



Final Report

The 2025 Economic Impact Study of the Spring Wildlife Migration on Central Nebraska

Prepared for
Nebraska Flyway

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Executive Summary

The spring wildlife migration through Central Nebraska creates an annual economic impact on the region. Visitors come to the area from neighboring states and more distant places to view cranes and other wildlife (for example, prairie chickens). Visitor spending and donations support organizations such as Rowe Sanctuary and The Crane Trust that host blinds and other viewing facilities during the season and engage in habitat preservation and research year-round. Off-site visitor spending on lodging, food, retail, and other entertainment creates a further direct impact on the central Nebraska economy. The central Nebraska region includes Adams, Buffalo, Clay, Custer, Dawson, Hamilton, Hall, Howard, Kearney, Lincoln, Merrick Phelps, and Sherman counties.

Direct impacts on the economy are supplemented by multiplier impacts as initial spending at crane centers and hospitality businesses spills over to other area businesses.¹ This study estimates the economic impact of the 2025 wildlife migration based on revenue and visitation reported by organizations and a survey of visitor spending. The study is conducted by the Bureau of Business Research and Rural Prosperity Nebraska at the University of Nebraska. The annual economic impact flows from two primary sources. The first is spending by organizations that provide opportunities to view cranes and other wildlife and engage in year-round conservation efforts. The second is spending by visitors from across the country who travel to central Nebraska to view migrating wildlife.

Table ES.1 shows the annual impact due to operations of organizations and businesses such as Crane Trust, Rowe Sanctuary and private businesses that provide wildlife viewing opportunities. The total economic impact in terms of output was estimated to be \$8.62 million in 2025. This annual economic impact includes \$3.90 million in value-added, a measure analogous to gross domestic product. Labor income is the largest component of value-added. Annual operations support \$2.58 million in labor income each year earned in 49 jobs. These figures reflect both direct and multiplier impacts.

Table ES.1
2025 Total Annual Economic Impact from Operations

Impact Measure	Annual Operations Impact
Output (Business Sales and Organization Revenue) (Millions \$)	\$8.62
Value-Added (Millions \$)	\$3.90
Labor Income (Millions \$)	\$2.58
Employment (Full-Year Equivalent)	49

Source: Rowe Sanctuary, Crane Trust and UNL-BBR Calculations

Visitor spending is determined by the number of individuals drawn to Central Nebraska during the migration season and the magnitude of their spending. Crane viewing centers such as at Rowe

¹ Spillover (economic multiplier) impacts can be estimated using specialized software called IMPLAN, which estimates multipliers for over 400 industries in states, individual counties and combinations of counties. The IMPLAN model is used to conduct economic multiplier analysis in the multi-county Central Nebraska region.

Sanctuary and Crane Trust provided counts of visitors. Surveys of visitors provided detailed information on the reasons for visiting central Nebraska during the migration season, length of stay and spending in the area. Surveys were gathered on site and on-line. A copy of the survey instrument is provided in Appendix 1 at the end of this report.

Posters located at crane viewing facilities provided visitors with a method to find and complete an on-line survey. Facility personnel also were able to provide paper surveys to visitors who preferred to complete the survey off-line. In addition, researchers and student surveyors were present at crane viewing locations on select days and surveys were sent to visitor email lists maintained by organizations such as Rowe Sanctuary. These multiple approaches to gathering surveys yielded nearly 900 survey responses.

Survey responses indicated that the largest share of visitors to central Nebraska (17.6%) came from Omaha, Lincoln or other areas of Nebraska (besides central Nebraska). Visitors also came from neighboring or nearby states such as Colorado (15.0%), Minnesota (9.3%), Iowa (7.1%), Wisconsin (5.0%), Illinois (4.7%), Missouri (4.0%), Kansas (3.7%), Wyoming (2.5%) and South Dakota (1.3%). A notable share of visitors also traveled from the coasts to central Nebraska including from states like California (2.1%), New York (1.9%), Florida (1.6%) and Washington (1.2%). Surveys also provided detailed information about visitor spending while in central Nebraska and about the bird-viewing facilities visitors patronized during their trip. Surveys revealed that most visitors stopped by multiple facilities as well as roadside viewing sites. This information allowed researchers to estimate a count of unique visitors to central Nebraska using information about total annual visits provided by facilities such as Crane Trust and Rowe Sanctuary. Analysis provided an estimate of 34,900 unique visitors who spent an average of 3.1 days in central Nebraska, yielding an estimate of 108,234 visitor days during the migration season.

Table ES.2 below shows estimated annual spending by visitors to Central Nebraska by category during the 2025 season. Estimated spending was \$151.66 per visitor per day. Nearly \$60 per visitor per day was spent on lodging and nearly \$40 on food and drink. Another \$9 was spent per visitor per day on other entertainment. Visitors therefore had a significant impact throughout the central Nebraska hospitality sector. Daily spending is multiplied by total estimated attendance to yield total visitor spending during the season. Total visitor spending is estimated at \$16.42 million.

Table ES.2
Visitor Spending During the 2025 Migration

Spending Category	Number of Visitor Days	Average Spending Per Visitor Per Day	Estimated Total Spending (\$Millions)
Hotel/Lodging	108,234	\$58.00	\$6.28
Food and Drinks	108,234	\$37.77	\$4.09
Gasoline and Fuel	108,234	\$23.65	\$2.56
Shopping	108,234	\$22.15	\$2.40
Entertainment	108,234	\$8.89	\$0.96
Other	108,234	\$1.20	\$0.13
Total		\$151.66	\$16.42

Source: Visitor Counts and Survey of Visitors

Table ES.3 shows the total annual economic impact resulting from visitor spending. The total economic impact on business output during the season was \$19.38 million in 2025. This included direct spending plus the “multiplier impact” as direct spending circulates further within the regional economy. Most of the visitor spending in Table ES.3 contributes a direct impact on the Central Nebraska economy.² The \$19.38 million output impact includes \$10.63 million of value-added, the measure of economic activity that is comparable to gross domestic product. Labor income is the largest component of value-added. Visitor spending supported \$5.59 million in labor income each year earned in 171 year-round equivalent jobs.

