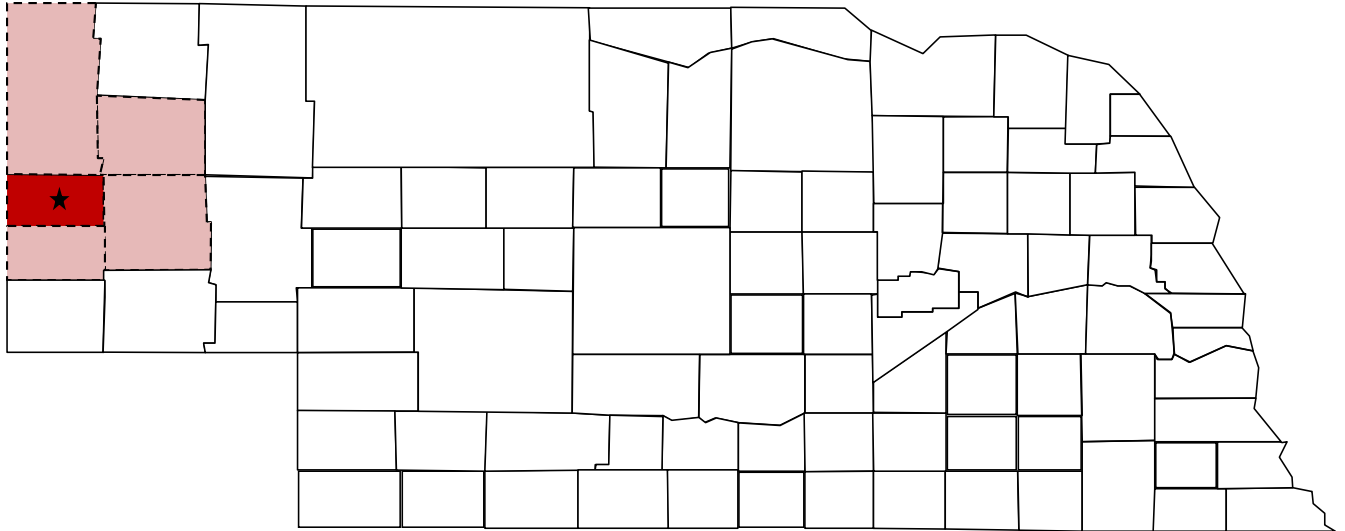


Economic and Demographic Trends

Scottsbluff, Scotts Bluff County, and the Surrounding Area



March 2015

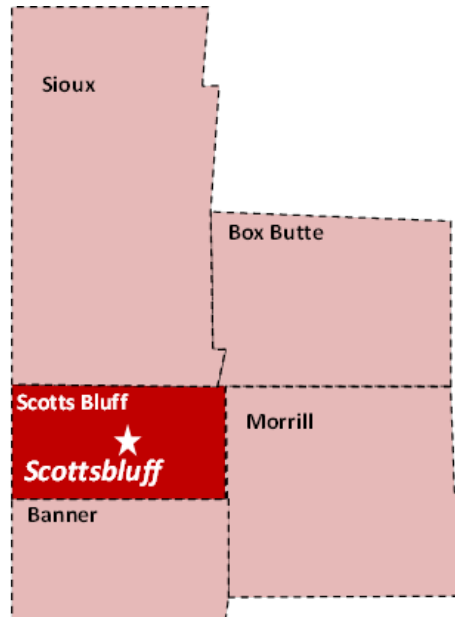
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Economic and Demographic Trends in Scottsbluff, Scotts Bluff County, and the Surrounding Area



This study provides data on labor force, employment, commuting patterns, population, migration, retail sales, and income for Scottsbluff and Scotts Bluff 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 Scotts Bluff County, other Nebraska counties included in this area are Banner, Box Butte, Morrill, and Sioux. The retail sales section also compares retail growth between Scottsbluff and eight other similarly sized Nebraska communities.

Labor Force and Employment

Table 1 and Charts 1–5 (next pages) present nonfarm wage and salary data for Scotts Bluff County for the period 2004–2013. Nonfarm employment is broken down into 11 sectors as defined by the Bureau of Labor Statistics and which are compliant with the North American Industrial Classification System (NAICS).

Nonfarm wage and salary employment consists of the following 11 sectors:

- Natural Resources & Mining
- Construction
- Manufacturing
- Trade, Transportation & Utilities
- Information
- Financial Activities
- Professional & Business Services
- Education & Health Services
- Leisure & Hospitality
- Other Services (except Public)
- Government

The measure of employment reported in Table 1 (below) is data on the number of people employed in the non-agriculture wage and salary sector in Scotts Bluff County (regardless of their county of residence). These data indicate total nonfarm wage and salary employment in Scotts Bluff County increased 1.4 percent (234 jobs) between 2004 and 2013.

Table 1 also provides employment data for Scotts Bluff County by major economic sector for years 2004–2013. Of the sectors reporting complete data, the Education and Health Services sector recorded the largest percentage and actual increases in employment between 2004 and 2013 (18.6 percent or 526 jobs).

Table 1

**Non-Farm Wage & Salary Employment Trends, Scotts Bluff County, Nebraska
Selected Years: 2004-2013**

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	% Change 2004-13	# Change 2004-13
Non-farm Employment (W&S)	16,708	16,678	16,899	17,308	17,169	16,962	16,662	16,673	17,013	16,942	1.4	234
Total Private Industries	13,615	13,575	13,744	14,146	13,996	13,777	13,488	13,493	13,813	13,755	1.0	140
Goods Producing	2,562	2,408	2,352	2,461	2,418	2,264	1,964	2,086	2,113	2,154	-15.9	-408
Natural Resources & Mining	252	272	266	245	221	283	279	281	268	266	5.6	14
Construction	968	874	867	969	1,041	960	740	823	833	766	-20.9	-202
Manufacturing	1,341	1,262	1,220	1,247	1,156	1,021	945	982	1,012	1,122	-16.3	-219
Service Providing	11,053	11,167	11,392	11,685	11,578	11,513	11,524	11,407	11,700	11,601	5.0	548
Trade, Transportation & Utilities	3,656	3,764	3,737	3,750	3,742	3,793	3,704	3,724	3,779	3,701	1.2	45
Information	260	250	218	221	220	229	221	219	235	265	1.9	5
Financial Activities	1,128	1,137	1,259	1,365	1,254	1,264	1,240	1,195	1,092	1,045	-7.4	-83
Professional & Business Services	1,062	1,146	1,299	1,413	1,269	1,246	1,309	1,282	1,290	1,214	14.3	152
Education & Health Services	2,829	2,851	2,879	2,909	3,092	3,011	3,049	3,020	3,054	3,355	18.6	526
Leisure & Hospitality	1,602	1,519	1,566	1,613	1,629	1,608	1,637	1,616	1,626	1,645	2.7	43
Other Services, except Public	518	500	434	415	372	361	365	352	626	376	-27.4	-142
Government	3,094	3,103	3,155	3,162	3,174	3,185	3,174	3,180	3,200	3,187	3.0	93
Federal	187	183	179	178	188	184	192	177	167	155	-17.1	-32
State	462	477	479	484	465	478	490	520	551	579	25.3	117
Local	2,445	2,443	2,497	2,500	2,521	2,523	2,492	2,482	2,481	2,453	0.3	8

