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NEBRASKA COUNTY PERSONAL INCOME

The economies of Nebraska's counties vary considerably in size and composition. During the period 1976-1978, Nebraska's ten largest counties¹ accounted for 63 percent of the state's total personal income. These counties were generally centers of trade, manufacturing, finance, government, and services. At the same time, however, in two-thirds of Nebraska's counties, agriculture was still the most important sector.

This article will present an analysis of the economies of Nebraska's counties by focusing on personal earnings and incomes of these counties during the period 1976-1978. Although personal income does not reflect all the economic activity of an area, these data are the best available measures of economic activity at the county level. County-level personal earnings and income data are estimated and released annually by the Bureau of Economic Analysis (BEA) of the United States Department of Commerce. The latest year for which data are available is 1978.

Personal income data for small areas must be used with caution. These data are easily influenced by unusual conditions, which may be temporary, such as an excellent harvest, a major construction project (e.g., coal-fired power plants), or a catastrophe (e.g., a drought or other adverse weather conditions). In addition, because agriculture is the major sector in many Nebraska counties, it should be noted that farm income is the most volatile and difficult-to-measure component of personal income. This volatility is due not only to changes in outputs, but also to dramatic changes in prices.

For these reasons, no single year can adequately reflect a county's economic situation. Most of the analysis in this article, therefore, is based upon averages for the years 1976, 1977, and 1978. It is hoped that this will smooth out some of the short-term fluctuations while maintaining the integrity of the data.

PRIMARY SOURCES OF PERSONAL EARNINGS

As used in this section, personal earnings consist of wage and salary payments, other labor income, and farm and nonfarm proprietors' income. It differs from personal income in that it excludes property income from interest, rents, and dividends; excludes transfer payments; includes contributions for social insurance; and is not adjusted for place of residence. Personal earnings also is called "total labor and proprietors' income by place of work." It must be remembered that property income and transfer payments can be major components of a county's

¹Based on personal income. The counties are Adams, Dodge, Douglas, Hall, Lancaster, Lincoln, Madison, Platte, Sarpy, and Scotts Bluff. In comparison, these counties accounted for 59 percent of the state's population in 1980.

personal income, since 30 percent of Nebraska's personal income derives from these areas. Furthermore, neither series includes corporate profits or corporate income taxes. Although personal earnings do not present the entire picture of an economy, they can be useful in determining its character.

Even though nonagricultural industries are important to many Nebraska counties, Figure 1 (p. 6) shows that during 1976-1978, the farm sector was still the primary source of earnings² for sixty-three counties. The degree of importance varied considerably, accounting for 18 percent in Cheyenne and Jefferson counties, while accounting for 66 percent in Wheeler County. These agricultural counties generally are located in rural areas and contain no city larger than 10,000 persons, but some counties, such as Washington, Saunders, and Cass, are adjacent to several metropolitan counties. It would be a mistake to assume that agriculture's (or any other sector's) influence is limited to what is directly produced in that sector. The economy of an area contains strong interrelationships among all sectors.

In the next largest group of counties, manufacturing was the principal industry. Thirteen counties fall in this category, with the degree of importance ranging from 20 percent in Keith and Phelps counties to more than 50 percent in Dakota County. Most of these counties contain one of the state's major cities and many lie in the Platte River valley.

Government was the major sector in eleven of Nebraska's ninety-three counties, and for the state as a whole. Two types of counties comprise this group: those with large state or federal government institutions, such as Dawes, Adams, Gage, Lancaster, Sarpy, and Wayne; and those sparsely populated counties in which the local government is predominant, such as Hooker, Thomas, Blaine, and Loup counties. The degree of dependence on government ranged from 18 percent in Merrick County to 75 percent in Sarpy County.

The most important sectors in the remaining six counties were services (Douglas, Seward, and Garfield); transportation, communication, and public utilities (Box Butte and Lincoln); and construction (Otoe).

