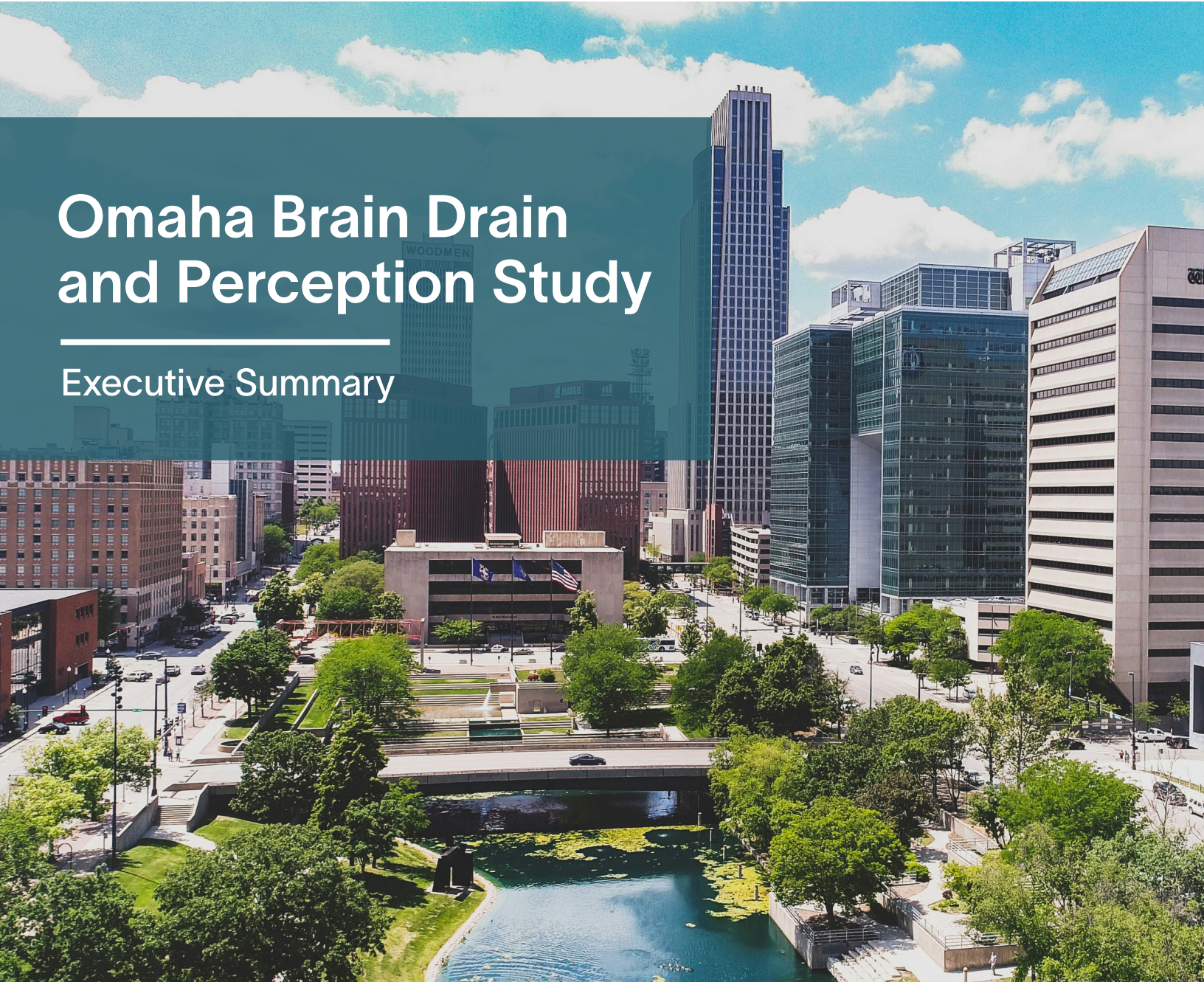




Omaha Brain Drain and Perception Study

Executive Summary



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OMAHA faces the same structural demographic headwinds as the United States overall, with retiring baby boomers, birth rates below replacement, and a shrinking share of young people in the population. **This makes talent attraction and retention the primary constraint on future economic growth.**

Despite these headwinds, Omaha has generally been a modest net importer of talent over the past decade, with only three of the last ten years of record showing net losses, with pandemic-era outflows reversing by 2022. In 2022 Omaha lost roughly 500 people on net to other metropolitan areas but offset this by attracting residents from rural areas.