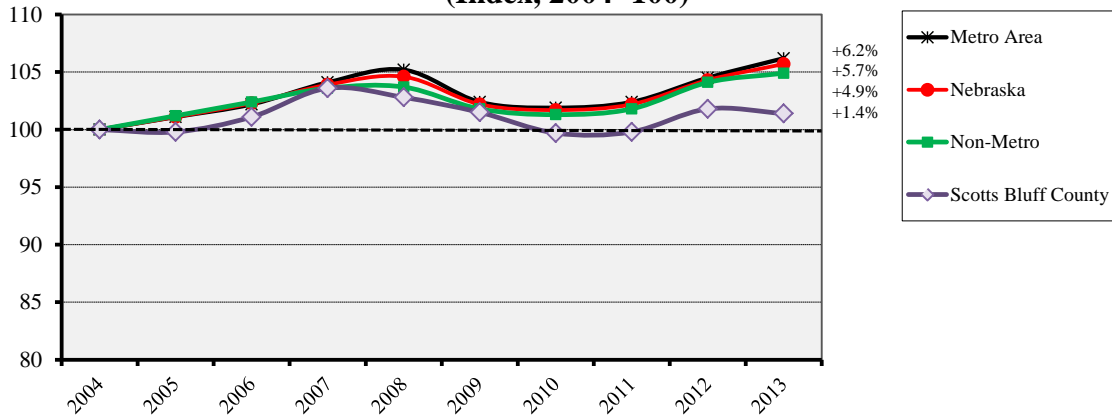
Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data, released June 2014
Labor Force & Work Force Summary, 2003-2012, Annually, Scotts Bluff County (June 2013 data)

Chart 1 (next page) compares total nonfarm wage and salary employment growth in Scotts Bluff County with metropolitan, non-metropolitan, and Nebraska as a whole for the review period 2004–2013. Non-metropolitan Nebraska is defined as Nebraska minus the seven Lincoln and Omaha metropolitan counties of Cass, Douglas, Lancaster, Sarpy, Saunders, Seward, and Washington.

As this chart indicates, total non-farm wage and salary employment in Scotts Bluff County increased 1.4 percent (234 jobs) from 2004 to 2013, compared to a 5.7 percent increase for Nebraska as a whole, a 6.2 percent increase in metropolitan Nebraska, and a 4.9 percent increase in non-metropolitan Nebraska.

Chart 1

**Nonfarm (W&S) Employment, Scotts Bluff County, Nebraska,
Metro, and Non-Metro Nebraska, 2004-2013
(Index, 2004=100)**

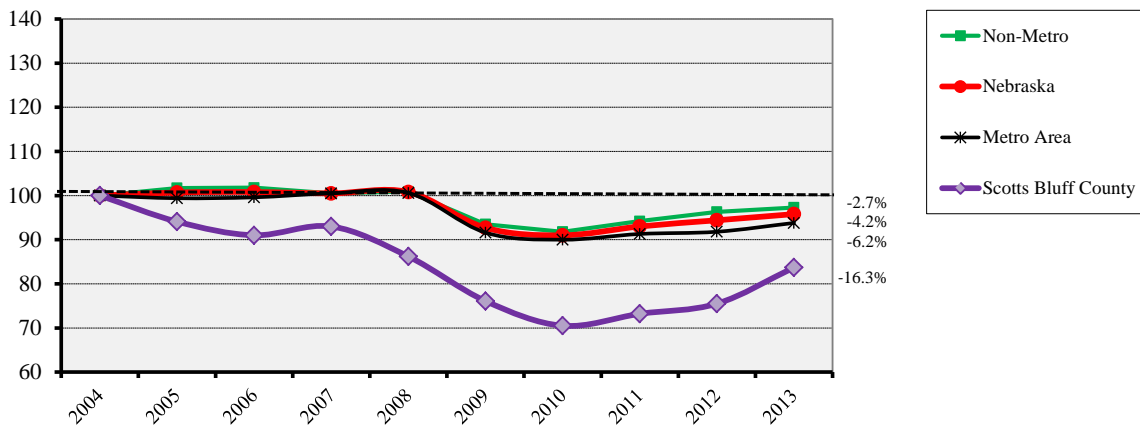


Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), Released June 2014

Chart 2 presents data on manufacturing wage and salary employment growth for Scotts Bluff County, Nebraska, metropolitan, and non-metropolitan areas. The Manufacturing sector for Scotts Bluff County recorded a 16.3 percent decrease in employment (219 jobs) between 2004 and 2013. This compares to a 2.7 percent decrease in employment for non-metropolitan Nebraska; a 4.2 percent decrease for Nebraska as a whole; and a 6.2 percent decrease for metropolitan Nebraska over the same period.

Chart 2

**Manufacturing (W&S) Employment, Scotts Bluff County, Nebraska,
Metro, and Non-Metro Nebraska, 2004-2013
(Index, 2004=100)**



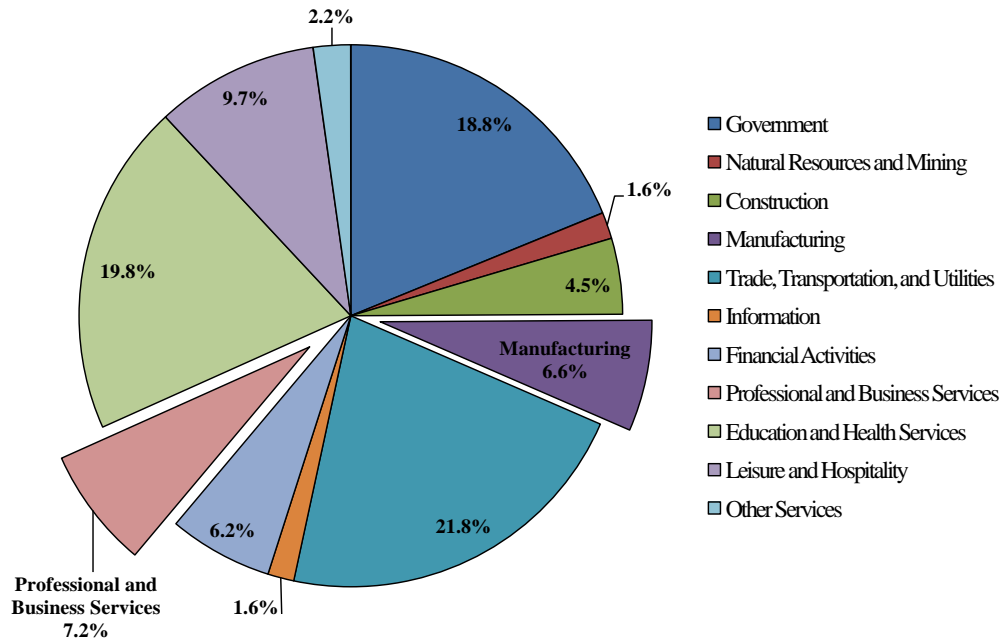
Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), Released June 2014

The next series of pie charts (Charts 3, 4 & 5) display the distribution of non-farm wage and salary (W&S) employment by major economic sector in Scotts Bluff County compared to the non-metropolitan and metropolitan distributions.

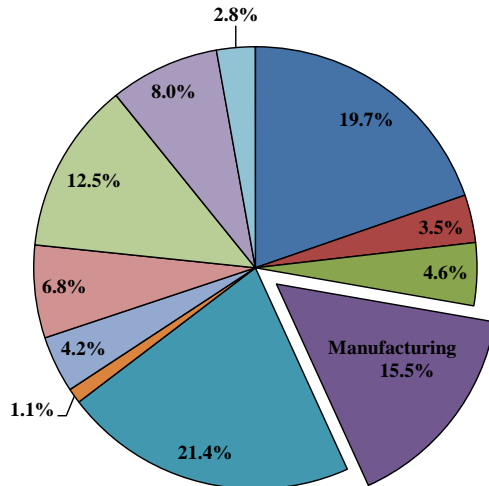
When comparing the Scotts Bluff County employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Manufacturing sector which makes up 6.6 percent of the county workforce (1,122 employees) compared to 15.5 percent for non-metropolitan Nebraska; a difference of 8.9 percent. Comparing Scotts Bluff County to the overall metropolitan distribution, the largest deviation is found in the Professional and Business Services sector (7.2 percent Scotts Bluff County vs. 14.9 percent metropolitan Nebraska; a difference of 7.7 percent).

