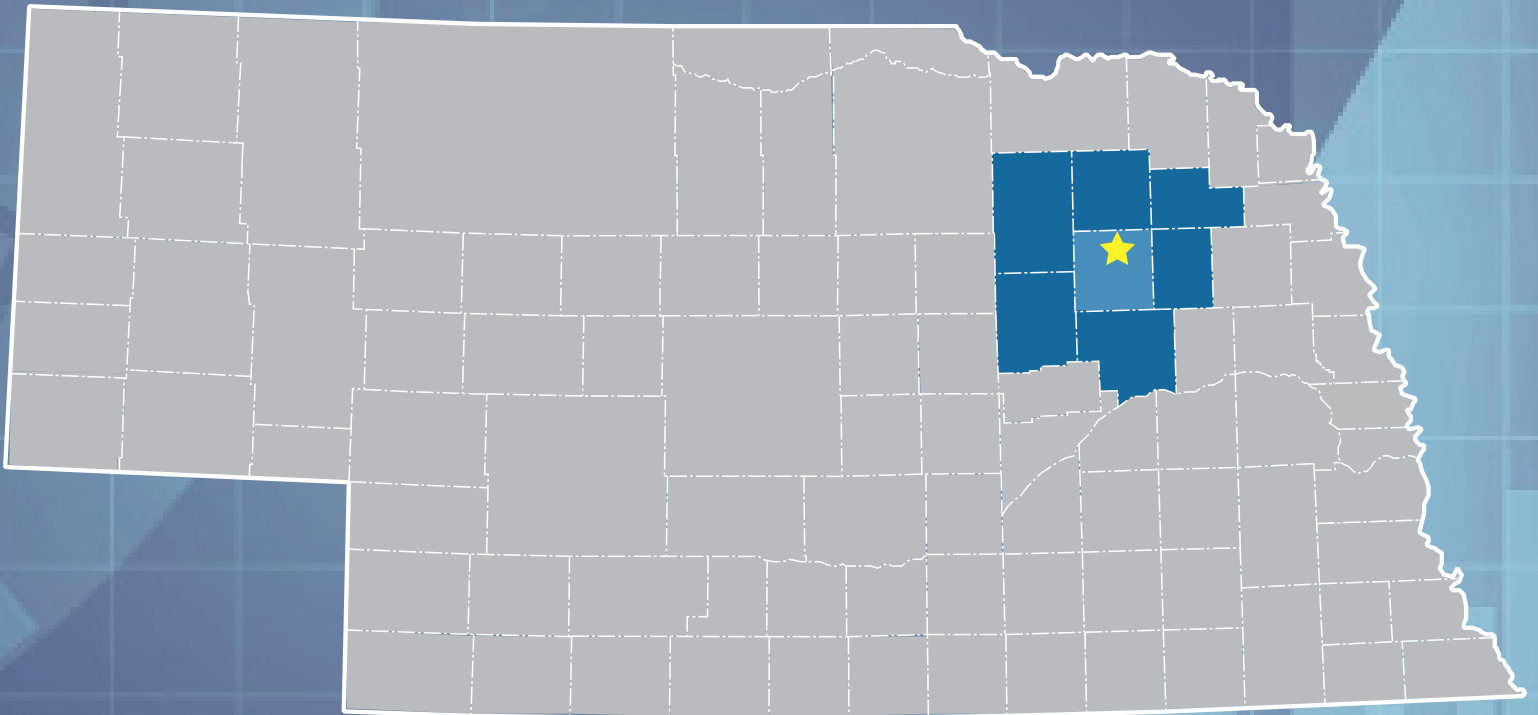


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ECONOMIC AND DEMOGRAPHIC TRENDS

Norfolk, Madison County and the Surrounding Area



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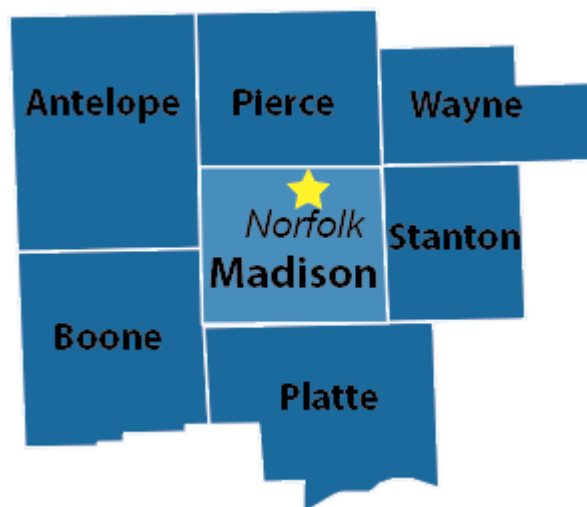
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ECONOMIC AND DEMOGRAPHIC TRENDS IN

Norfolk,

Madison County

AND THE SURROUNDING AREA



This study provides data on labor force, employment, commuting patterns, population, migration, retail sales, and income for Madison 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 Madison County, other counties included in this area are Antelope, Boone, Pierce and Platte. The retail sales section also compares retail growth between Norfolk and eight other similarly sized Nebraska communities.

LABOR FORCE AND EMPLOYMENT

Table 1 and Chart 1 (next page) present nonfarm wage and salary data for Madison County for the period 2010–2020. 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 is data on the number of people employed in the Nonfarm Wage and Salary (W&S) sector in Madison County (regardless of their county of residence). These data indicate total nonfarm wage and salary employment in Madison County increased 3.5 percent (719 jobs) between 2010 and 2020.

Table 1 and Chart 1 also provide employment data for Madison County by major economic sector for years 2010–2020. The Construction sector recorded the largest percentage increase in employment between 2010 and 2020 (26.7 percent or 205 jobs). The Manufacturing sector recorded the largest actual employment increase between 2010 and 2020 (522 jobs or 16.8 percent).

TABLE 1
Nonfarm Wage & Salary Employment Trends • 2010–2020
Madison County, Nebraska

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% Change 2010-2020	# Change 2010-2020
Nonfarm W&S Employment	20,545	20,702	21,062	21,340	21,642	21,636	21,672	21,668	21,733	22,096	21,264	3.5	719
Total Private Industries	16,782	16,995	17,362	17,612	17,943	17,954	17,950	17,971	18,084	18,382	17,664	5.3	882
Goods Producing	3,990	3,987	4,069	4,104	4,126	4,251	4,233	4,384	4,504	4,791	4,727	18.5	737
Natural Resources & Mining	120	161	174	177	189	197	180	121	120	130	131	9.2	11
Construction	769	758	821	845	834	888	897	955	952	951	974	26.7	205
Manufacturing	3,101	3,068	3,074	3,081	3,102	3,167	3,156	3,309	3,431	3,709	3,623	16.8	522
Service Providing	12,792	13,008	13,293	13,508	13,818	13,702	13,717	13,587	13,580	13,591	12,936	1.1	144
Trade, Transportation & Utilities	5,059	5,098	5,142	5,159	5,194	5,214	5,153	5,043	4,897	4,871	4,794	-5.2	-265
Information	269	266	249	247	250	246	245	221	214	208	194	-27.9	-75
Financial Activities	863	860	858	871	878	875	955	994	916	928	902	4.5	39
Professional & Business Services	1,378	1,333	1,287	1,299	1,525	1,474	1,451	1,364	1,412	1,480	1,340	-2.8	-38
Education & Health Services	3,051	3,158	3,191	3,467	3,527	3,501	3,567	3,568	3,575	3,501	3,413	11.9	362
Leisure & Hospitality	1,593	1,641	1,724	1,756	1,771	1,700	1,667	1,696	1,873	1,916	1,707	7.2	114
Other Services, except Public	579	652	842	710	673	692	680	700	693	688	586	1.2	7
Government	3,763	3,707	3,700	3,728	3,699	3,682	3,722	3,697	3,649	3,714	3,600	-4.3	-163
Federal	238	211	200	196	190	175	174	174	166	173	179	-24.8	-59
State	770	765	779	776	761	763	765	746	709	730	786	2.1	16
Local	2,755	2,732	2,722	2,757	2,747	2,745	2,782	2,776	2,774	2,811	2,636	-4.3	-119

Labor Force & Work Summary, 2010-2020, Annual, Madison County, Nebraska (June 2021 data)

CHART 1
Employment by Industry • 2010–2020
Madison County, Nebraska

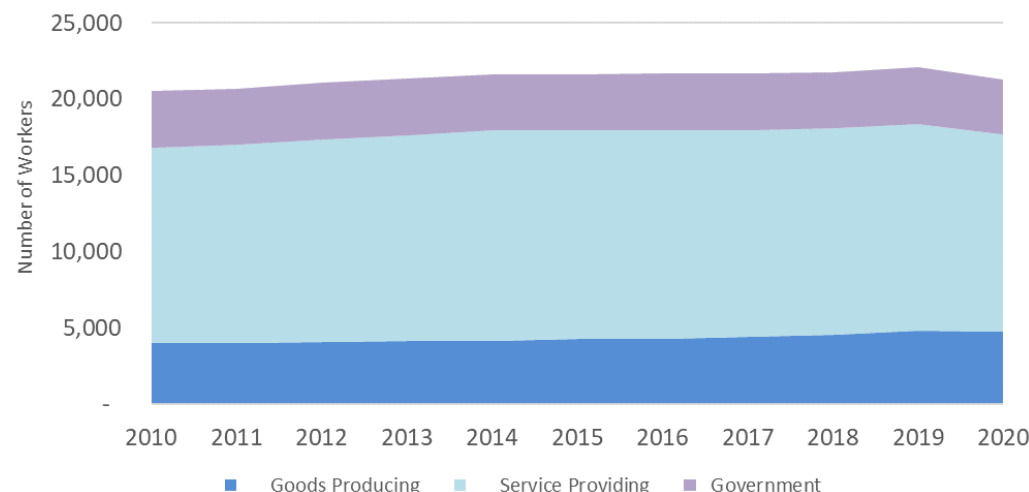


Chart 2 compares total nonfarm wage and salary employment growth in Madison County with metropolitan, non-metropolitan and Nebraska as a whole for the review period 2010–2020. Non-metropolitan Nebraska is defined as Nebraska minus the seven Lincoln and Omaha metropolitan counties of Cass, Douglas, Lancaster, Sarpy, Saunders, Seward and Washington.

As this chart indicates, total nonfarm wage and salary employment in Madison County increased 3.5 percent (719 jobs) from 2010 to 2020, compared to a 5.1 percent increase for Nebraska as a whole, a 6.8 percent increase in metropolitan Nebraska and a 13.1 percent increase in non-metropolitan Nebraska.