Table ES.3
2025 Total Annual Economic from Visitor Spending

Impact Measure	Direct	Multiplier	Total
Output (Millions \$)	\$12.94	\$6.44	\$19.38
Value-Added (Millions \$)	\$7.29	\$3.34	\$10.63
Labor Income (Millions \$)	\$3.75	\$1.84	\$5.59
Employment (Full-Year Equivalent)	133	38	171

Source: Rowe Sanctuary, Crane Trust and UNL-BBR Calculations

Table ES.4 shows the overall annual economic impact of the wildlife migration season. The overall annual impact is the sum of the operations impact and the larger impact of visitor spending. In 2025, the overall annual economic impact is estimated to be \$28.00 million, which was sufficient to support \$8.17 million of labor income spread over an estimated 219 jobs. The annual local sales, property and lodging tax revenue associated with this economic impact is \$724,000.

Table ES.4
2025 Overall Annual Economic from Spring Wildlife Migration

Impact Measure	2017	2025	% Change
Output (Millions \$)	\$14.30	\$28.00	96%
Labor Income (Millions \$)	\$5.26	\$8.17	55%
Employment (Full-Year Equivalent)	182	219	20%
Current Price Index, Midwest (March)	228.8	296.2	29%

Sources: Center Budgets, Visitor Counts, Survey of Visitors and UNL-BBR IMPLAN Calculations

Table ES.4 also shows the economic impact estimate from the previous impact study³ of the spring wildlife migration that examined the year 2017.⁴ The impact in terms of business sales and organization revenue (output) rose by 96% between 2017 and 2025. Labor market impacts in terms of wages and jobs also grew, but less rapidly. This is not surprising. Output per worker rises steadily in the U.S. economy implying that industry output will rise faster than wages and employment.

Labor income rose by 55% between the 2017 and 2025 seasons, higher than the 29% increase in the consumer price index for the Midwest region between March 2017 and March 2025. Table ES.4

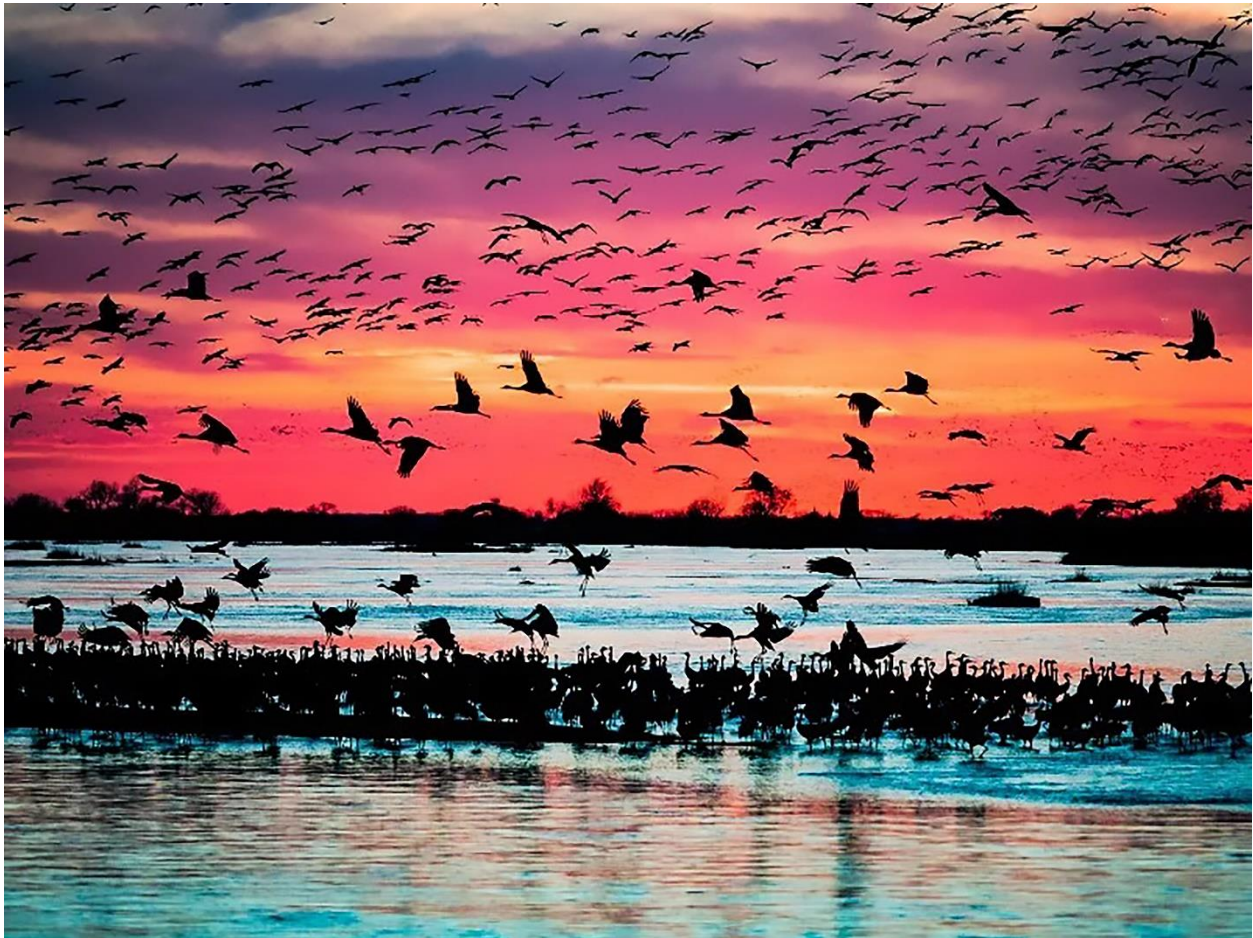
² Only the “mark-up” portion of fuel and retail sales provides a direct impact on the Central Nebraska economy. The mark-up portion supports the wages, rents, utilities and other costs of regional retail businesses while the wholesale value flows out of state to manufacturers and refiners.

³ Dority, B., Thompson, E, Kaskie, S and Tschauner, L., 2017. *The Economic Impact of the Annual Crane Migration on Central Nebraska 2017*, UNK College of Business and UNL Bureau of Business Research.