RELATIVE IMPORTANCE OF PERSONAL EARNINGS BY SECTOR

Figure 1 indicates the major sector in each county, but it does not show the importance of these sectors in other Nebraska counties. Tables 1 and 2 (p. 2) rank the ten Nebraska counties with the highest portions of earnings originating (Continued on page 3)

²The primary source of earnings is that sector which directly accounts for the largest percent of total earnings.

Table 1
RANKING OF NEBRASKA COUNTIES WITH RELATIVELY HIGHEST PORTION
OF EARNINGS FROM FARM, MINING, CONTRACT CONSTRUCTION,
MANUFACTURING, AND GOVERNMENT SECTORS: 1976-1978

Farm		Mining		Contract Construction		Manufacturing		Government	
County	Percent of Earnings	County	Percent of Earnings	County	Percent of Earnings	County	Percent of Earnings	County	Percent of Earnings
Wheeler	66.05	Kimball	22.06	Otoe	21.93	Dakota	50.70	Sarpy	75.14
Banner	63.62	Banner	10.73	Lincoln	21.63	Colfax	40.80	Blaine	39.39
McPherson	62.82	Hayes	5.12	Gosper	12.48	Dawson	39.49	Loup	32.27
Arthur	61.54	Cheyenne	4.88*	Fillmore	12.39	Stanton	34.45	Hooker	31.91
Dundy	59.55	Red Willow	4.85	Thomas	11.71	Saline	34.07	Thomas	27.81
Perkins	57.65	Hitchcock	4.75	Merrick	11.01	Platte	30.07	Dawes	27.05
Gosper	55.44	Cass	3.61	Washington	10.31	Dodge	28.63	Lancaster	25.31
Pierce	53.27	Morrill	2.50	Keya Paha	9.76	Buffalo	23.43	Wayne	24.86
Frontier	51.40	Saunders	2.30	Boyd	9.01	Hall	23.04	Gage	24.22
Hayes	51.21	Platte	1.30	Garfield	8.54	Johnson	23.04	Platte	23.45
Nebraska	8.88	Nebraska	0.40	Nebraska	7.25	Nebraska	15.93	Nebraska	17.56
United States	2.33	United States	1.52	United States	5.94	United States	26.14	United States	17.07

*Based on two years of data.

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Table 2
RANKING OF NEBRASKA COUNTIES WITH RELATIVELY HIGHEST PORTION OF EARNINGS FROM
TRANSPORTATION, COMMUNICATION, AND PUBLIC UTILITIES; WHOLESALE TRADE;
RETAIL TRADE; FINANCE, INSURANCE, REAL ESTATE; AND SERVICES SECTORS: 1976-1978

Transportation Communication, and Public Utilities		Wholesale Trade		Retail Trade		Finance, Insurance, and Real Estate		Services	
County	Percent of Earnings	County	Percent of Earnings	County	Percent of Earnings	County	Percent of Earnings	County	Percent of Earnings
Lincoln	25.43	Merrick	15.76	Thomas	19.89	Douglas	10.11	Garfield	25.33
Box Butte	20.91	Rock	15.55	Sheridan	16.83	Lancaster	8.23	Thurston	21.70
Dawes	14.54	Chase	12.02	Keith	16.25	Seward	7.33	Seward	20.78
Cheyenne	14.43	York	11.35	Blaine	16.19	Cass	5.30	Douglas	18.62
Douglas	13.65	Clay	11.02	Valley	16.04	Cherry	5.12	Keith	16.93
Jefferson	13.29	Phelps	10.96	Dawes	15.80	Phelps	5.06	Washington	16.80
Rock	11.99	Howard	10.88	Hall	14.91	Blaine*	4.91	Phelps	16.33
Scotts Bluff	11.69	Antelope	10.73	Grant	14.69	Chase	4.81	Scotts Bluff	16.15
Cass	10.70	Douglas	10.54	Brown	14.62	Merrick	4.77	Dawes	16.00
Red Willow	9.80	Hall	10.53	Wayne	14.60	Hall	4.54	Adams	15.47
Nebraska	9.74	Nebraska	8.09	Nebraska	10.76	Nebraska	6.52	Nebraska	14.53
United States	7.58	United States	6.58	United States	10.10	United States	5.66	United States	16.68

*Based on two years of data.