CHART 2

Nonfarm W&S Employment • 2010–2020

Madison County, Nebraska, Metro and Non-Metro Nebraska

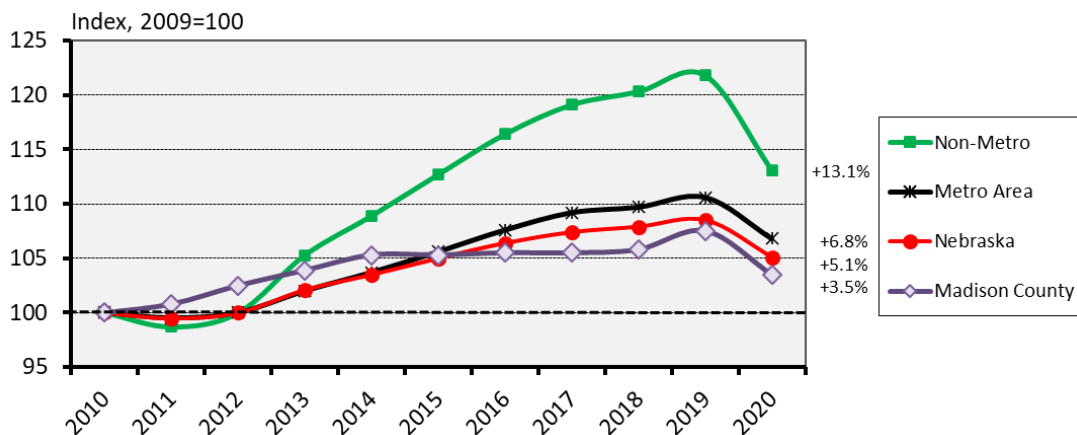
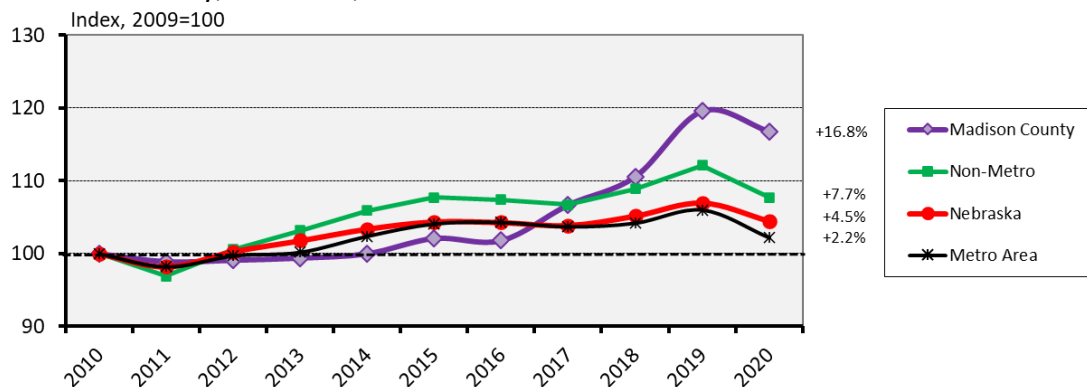


Chart 3 presents data on manufacturing wage and salary employment growth for Madison County, Nebraska, metropolitan and non-metropolitan areas. The Manufacturing sector for Madison County recorded a 16.8 percent increase in employment (522 jobs) between 2010 and 2020. This compares to a 7.7 percent increase in employment for non-metropolitan Nebraska; a 4.5 percent increase for Nebraska as a whole; and a 2.2 percent increase for metropolitan Nebraska over the same period.

CHART 3

Manufacturing W&S Employment • 2010–2020

Madison County, Nebraska, Metro and Non-Metro Nebraska



Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), released June 2021

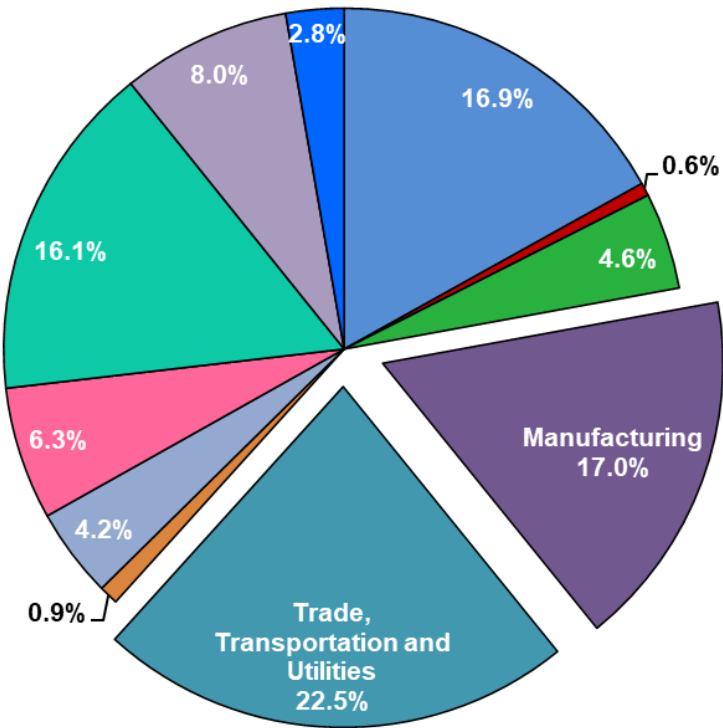
The next series of pie charts (Charts 4, 5 and 6) display the distribution of nonfarm wage and salary (W&S) employment by major economic sector in Madison County compared to the non-metropolitan and metropolitan distributions.

When comparing the Madison County employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Trade, Transportation, and Utilities sector which makes up 22.5 percent of the county workforce (4,794 employees) compared to 18.5 percent for non-metropolitan Nebraska; a difference of 4.0 percent. Comparing Madison County to the overall metropolitan distribution, the largest deviation is found in the Manufacturing sector (17.0 percent Madison County vs. 6.5 percent metropolitan Nebraska; a difference of 10.5 percent).

CHART 4, 5 & 6

Nonfarm W&S Employment by Major Economic Sector

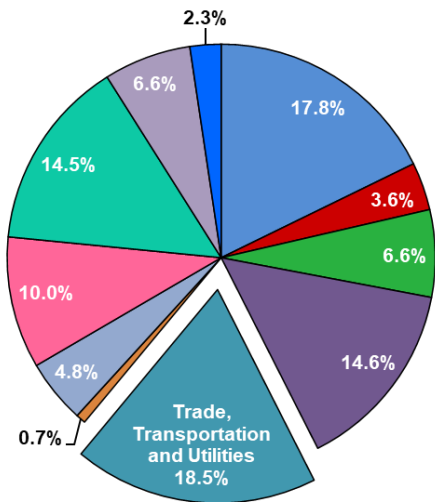
Madison County, 2020



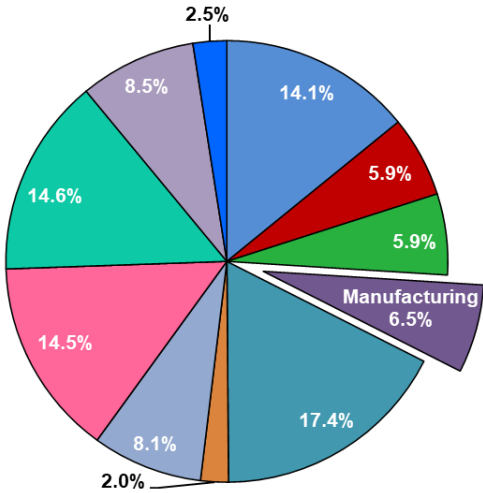
- Government
- Natural Resources and Mining
- Construction
- Manufacturing
- Trade, Transportation, and Utilities
- Information
- Financial Activities
- Professional and Business Services
- Education and Health Services
- Leisure and Hospitality
- Other Services

Source: U.S. Bureau of Labor Statistics

Non-Metropolitan Nebraska, 2020



Metropolitan Nebraska, 2020



The next table (Table 2) shows labor force information for Madison County for the time period 2010–2020. Labor force data (labor force, unemployment, and total employment) 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 Madison County residents participating in the labor force between 2010 and 2020 (3.9 percent or 742 people).

The number of those unemployed in Madison County decreased by 5.7 percent (46 people) between 2010 and 2020. 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 Madison County unemployment rate was 3.9 percent in 2020; below that for metropolitan Nebraska (4.6 percent), below Nebraska as a whole (4.2 percent), and above non-metropolitan Nebraska (3.5 percent).

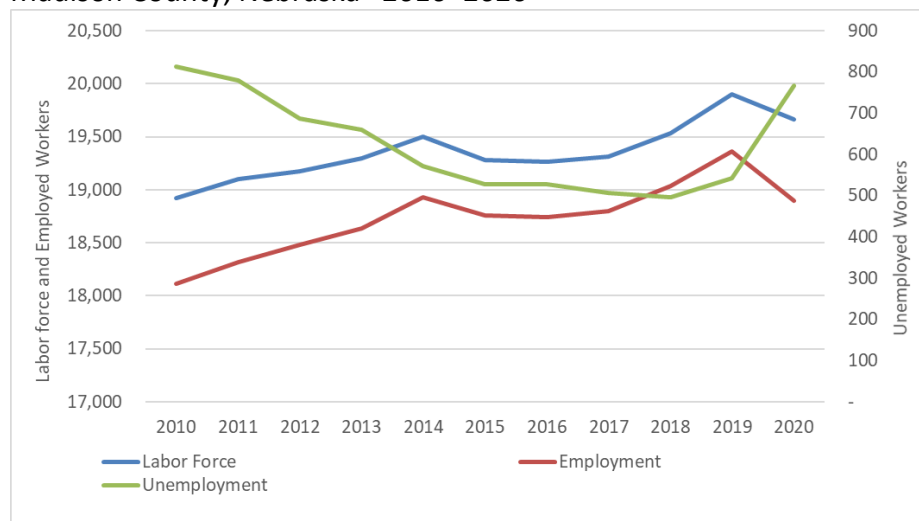
TABLE 2
Labor Force & Employment Trends

Madison County, Nebraska · 2010–2020

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% Change 2010-2020	# Change 2010-2020
Labor Force	18,923	19,098	19,170	19,293	19,497	19,284	19,266	19,309	19,532	19,903	19,665	3.9	742
Employment	18,110	18,319	18,482	18,634	18,926	18,757	18,738	18,802	19,035	19,360	18,898	4.4	788
Unemployment	813	779	688	659	571	527	528	507	497	543	767	-5.7	-46
Unemployment Rate	4.3	4.1	3.6	3.4	2.9	2.7	2.7	2.6	2.5	2.7	3.9	N/A	N/A

CHART 7
Labor Force & Employment Trends

Madison County, Nebraska · 2010–2020



Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, Annual Data, released April 2021
The right axis on Chart 7 refers to Unemployed Workers

RESIDENCE AND WORK FLOW PATTERNS

The next series of tables show residence (Work Destination) and workflow (Home Destination) patterns for The City of Norfolk. 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 city is pulling employees to fill positions. These data are estimates 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 Norfolk are from 2018.

Table 3 (pages 6–7) examines the Work Destination area for Norfolk from three perspectives: by state, by county, and by place (city). In Table 3, the Census identified 12,307 city labor force participants holding primary jobs. As Table 3 shows, 96.3 percent of Norfolk's labor force participants are employed within the state of Nebraska. Approximately 65.8 percent of Norfolk workers remain within Madison County for employment with 34.2 percent leaving the county borders for work (next page). The top ten incorporated places where Norfolk labor force participants are employed are also shown on the following page.