Charts 3, 4, 5

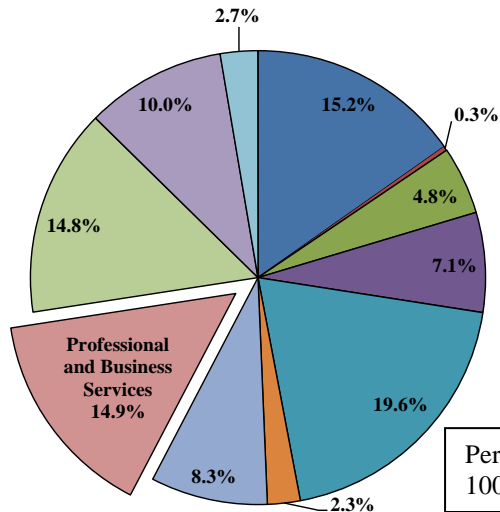
Nonfarm Wage & Salary Employment by Major Economic Sector Scotts Bluff County, 2013



Non-Metro Area W&S Employment, 2013



Metro Area W&S Employment, 2013



Percentages may not sum 100 due to rounding.

Source: U.S. Dept. of Labor, Bureau of Labor Statistics

The next table (Table 2) shows labor force information for Scotts Bluff County for the time period 2004–2013. In the case of the labor force information (labor force, unemployment, and total employment), these data are measured based on the county of residence of the labor force participants (regardless of where they work). As the labor force and total employment data indicate, there was an increase in the number of Scotts Bluff County residents participating in the labor force between 2004 and 2013 (1.9 percent or 363 people).

The number of those unemployed in Scotts Bluff County decreased by 1.8 percent (15 people) between 2004 and 2013. 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 Scotts Bluff County unemployment rate was 4.2 percent in 2013; above that for metropolitan Nebraska (4.1 percent), above Nebraska as a whole (3.9 percent), and above non-metropolitan Nebraska (3.7 percent).

Table 2

**Labor Force & Employment Trends, Scotts Bluff County, Nebraska
Selected Years: 2004-2013**

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	% Change 2004-13	# Change 2004-13
Labor Force	19,389	19,086	19,076	19,543	19,616	19,560	19,389	19,657	19,721	19,752	1.9	363
Unemployment	849	812	622	572	715	1,016	1,050	960	890	834	-1.8	-15
Unemployment Rate	4.4	4.3	3.3	2.9	3.6	5.2	5.4	4.9	4.5	4.2	(N/A)	(N/A)
Employment	18,540	18,274	18,454	18,971	18,901	18,544	18,339	18,697	18,831	18,918	2.0	378

(N/A) Data not available

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, Annual Data, released March 2014

Residence and Work Flow Patterns

The next series of tables show residence (Work Destination) and workflow (Home Destination) patterns for Scottsbluff, in Scotts Bluff County. A Work Destination report looks at where residents in a selected area are working (where they are commuting to work). A Home Destination report looks at the area from which a city is pulling employees to fill positions. These data are from the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) program. This program uses a variety of statistical and computing techniques to combine federal and state administrative data on employers and employees with core Census Bureau censuses and surveys while protecting the confidentiality of people and firms that provide the data. The most current data available for Scottsbluff are from 2011.

Table 3 (pages 6–7) examines the Work Destination area for Scottsbluff from three perspectives: by state, by county, and by place (city). In Table 3, the Census identified 6,382 Scottsbluff labor force participants holding primary jobs. As Table 3 shows, 97.6 percent of Scottsbluff’s labor force participants are employed within the state of Nebraska. Approximately 77.8 percent of Scottsbluff workers remain within Scotts Bluff County for employment with 22.2 percent leaving the county borders for work (next page). Looking deeper to the locality level, the table also shows the top locations where Scottsbluff labor force participants are employed (next page).

Table 3

Work Destination Report **Where Workers are Employed Who Live in the Selection Area**

2011

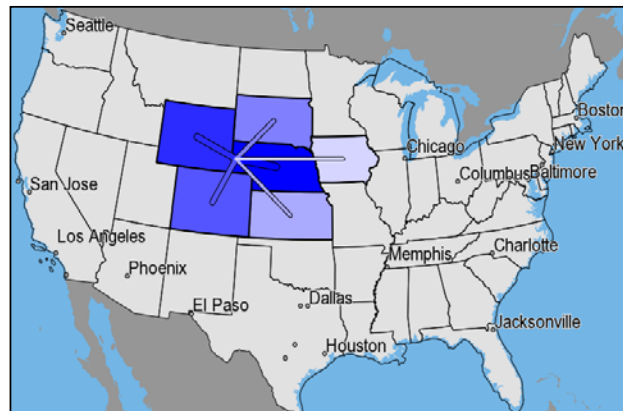
	Count	Share
Total Primary Jobs	6,382	100.0%

By States

Job Counts by States Where Workers are Employed

2011

	Count	Share
Nebraska	6,227	97.6%
Wyoming	72	1.1%
Colorado	48	0.8%
South Dakota	28	0.4%
Kansas	5	0.1%
Iowa	2	0.0%
All Other Locations	0	0.0%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, March 2015

Table 3 (continued)

By Counties
Job Counts by Counties Where Workers are Employed
2011

	Count	Share
Scotts Bluff County, NE	4,965	77.8%
Holt County, NE	200	3.1%
Lincoln County, NE	111	1.7%
Box Butte County, NE	96	1.5%
Lancaster County, NE	96	1.5%
Morrill County, NE	76	1.2%
Cheyenne County, NE	71	1.1%
Dawes County, NE	56	0.9%
Wayne County, NE	54	0.8%
Goshen County, WY	47	0.7%
All Other Locations	610	9.6%



By Places (top 10)
Job Counts by Places (Cities, CDPs, etc.) Where Workers are Employed
2011

	Count	Share
Scottsbluff city, NE	3,375	52.9%
Gering city, NE	777	12.2%
O'Neill city, NE	172	2.7%
North Platte city, NE	99	1.6%
Lincoln city, NE	96	1.5%
Alliance city, NE	66	1.0%
Sidney city, NE	60	0.9%
Terrytown city, NE	55	0.9%
Mitchell city, NE	54	0.8%
Chadron city, NE	46	0.7%
All Other Locations	1,582	24.8%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, March 2015

People also travel from other locations to work in Scottsbluff—this is the Home Destination report or the labor shed area. Table 4 (pages 8–9) depicts the home locations of those employed within Scottsbluff. The Census identified 9,872 primary jobs within the city of Scottsbluff. As Table 4 indicates, 94.0 percent of these jobs are held by Nebraska residents. Approximately 76.0 percent of Scottsbluff workers live within the county borders and the top localities show the distribution of employee residents around the area (next page).

Table 4

Home Destination Report Where Workers Live Who are Employed in the Selection Area

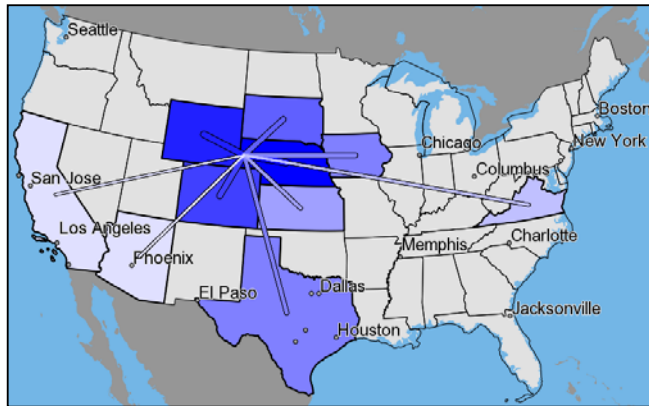
Total Primary Jobs

	2011	
	Count	Share
Total Primary Jobs	9,872	100.0%

By States

Job Counts by States Where Workers Live

	2011	
	Count	Share
Nebraska	9,278	94.0%
Wyoming	286	2.9%
Colorado	117	1.2%
South Dakota	16	0.2%
Iowa	15	0.2%
Texas	15	0.2%
Kansas	13	0.1%
Virginia	11	0.1%
Arizona	10	0.1%
California	10	0.1%
All Other Locations	101	1.0%



By Counties

Job Counts by Counties Where Workers Live

	2011	
	Count	Share
Scotts Bluff County, NE	7,500	76.0%
Sheridan County, NE	270	2.7%
Morrill County, NE	240	2.4%
Box Butte County, NE	188	1.9%
Goshen County, WY	153	1.5%
Cheyenne County, NE	148	1.5%
Dawes County, NE	131	1.3%
Sioux County, NE	90	0.9%
Lincoln County, NE	76	0.8%
Kimball County, NE	69	0.7%
All Other Locations	1,007	10.2%