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

(Continued from page 1) from each of the ten sectors used in the compilation of personal earnings. Sectoral earnings for the counties listed in these tables are expressed as percentages of total earnings in a county. As a result, they measure the relative size within a county, and not the absolute size of the sector. Included in these tables, for comparison purposes, are the earnings ratios for the state and the United States.

There is no particular reason for ranking only the top ten counties other than convenience. Since only ten counties are listed, it must be remembered that the difference between the tenth and eleventh ranked county may be relatively small. It would have been interesting to list the lowest ranking counties, too, but many Nebraska counties have so few businesses that BEA does not disclose information for some sectors because of confidentiality considerations. Therefore, the necessary statistics could not be computed.

The first sector listed in Table 1 is the farm sector. As mentioned earlier, the majority of Nebraska's counties depend heavily on this sector. The ten counties with the highest percent of earnings from this sector are all sparsely populated, rural counties with no communities larger than 2,500; and, with the exception of Pierce County, are concentrated in the western portion of the state. Furthermore, at least half of their earnings come from this sector.

Mining was not a major industry for any county. For some western Nebraska counties with oil and gas production, however, mining was a sizable income producer. For example, Kimball County received 22 percent of its earnings from mining and Banner received nearly 11 percent. Cass, Saunders, and Platte counties earned their mining incomes from sand and gravel operations.

The construction of several large electrical power plants was a major feature of Nebraska's construction industry. Two counties heavily dependent on this type of construction were Otoe and Lincoln, as one-fifth of their earnings came from this sector. It is unlikely that this sector will retain its relative importance in these two counties or in the state after the completion of the power plants. The remaining counties received between 8.5 and 12.5 percent of their earnings from construction. They were spread throughout the state and generally had small populations.

Figure 1 indicated that in thirteen counties manufacturing was the dominant industry. Eight of these counties also ranked in the top ten for the state. In Stanton and Johnson counties, agriculture was still the primary industry even though they had relatively large manufacturing sectors. Dakota County, with its large meat packing plant, led the state with an earnings ratio of 50.7 percent.

The government sector contains the county which was most dependent on any one sector. More than three-fourths of Sarpy County's earnings originated from government, due to the presence of Offut. Dawes, Lancaster, Wayne, and Gage counties contain state institutions, while the remaining counties were more dependent on local government.

Table 2 contains the five industries which comprise the distributive sector of the state. Together they accounted for one-half of Nebraska's total earnings. The first column in this table indicates the importance of Nebraska as a rail transportation center. This is evidenced by the fact that transportation, communication, and public utilities (TCU) was a significant source of earnings for

several Nebraska counties. In Lincoln and Box Butte counties, it was their primary source. The counties with large TCU sectors generally lie along the routes of Nebraska's two major railroads—Union Pacific and Burlington Northern—and are among the state's most populous counties.

Because wholesale trade includes the sale of farm machinery and equipment and other farm supplies, the counties with large portions of earnings from this sector typically lie in rural areas, with agriculture as the primary industry. Douglas County was the only county in this group whose sales principally would be to retailers, businesses, or industries rather than to agriculture.

It is interesting to note that Thomas County received nearly 20 percent of its earnings from retail trade. In fact, most of the ten highest counties are located in the rural areas of western and central Nebraska, with agriculture or government as their primary industry. It might be expected that retail sales would be more important in the larger urban counties. These counties do have large retail sectors, but they were relatively less important because of their diverse economies.