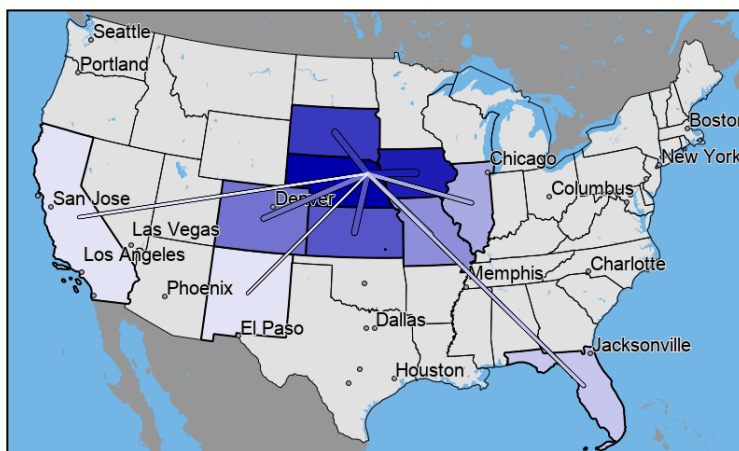
TABLE 3

Work Destination Report • 2018

Where Workers are Employed Who Live in the Selection Area

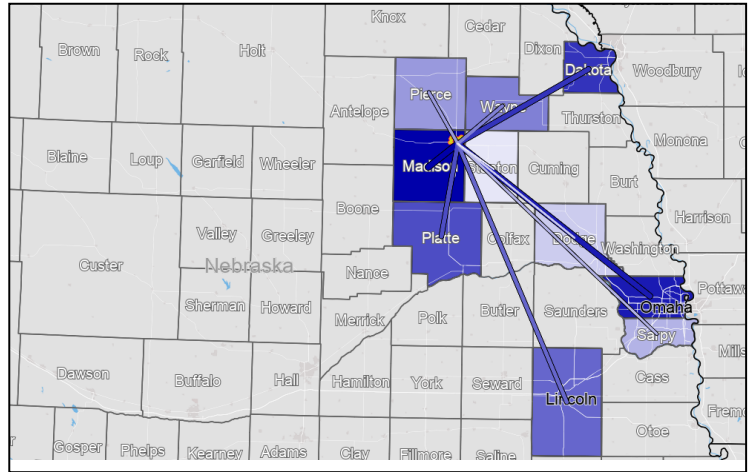
	Count	Share
Total Primary Jobs	12,307	100.0%

	Count	Share
Nebraska	11,849	96.3%
Iowa	203	1.6%
South Dakota	145	1.2%
Kansas	18	0.1%
Colorado	14	0.1%
Missouri	12	0.1%
Illinois	8	0.1%
Florida	7	0.1%
California	6	0.0%
New Mexico	6	0.0%
All Other Locations	39	0.3%



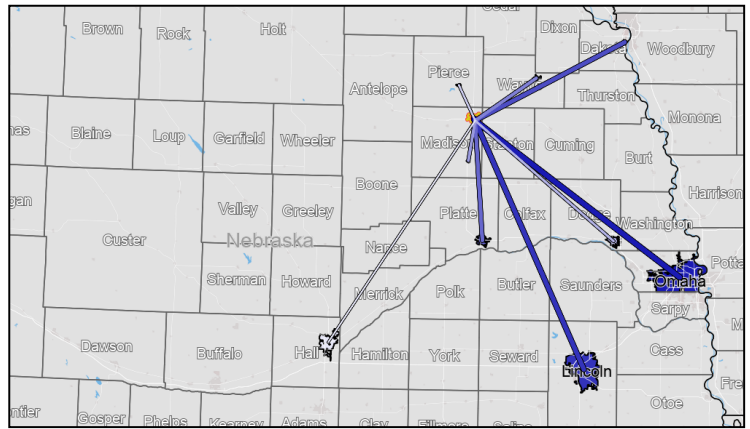
By Counties

	Count	Share
Madison County, NE	8,092	65.8%
Douglas County, NE	789	6.4%
Dakota County, NE	431	3.5%
Platte County, NE	361	2.9%
Lancaster County, NE	333	2.7%
Wayne County, NE	289	2.3%
Pierce County, NE	226	1.8%
Sarpy County, NE	138	1.1%
Dodge County, NE	131	1.1%
Stanton County, NE	125	1.0%
All Other Locations	1,392	11.3%



By Places *Top 10 Cities, CDPS, etc.*

	Count	Share
Norfolk city, NE	5,982	48.6%
Omaha city, NE	754	6.1%
Lincoln city, NE	315	2.6%
Dakota City city, NE	312	2.5%
Columbus city, NE	210	1.7%
Wayne city, NE	194	1.6%
Madison city, NE	110	0.9%
Fremont city, NE	105	0.9%
Pierce city, NE	78	0.6%
Grand Island city, NE	76	0.6%
All Other Locations	4,171	33.9%



People also travel from other locations to work in Norfolk—this is the Home Destination Report or the labor shed area. Table 4 (pages 8–9) depicts the home locations of those employed within Norfolk. The Census identified 13,316 primary jobs within Norfolk. As Table 4 indicates, 96.6 percent of these jobs are held by Nebraska residents. Approximately 55.5 percent of Norfolk workers live within the Madison County borders and the top localities show the distribution of employee residents around the area (next page).

TABLE 4

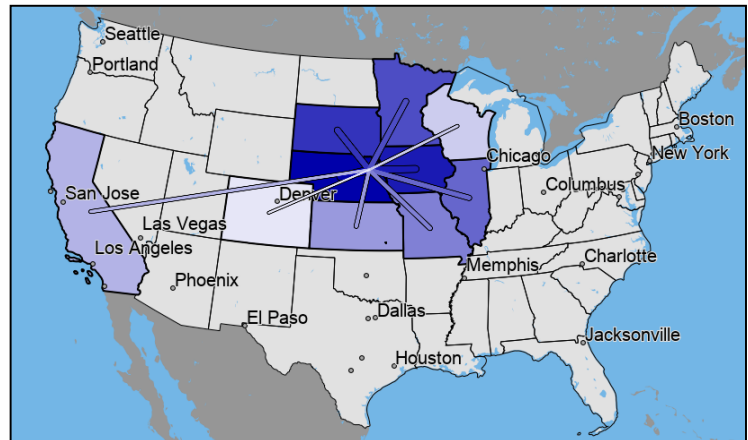
Home Destination Report • 2018

Where Workers Live Who are Employed in the Selection Area

	Count	Share
Total Primary Jobs	13,316	100.0%

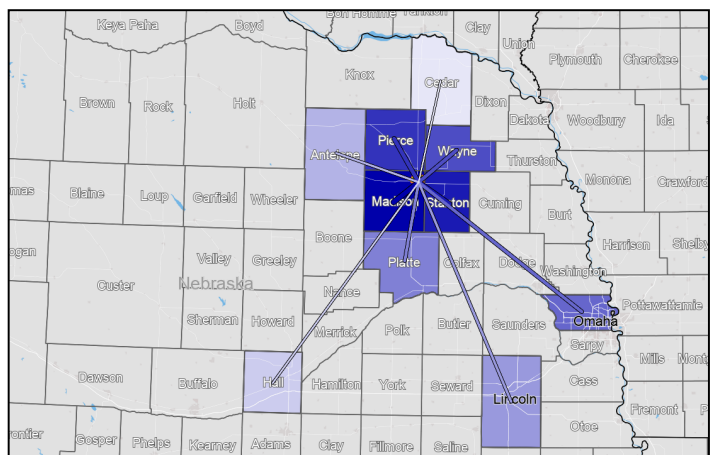
By States

	Count	Share
Nebraska	12,860	96.6%
Iowa	144	1.1%
South Dakota	81	0.6%
Minnesota	30	0.2%
Illinois	27	0.2%
Missouri	20	0.2%
Kansas	18	0.1%
California	17	0.1%
Wisconsin	15	0.1%
Colorado	12	0.1%
All Other Locations	92	0.7%



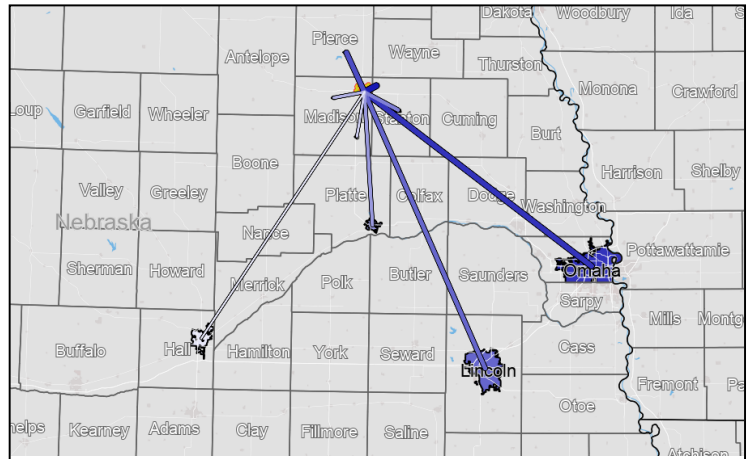
By Counties

	Count	Share
Madison County, NE	7,389	55.5%
Stanton County, NE	966	7.3%
Pierce County, NE	818	6.1%
Wayne County, NE	454	3.4%
Douglas County, NE	353	2.7%
Platte County, NE	344	2.6%
Lancaster County, NE	323	2.4%
Antelope County, NE	205	1.5%
Hall County, NE	177	1.3%
Cedar County, NE	157	1.2%
All Other Locations	2,130	16.0%



By Places *Top 10 cities, CDPS, etc.*

	Count	Share
Norfolk city, NE	5,982	44.9%
Woodland Park CDP, NE	359	2.7%
Omaha city, NE	312	2.3%
Pierce city, NE	288	2.2%
Lincoln city, NE	287	2.2%
Stanton city, NE	281	2.1%
Columbus city, NE	204	1.5%
Battle Creek city, NE	195	1.5%
Madison city, NE	156	1.2%
Grand Island city, NE	140	1.1%
All Other Locations	5,112	38.4%



The next table and charts (Table 5, page 9, Charts 8–18, pages 10–12) show an inflow/outflow report for the Norfolk 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 Norfolk. More detailed figures can also be found in Tables 6–8 (pages 10–12).