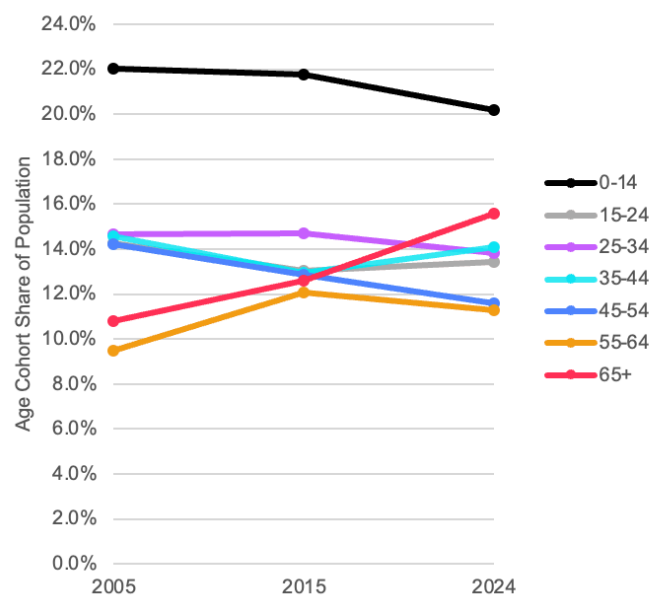
The report examined migration data to select **five metropolitan areas for benchmarking and perception survey analysis:**

- **Dallas**
- **Denver**
- **Minneapolis**
- **Kansas City**
- **Phoenix**

Peer benchmarking against these markets showed that Omaha is highly competitive overall. It is tied with Kansas City for economic factors and tied for third on quality of life. Overall, Omaha tied with Dallas for the best composite score among the six metros, indicating that it compares favorably even against much larger markets. Omaha's strongest advantages lie in everyday livability and affordability. It has low poverty rates, strong K–12 outcomes and favorable pupil–teacher ratios, the second-lowest overall cost of living, the lowest median home value and rent, the best homeownership affordability, the shortest commute times, more abundant and relatively affordable childcare, low violent crime, good access to healthcare providers, and a strong network of social membership associations. Its entrepreneurial environment is stable, with relatively low business exit rates and high firm “constancy” across most age groups. Omaha's main disadvantages are in wages, connectivity, and diversity. It ranks low on

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Rising share of retirement age population in place of young people



cost of living adjusted and real wages and has recently lagged its peers in real wage growth. Air connectivity and public transit and bike infrastructure are weaker, reflecting its smaller market size, and the metro is the least racially and ethnically diverse of the benchmarked regions. Nebraska's property tax and inheritance tax structure further dampens competitiveness, especially for long-term residents and potential boomerang talent.

The talent perception study conducted as part of the 2025 Brain Drain/Gain Study for the Omaha Chamber of Commerce documents talent's "path to purchase" for jobs and locations among working-age talent across five markets in the U.S. and

Benchmarking Rank Scoring

Topic	Omaha	Dallas	Denver	Kansas City	Minneapolis	Phoenix
Wages	6	3	1	4	2	4
Poverty	1	2	2	2	2	6
Taxes	4	1	5	2	6	3
K-12	1	5	3	4	1	5
Housing	1	4	5	3	2	5
COLI	2	4	6	1	3	5
Entrepreneurship	4	1	5	3	6	2
Internet	2	1	6	2	4	5
Commute	1	6	5	2	3	4
Air Connectivity	6	1	2	5	3	4
Walkability	5	3	2	6	1	4
Diversity	6	1	3	4	5	2
Healthcare	3	6	1	4	2	5
Childcare	1	4	2	4	6	2
Community	3	4	2	4	1	6
Crime	1	1	5	5	1	1
Economic Rank Total	19	20	27	19	22	30
Quality of Life Rank Total	28	27	28	36	26	33
Total Rank Score	47	47	55	55	48	63
Rank	1	1	4	4	3	6