Finance, insurance, and real estate (FIRE) was dominated by the state's two largest counties, Douglas and Lancaster. The FIRE sector contained some of the lowest earnings ratios of all the sectors. Based on these ratios, FIRE was most important to Douglas (10.11 percent), Lancaster (8.23 percent), and Seward (7.33 percent) counties. The extent of the dominance of this sector by these large counties is indicated by the fact that the remaining seven counties all had relative earnings which were less than the state average.

The final distributive sector, services, was the third largest sector in the state, but, as indicated earlier, it was the principal sector in just three counties. Counties in this group were not concentrated in any area of the state, and most contained a city which is included among the state's principal business centers.

PER CAPITA INCOMES

Comparison of the relative levels of economic well-being at the county level can best be achieved by analyzing the levels of per capita personal income. As was the case for earnings, this analysis will use the averages of the years 1976 through 1978 to eliminate some of the volatility inherent in county personal income series.

Over the period 1976-1978, per capita personal income for the state averaged \$6,758, compared to the national average of \$7,093. Nebraska counties exhibited a wide variation in per capita incomes, ranging from 55 percent below to 40 percent above the state average. Fourteen counties equaled or exceeded the national average, while twenty-two equaled or exceeded the state average.

Figure 2 (p. 6) illustrates the dispersion among Nebraska counties. As is shown on this map, twenty-two of the counties had per capita incomes equal to or exceeding the state average, twenty-five were in the range of 90.0 to 99.9 percent of the state average, twenty-seven fell in the 80.0 to 89.9 percent range, and nineteen counties had per capita incomes which were less than 80 percent of the state average.

Comparing Figure 2 to Figure 1, it can be seen that counties with higher per capita personal incomes were more likely to have a nonagricultural sector as their main industry compared to the lower income counties. Furthermore, in the higher income counties, the main nonagricultural sector was likely to be manufacturing, while in the lower income counties (Continued on page 6)

Review and Outlook

The Nebraska economy improved significantly in July, with all sectors, save government and manufacturing, recording an increase in output. The state's physical volume index was 2.4% higher in July compared to the month-previous reading. Comparable statistics for the United States indicate that economic activity was unchanged in July compared to June readings.

The July reading of the Bureau of Business Research's economic index is the first break in the downward spiral from March 1980. The index peaked in May 1979 and has moved generally downward since that point. The July reading suggests that economic difficulties facing the state have at least temporarily been sidetracked. Improvements in commodity prices since July imply

a continuation of the uptrend during the last half of 1980.

A review of the major sectors indicates that agriculture recorded a 6.5% advance over June, while the nonagriculture sector recorded a 1.8% increase in July. For the nonagriculture component of the state's economy, this marked the first increase in the index since December 1979.

Components of the nonagriculture increase included construction, which was up 4.4% above month-earlier levels. This improvement represents the first increase since May 1979.

The manufacturing index was unchanged in July. It peaked in February and declined through June. The unchanged reading in July suggests that the slide may be completed in this sector.

The distributive trade recorded (Continued on page 5)