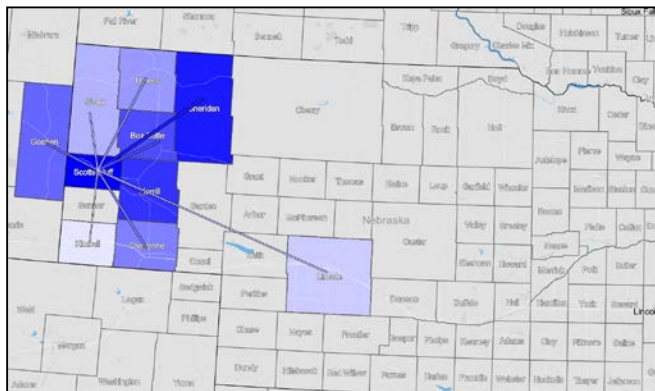
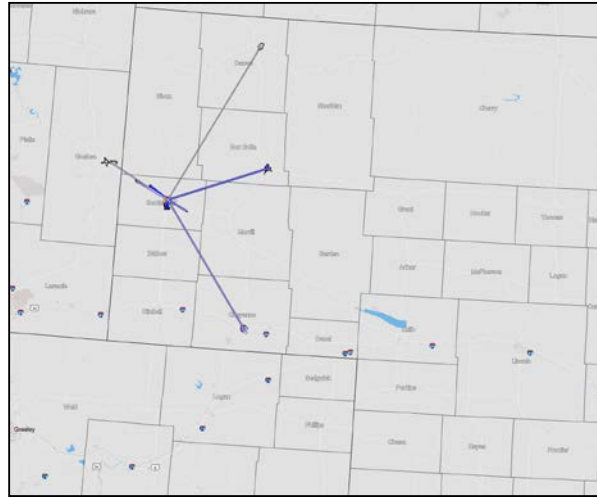


Table 4 (continued)

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

2011		
	Count	Share
Scottsbluff city, NE	3,375	34.2%
Gering city, NE	1,911	19.4%
Mitchell city, NE	293	3.0%
Terrytown city, NE	228	2.3%
Alliance city, NE	157	1.6%
Minatare city, NE	104	1.1%
Sidney city, NE	100	1.0%
Morrill village, NE	83	0.8%
Torrington city, WY	82	0.8%
Chadron city, NE	79	0.8%
All Other Locations	3,460	35.0%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, March 2015

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

Table 5

Inflow/Outflow Report

Selection Area Labor Market Size (Primary Jobs)

	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	9,872	100.0%	10,077	100.0%	9,968	100.0%
Living in the Selection Area	6,382	64.6%	6,371	63.2%	6,507	65.3%
Net Job Inflow (+) or Outflow (-)	3,490	-	3,706	-	3,461	-

In-Area Labor Force Efficiency (Primary Jobs)

	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	6,382	100.0%	6,371	100.0%	6,507	100.0%
Living and Employed in the Selection Area	3,375	52.9%	3,546	55.7%	3,597	55.3%
Living in the Selection Area but Employed Outside	3,007	47.1%	2,825	44.3%	2,910	44.7%

In-Area Employment Efficiency (Primary Jobs)

	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	9,872	100.0%	10,077	100.0%	9,968	100.0%
Employed and Living in the Selection Area	3,375	34.2%	3,546	35.2%	3,597	36.1%
Employed in the Selection Area but Living Outside	6,497	65.8%	6,531	64.8%	6,371	63.9%

Table 5 (continued)

Outflow Job Characteristics (Primary Jobs)	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	3,007	100.0%	2,825	100.0%	2,910	100.0%
Workers Aged 29 or younger	810	26.9%	760	26.9%	779	26.8%
Workers Aged 30 to 54	1,512	50.3%	1,434	50.8%	1,462	50.2%
Workers Aged 55 or older	685	22.8%	631	22.3%	669	23.0%
Workers Earning \$1,250 per month or less	769	25.6%	731	25.9%	808	27.8%
Workers Earning \$1,251 to \$3,333 per month	1,483	49.3%	1,446	51.2%	1,435	49.3%
Workers Earning More than \$3,333 per month	755	25.1%	648	22.9%	667	22.9%
Workers in the "Goods Producing" Industry Class	619	20.6%	535	18.9%	665	22.9%
Workers in the "Trade, Transportation, and Utilities" Industry Class	755	25.1%	742	26.3%	791	27.2%
Workers in the "All Other Services" Industry Class	1,633	54.3%	1,548	54.8%	1,454	50.0%

Inflow Job Characteristics (Primary Jobs)	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	6,497	100.0%	6,531	100.0%	6,371	100.0%
Workers Aged 29 or younger	1,778	27.4%	1,711	26.2%	1,734	27.2%
Workers Aged 30 to 54	3,195	49.2%	3,348	51.3%	3,297	51.8%
Workers Aged 55 or older	1,524	23.5%	1,472	22.5%	1,340	21.0%
Workers Earning \$1,250 per month or less	1,730	26.6%	1,675	25.6%	1,773	27.8%
Workers Earning \$1,251 to \$3,333 per month	2,942	45.3%	3,047	46.7%	2,978	46.7%
Workers Earning More than \$3,333 per month	1,825	28.1%	1,809	27.7%	1,620	25.4%
Workers in the "Goods Producing" Industry Class	298	4.6%	251	3.8%	263	4.1%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,864	28.7%	1,828	28.0%	1,804	28.3%
Workers in the "All Other Services" Industry Class	4,335	66.7%	4,452	68.2%	4,304	67.6%

Interior Flow Job Characteristics (Primary Jobs)	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	3,375	100.0%	3,546	100.0%	3,597	100.0%
Workers Aged 29 or younger	845	25.0%	950	26.8%	1,009	28.1%
Workers Aged 30 to 54	1,731	51.3%	1,777	50.1%	1,807	50.2%
Workers Aged 55 or older	799	23.7%	819	23.1%	781	21.7%
Workers Earning \$1,250 per month or less	925	27.4%	932	26.3%	976	27.1%
Workers Earning \$1,251 to \$3,333 per month	1,554	46.0%	1,706	48.1%	1,735	48.2%
Workers Earning More than \$3,333 per month	896	26.5%	908	25.6%	886	24.6%
Workers in the "Goods Producing" Industry Class	185	5.5%	148	4.2%	182	5.1%
Workers in the "Trade, Transportation, and Utilities" Industry Class	774	22.9%	806	22.7%	828	23.0%
Workers in the "All Other Services" Industry Class	2,416	71.6%	2,592	73.1%	2,587	71.9%

Source: U.S. Census Bureau, LED Origin-Destination Data Base, March 2015

The Distance/Direction Report depicted in Table 6 and Figure 1 shows the number (count) and percentage (share) of primary job holders living in Scottsbluff and the distance they travel to work. Looking at Table 6, the count of primary job holders living within Scottsbluff is fewer in 2011 compared to 2009. The distribution of miles traveled to work has shifted slightly since 2009. Figure 1 shows the location and concentration of these workplaces.