TABLE 5
Inflow/Outflow Report

City of Norfolk, Primary Jobs

Selection Area Labor Market Size	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	13,316	100.0%	13,171	100.0%	13,297	100.0%
Living in the Selection Area	12,307	92.4%	12,043	91.4%	12,024	90.4%
Net Job Inflow (+) or Outflow (-)	1,009	-	1,128	-	1,273	-

In-Area Labor Force Efficiency	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	12,307	100.0%	12,043	100.0%	12,024	100.0%
Living and Employed in the Selection Area	5,982	48.6%	5,903	49.0%	6,087	50.6%
Living in the Selection Area but Employed Outside	6,325	51.4%	6,140	51.0%	5,937	49.4%

In-Area Employment Efficiency	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	13,316	100.0%	13,171	100.0%	13,297	100.0%
Employed and Living in the Selection Area	5,982	44.9%	5,903	44.8%	6,087	45.8%
Employed in the Selection Area but Living Outside	7,334	55.1%	7,268	55.2%	7,210	54.2%

TABLE 6**Worker Outflow by Job Characteristic****City of Norfolk**

Outflow Job Characteristics	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	6,325	100.0%	6,140	100.0%	5,937	100.0%
Workers Aged 29 or younger	1,614	25.5%	1,590	25.9%	1,512	25.5%
Workers Aged 30 to 54	3,065	48.5%	3,061	49.9%	2,923	49.2%
Workers Aged 55 or older	1,646	26.0%	1,489	24.3%	1,502	25.3%
Workers Earning \$1,250 per month or less	1,056	16.7%	1,122	18.3%	1,005	16.9%
Workers Earning \$1,251 to \$3,333 per month	2,258	35.7%	2,303	37.5%	2,532	42.6%
Workers Earning More than \$3,333 per month	3,011	47.6%	2,715	44.2%	2,400	40.4%
Workers in the "Goods Producing" Industry Class	2,687	42.5%	2,611	42.5%	2,477	41.7%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,421	22.5%	1,524	24.8%	1,444	24.3%
Workers in the "All Other Services" Industry Class	2,217	35.1%	2,005	32.7%	2,016	34.0%

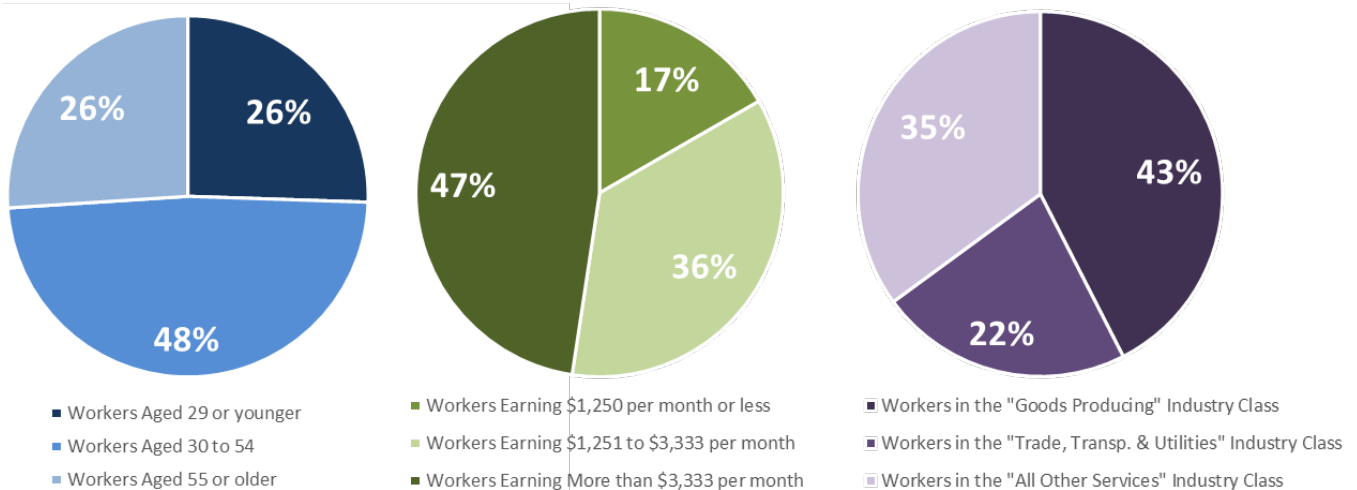
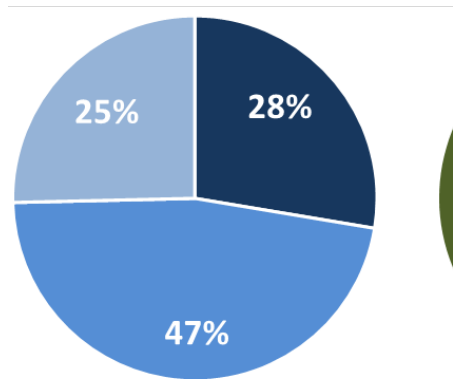
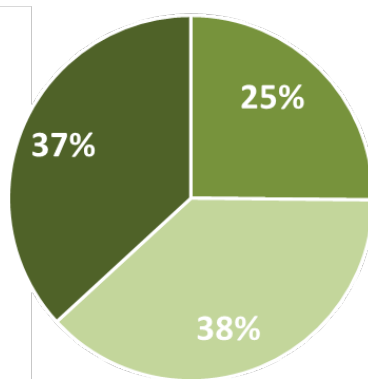
CHART 8, 9 & 10

TABLE 7**Worker Inflow by Job Characteristic****City of Norfolk**

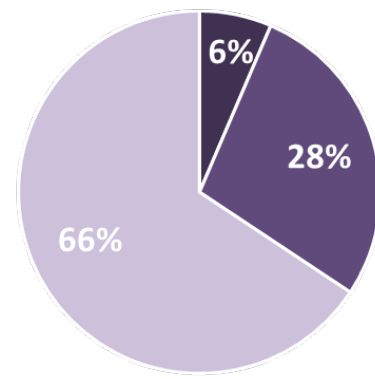
Inflow Job Characteristics	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	7,334	100.0%	7,268	100.0%	7,210	100.0%
Workers Aged 29 or younger	2,026	27.6%	2,110	29.0%	2,024	28.1%
Workers Aged 30 to 54	3,448	47.0%	3,393	46.7%	3,416	47.4%
Workers Aged 55 or older	1,860	25.4%	1,765	24.3%	1,770	24.5%
Workers Earning \$1,250 per month or less	1,845	25.2%	1,857	25.6%	1,911	26.5%
Workers Earning \$1,251 to \$3,333 per month	2,788	38.0%	2,837	39.0%	2,911	40.4%
Workers Earning More than \$3,333 per month	2,701	36.8%	2,574	35.4%	2,388	33.1%
Workers in the "Goods Producing" Industry Class	473	6.4%	483	6.6%	479	6.6%
Workers in the "Trade, Transportation, and Utilities" Industry Class	2,044	27.9%	2,087	28.7%	2,126	29.5%
Workers in the "All Other Services" Industry Class	4,817	65.7%	4,698	64.6%	4,605	63.9%



- Workers Aged 29 or younger
- Workers Aged 30 to 54
- Workers Aged 55 or older



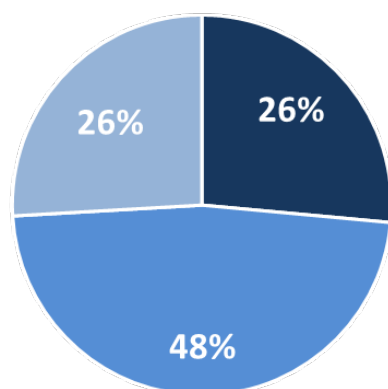
- Workers Earning \$1,250 per month or less
- Workers Earning \$1,251 to \$3,333 per month
- Workers Earning More than \$3,333 per month



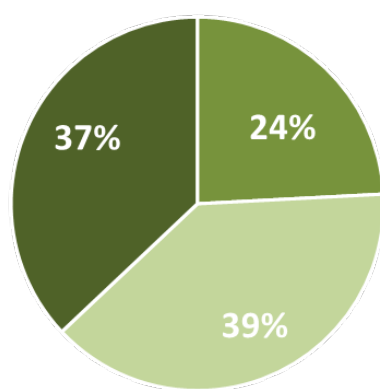
- Workers in the "Goods Producing" Industry Class
- Workers in the "Trade, Transp. & Utilities" Industry Class
- Workers in the "All Other Services" Industry Class

TABLE 8**Worker Interior by Job Characteristic****City of Norfolk****Interior Flow Job Characteristics**

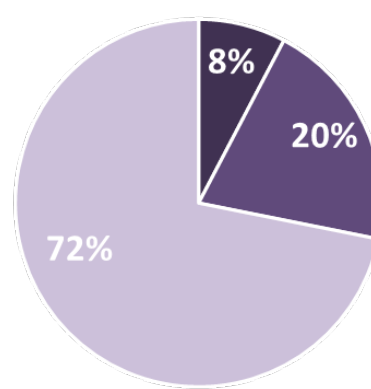
	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	5,982	100.0%	5,903	100.0%	6,087	100.0%
Workers Aged 29 or younger	1,583	26.5%	1,573	26.6%	1,679	27.6%
Workers Aged 30 to 54	2,849	47.6%	2,793	47.3%	2,921	48.0%
Workers Aged 55 or older	1,550	25.9%	1,537	26.0%	1,487	24.4%
Workers Earning \$1,250 per month or less	1,446	24.2%	1,475	25.0%	1,550	25.5%
Workers Earning \$1,251 to \$3,333 per month	2,322	38.8%	2,382	40.4%	2,599	42.7%
Workers Earning More than \$3,333 per month	2,214	37.0%	2,046	34.7%	1,938	31.8%
Workers in the "Goods Producing" Industry Class	461	7.7%	422	7.1%	456	7.5%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,222	20.4%	1,260	21.3%	1,335	21.9%
Workers in the "All Other Services" Industry Class	4,299	71.9%	4,221	71.5%	4,296	70.6%



■ Workers Aged 29 or younger
 ■ Workers Aged 30 to 54
 ■ Workers Aged 55 or older



■ Workers Earning \$1,250 per month or less
 ■ Workers Earning \$1,251 to \$3,333 per month
 ■ Workers Earning More than \$3,333 per month



■ Workers in the "Goods Producing" Industry Class
 ■ Workers in the "Trade, Transp. & Utilities" Industry Class
 ■ Workers in the "All Other Services" Industry Class

The Distance/Direction Report depicted in Table 9 and Figure 1 shows the number (count) and percentage (share) of primary job holders living in Norfolk and the distance they travel to work. Looking at Table 9, the count of primary job holders living within Norfolk is greater in 2018 compared to 2017 and 2016. The distribution of miles traveled to work has also shifted since 2016. Figure 1 shows the location and concentration of these workplaces.

TABLE 9 & FIGURE 1

Distance/Direction Report • Home to Work Census Block

Live within study area – distance to work

Job Counts in Work Blocks	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	12,307	100.0%	12,043	100.0%	12,024	100.0%
Less than 10 miles	7,708	62.6%	7,657	63.6%	7,869	65.4%
10 to 24 miles	782	6.4%	723	6.0%	692	5.8%
25 to 50 miles	903	7.3%	909	7.5%	848	7.1%
Greater than 50 miles	2,914	23.7%	2,754	22.9%	2,615	21.7%

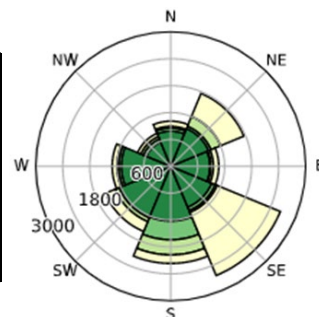


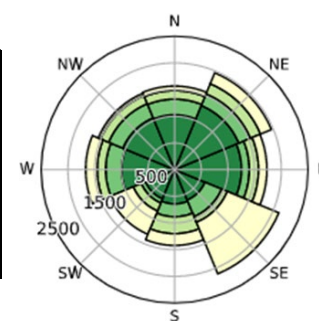
Table 10 and Figure 2 show the number (count) and percentage (share) of people employed within Madison County and the distance to their homes. Looking at Table 10, the number of primary jobs held within Norfolk has increased since 2018 since 2017 and 2016. The data also show the majority of Norfolk employees continue to travel less than 10 miles from work to home. Figure 2 shows the concentration of job counts by distance and direction.