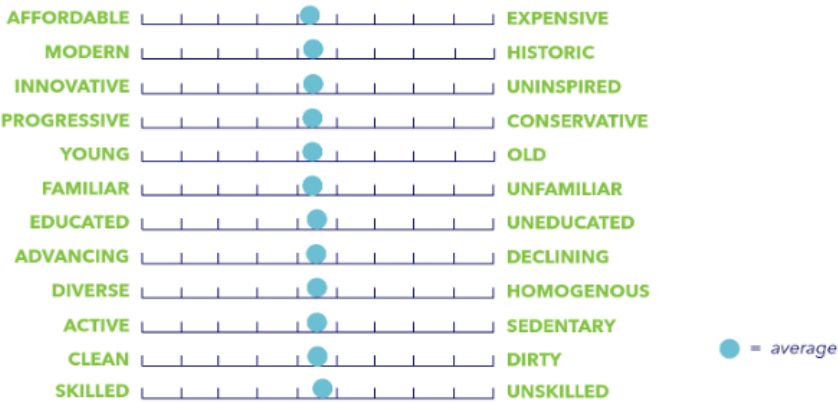
in Omaha and importantly, perceptions of Omaha as a place to live and work. Towards that end, the purpose of the study was to better understand not only how external talent perceives Omaha, but also what drives relocation decisions more broadly, and how Omaha can compete more effectively for workers in an increasingly mobile labor market. Knowing that attraction is only one piece of the puzzle, talent, including students currently living in the Omaha region were also surveyed to understand barriers to retention and any relocation intentions.

The findings reveal a talent landscape in which relocation is very much a live consideration. A meaningful share of

respondents express some level of desire to move within the next two years, though actual likelihood varies by metro area, life stage, and personal circumstances. Underlying these decisions is a combination of quality-of-life and career factors that tend to operate together rather than independently. Cost of living, housing affordability, safety, schooling, benefits, job alignment, and career advancement are all central to the equation and respondents often weigh them collectively as part of assessing overall fit.

One of the clearest patterns to emerge from the survey is the significant role awareness plays in shaping perception. In many markets, respondents possess only modest familiarity with Omaha. Yet those with greater knowledge or first-hand experience tend to rate it more favorably across many dimensions, suggesting an opportunity for Omaha to improve perceptions simply by increasing exposure. This familiarity gap often influences willingness to consider Omaha as a viable relocation destination, reinforcing the need for a more visible and targeted brand presence in key labor markets. The accompanying chart displays that Omaha struggles with demonstrating a distinct identity.

Overall, the survey suggests that Omaha's strongest assets lie in its livability including its affordability, safety, and family-friendliness, while perceptions of its urban energy, industry diversity, and long-term career opportunities offer room for growth. The results point toward a strategy that aligns Omaha's messaging with what talent values most, closes key perception gaps, and leverages increased familiarity to move more potential movers from curiosity to serious consideration.



Recommendations

1. Dedicate specific resources towards ongoing talent attraction and retention efforts.

- a. Focus on young talent where the pipeline risks are most pronounced.
- b. Dallas, Denver, Minneapolis, Kansas City and Phoenix are key markets to attract boomerang talent.
- c. Retention is more cost-effective than attraction. Intervene in institutions with lower retention rates to explore more education-employer partnerships. Focus on programs with lower retention rates.

2. Quality of Life Drives Moves, But Jobs Seal the Deal.

- a. Position quality of life as the emotional hook, but ensure career opportunity proof is always present and easy to find.
- b. Pair lifestyle content with job and career-related content such as “Careers You Can Build Here” spotlights and job landing pages by industry (tech, healthcare, finance, trades, creative, etc.)
- c. Integrate employers directly into talent marketing (co-branded campaigns, testimonials from hiring managers and employees).

3. Omaha’s biggest barrier is not performance...it’s perception.

- a. Marketing campaigns should include awareness-building but also move to myth-busting and re-education
- b. Consider a “What People Get Wrong About Omaha” content series including career advancement, young professional networks, and startup and innovation ecosystems.
- c. Replace generic affordability claims with comparative proof points such as cost of living calculator

4. Familiarity Breeds Conversion. Activate Your Ambassadors.

- a. Formalize an ambassador program. Arm boomerangs, long tenured residents, and alumni with key messaging and shareable content
- b. Encourage “Why I Stayed” and “Why I Came Back” narratives.
- c. Leverage social and professional networks

5. Omaha Can’t Be Everything to Everyone. Target “Best Bet” Opportunities.

- a. Stop trying to appeal broadly; focus on high-propensity segments.

6. The Retention Crisis Is Real. Students Present an Opportunity.

- a. Treat retention as a brand and messaging challenge, not just an HR issue.
- b. Shift the narrative from “start here” to “grow here.”
- c. Strengthen employer-student connections before graduations