⁴ Value-added is not reported in Table 4 since it was not featured in the 2017 study.

therefore shows real growth in the annual economic impact over the eight years. This is confirmed by the 20% increase in full-year equivalent employment, a measure which is not impacted by inflation or growth in real hourly wages. The \$724,000 local tax revenue impact is 91% more than the tax revenue impact identified in the 2017 study.

Optimistic and pessimistic scenarios for the 2025 impact also were estimated around the baseline impact estimate presented in Table ES.4. The “range” for the 2025 economic impact is from \$26.12 million to \$29.88 million. In terms of labor market impacts, the range is 203 to 236 jobs earning \$7.63 million to \$8.71 million in labor income.



Kearney sunset with cranes

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1. Introduction

The annual spring wildlife migration creates an economic impact throughout the central Nebraska region. Visitors come to the area from neighboring states and more distant places to view Sandhill cranes and other wildlife, such as prairie chickens. Visitor spending supports organizations such as Rowe Sanctuary and the Crane Trust that host blinds and other viewing facilities. Some organizations also may receive support from donations or trusts. Off-site visitor spending on lodging, food, retail, and other entertainment creates a further direct impact on the central Nebraska economy. The central Nebraska region includes Adams, Buffalo, Clay, Custer, Dawson, Hamilton, Hall, Howard, Kearney, Lincoln, Merrick Phelps, and Sherman counties.

These direct impacts on the economy are supplemented by multiplier impacts. Multiplier impacts occur as crane centers spend locally on supplies and services and as their employees spend their paychecks at businesses throughout the local economy. Likewise, there is a multiplier impact as hospitality businesses patronized by visitors and their employees spend money in the economy.

This study estimates the economic impact of the 2025 spring migration and was conducted by the Bureau of Business Research and Rural Prosperity Nebraska at the University of Nebraska. Both direct and multiplier impacts are measured along with tax revenue impacts.

Direct impacts include the operations spending of dedicated crane viewing organizations and the off-site spending of visitors. Multiplier impacts are estimated using an economic model of the central Nebraska economy developed using the IMPLAN software. Direct and multiplier impacts are summed up to estimate the total economic impact of the 2025 crane migration season on central Nebraska. This new economic activity also yields new tax revenue. The study estimates the local tax revenue impact from sales, lodging and property taxes.

2. Methodology

Information on organization employment, budgets, visitor counts and visitor spending are used to estimate the direct economic impact of the spring wildlife migration on central Nebraska. This includes the impact from organization operations and the impact of off-site visitor spending. Such spending also generates a multiplier impact on the area, as money attracted to the region circulates further within the economy. The approach for estimating these direct and multiplier impacts is described below.

A. Organization Operations

The first component of the direct impact is spending by organizations that provide opportunities to view cranes and other wildlife and engage in year-round conservation efforts. Specifically, information on the annual operations spending of organizations such as Crane Trust and Rowe Sanctuary is gathered directly from these organizations. Information includes annual spending and employment and the share of revenue that is supported by visitors during crane season and other factors such as trust income and grants. New money for the regional economy to support operations is a direct impact on the central Nebraska economy. Revenue for other wildlife viewing organizations is also considered.

B. Visitor Spending

Visitor spending is determined by the number of individuals drawn to central Nebraska during the migration season and the magnitude of their spending in the region. Crane viewing centers such as at Rowe Sanctuary and Crane Trust provided counts of visitors. Surveys of visitors provided detailed information on the reasons for visiting central Nebraska during the migration season, length of stay and spending in the area. Surveys were gathered on site and on-line. A copy of the survey instrument is provided in Appendix 1 of this report. The survey was hosted on Qualtrics or printed out to be completed on site or returned by mail.

Posters located at crane viewing facilities and visitor centers provided visitors with a method to find and complete an on-line survey. Facility personnel at crane viewing centers also were able to provide paper surveys to visitors who preferred to complete the survey off-line. In addition, researchers and student surveyors were present at crane viewing locations on select days and invitations to complete a survey was sent to visitor email lists maintained by Rowe Sanctuary. These multiple approaches to gathering surveys yielded nearly 900 survey responses.

Visitor counts from crane viewing organizations were combined with survey results on the length of stay to estimate total visitor days during the spring migration season. Counts of visitor days are combined with survey results on per-person daily spending to estimate total spending at central Nebraska hospitality businesses like hotels, restaurants and retail stores in the spring migration season.