TABLE 10 & FIGURE 2

Distance/Direction Report • Work to Home Census Block

Work within study area – distance to home

Job Counts in Home Blocks	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	13,316	100.0%	13,171	100.0%	13,297	100.0%
Less than 10 miles	7,479	56.2%	7,396	56.2%	7,584	57.0%
10 to 24 miles	1,923	14.4%	1,891	14.4%	1,949	14.7%
25 to 50 miles	1,452	10.9%	1,494	11.3%	1,537	11.6%
Greater than 50 miles	2,462	18.5%	2,390	18.1%	2,227	16.7%



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, September 2021

POPULATION AND MIGRATION TRENDS

The following tables (Tables 11 and 12) present population trend data for Madison County and the surrounding area. As Table 11 indicates, Madison County's population experienced an average annual increase of 0.6 percent between 1970 and 2010 for a total increase of 27.3 percent or 7,474 people. This population increase compares to an average annual increase of 0.5 percent, 23.0 percent total, for Nebraska as a whole. Madison County reported an average annual decrease of less than 0.2 percent in population from 2010 to 2020 (63 people total).

TABLE 11

County Population • 1970–2020

Madison County and the Surrounding Area

Location	1970	1980	1990	2000	2010	2020	Avg. Annual % Change 1970-2010	Avg. Annual % Change 2010-2020
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,937,552	0.5	0.6
Madison County	27,402	31,382	32,655	35,226	34,876	34,813	0.6	0.0
Antelope County	9,047	8,675	7,965	7,452	6,685	6,264	-0.8	-0.6
Boone County	8,190	7,391	6,667	6,259	5,505	5,096	-1.0	-0.8
Pierce County	8,493	8,481	7,827	7,857	7,266	7,184	-0.4	-0.1
Platte County	26,544	28,852	29,820	31,568	32,237	33,364	0.5	0.3
Stanton County	5,758	6,549	6,244	6,455	6,129	5,880	0.2	-0.4
Wayne County	10,400	9,858	9,364	9,851	9,595	9,492	-0.2	-0.1

Table 12 data reveals the population of Madison County's incorporated places as a whole experienced an average annual population increase of 0.9 percent from 1970 to 2010 and an average annual decrease of less than 0.1 percent from 2010 to 2020 for a total increase of 42.7 percent (8,626 people) from 1970 to 2020. Norfolk, the county's largest city, reported a 46.7 percent increase in population (7,756 people) between 1970 and 2020. The unincorporated areas outside of the selected communities experienced a 16.9 percent decrease (1,215 people) during the period 1970–2020.

TABLE 12

Population • 1970–2020

Madison County Communities/Rural Populations

Location	1970	1980	1990	2000	2010	2020	Avg. Annual % Change 1970-2010	Avg. Annual % Change 2010-2020
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,937,552	0.5	0.6
Madison County	27,402	31,382	32,655	35,226	34,876	34,813	0.6	0.0
Battle Creek	768	948	1,003	1,158	1,207	1,156	1.1	-0.4
Madison	1,595	1,950	2,159	2,367	2,438	2,343	1.1	-0.4
Meadow Grove	372	400	338	311	301	283	-0.5	-0.6
Newman Grove	863	930	787	797	721	686	-0.4	-0.5
Norfolk	16,607	19,449	21,362	23,516	24,210	24,363	0.9	0.1
Total Incorporated Places	20,205	23,677	25,649	28,149	28,877	28,831	0.9	0.0
Unincorporated Areas	7,197	7,705	7,006	7,077	5,999	5,982	-0.5	0.0

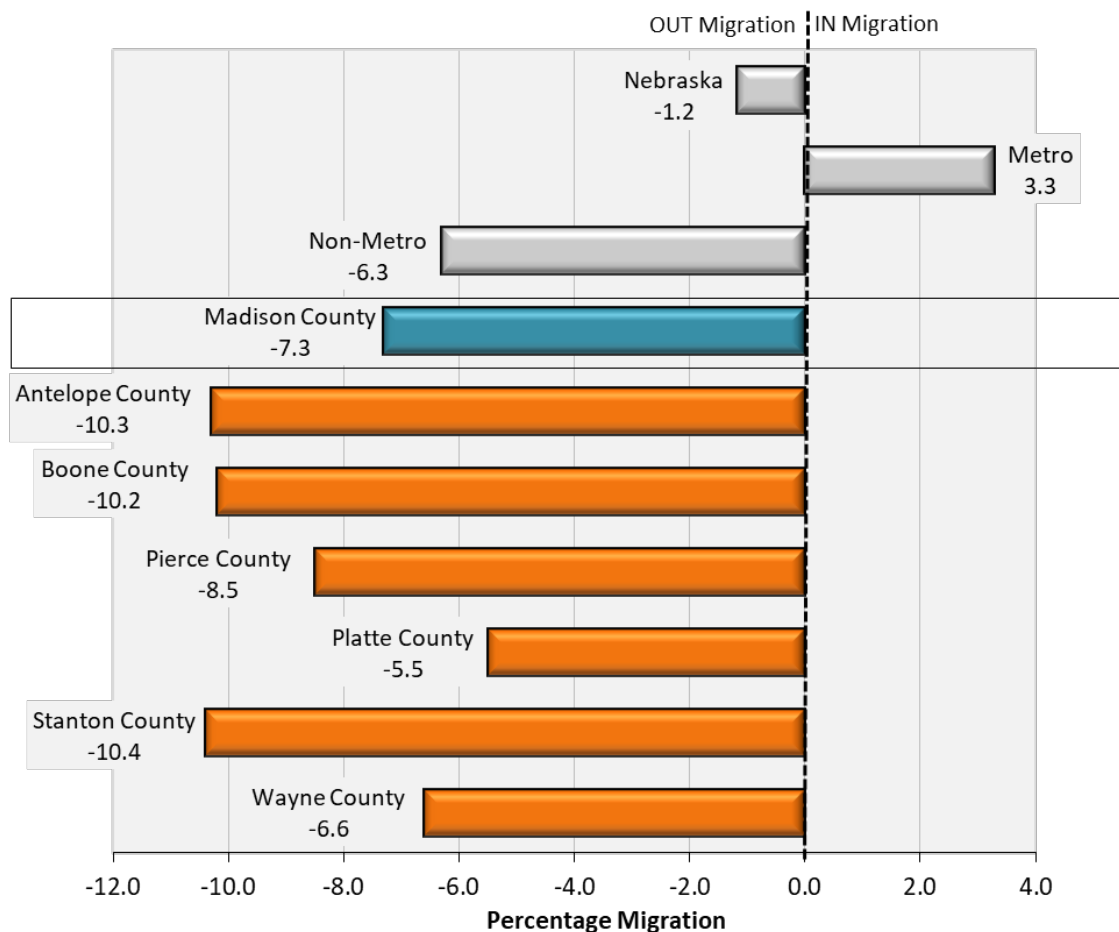
Source: U.S. Bureau of the Census, Census of Population, May 2021

The next two charts (Chart 17 and 18, next page) graphically depict the migration patterns for Nebraska, Madison 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, Madison County experienced a net out-migration of 2,583 people or 7.3 percent of its 2000 population.

CHART 17

Net Migration as Percent of 2000 Population • 2000–2010

Madison County and the Surrounding Area



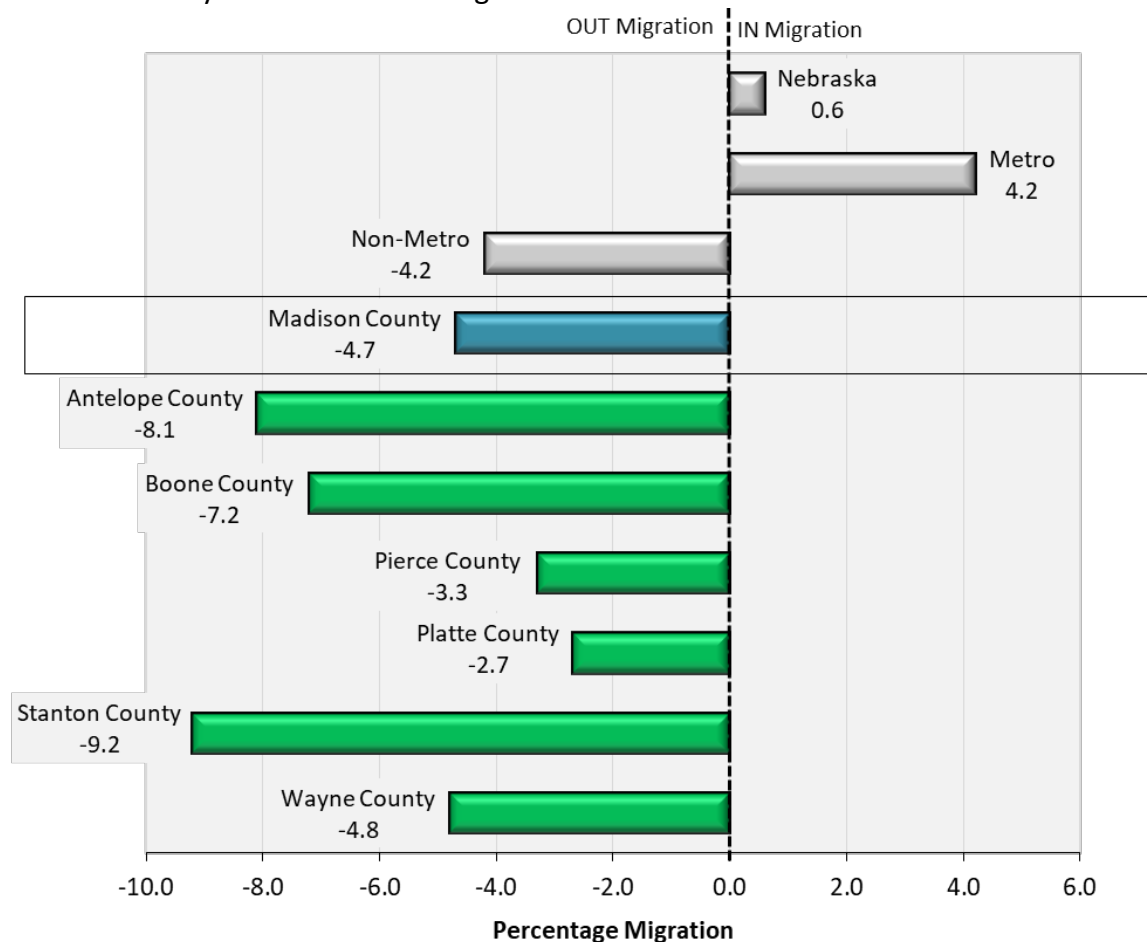
Source: U.S. Census Bureau, County population and estimated components of population change, July 2016

Looking at the years 2010–2020 (Chart 18), Madison County experienced a net out-migration of 1,648 people or 4.7 percent of its 2010 population.