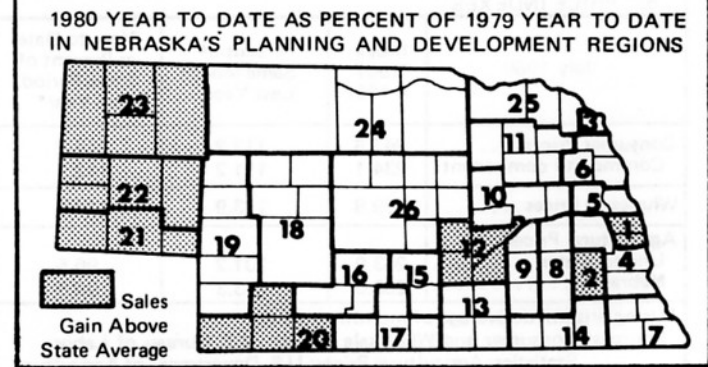
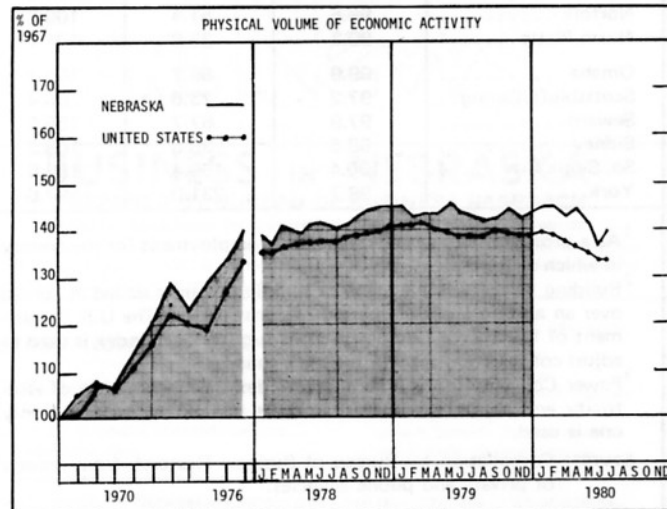
Notes for Tables 1 and 2: (1) The "distributive" indicator represents a composite of wholesale and retail trade; transportation, communication and utilities; finance, insurance, and real estate; and selected services. (2) The "physical volume" indicator and its components represent the dollar volume indicator and its components adjusted for price changes using appropriate price indexes—see Table 5, page 5.

ECONOMIC INDICATORS: NEBRASKA AND UNITED STATES				
1. CHANGE FROM PREVIOUS YEAR				
July 1980	Current Month as Percent of Same Month Previous Year		1980 Year to Date as Percent of 1979 Year to Date	
	Nebraska	U.S.	Nebraska	U.S.
Indicator	Nebraska	U.S.	Nebraska	U.S.
Dollar Volume	106.8	106.7	107.4	109.3
Agricultural	129.3	109.8	113.8	105.2
Nonagricultural	103.8	106.6	106.5	109.4
Construction	70.5	92.8	74.0	104.9
Manufacturing	105.9	104.1	113.6	110.6
Distributive	106.3	109.0	108.0	109.8
Government	102.4	107.1	102.4	106.8
Physical Volume	96.3	95.6	97.5	97.3
Agricultural	125.2	108.4	117.7	109.1
Nonagricultural	93.0	95.2	95.1	96.9
Construction	64.1	84.3	66.6	94.4
Manufacturing	93.6	91.1	100.3	96.1
Distributive	93.9	96.3	94.7	96.2
Government	97.5	103.4	97.9	102.6

2. CHANGE FROM 1967		
Indicator	Percent of 1967 Average	
	Nebraska	U.S.
Dollar Volume	336.3	314.8
Agricultural	358.2	335.2
Nonagricultural	332.8	314.2
Construction	215.4	285.3
Manufacturing	346.2	277.2
Distributive	350.0	339.3
Government	301.2	306.5
Physical Volume	139.7	133.6
Agricultural	141.6	137.9
Nonagricultural	139.3	133.4
Construction	72.5	96.1
Manufacturing	159.8	126.0
Distributive	141.2	136.9
Government	135.4	150.4