Table 6

Distance/Direction Report - Home to Work Census Block

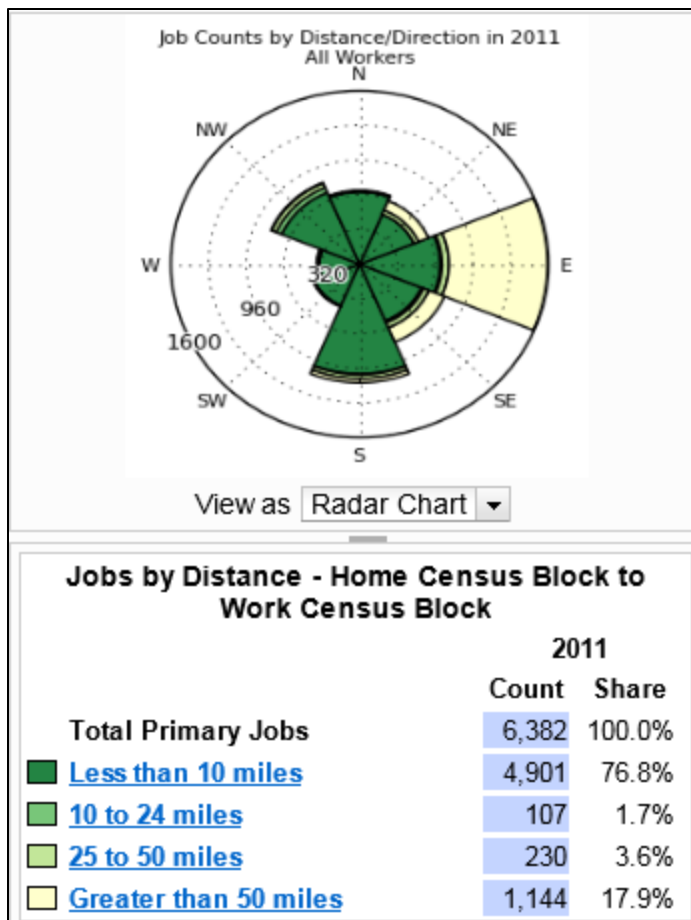
Live within study area - distance to work

Job Counts in Work Blocks by Distance Only

	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	6,382	100.0%	6,371	100.0%	6,507	100.0%
Less than 10 miles	4,901	76.8%	5,062	79.5%	5,232	80.4%
10 to 24 miles	107	1.7%	123	1.9%	94	1.4%
25 to 50 miles	230	3.6%	211	3.3%	244	3.7%
Greater than 50 miles	1,144	17.9%	975	15.3%	937	14.4%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, March 2015

Figure 1



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, March 2015

Table 7 and Figure 2 show the number (count) and percentage (share) of people employed within Scottsbluff and the distance to their homes. Looking at Table 7, the number of primary jobs held within Scottsbluff has decreased since 2009. The data also show the majority of Scottsbluff 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 7

Distance/Direction Report - Work to Home Census Block

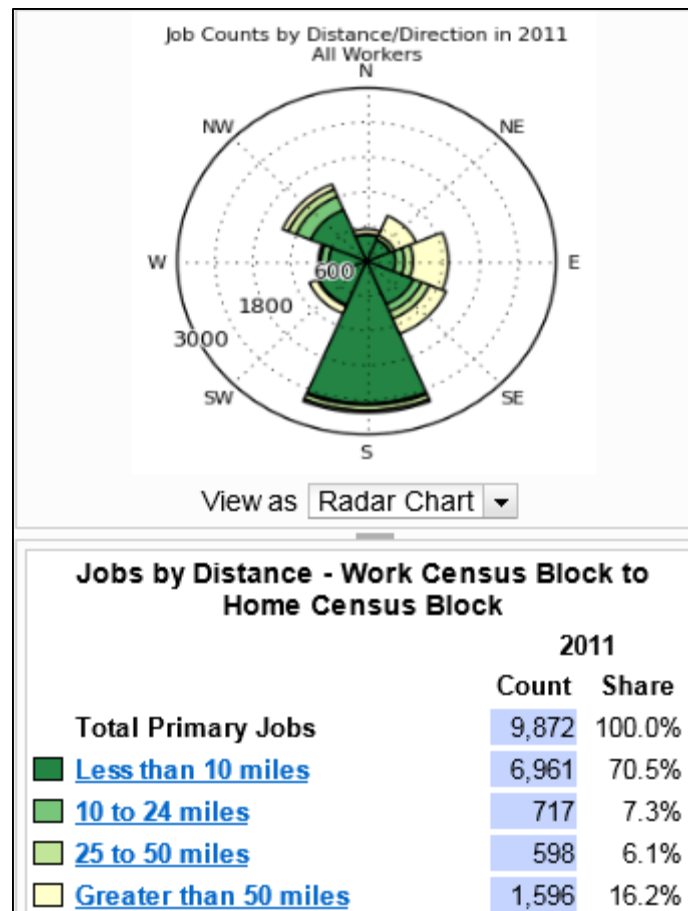
Live within study area - distance to home

Job Counts in Home Blocks by Distance Only

	2011		2010		2009	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	9,872	100.0%	10,077	100.0%	9,968	100.0%
Less than 10 miles	6,961	70.5%	7,333	72.8%	7,288	73.1%
10 to 24 miles	717	7.3%	751	7.5%	682	6.8%
25 to 50 miles	598	6.1%	612	6.1%	628	6.3%
Greater than 50 miles	1,596	16.2%	1,381	13.7%	1,370	13.7%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, March 2015

Figure 2



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, March 2015

Population and Migration Trends

The following tables (Tables 8 and 9) present population trend data for Scotts Bluff County and the surrounding area. As Table 8 indicates, Scotts Bluff County's population experienced a very minimal change (0.0 percent average annual) between 1970 and 2010 for a total increase of 1.5 percent or 538 people. This population increase compares to an average annual increase of 0.5 percent, 23.0 percent total, for Nebraska as a whole. Scotts Bluff County reported an average annual 0.1 percent decrease in population from 2010 to 2013 (122 people total).

Table 8

County Population 1970-2013 Scotts Bluff County and the Surrounding Area

Location	---Year---						Avg. Annual	Avg. Annual
	1970	1980	1990	2000	2010	2013	% Change 1970-2010	% Change 2010-2013
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,868,516	0.5	0.8
Scotts Bluff County	36,432	38,344	36,025	36,951	36,970	36,848	0.0	-0.1
Banner County	1,034	918	852	819	690	759	-1.0	3.2
Box Butte County	10,094	13,696	13,130	12,158	11,308	11,305	0.3	0.0
Morrill County	5,813	6,085	5,423	5,440	5,042	4,908	-0.4	-0.9
Sioux County	2,034	1,845	1,549	1,475	1,311	1,313	-1.1	0.1

Source: U.S. Bureau of the Census, Census of Population, April 2014

Table 9 data reveals the population of Scotts Bluff County's incorporated places as a whole experienced an average annual population increase of 0.3 percent from 1970 to 2010 and a decrease of 0.1 percent from 2010 to 2013 for a total increase of 12.7 percent (3,246 people) from 1970 to 2013. Scottsbluff, the county's largest city, reported a 3.6 percent increase in population (516 people) between 1970 and 2013. The unincorporated areas outside of the selected communities experienced a 25.9 percent decrease (2,830 people) during the period 1970–2013.

Table 9

County Population 1970-2013 Scotts Bluff County Communities and Unincorporated Areas