CHART 18

Net Migration as Percent of 2010 Population • 2010–2020

Madison County and the Surrounding Area



Source: U.S. Census Bureau, County population and estimated components of population change, May 2021

The next table and chart (Tables 13 and Chart 19, next page) provide detail on migration patterns. Data reported in these tables are 2015–2019, 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.

Table 13 data show the current population one-year or older is 391 greater than the number of people living in Madison County one-year ago. This indicates Madison County experienced a net increase in its population age one and older and in-migration was greater than out-migration plus the number of deaths.

TABLE 13
5-Year Estimate Population Change
Due to Migration and Mortality • 2015–2019

Madison County, Nebraska

Current population one-year or older	34,724
Number of people living in the area one-year ago	34,333
Population change due to migration and mortality	391

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 April 2021

The 2015–2019, five-year estimates in Chart 19 reveal a net gain of 632 people from other Nebraska counties and a net loss of 296 people from other states for a total net gain of 336 people one-year or older. As shown in Chart 19, net gains occurred in the age groups Age 1 to 17 (gain of 58), Age 18 to 24 (gain of 69), Age 25 to 44 (gain of 111) and Age 65 and over (gain of 135) and a net loss in age group Age 45 to 64 (loss of 37).

Chart 19 also shows the net gains and losses by educational attainment for persons ages 25 and older. There was a gain in residents with a HS diploma or less (gain of 48); bachelor's degree, associate's degree, or some college (gain of 158) and graduate or professional degree (gain of 3).

CHART 19

Population Change Due to Migration and Mortality Five-Year Estimate • 2015–2019

Madison County and Nebraska

-- Part A: By Age Group --							
Age Group	Moved to Different Nebraska County	From Different Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	Moved From Different State	Net Gain From Other States	Net Gain From Nebraska Counties and Other States
Age 1 to 17	170	282	112	252	198	-54	58
Age 18 to 24	389	649	260	308	117	-191	69
Age 25 to 44	340	585	245	352	218	-134	111
Age 45 to 64	168	110	-58	93	114	21	-37
Age 65 and over	126	199	73	32	94	62	135
Total	1,193	1,825	632	1,037	741	-296	336
-- Part B: By Educational Attainment --							
Educational Attainment	Moved to Different Nebraska County	From Different Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	Moved From Different State	Net Gain From Other States	Net Gain From Nebraska Counties and Other States
HS diploma or less	320	332	12	121	157	36	48
Bachelor's or some college	281	546	265	308	201	-107	158
Grad. or Prof. degree	33	16	-17	48	68	20	3
Total	634	894	260	477	426	-51	209

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; 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 April 2021

The following chart and table (Chart 20; Table 14) compare the U.S. Census Bureau's age distribution of population for Nebraska as a whole and Madison County. The population of Madison County is comparable in age than Nebraska as a whole. The median age for Madison County residents in 2019 was 36.9 years of age compared to 36.8 years of age for residents of Nebraska as a whole.

CHART 20

Age Distribution of the Population • 2019

Madison County and Nebraska

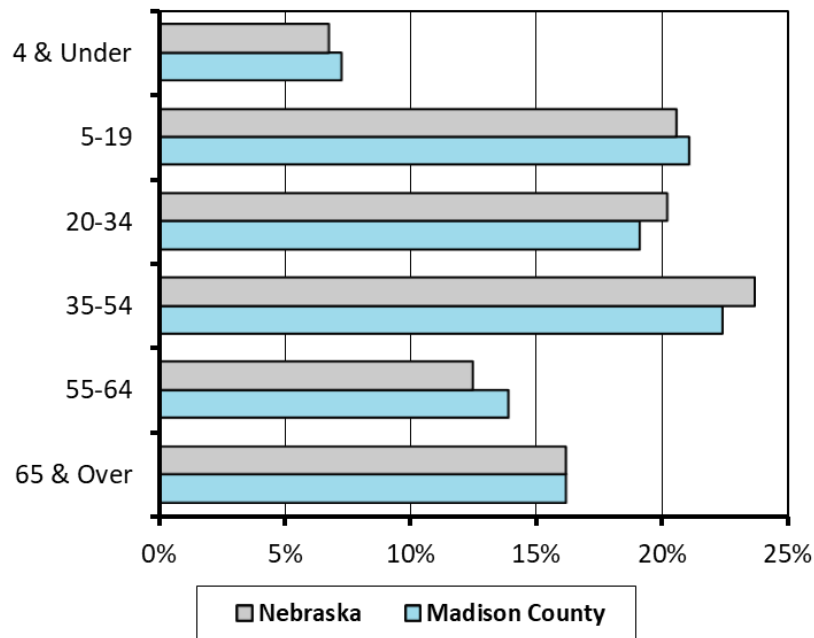


TABLE 14

	2019 Population		Percent	
	Nebraska	Madison County	Nebraska	Madison County
4 & Under	130,880	2,562	6.8%	7.3%
5-19	398,941	7,418	20.6%	21.1%
20-34	390,889	6,690	20.2%	19.1%
35-54	458,947	7,868	23.7%	22.4%
55-64	242,293	4,868	12.5%	13.9%
65 & Over	312,458	5,693	16.2%	16.2%
Total	1,934,408	35,099	100%	100%
Median Age	36.8	36.9		

Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," March 2021

Table 15 shows additional median ages as estimated by the American Community Survey for communities within Madison 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 21 graphically depicts the median age distribution for the study area.

TABLE 15

Median Age by Location and Gender • 2019

Madison County and the Surrounding Area

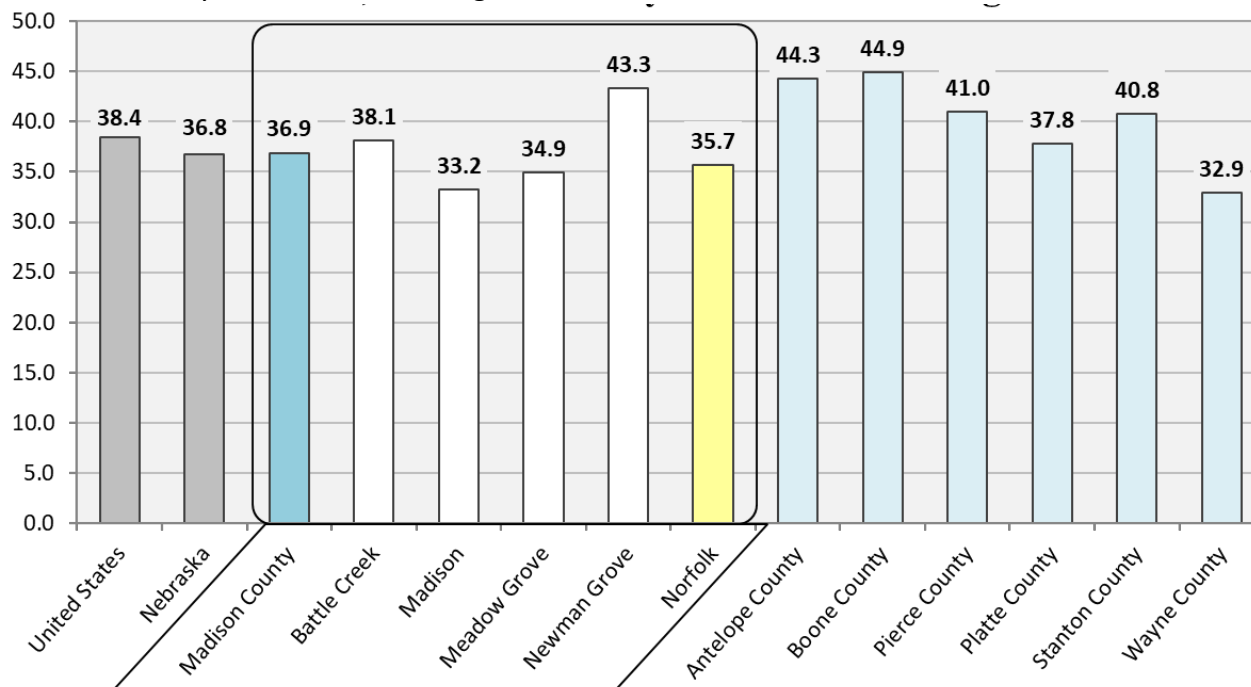
	Median Age		
	Total	Male	Female
United States	38.4	37.2	39.7
Nebraska	36.8	35.8	37.8
Madison County	36.9	36.1	37.8
Battle Creek	38.1	34.9	39.0
Madison	33.2	31.5	35.7
Meadow Grove	34.9	32.8	41.0
Newman Grove	43.3	38.3	48.3
Norfolk	35.7	34.6	36.4

Antelope County	44.3	41.7	46.5
Boone County	44.9	43.7	46.5
Pierce County	41.0	40.1	42.0
Platte County	37.8	36.6	39.2
Stanton County	40.8	39.9	42.0
Wayne County	32.9	32.2	33.6

CHART 21

Median Age by Location • 2019

Madison County and the Surrounding Area



Source: U.S. Census Bureau, 2015-2019 American Community Survey, March 2021

RETAIL SALES

Table 16 and Chart 22 show the retail sales (non-motor vehicle) pull factors for Madison County and the surrounding area for 2020. 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.

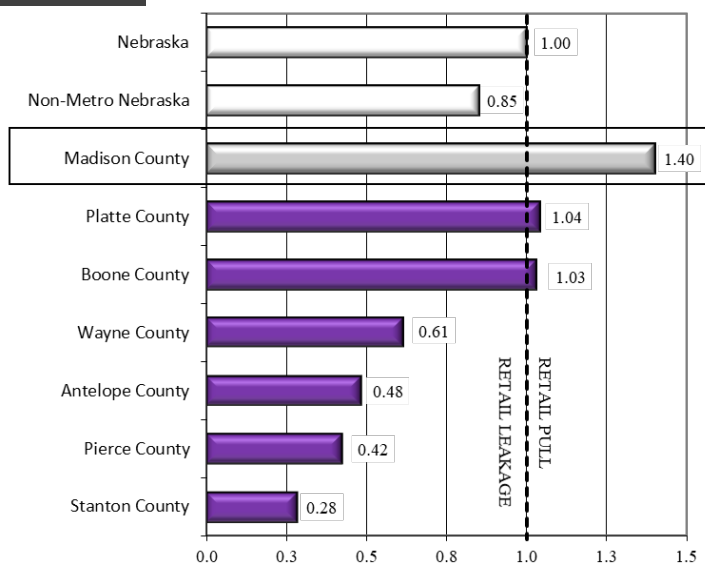
TABLE 16

Retail Sales Non-Motor Vehicles Pull Factors • 2020

Nebraska, Madison County and Surrounding Counties

	2020 Population	2020 Retail Sales (x \$1,000)	2020 Per Cap Sales (\$)	2020 Pull Factor
Nebraska	1,937,552	25,033,747	12,920	1.00
Non-Metro Nebraska	767,468	8,476,731	11,045	0.85
Madison County	34,813	629,044	18,069	1.40
Antelope County	6,264	38,547	6,154	0.48
Boone County	5,096	67,984	13,341	1.03
Pierce County	7,184	38,792	5,400	0.42
Platte County	33,364	449,225	13,464	1.04
Stanton County	5,880	21,194	3,604	0.28
Wayne County	9,492	75,134	7,915	0.61

CHART 22



Reviewing the pull factors at the county level indicates Madison County experiences net positive retail injections. The 2020 pull factor of 1.40 indicates, on a per capita basis, retail sales in Madison County are considerably 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 Madison County (1.40) with the pull factor for the non-metropolitan area of Nebraska (0.85) indicates per capita retail sales in Madison County are 63.6 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2021

Table 17 and Chart 23 compare the 2020 pull factors for selected area communities. The community of Norfolk's pull factor of 1.86 indicates that, on a per capita basis, non-motor vehicle retail sales in Norfolk are approximately 86.0 percent greater than the state's average per capita sales.