C. Multiplier Impact, Total Impact and Tax Revenue Impact

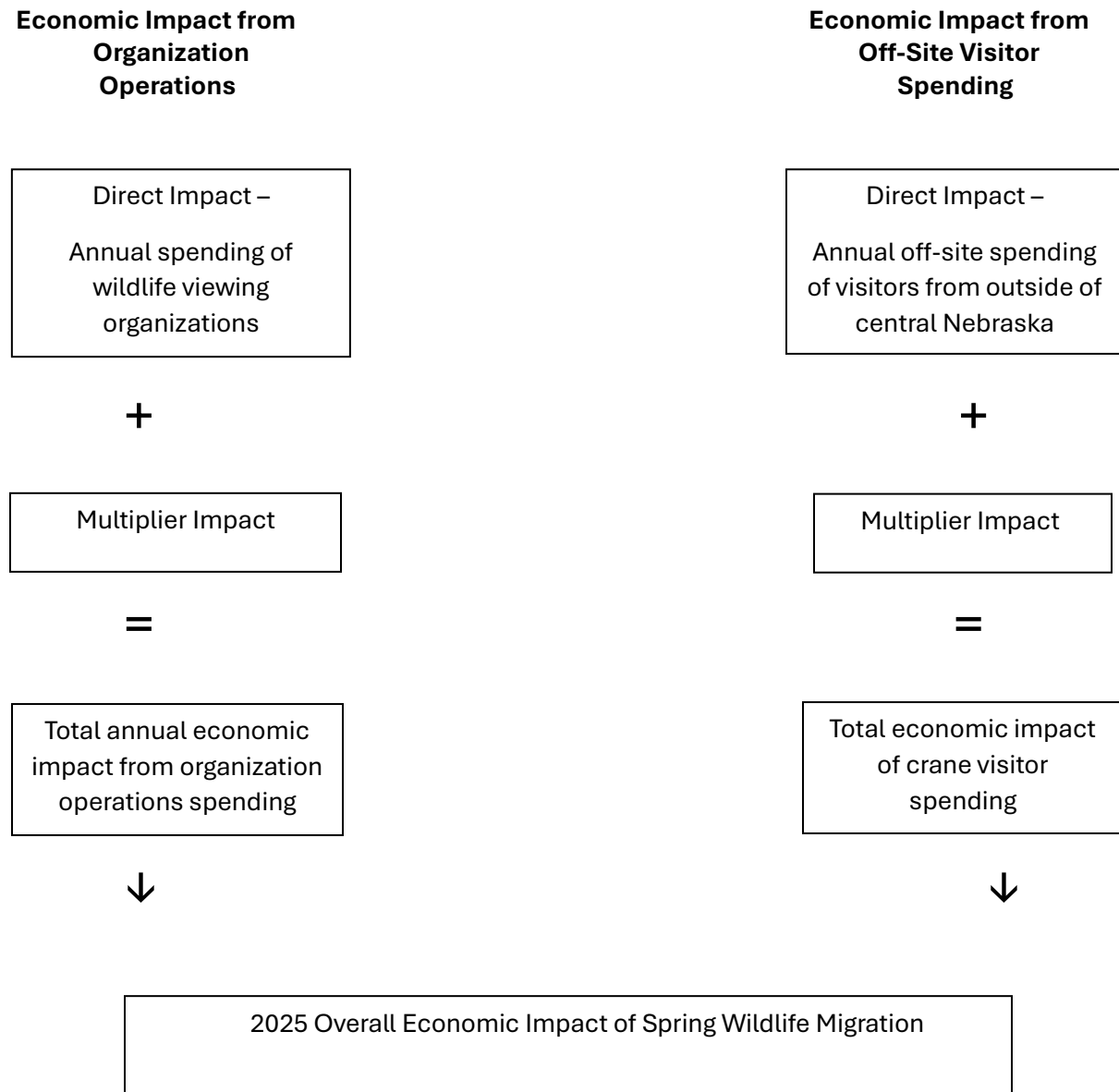
In addition to the direct impact of organization operations and off-site visitor spending, the “multiplier Impact” also contributes to the economic impact on central Nebraska. The multiplier impact occurs when new money attracted to the region by visitors or donors circulates further within the local economy. For example, a crane viewing center will spend money on utilities or professional services, creating sales and employment at regional providers of these goods and services. Likewise, administrators and staff at these organizations would spend their paycheck at nearby businesses.

A multiplier impact also results from visitor spending. For example, a restaurant patronized by a visitor from Omaha would need to buy supplies from a wholesaler, and accounting and other business services from regional providers. Likewise, employees of the restaurant would spend their paycheck on the various components of household spending such as on their mortgage or rent, food at grocery stores or restaurants, insurance, health care, retail shopping, furniture and recreation and entertainment. Such multiplier impacts would occur at businesses throughout the region, adding to the overall economic impact of the 2025 migration season. The total economic impact is the sum of the direct impact and multiplier impact.

Economic multiplier impacts can be estimated using specialized software called IMPLAN, which estimates multipliers for over 400 industries in states, individual counties and combinations of counties. Economic multipliers generated by the IMPLAN model reflect the unique industrial structure of businesses found in a specific region. The IMPLAN model was used to conduct

economic multiplier analysis in the multi-county central Nebraska region. Figure 1 below shows how direct and multiplier impacts were combined to estimate total annual impact. A multiplier impact was calculated for each type of direct impact. Direct and multiplier impacts were then summed up to yield the overall annual economic impact.

Figure 1
Approach for calculating 2025 Economic Impact of Spring Wildlife Migration on Central Nebraska



New economic activity also generates a tax revenue impact. Off-site visitor spending generates sales and lodging tax revenue. Visitor spending also supports the operations of other businesses, including monthly building rent (or mortgage) payments. This implicitly supports the local property tax base and property tax collections. Further, there are sales and property tax revenue generated at

other businesses due to the multiplier impact. The local sales, property and lodging tax impact in the central Nebraska region is also estimated.

The approach used in the current study is broadly consistent with past studies of the economic impact of the spring migration. Dority, Thompson, Kaskie, Tschauner⁵ conducted a study in 2017 and noted that studies were previously conducted in 1992, 1998 and 2009. At least one member of the research team for the current study was involved in the 2009 and 2017 studies, and the current study most clearly follows the approach used in those years.

The 2009, 2017 and current study all relied on financial information from organizations that host crane viewing, surveys of visitors to crane viewing blinds as well as public crane viewing platforms. Each also used the IMPLAN model for calculating multiplier impacts. The 2017 and current study each gathered detailed information about all of the crane viewing areas that out of area travelers visited while in central Nebraska and found that most visited multiple sites and that nearly all visitors to public crane viewing platforms also visited crane viewing facilities like Rowe Sanctuary or Crane Trust. There was a similar finding in the current study, and this finding motivates emphasizing attendance counts from these organizations. Like the current study, the 2009 and 2017 studies also utilized the 12-county definition for central Nebraska utilized in the current study. The current study, however, made a more concerted effort to gather surveys from visitors to the western portion of the central Nebraska region, better capturing visitation from states such as Colorado and Wyoming.

3. Annual Economic Impact

A. Annual Operations

Rowe Sanctuary and Crane Trust work to preserve habitat, research cranes and build support for migratory birds who rely on central Nebraska. The year-round economic activity of these organizations is therefore a consequence of the annual crane migration.

Both Rowe Sanctuary and the Crane Trust provided annual reports that contained budget information for the most recent available fiscal year. Further, many other local private and public organizations welcome visitors and provide services before, during and after the crane migration season. Local governments and tourism agencies which work with visitors report aiding visitors with existing annual staff and seasonal volunteers, indicating only a nominal need to increase spending. However, private organizations such as Dusty Trails also provide seasonal tours and related services and add staff and expenses during the crane migration season. These private organizations also contribute to additional annual operations in central Nebraska related to the migration season. For these organizations, additional revenue is estimated based on reports on the number of ticket buyers and ticket prices.