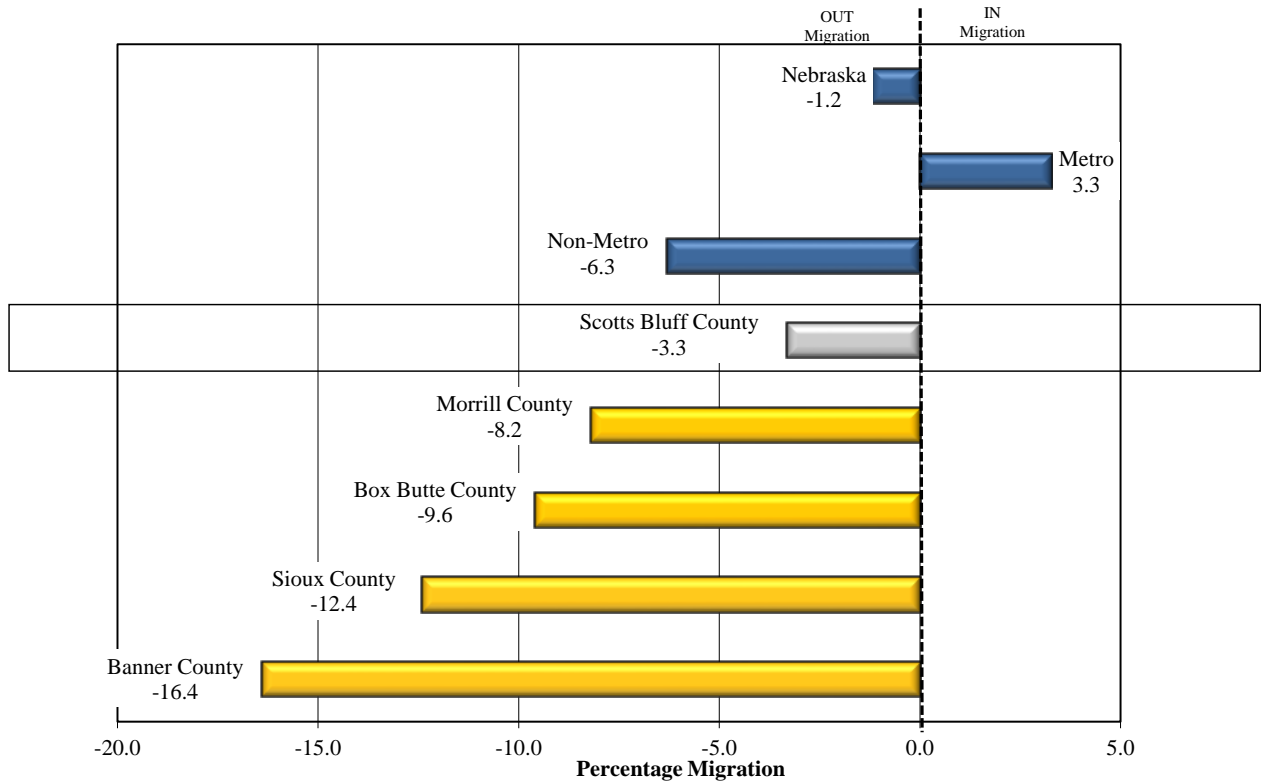
Location	---Year---						Avg. Annual	Avg. Annual
	1970	1980	1990	2000	2010	2013	% Change 1970-2010	% Change 2010-2013
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,868,516	0.5	0.8
Scotts Bluff County	36,432	38,344	36,025	36,951	36,970	36,848	0.0	-0.1
Gering	5,639	7,760	8,025	7,751	8,500	8,480	1.0	-0.1
Henry	147	155	145	162	106	106	-0.8	0.0
Lyman	561	551	452	421	341	336	-1.2	-0.5
McGrew	79	110	99	103	105	105	0.7	0.0
Melbeta	124	151	116	138	112	113	-0.3	0.3
Minatare	939	969	807	810	816	808	-0.4	-0.3
Mitchell	1,842	1,956	1,742	1,831	1,702	1,685	-0.2	-0.3
Morrill	937	1,097	980	957	921	925	0.0	0.1
Scottsbluff	14,507	14,156	14,029	14,732	15,039	15,023	0.1	0.0
Terrytown	747	727	535	646	1,198	1,187	1.2	-0.3
Total Incorporated Places	25,522	27,632	26,930	27,551	28,840	28,768	0.3	-0.1
Unincorporated Areas	10,910	10,712	9,095	9,400	8,130	8,080	-0.7	-0.2

Source: U.S. Bureau of the Census, Census of Population, April 2014

The next two charts (Chart 6 & 7) graphically depict the migration patterns for Nebraska, Scotts Bluff 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, Scotts Bluff County experienced a net out-migration of 1,205 people or 3.3 percent of its 2000 population.

Chart 6

**2000-2010 Net Migration as Percent of 2000 Population
Scotts Bluff County and the Surrounding Area**

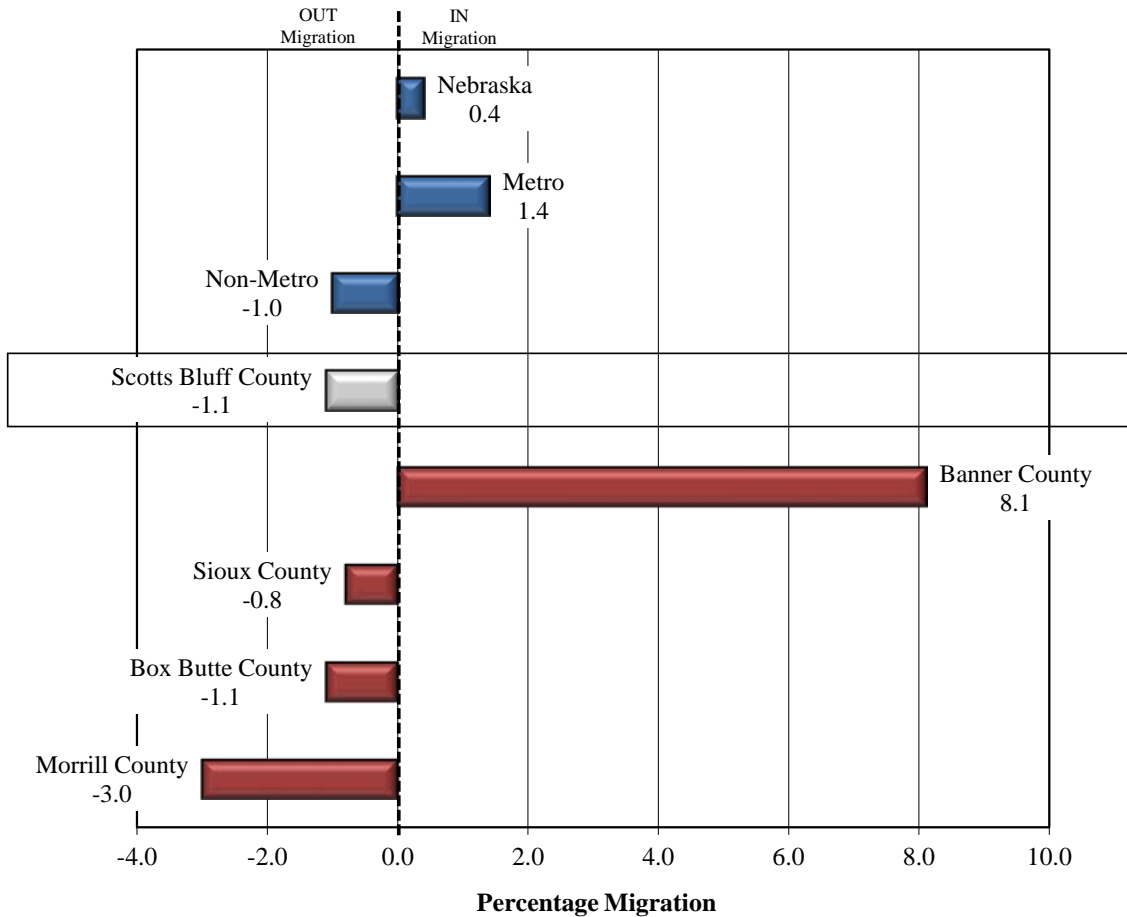


Source: U.S. Census Bureau, County population and estimated components of population change, June 2014

Looking at the years 2010–2013 (Chart 7), Scotts Bluff County experienced a net out-migration of 408 people or 1.1 percent of its 2010 population.

Chart 7

2010-2013 Net Migration as Percent of 2010 Population Scotts Bluff County and the Surrounding Area



Source: U.S. Census Bureau, County population and estimated components of population change, June 2014

The next two tables (Tables 10 and 11) provide detail on migration patterns. Data reported in these tables are 2007–2011 five-year estimates, which are the latest multiyear estimates available. Multiyear estimates from the American Community Survey are “period” estimates that represent data collected over a period of time (as opposed to “point-in-time” estimates, such as the decennial census, that approximate the characteristics of an area on a specific date). Migration patterns are influenced by employment opportunities, cost-of-living, and quality-of-life factors.

Table 10 data show 36 percent of the 2,519 people moving into Scotts Bluff County moved from other Nebraska locations (907 people). Data also reveal 1,612 people (64 percent) migrated into the county from other states.