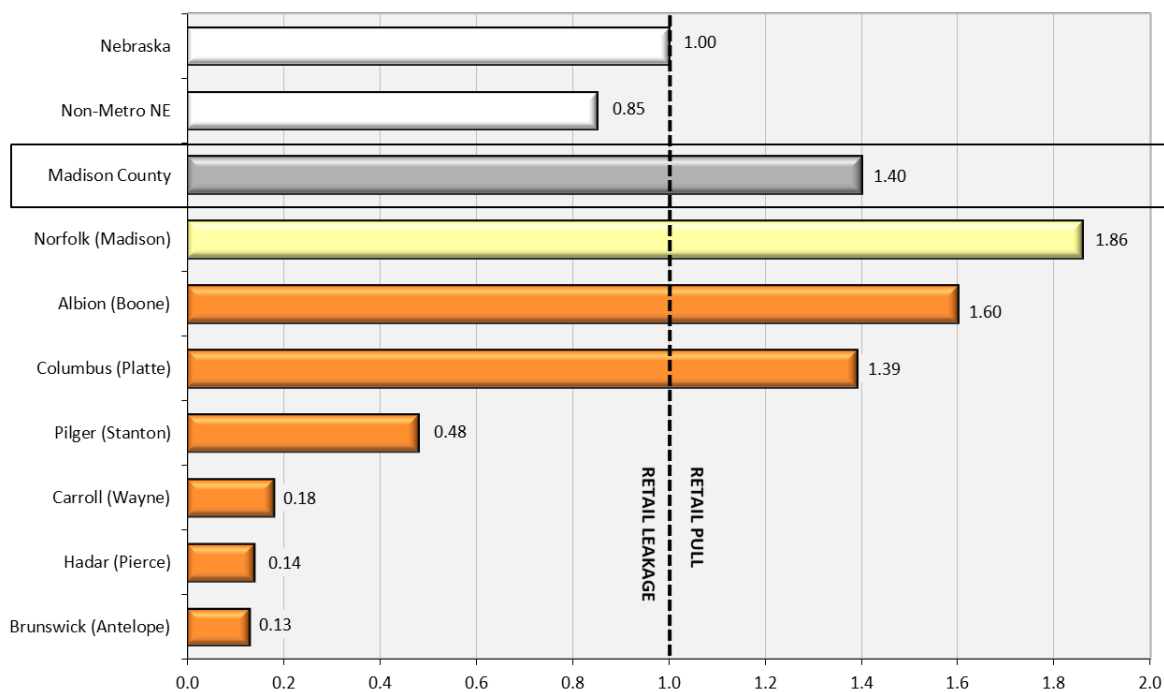
TABLE 17

Retail Sales Non-Motor Vehicles Pull Factors • 2020

Nebraska and Selected Study Area Cities

	2020 Population	2020 Retail Sales (x \$1,000)	2020 Per Cap Sales (\$)	2020 Pull Factor
Nebraska	1,937,552	25,033,747	12,920	1.00
Non-Metro Nebraska	767,468	8,476,731	11,045	0.85
Madison County	34,813	629,044	18,069	1.40
Norfolk (Madison)	24,363	584,718	24,000	1.86
Brunswick (Antelope)	130	219	1,682	0.13
Albion (Boone)	1,558	32,264	20,709	1.60
Hadar (Pierce)	311	582	1,873	0.14
Columbus (Platte)	23,597	424,457	17,988	1.39
Pilger (Stanton)	362	2,243	6,196	0.48
Carroll (Wayne)	212	507	2,390	0.18

CHART 23



Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2021

Table 18 (sorted by population) and Chart 24 (sorted by pull factor) further breakdown the 2020 pull factors into the communities reporting retail sales figures within Madison County. As this table indicates, the community of Norfolk had the strongest pull factor (1.86) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 1.40 for Madison County in 2020.

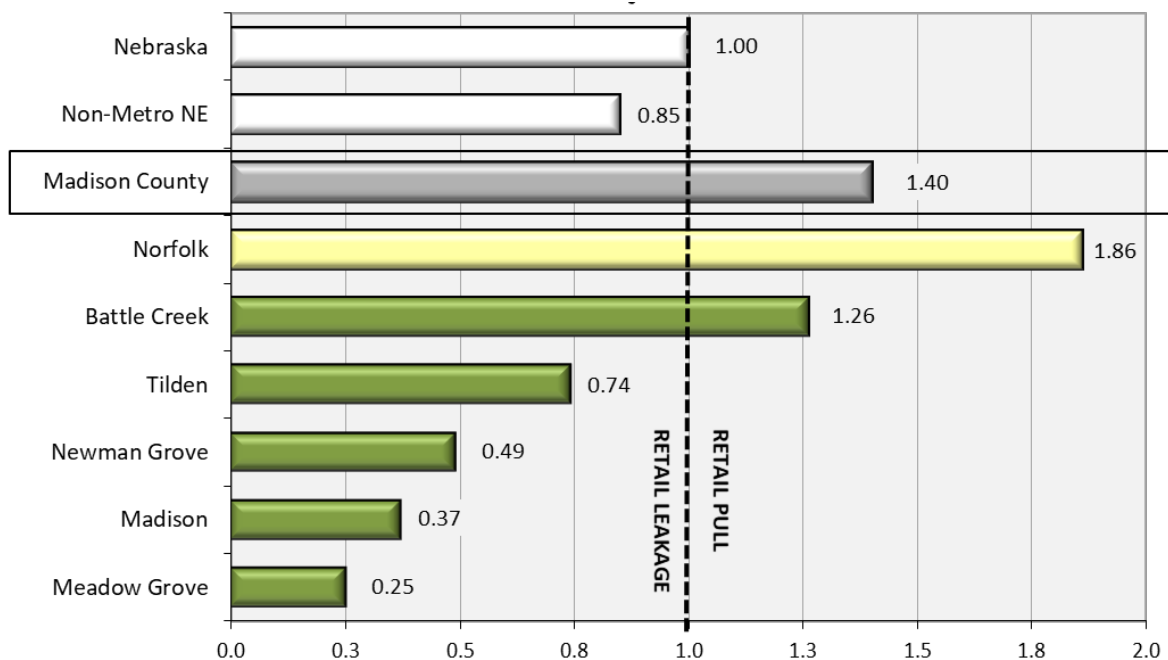
TABLE 18

Retail Sales Non-Motor Vehicles Pull Factors • 2020

Nebraska and Available Madison County Communities

	2020 Population	2020 Retail Sales (x \$1,000)	2020 Per Cap Sales (\$)	2020 Pull Factor
Nebraska	1,937,552	25,033,747	12,920	1.00
Non-Metro Nebraska	767,468	8,476,731	11,045	0.85
Madison County	34,813	629,044	18,069	1.40
Norfolk	24,363	584,718	24,000	1.86
Battle Creek	1,156	18,784	16,249	1.26
Madison	2,343	11,169	4,767	0.37
Meadow Grove	283	920	3,252	0.25
Newman Grove	686	4,340	6,327	0.49
Tilden	936	9,003	9,619	0.74

CHART 24



Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2021

Table 19 (sorted by population) and Chart 25 (sorted by pull factor) show the 2020 pull factors for Nebraska, Norfolk, and eight other similarly sized communities selected from around the state. Papillion's pull factor of 2.80 leads the group for 2020 thus indicating Papillion has greater retail pull.

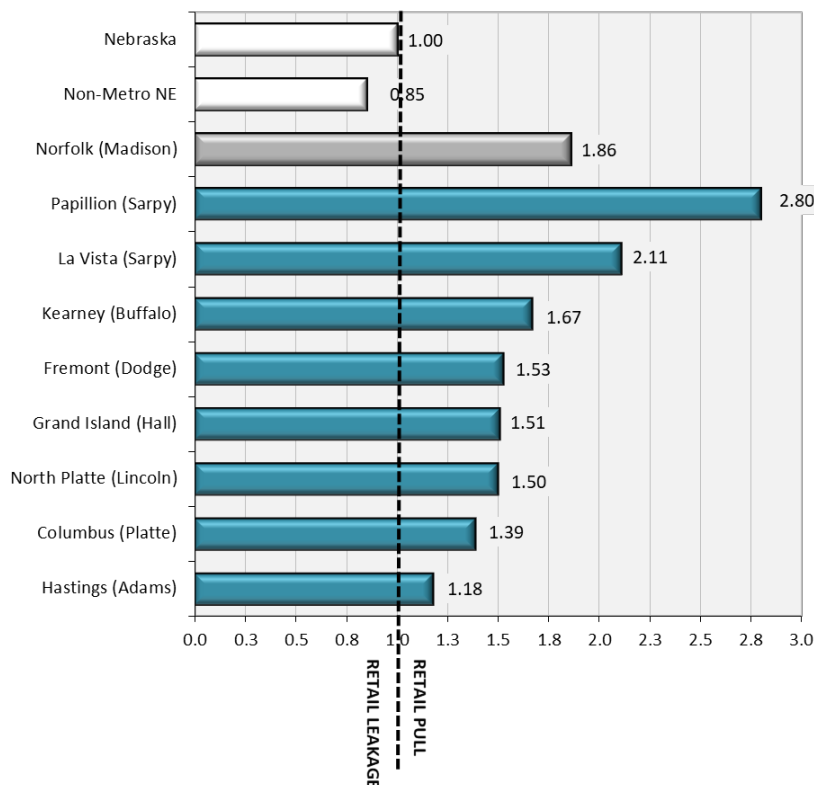
TABLE 19

Retail Sales Non-Motor Vehicles Pull Factors • 2020

Norfolk & Other Similarly Sized Nebraska Communities

	2020 Population	2020 Retail Sales (x \$1,000)	2020 Per Cap Sales (\$)	2020 Pull Factor
Nebraska	1,937,552	25,033,747	12,920	1.00
Non-Metro Nebraska	767,468	8,476,731	11,045	0.85
Norfolk (Madison)	24,363	584,718	24,000	1.86
La Vista (Sarpy)	17,020	464,490	27,291	2.11
Papillion (Sarpy)	20,293	734,409	36,190	2.80
North Platte (Lincoln)	23,202	449,558	19,376	1.50
Columbus (Platte)	23,597	424,457	17,988	1.39
Hastings (Adams)	24,725	376,841	15,241	1.18
Fremont (Dodge)	26,227	518,712	19,778	1.53
Kearney (Buffalo)	34,235	739,125	21,590	1.67
Grand Island (Hall)	51,004	992,488	19,459	1.51