For economic impact analysis, additional economic activity during the migration season from the sources listed above were combined and yielded approximately \$5 million in revenue from visitors from outside of Central Nebraska. A specific number is not reported here due to our approach in

⁵ See footnote 3.

this report to provide industry aggregate results and avoid reporting on activities of individual organizations. Total annual operations impacts are reported below in Table 1, but these impacts include the direct spending described above plus the multiplier impacts. As described in the methodology section, multiplier impacts are estimated using IMPLAN.

Table 1 shows an annual operations impact of \$8.62 million in output. This annual economic impact includes \$3.90 million in value-added. Labor income is the largest component of value-added. Annual operations support \$2.58 million in labor income each year earned in 49 jobs.

Table 1
2025 Total Annual Economic from Operations

Impact Measure	Annual Operations Impact
Output (Business Sales and Organization Revenue) (Millions \$)	\$8.62
Value-Added	\$3.90
Labor Income	\$2.58
Employment (Full-Year Equivalent)	49

Source: Rowe Sanctuary, Crane Trust and UNL-BBR Calculations

B. Visitor Spending

Total visitor spending is determined by the number of visitors drawn to central Nebraska during the migration season and the magnitude of their spending. Crane viewing centers such as at Rowe Sanctuary provided counts of visitors. Surveys of visitors provided detailed information on the reasons for visiting central Nebraska during the migration season, the length of stay, and spending in the area.

Number of Visitors

Survey results indicated that most visitors to the region visited Rowe Sanctuary or Crane Trust or both. Many visitors also went to other attractions in the area. In the North Platte section of the impact region, a significant number of visitors patronize attractions including Dusty Trails tours without traveling to other parts of the central Nebraska impact region.

Survey results were combined with counts of visitors to Crane Trust, Rowe Sanctuary and Dusty Trails tours to estimate total visitors to central Nebraska during the migration season. The combined visits to Crane Trust and Rowe Sanctuary during the season was 47,500, but approximately 54.4% of visitors who reported visiting one of these centers also reported visiting the other. Adjusting for this⁶ and adding unique visitors to western parts of the region yielded an estimate of 34,900 visitors to central Nebraska. Traffic volume data during the 2025 spring migration support this finding of significant visitation. As explained in Appendix 2, traffic counter data from local roads located near crane viewing facilities in Hall and Buffalo County found that traffic volumes rose by 67% to 163% over normal levels during the spring migration season.

⁶ Method took an average of the annual visitors to each institution and assumed that 54.4% of that average visited both.

Visit Characteristics

The survey of visitors during the spring migration gathered information about visit characteristics including the residence of visitors, the reason for the visit, the length of the visit and the number of persons in each travel party. Survey responses are used to estimate the spending of these visitors. Surveys were collected from three sources. The first was an email list of visitors maintained by Rowe Sanctuary. The second was surveys on 4 evenings or mornings at the Alda Viewing Platform, the Plautz Viewing Platform and the hike-bike trail at Fort Kearney State Park. The third was on-line surveys or in-person survey opportunities announced at other key locations for visitors, such as Kearney Visitors Center, Grand Island Tourism Office, Rowe Sanctuary, Crane Trust, Fort Kearney State Historical Park, Dusty Trails and the Crane Cabin Retreat. The posters announced the survey and provided a QR code that allowed visitors to access an on-line survey and visitors also were made aware of opportunities to complete paper surveys on-site or take a paper survey and return envelope and complete and return the survey at a later time.

Table 2 provides information on the origin of survey respondents by state and country. Nearly one-fifth (19.5%) of visits are from travel parties who reside in Nebraska. Only 1.9% were from the central Nebraska impact region while the rest are tourists, primarily from Omaha (10.5%) but also from Lincoln and elsewhere in the state.

As might be expected, most remaining visiting parties were from neighboring states, especially states known for outdoor and recreation tourism such as Colorado (15%), Minnesota (9.3%) or Wyoming (which at 2.5% had a large share given its population). In addition, 7.1% of visiting parties were from Iowa, 4.7% from Illinois, 4.0% from Missouri and 3.7% from Kansas. Just 1.3% were from South Dakota, which may reflect poor North-South highway access into central Nebraska.

Table 2 also shows that visitors travel great distances to visit the spring migration. Nebraska is over a thousand miles from the most populous states of California, Florida and New York and hundreds of miles from Texas. Between 1.4% to 2.1% of visiting parties came from each of these states. Nearly one-quarter of visiting parties came from other U.S. states not mentioned above. International visitors accounted for 1.1% of visiting parties.

Table 3 shows information on the number of people in these visiting parties. As might be expected, a party size of 2 to 4 people was most common, accounting for 78.8% of all visiting parties. In addition, single-persons accounted for one-sixth (15.5%) of visiting parties. Larger parties were less common, with 3.9% containing 5 to 7 people, 1.3% containing 8 to 10 people and 0.5% containing 11 or more.

Table 2
Share of Visiting Parties from Each State or Nebraska Region

State or Nebraska Region	Percent of Visiting Parties
Nebraska	19.5%
Omaha Metropolitan Area	10.5%
Lincoln Metropolitan Area	4.2%
Central Nebraska	1.9%
Other Nebraska	2.9%
Neighboring States	
Colorado	15.0%
Minnesota	9.3%
Iowa	7.1%
Illinois	4.7%
Missouri	4.0%
Kansas	3.7%
Wyoming	2.5%
South Dakota	1.3%
Most Populous States	
California	2.1%
New York	1.9%
Florida	1.6%
Texas	1.4%
Other States	24.8%
International	1.1%

Source: Survey of Visitors

Table 3
Number of Visitors Per Visitor Party

Party Size (Number of People)	Percent
1 Person	15.5%
2 to 4 Persons	78.8%
5 to 7 Persons	3.9%
8 to 10 Persons	1.3%
11 or More Persons	0.5%

Source: Survey of Visitors

Table 4 below provides information on the reason for the visit, specifically whether visitors primarily came to central Nebraska for the spring migration, whether it was one of three or four reasons, or whether the visitors would already have been in the area. Table 4 shows that 98% of survey respondents indicated that the spring migration was the principal reason that they traveled to the central Nebraska region. Just 2% indicated that it was among 3 or 4 reasons and none indicated that they would have already traveled to the region. Table 4 also provides responses to that question from the 2017 survey, which utilized a very similar survey question. Consistent with the

current survey, 87% of respondents to the 2017 survey indicated that the spring migration was the principal reason for visiting the area.