3. NET TAXABLE RETAIL SALES OF NEBRASKA REGIONS AND CITIES (Adjusted for Price Changes)			
Region Number and City	City Sales*	Sales in Region*	
	July 1980 as percent of July 1979	July 1980 as percent of July 1979	Year to date '80 as percent of Year to date '79
<i>The State</i>	95.5	93.7	89.9
1 Omaha	95.1	95.5	90.5
Bellevue	107.9		
2 Lincoln	95.6	94.7	90.9
3 So. Sioux City	96.1	92.6	88.3
4 Nebraska City	99.1	87.8	83.0
5 Fremont	100.3	95.9	84.3
Blair	100.0		
6 West Point	93.1	84.8	79.7
7 Falls City	96.3	89.0	85.7
8 Seward	93.8	89.9	84.6
9 York	100.5	93.7	86.7
10 Columbus	91.7	86.5	85.8
11 Norfolk	91.0	82.5	83.9
Wayne	86.3		
12 Grand Island	106.1	104.2	88.7
13 Hastings	89.6	91.1	87.3
14 Beatrice	94.0	91.1	87.0
Fairbury	93.6		
15 Kearney	100.5	97.9	87.3
16 Lexington	90.2	90.6	88.1
17 Holdrege	106.8	96.4	88.3
18 North Platte	93.7	90.4	83.6
19 Ogallala	88.6	89.9	85.6
20 McCook	103.6	102.4	90.7
21 Sidney	92.9	101.3	96.7
Kimball	129.0		
22 Scottsbluff/Gering	89.4	88.1	90.0
23 Alliance	91.5	95.2	90.6
Chadron	99.8		
24 O'Neill	90.0	87.9	84.2
25 Hartington	82.3	79.6	81.3
26 Broken Bow	87.8	87.7	86.6

*State totals include sales not allocated to cities or regions. The year-to-year ratios for city and region sales may be misleading because of changes in the portion of unallocated sales. Region totals include, and city totals exclude, motor vehicle sales. Sales are those on which sales taxes are collected by retailers located in the state. Compiled from data provided by Nebraska Department of Revenue.



(Continued from page 4) a 3.4% increase in July, which represents the first increase for this sector since December 1979. This sector has been declining since reaching a peak in May of 1979. The decline in the distributive trade reflects the battering real disposable personal income has taken during the past two years. Consumers' real income has declined primarily because of high rates of inflation but also due to lagging gains in personal income. As a consequence, consumers have less capacity to increase real purchases.

Only the government sector declined in July, recording a decrease in the fiscal volume index of 2.9%. The public sector peaked in August 1978 and has been slowly declining since.

The improvement in the state's economic picture was directly linked to an improving agriculture sector. Cash farm marketings increased \$136 million on a seasonally adjusted basis during July 1980. On a year-to-year basis, cash farm marketings were up \$167 million compared to the same month in 1979, or nearly 47% higher than year-earlier levels. Prices received by the farmers were up more than 3% in July above year-previous levels, but prices paid by farmers were up even more at 11.1%.

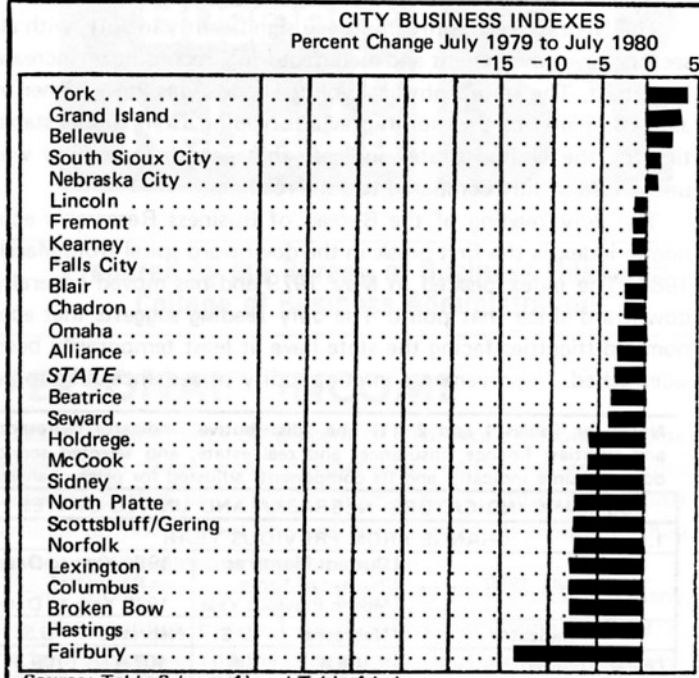
Employment in Nebraska was estimated at 766,000, down 9,000 from June 1980. On a yearly basis, employment was down approximately 10,000 persons when compared with July 1979. While employment was down in July compared to June, unemployment decreased to 4% of the labor force because of a decline in labor force size. Unemployment in June was 4% compared with 2.8% in July of 1979. Employment lags overall economic trends, so improvements in this statistic will require another two or three months. Assuming the recession is over, gains in employment should develop during the third quarter of 1980.