CHART 25



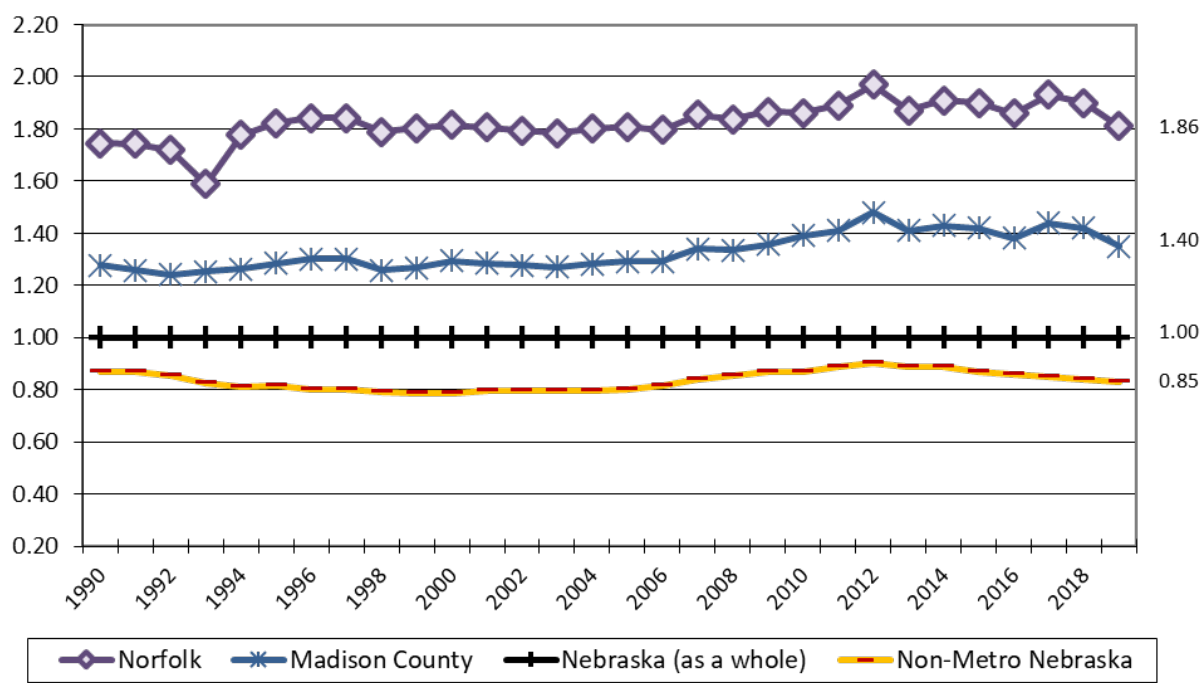
Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2021

Chart 26 illustrates the pull factor trend for Norfolk, Madison County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2020. In examining the timeline, the City of Norfolk shows retail pull fluctuating well above the state average throughout the entire study period. Data within Madison County (as a whole) also shows the pull factor similar to the non-metropolitan county average and the Nebraska (as a whole) average throughout the time period again considerably higher.

CHART 26

Pull Factors • 1990–2020

Norfolk, Madison County, Non-Metro & Nebraska (as a whole)



Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2021

PER CAPITA PERSONAL INCOME

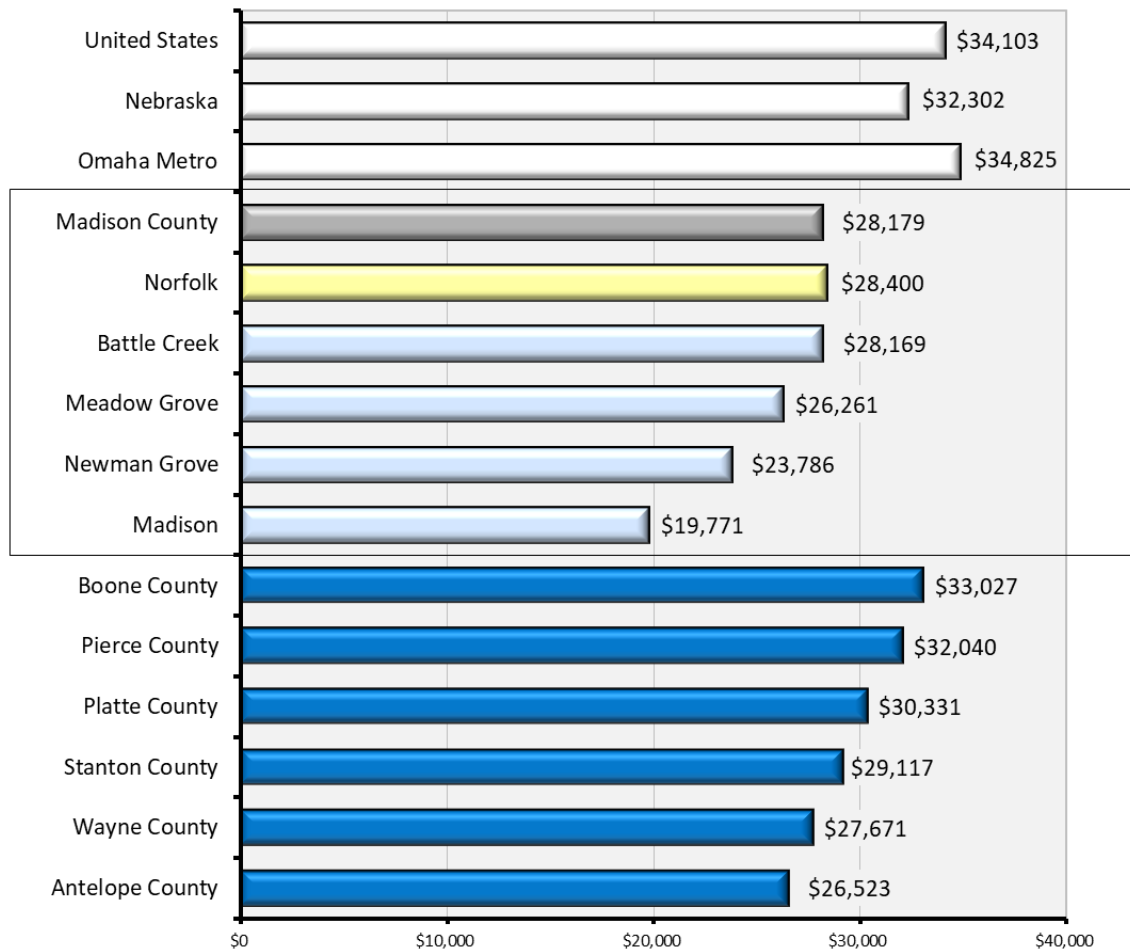
Chart 27 examines the per capita personal income levels within the study area. The American Community Survey data allows us to look more closely at non-metropolitan areas in Nebraska. Information on income distribution comes from various sources including earnings, retirement income, and public assistance.

The 2015–2019, five-year estimates show per capita personal income for Madison County is estimated to be \$28,179 compared to \$32,302 for Nebraska as a whole.

CHART 27

Per Capita Personal Income • 2015-2019

Nebraska, Madison County & Surrounding Counties



Source: U.S. Census Bureau 2015–2019 American Community Survey, accessed March 2021.

MEDIAN HOUSEHOLD INCOME

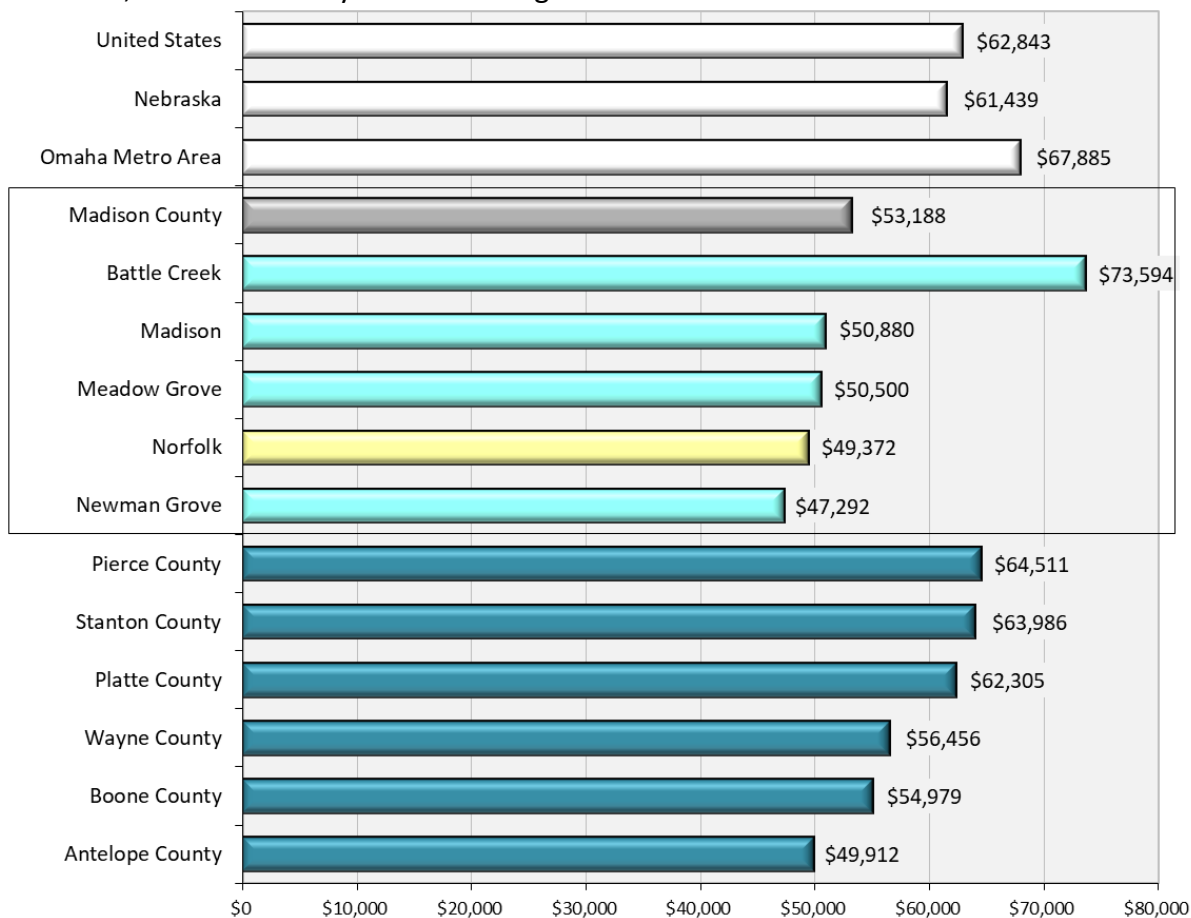
Median household income provides a different perspective of income levels than median family or per capita income. Family income is defined as having two or more related people in a household. Household income (used in this study) can consist of multiple family members or can be represented by a single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

The 2015–2019, five-year estimates show median household income for Madison County is estimated to be \$53,188 compared to \$61,439 for Nebraska as a whole.

CHART 28

Median Household Income • 2015–2019

Nebraska, Madison County & Surrounding Counties



Source: U.S. Census Bureau 2015–2019 American Community Survey, accessed March 2021