Table 4
Reasons for Visit to Central Nebraska

Reason for Coming to the Grand Island-Hastings-Kearney-North Platte Area	2025 Survey	2017 Survey
It was the principal reason that I came to the Area	98%	87%
It was one of three or four reasons that I came to the area	2%	8%
It was mentioned in local visitors guides and looked interesting	0%	1%
It was not very important because I would have come to the area anyway	0%	4%

Source: Survey of Visitors

Data in Table 4 demonstrate that most visits, and the resulting visitor spending was a direct result of the spring wildlife migration. Their visitor spending therefore results from the migration season. The specific level of spending during the season depends on how long the estimated 34,900 visitors to the region stay in central Nebraska and their average spending per day.

Table 5 provides information on the length of stay in central Nebraska. The most common trip length is 2 to 3 days, which could include weekend visits. These trips accounted for 58.4% of all trips. Just less than one in six visits (15.4%) is a day trip. Nearly one in five visits (19.2%) are 4 to 6 days. Such longer trips accommodate visits to multiple viewing sites, consistent with what survey respondents reported. A notable share of visits lasted a week or more. Note that 1.5% of respondents reported that “I live here”, indicating most central Nebraska visitors lived close to the areas they visited.

Table 5
Visitor party Lenth of Stay

Days Spent in Central Nebraska	Percent
1 Day (Day-Trip)	15.4%
2 to 3 Days	58.4%
4 to 6 Days	19.2%
1 Week	3.5%
2 Weeks	1.4%
3 Weeks	0.3%
1 Month	0.2%
“I live here”	1.5%

Source: Survey of Visitors

Across all visits, the average trip length was 3.1 days. Applying this average trip length to the estimated 34,900 estimated visitors to Central Nebraska described earlier, yields an estimate of 108,234 visitor days during the migration season. Visitor spending per day is reported next.

Spending Per Visitor

Surveys also provided information on the spending of visiting parties during their trip to central Nebraska as well as the number of visitors per party and days per trip. This information was used to estimate the spending per visitor per day from visitors who 1) primarily came to central Nebraska to

attend the migration season or who 2) came to central Nebraska for multiple reasons but extended their visit by 1 or more days to view the migration. Visitor spending was divided by all visitor days to yield an estimate of spending per visitor per day. This was estimated for lodging, food and drink, gasoline and fuel, shopping, other entertainment and any other spending. Spending on tickets for blinds was not included as this was a source of revenue to support the annual operations of organizations, which was already captured above. Table 6 below shows estimated central Nebraska spending per visitor per day by category for the 2025 migration season. Estimated spending is \$151.66 per visitor per day. Nearly \$60 per visitor per day is spent on lodging and nearly \$40 on food and drink. Another \$9 was spent per visitor per day on other entertainment. Visitors therefore had a significant impact throughout the central Nebraska hospitality sector.

Table 6
Visitor Spending During the 2025 Migration

Spending Category	Number of Visitor Days	Average Spending Per Visitor Per Day	Estimated Total Spending (\$Millions)
Hotel/Lodging	108,234	\$58.00	\$6.28
Food and Drinks	108,234	\$37.77	\$4.09
Gasoline and Fuel	108,234	\$23.65	\$2.56
Shopping	108,234	\$22.15	\$2.40
Entertainment	108,234	\$8.89	\$0.96
Other	108,234	\$1.20	\$0.13
Total		\$151.66	\$16.42

Source: Visitor Counts and Survey of Visitors

This spending is also multiplied by the total estimated attendance to yield total visitor spending during the migration. Total visitor spending is estimated to be \$16.42 million. Just over two-fifths of spending was for lodging while spending on food and drink accounts for one-quarter of spending.

Table 7 shows the total economic impact associated with visitor spending including direct spending and the multiplier impact. Note that a portion of the \$16.42 million in visitor spending does not contribute a direct impact on the Central Nebraska economy. In particular, only the mark-up portion of fuel and retail spending supports wages, rents, utilities and other local expenses of these businesses. The wholesale value of gasoline and retail items flows to the miners, refiners and factories around the country and globe that produce these retail items. With this adjustment, the total economic impact of visitors spending on business output during the season is \$19.38 million. This includes value-added of \$10.63 million. Labor income is the largest component of value-added. Annual operations support \$5.59 million in labor income each year earned in 171 jobs.

Table 7
2025 Total Annual Economic from Visitor Spending

Impact Measure	Direct	Multiplier	Total
Output (Millions \$)	\$12.94	\$6.44	\$19.38
Value-Added (Millions \$)	\$7.29	\$3.34	\$10.63
Labor Income (Millions \$)	\$3.75	\$2.84	\$5.59
Employment (Full-Year Equivalent)	133	38	171

Source: Visitor Counts, Survey of Visitors and UNL-BBR Calculations using IMPLAN

C. Total Economic Impact and Tax Revenue Impact

Table 8 shows the overall annual economic impact of the spring migration. The overall total is the sum of the operations impact and the larger impact of visitor spending. The overall annual economic impact is \$28.00 million and is sufficient to support \$8.17 million of labor income spread over an estimated 219 jobs. Table 8 also shows the economic impact estimate from the previous study of the crane migration that examined the year 2017.⁷ The impact in terms of business sales and organization revenue (output) was up by 96%. Growth in labor market impacts was less rapid as output per worker continued to rise in the U.S. economy. Labor income rose by 55%, higher than the 29% increase in the consumer price index for the Midwest region between March 2017 and March 2025. Table 4 therefore shows real growth in the annual economic impact between 2017 and 2025. This is confirmed by the 20% increase in full-year equivalent employment, a measure which is not impacted by inflation or growth in real hourly wages.