Table 10

Scotts Bluff County, Nebraska, 2007-2011, Five-Year Estimate
Inflow Into County

	Number	Percent
Movers within the United States	6,413	100.0
Within Same County	3,894	60.7
Different County, Same State	907	14.1
Different State	1,612	25.1
Movers from Abroad	0	0.0
Total Movement	6,413	

Source: American Community Survey, County-to-County Migration Flows, 2007-2011 data, accessed February 2014

Reported Counties
(where people moved from)

State	County	Number
Nebraska	Cheyenne County	194
Oregon	Washington County	148
Nebraska	Morrill County	142
Wyoming	Natrona County	134
Colorado	Larimer County	104
Colorado	Teller County	93
Nebraska	Douglas County	82
Nebraska	Kimball County	74
Wyoming	Converse County	74
Arizona	Maricopa County	61
Asia	-	59
Florida	Clay County	56
Idaho	Gooding County	54
Colorado	Routt County	53
Nebraska	Saline County	42
Nebraska	Sarpy County	41
Wyoming	Goshen County	41
Alabama	Tuscaloosa County	40
Colorado	Morgan County	38
Colorado	Weld County	38
Nebraska	Sioux County	36
Washington	Pierce County	35
Nebraska	Dawes County	34
Nebraska	Garden County	33
Nebraska	Phelps County	32

Source: American Community Survey, County-to-County Migration Flows, 2007-2011 data, accessed February 2014

The 2007–2011, five-year estimates in Table 11 reveal 38.4 percent of the 2,087 people migrating out of Scotts Bluff County remained in the state of Nebraska (801 people). Data show 1,286 Scotts Bluff County residents (61.6 percent) also moved to other states during this time period. Employment, housing, and educational opportunities located in these counties play a major role in this migration pattern.

Table 11

**Scotts Bluff County, Nebraska, 2007-2011, Five-Year Estimate
Outflow From County**

	Number	Percent
Movers within the United States	5,981	100.0
Within Same County	3,894	65.1
Different County, Same State	801	13.4
Different State	1,286	21.5
Movers to Puerto Rico	0	0.0
Total Movement	5,981	

Source: American Community Survey, County-to-County Migration Flows, 2007-2011 data, accessed February 2014

**Reported Counties
(where people moved to)**

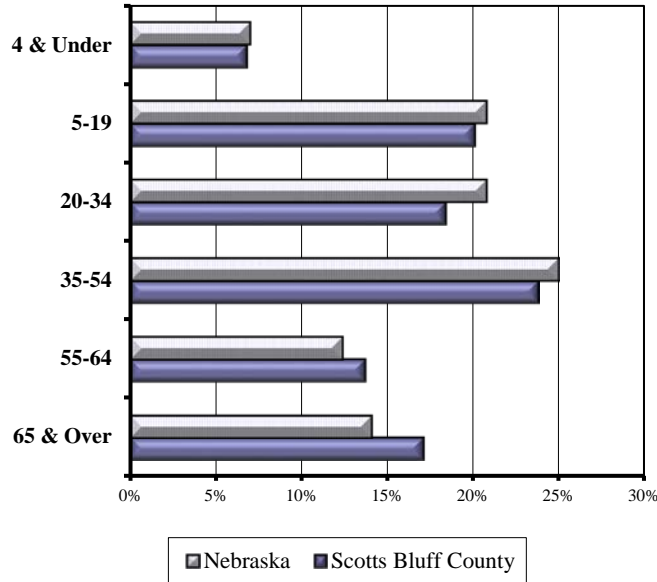
State	County	Number
Nebraska	Lancaster County	204
Wyoming	Goshen County	195
Florida	Duval County	193
Wyoming	Converse County	106
Colorado	Arapahoe County	105
Nebraska	Douglas County	103
Nebraska	Dawes County	101
Missouri	St. Charles County	92
Wyoming	Laramie County	91
Arizona	Maricopa County	87
Nebraska	Morrill County	52
Nebraska	Cheyenne County	50
Colorado	Boulder County	42
Nebraska	Adams County	40
Nebraska	Hall County	37
Wyoming	Albany County	32
Indiana	Allen County	30
South Dakota	Minnehaha County	30
Nebraska	Banner County	29
Nebraska	Box Butte County	29
South Dakota	Pennington County	28
Texas	Potter County	21
Nebraska	Seward County	21
Wyoming	Fremont County	19
Nebraska	Washington County	19

Source: American Community Survey, County-to-County Migration Flows, 2007-2011 data, accessed February 2014

The following chart and table (Chart 8; Table 12) compare the U.S. Census Bureau’s age distribution of population for Nebraska as a whole and Scotts Bluff County. The population of Scotts Bluff County is significantly older in age than Nebraska as a whole. The median age for Scotts Bluff County residents in 2013 was 39.0 years of age compared to 36.2 years of age for residents of Nebraska as a whole.

Chart 8

**Age Distribution of the Population, 2013
Scotts Bluff County and Nebraska**



Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," June 2014

Table 12

**Age Distribution of the Population, 2013
Scotts Bluff County and Nebraska**

	2013 Population		Percent	
	Nebraska	Scotts Bluff County	Nebraska	Scotts Bluff County
4 & Under	130,160	2,520	7.0%	6.8%
5-19	387,807	7,422	20.8%	20.1%
20-34	388,117	6,789	20.8%	18.4%
35-54	467,120	8,764	25.0%	23.8%
55-64	231,304	5,040	12.4%	13.7%
65 & Over	264,008	6,313	14.1%	17.1%
Total	1,868,516	36,848	100%	100%
Median Age	36.2	39.0		

Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," June 2014

Table 13 shows additional median ages as estimated by the American Community Survey for communities within Scotts Bluff County and the surrounding counties both as a total and by gender. These are 5-year estimates and differ from the U.S. Census Bureau’s single year distributions. Chart 9 graphically depicts the median age distribution for the study area.

Table 13

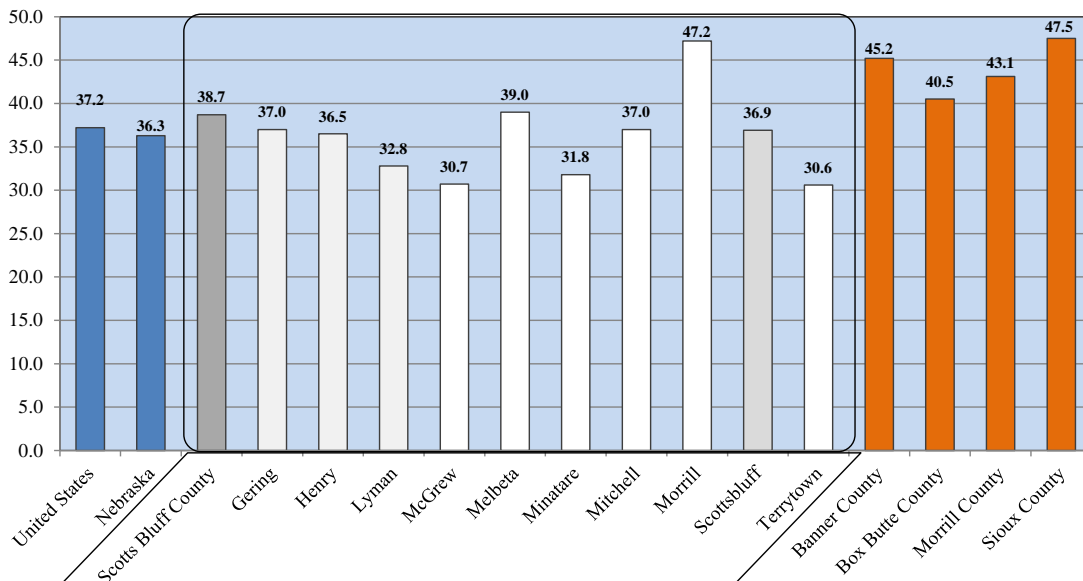
Median Age by Location and Gender
5-Year Estimate, 2008–2012
Scotts Bluff County and the Surrounding Area