July was a better month for retail sales in Nebraska and the United States than the months immediately preceding it. On a dollar volume basis, retail sales nationally were up 3.2% above the June level. In Nebraska the increase in retail sales was 16.1% above the June level. Part of the increase reflects the depressed nature of retail sales since March of 1980, but undoubtedly some of the gain reflects strength in the national economy.

Data in Table 3 indicate city and region real retail sales. Notable increases were recorded in Kimball, Bellevue, Grand Island, Holdrege, and McCook. Caution is advised in interpreting these statistics, for the single monthly observation may distort results.

The effects of the slowdown in economic activity are reflected in the city business indexes, as twenty-one of the twenty-six reporting cities recorded losses in July 1980 relative to year-previous levels. York, Grand Island, Bellevue, South Sioux City, and Nebraska City all recorded increases in local economic activity on a July-to-July basis.

D. E. P.



Source: Table 3 (page 4) and Table 4 below.

4. JULY CITY BUSINESS INDICATORS

The State and Its Trading Centers	Percent of Same Month a Year Ago		
	Employment ¹	Building Activity ²	Power Consumption ³
<i>The State</i>	99.5	65.5	107.2
Alliance	101.8	79.4	106.9
Beatrice	100.7	65.9	103.6
Bellevue	99.9	65.4	114.3
Blair	97.6	52.4	115.6
Broken Bow	99.3	38.8	137.1
Chadron	99.5	54.1	106.3
Columbus	96.9	47.4	100.5
Fairbury	98.0	7.6	105.2
Falls City	99.9	47.6	129.4
Fremont	98.2	48.1	125.2*
Grand Island	99.6	105.2	109.7
Hastings	98.3	39.1	108.6
Holdrege	98.5	19.2	92.5
Kearney	99.5	61.9	106.8
Lexington	97.0	38.2	117.3
Lincoln	103.6	71.5	106.7
McCook	97.7	21.1	104.2
Nebraska City	98.8	81.3	124.8
Norfolk	98.5	51.4	100.2
North Platte	99.3	36.8	101.7
Omaha	99.9	66.7	108.1
Scottsbluff/Gering ..	97.2	73.6	96.4
Seward	97.9	67.7	108.5
Sidney	98.5	38.5	108.2
So. Sioux City	100.4	159.4	103.0
York	98.7	231.0	107.6

¹As a proxy for city employment, total employment for the county in which a city is located is used.

²Building Activity is the value of building permits issued as spread over an appropriate time period of construction. The U.S. Department of Commerce Composite Construction Cost Index is used to adjust construction activity for price changes.

³Power Consumption is a combined index of consumption of electricity and natural gas except in cases marked * for which only one is used.

Source: Compilation by Bureau of Business Research from reports of private and public agencies.

5. PRICE INDEXES

July 1980	Index (1967 = 100)	Percent of Same Month Last Year	Year to Date as Percent of Same Period Last Year*
Consumer Prices	247.8	113.2	114.2
Commodity component	234.1	111.2	112.7
Wholesale Prices	269.8	113.9	114.5
Agricultural Prices			
United States	243.0	101.2	96.5
Nebraska	253.0	103.3	96.8

*Using arithmetic average of monthly indexes.
Sources: Consumer and Wholesale Prices: U.S. Bureau of Labor Statistics; Agricultural Prices: U.S. Department of Agriculture.