Table 8

2025 Overall Annual Economic from Spring Migration and Comparison with 2017 Impact

Impact Measure	2017	2025	% Change
Output (Millions \$)	\$14.30	\$28.00	96%
Labor Income (Millions \$)	\$5.26	\$8.17	55%
Employment (Full-Year Equivalent)	182	219	20%
Current Price Index, Midwest (March)	228.8	296.2	29%

Sources: Center Budgets, Visitor Counts, Survey of Visitors and UNL-BBR IMPLAN Calculations

The local tax revenue impact was estimated based on spending of visitors and income earned by local workers. A local sales tax rate of 1.83% was applied to visitor spending at hotels, restaurants and retail stores. The 1.83% rate is the average of rates found in Grand Island, Kearney and North Platte. Spending at hotels was subject to a 4% lodging tax rate, the rate in all 3 locations. These two sources yielded \$502,000 in local tax revenue. Local sales tax also is generated due to the multiplier impact. Based on statewide averages, approximately 35% of income is spent on goods and services subject to sales tax. Applying this ratio to \$2.84 million in multiplier impact income yields an estimate of another \$17,000 in local sales tax revenue. Finally, labor income also supports taxable property in central Nebraska by helping businesses and homeowners pay their mortgage (or rent). Statewide, there is \$1.47 of taxable property per \$1 of annual income. Applying this ratio to the \$8.17 million income impact and using a 1.7 percent property tax rate, the average tax rate on residential and commercial real property in Buffalo, Hall and Lincoln counties, yields an estimate of \$204,000 in local property tax revenue. Combining local tax revenue from all sources yields an estimated annual local tax revenue impact of \$724,000. This is 91% more than the \$374 local tax revenue impact identified in the 2017 study.

4. Alternative Impact Scenarios

Project sponsors at Nebraska Flyway requested the inclusion of alternative scenarios regarding the annual economic impact. Scenarios based on more optimistic or pessimistic assumptions would provide a range of potential impact estimates around the primary estimate presented above. Alternate estimates are based on different assumptions about annual visitors, estimated to be

⁷ Value-added is not reported in Table 4 since it was not featured in the 2017 study.

34,900 in the analysis in Section 3. In Section 3, it was assumed that “overlap” visitors who attended both Rowe Sanctuary and Crane Trust (54.4% of visitors) were equally likely to have started their visit at each institution. Alternative assumptions would be that all overlap visitors originated at either Rowe Sanctuary or Crane Trust. Rowe Sanctuary has somewhat fewer visitors than The Crane Trust.

The assumption that 54.4% of visitors to Rowe Sanctuary were overlap visitors but no visitors to Crane Trust were overlap visitors would be an optimistic assumption.⁸ There would be fewer total overlap visitors in this case and more estimated visitors overall. In fact, the estimated annual visitors due to the spring migration would rise from 34,900 to 38,300 in this case. Total estimated visitor days would rise from 108,234 to 118,743. Total annual visitor spending in central Nebraska also would rise, from \$16.42 million to \$18.01 million.

The assumption that no visitors to Rowe Sanctuary were overlap visitors but 54.4% of visitors to Crane Trust were overlap visitors would be a pessimistic assumption. There would be more total overlap visitors in this case and fewer estimated visitors overall. In fact, the estimated annual visitors due to the spring migration would fall from 34,900 to 31,600 in this case. Total estimated visitor days would fall from 108,234 to 97,725. Total annual visitor spending in central Nebraska also would fall, from \$16.42 million to \$14.82 million.

Table 9 presents the 2025 economic impact of the spring migration under the pessimistic and optimistic scenarios. Table 9 also repeats the “baseline” 2025 impact estimate from Table 8 for context. The “range” for the 2025 economic impact is from \$26.12 million to \$29.88 million. In terms of labor market impacts, the range is 203 to 236 jobs earning \$7.63 million to \$8.71 million in labor income.

Table 9
2025 Overall Annual Economic from Spring Migration: Pessimistic and Optimistic Scenarios

Impact Measure	Pessimistic	Baseline	Optimistic
Output (Millions \$)	\$26.12	\$28.00	\$29.88
Labor Income (Millions \$)	\$7.63	\$8.17	\$8.71
Employment (Full-Year Equivalent)	203	219	236

Source: Visitor Counts, Survey of Visitors and UNL-BBR Calculations using IMPLAN

⁸ IMPLAN multipliers are fixed and spending per visitor day is a weighted average so there is no way to create optimistic or pessimistic scenarios for these factors.

Appendix 1: Survey for Economic Impact of Sandhill Crane Migration

(Please complete only one survey per group)

Your responses will help us study the economic impact of spring wildlife-watching experiences, including Sandhill Cranes and Prairie Chickens in Central Nebraska. Please complete only one survey per group and do not submit multiple responses for the same season. Focus your answers on your current wildlife-watching visit. All responses are CONFIDENTIAL and ANONYMOUS.

Thank you for your time!

1. If you live in the United States, what is your zip code?
- a. If you live outside of USA, please enter the country name here: _____
2. Have you previously visited Central Nebraska to observe the Sandhill Crane Migration? YES NO
3. How did you learn about the Sandhill Crane Migration? (Select all that apply)
- Newspaper Magazine Email Television Visitor's Bureau Word of Mouth Hotel
 Brochure Bird Association Other Bird Festival Website Facebook Other: _____

Please estimate your group's total daily spending in the following categories while visiting Central Nebraska (Kearney, Grand Island, Hastings, and North Platte). Include all expenses for the entire group, not just individual spending, within the local area.