(Continued from page 3) it was likely to be government. In sum, twenty of forty-seven counties in the two higher income groups were more dependent on nonagricultural industries, but this was the case in only ten of forty-six counties in the two lower income groups.

CONCLUSION

The preceding sections of this article have attempted to provide a brief review of the structure and character of the economies of Nebraska's counties during the period 1976-1978. To accomplish this task, attention primarily was focused on personal earnings data because personal income data are not available by sector on a county basis. Two main sources of income (transfer payments and property income), however, are excluded from earnings data. As a result, the earnings ratios presented in this article will tend to overstate the relative importance of the sectors in relation to the total personal income of the county.

Additionally, the analysis in this article looked only at a county's economy during a specific time period, 1976-1978. Articles in previous issues of *Business in Nebraska* have shown that the structure of the Nebraska economy has been (and is still) changing. The extent to which this transition has carried over to

Nebraska's counties has not been addressed in this article.

Data from ten years earlier reveal that there have been some changes in primary sources of income in Nebraska counties. During the period 1966-1968, government was the primary source of earnings for the state. The principal sectors and the number of counties in which they were the primary sources of earnings are presented below:

Sector	No. of Counties
(1) Farming	76
(2) Manufacturing	6
(3) Retail Trade	6
(4) Government	5
(5) TCU	1

When compared to the 1976-1978 data, these figures do seem to indicate some tendency for changes in the state economy to spread throughout the state. Despite these changes, agriculture has remained the primary industry in most Nebraska counties, and the other economic sectors continue to rely on agricultural production for raw materials and on agricultural income for a substantial share of their markets.

J. A. D.

Fig. 1 PRIMARY SOURCES OF EARNING FOR COUNTIES 1976-1978 AVERAGE

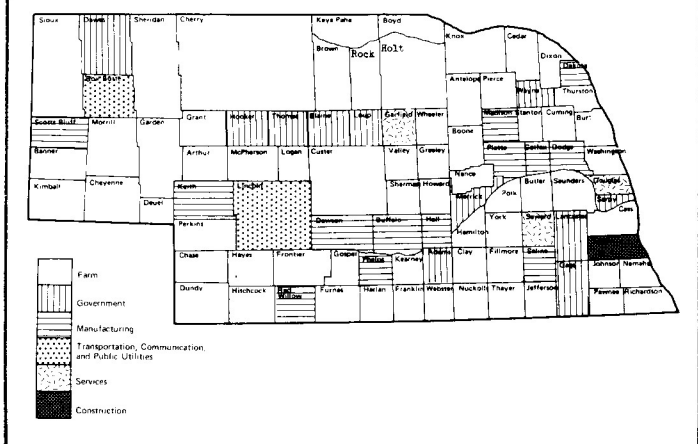
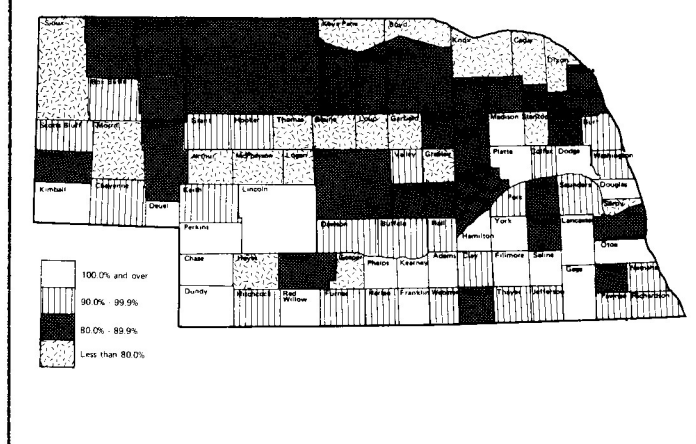


Fig. 2 COUNTY PER CAPITA PERSONAL INCOME AS A PERCENT OF STATE 1976-1978 AVERAGE



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