4. Hotel / Lodging N/A \$1-75 \$76-\$100 \$101-\$125 \$126-\$150 \$151-\$200 \$200-\$250 \$251+
5. Food and drinks N/A \$1-\$25 \$26-\$50 \$51-\$100 \$101-\$150 \$151-\$200 \$201+
6. Gasoline/Fuel N/A \$25-\$50 \$51-\$75 \$76-\$100 \$101-\$125 \$126+
7. Shopping, gifts, souvenirs N/A \$25-\$50 \$51-\$75 \$76-\$100 \$101-\$125 Other \$ _____
8. Other arts, museums, entertainment N/A \$25-\$50 \$51-\$75 \$76-\$100 \$101-\$125 Other \$ _____
9. Other spending, please specify: _____ \$ _____
10. How many people are covered by the total spending you reported above? 1 2-4 5-7 8-10 11+
11. How many days have you spent or will you spend visiting the Central Nebraska area?
 1 2-3 4-6 One Week Two Weeks Three Weeks One Month I live here.
12. Which crane viewing or other ecotourism/nature-based tourism locations have you visited or plan to visit? Please check ALL that apply.
- | | |
|---|---|
| <input type="radio"/> Rowe Sanctuary [Audubon] | <input type="radio"/> Spring Creek Prairie [Audubon] |
| <input type="radio"/> Prairie Wind Birding Tours [Odessa, NE] | <input type="radio"/> Prairie Chicken Dance Tours [McCook] |
| <input type="radio"/> Dusty Trails [Birding Outfitters] | <input type="radio"/> Rainwater Basin Wetland Management District |
| <input type="radio"/> Crane Trust Nature & Visitor Center | <input type="radio"/> Valentine National Wildlife Refuge |
| <input type="radio"/> Fort Kearny State Park | <input type="radio"/> Buffalo Bill State Park |
| <input type="radio"/> Wildcat Hills State Recreation Area | <input type="radio"/> Fort Robinson State Park |
| <input type="radio"/> Roadside Viewing | <input type="radio"/> Other, please specify: _____ |
13. How important was the **Sandhill Crane Migration** in your decision to visit the Kearney-Grand Island-Hastings-North Platte area? Please check ONLY ONE response.
- It was the principal reason I came to the area.
 It was one of three or four reasons that I came to the area.
 It was mentioned in local visitor guides and looked interesting.
 It was not very important because I would have come to the area anyway.

14. How many **additional days** will you stay in Central Nebraska due to the **Sandhill Crane Migration** and/or **Prairie Chicken** tours? 0 days (**The bird-watching experience** did not extend the length of my trip)
- 1 day
 - 2 days
 - 3 days
 - 4 days
 - 5 days or more
- (Please specify the number of additional days: ____)



Hastings sunset with cranes

Appendix 2. Traffic Counts

To further study visitation to central Nebraska during the spring wildlife migration, transportation officials in Buffalo and Hall counties installed traffic counters on a roadway located near key crane viewing facilities in each county. Counters were installed for several weeks during and after the spring wildlife migration. Each roadway is described in Table A2.1 below, along with the dates for which traffic counts were measured during the current study.

Table A2.1
Growth in Average Daily Traffic Counts During Spring Migration: 2017 Study and Current Study

Roadway Location & Description	Dates Studied in 2025	Percent Increase in Average Daily Traffic	
		2017 Study	Current Study (2025)
Buffalo County – 17 th /Sodtown (gravel road)	In Season: March 13-30 Off Season: April 29 – May 13	119%	163%
Hall County (Platte River Rd, Wood River to Alda Exits)	In Season: March 24- April 4 Off Season: April 28 – May 19	102%	67%

Source: Hall County and Buffalo County Traffic counter data

Daily traffic volumes were found to rise significantly during the spring migration season compared to the “control period” after the season ended. In Buffalo County, average daily traffic volumes were 163% higher in season than off season. In Hall County, traffic volumes were 67% higher in season than off season. Taken together, the rates of increase in season were similar to the rates of increase identified in the 2017 report (Buffalo County was higher and Hall County was lower). This provides another indicator of the high level of visitation during the spring migration.

Appendix 3. About the Bureau of Business Research and Key Personnel

The Bureau of Business Research

The Bureau of Business Research is a leading source for analysis and information on the Nebraska economy. The Bureau conducts both contract and sponsored research on the economy of Nebraska and its communities including: 1) economic and fiscal impact analysis; 2) models of the structure and comparative advantage of the current economy; 3) economic, fiscal, and demographic outlooks, and 4) assessments of how economic policy affects industry, labor markets, infrastructure, and the standard of living. The Bureau also competes for research funding from federal government agencies and private foundations from around the nation and contributes to the academic mission of the University of Nebraska through scholarly publication and the education of students.

Key Personnel

Dr. Eric Thompson – Principal Investigator

Dr. Eric Thompson will be the principal investigator on this project. Dr. Thompson is the Director of the Bureau of Business Research and the K.H. Nelson Professor of Economics at the University of Nebraska-Lincoln. Dr. Thompson has conducted a broad group of economic impact studies including impact studies of Nebraska agriculture, Sandhill Cranes migration, the Nebraska the Nebraska child care industry, the Omaha Zoo, the Nebraska horseracing industry, Husker Harvest Days, and the UNL Athletic Department. Dr. Thompson also works on demographic projections, and analyses of economic development programs for Nebraska and cities in Nebraska. He also has conducted numerous economic studies for the Lincoln Department of Economic Development, the Greater Omaha Chamber, various Nebraska industries, and Nebraska tourism attractions. Dr. Thompson's research has received support from the United States Department of Labor, the National Science Foundation, the United States Department of Agriculture, the Robert Wood Johnson Foundation, the Nebraska Health and Human Services System, as well as Lincoln, Omaha, and Nebraska organizations and agencies. In his previous employment, Dr. Thompson served as the Director of the Center for Business and Economic Research and a Research Associate Professor of Economics at the University of Kentucky. Dr. Thompson received his Ph.D. in agricultural economics from the University of Wisconsin-Madison in 1992. His research fields include regional economics, economic forecasting, and state and local economic development. His research has been published in *Regional Science and Urban Economics*, *Journal of Regional Science*, *American Journal of Agricultural Economics*, *World Development* and *Journal of Cultural Economics*.

Shawn Kaskie – Co-Principal Investigator

Kaskie is a Community Economic Development and Leadership facilitator, coach, and researcher passionate about working with partners to help communities, businesses, and stakeholders achieve their visions. His "day job" is a Rural Prosperity Nebraska Extension Educator for the University of Nebraska, serving an 8-county rural area surrounding Broken Bow, NE. He was the

Director of the Center for Entrepreneurship and Rural Development at the University of Nebraska at Kearney and the founding director of an Economic Development organization in Sherman County, Nebraska. He is completing a Ph.D. on the "changing roles of economic developers" while conducting applied research as a Doctoral Candidate at the University of Nebraska at Lincoln with the International Economic Development Council.



Platte River sunset by Jonathan Nikkila