	Median Age		
	Total	Male	Female
United States	37.2	35.8	38.5
Nebraska	36.3	35.0	37.5
Scotts Bluff County	38.7	37.0	40.1
Gering	37.0	36.6	37.4
Henry	36.5	26.0	37.1
Lyman	32.8	31.5	33.0
McGrew	30.7	30.5	30.9
Melbeta	39.0	34.3	44.0
Minatare	31.8	29.3	33.8
Mitchell	37.0	33.7	40.5
Morrill	47.2	47.9	43.6
Scottsbluff	36.9	35.1	39.6
Terrytown	30.6	24.8	40.9
Banner County	45.2	48.7	43.8
Box Butte County	40.5	39.9	41.7
Morrill County	43.1	41.3	45.7
Sioux County	47.5	47.8	46.8

Source: U.S. Census Bureau, 2008-2012 American Community Survey, March 2013
 Data Set: 2008-2012 American Community Survey 5-Year Estimates

Chart 9

Median Age by Location, 5-Year Estimate, 2008–2012
Scotts Bluff County and the Surrounding Area



Source: U.S. Census Bureau, 2008-2012 American Community Survey, March 2013
 Data Set: 2008-2012 American Community Survey 5-Year Estimates

Retail Sales

Table 14 and Chart 10 show the retail sales (non-motor vehicle) pull factors for Scotts Bluff County and the surrounding area for 2013. The pull factor is computed by dividing the per capita taxable, non-motor vehicle (NMV) retail sales by the state average per capita NMV retail sales. A pull factor of one indicates an area has per capita NMV retail sales equal to the state. A value greater than one indicates an area is drawing retail sales from other areas. Conversely, a pull factor with a value less than one indicates the subject area is losing potential retail activity to other places or, in other words, is experiencing retail sales leakage. This simple calculation does not factor in income levels or purchasing power within an area.

Table 14

2013 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska, Scotts Bluff County, and Surrounding Counties

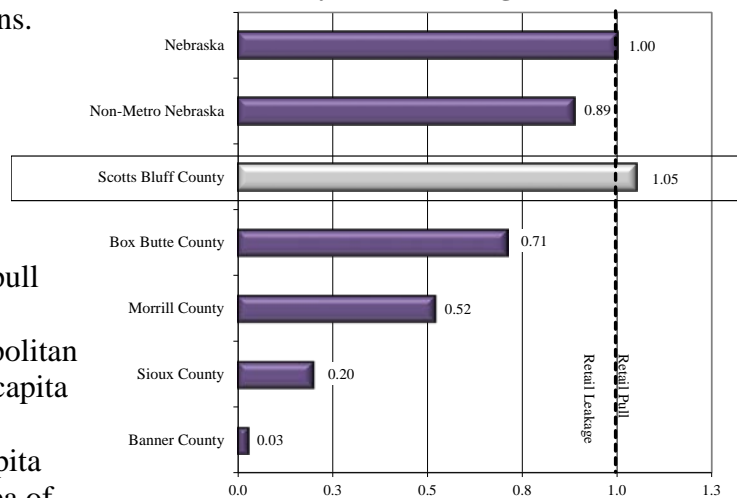
	2013 Population	2013 Retail Sales (x \$1,000)	2013 Per Cap Sales (\$)	2013 Pull Factor
Nebraska	1,868,516	22,469,705	12,025	1.00
Non-Metro Nebraska	781,295	8,349,191	10,686	0.89
Scotts Bluff County	36,848	464,474	12,605	1.05
Banner County	759	265	350	0.03
Box Butte County	11,305	95,995	8,491	0.71
Morrill County	4,908	30,728	6,261	0.52
Sioux County	1,313	3,121	2,377	0.20

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2014

Chart 10

Reviewing the pull factors at the county level indicates Scotts Bluff County experiences net positive retail injections. The 2013 pull factor of 1.05 indicates, on a per capita basis, retail sales in Scotts Bluff County are similar to 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 Scotts Bluff County (1.05) with the pull factor for the non-metropolitan area of Nebraska (0.89) indicates per capita retail sales in Scotts Bluff County are 18.0 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

2013 Retail Sales (NMV) Pull Factors, Nebraska, Scotts Bluff County & Surrounding Counties



Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2014

Table 15 and Chart 11 compare the 2013 pull factors for selected area communities. The community of Scottsbluff's pull factor of 2.08 indicates that, on a per capita basis, non-motor vehicle retail sales in Scottsbluff are approximately 108.0 percent greater than the state's average per capita sales.

Table 15

**2013 Retail Sales (NMV) Pull Factors
Nebraska, Scotts Bluff County, and Selected Study Area Communities**

	2013 Population	2013 Retail Sales (x \$1,000)	2013 Per Cap Sales (\$)	2013 Pull Factor
Nebraska	1,868,516	22,469,705	12,025	1.00
Non-Metro Nebraska	781,295	8,349,191	10,686	0.89
Scotts Bluff County	36,848	464,474	12,605	1.05
Scottsbluff (Scotts Bluff)	15,023	376,313	25,049	2.08
County Total (Banner)	759	265	350	0.03
Alliance (Box Butte)	8,498	89,223	10,499	0.87
Bridgeport (Morrill)	1,522	22,157	14,558	1.21
Harrison (Sioux)	247	2,911	11,785	0.98

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2014

Chart 11

**2013 Retail Sales (NMV) Pull Factors, Nebraska,
Scotts Bluff County & Selected Study Area Communities**

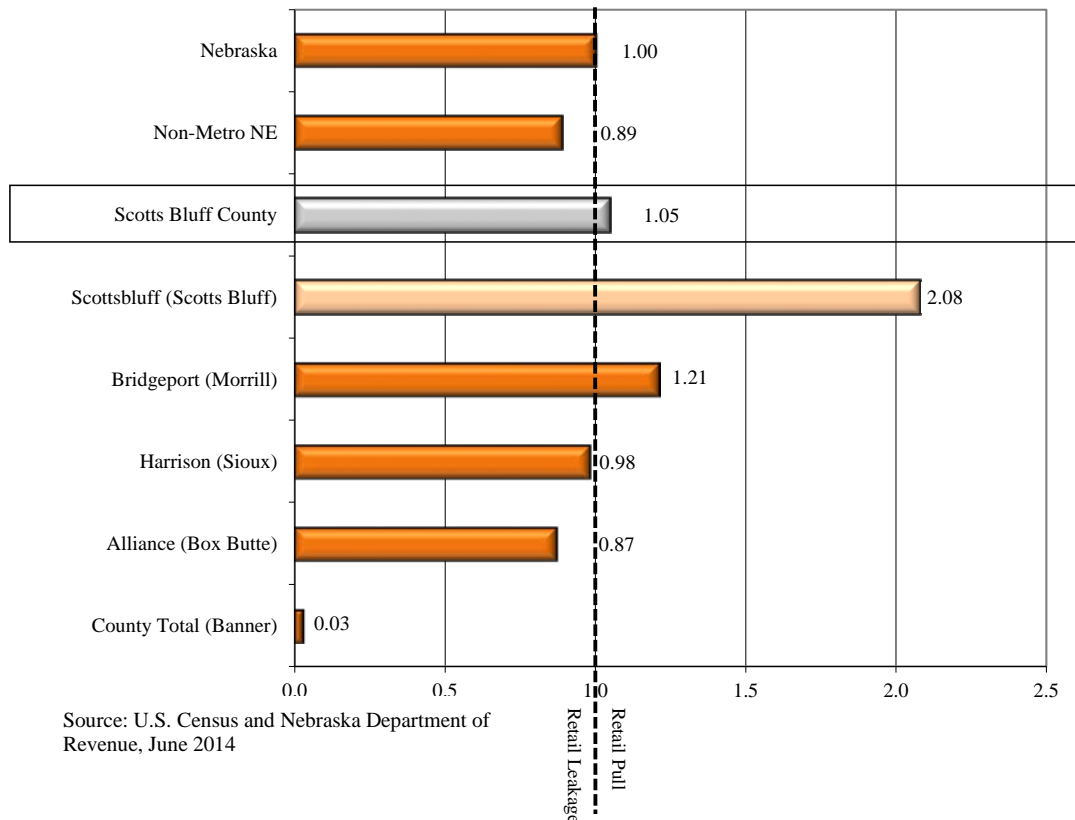


Table 16 (sorted by population) and Chart 12 (sorted by pull factor) further breakdown the 2013 pull factors into the communities reporting retail sales figures within Scotts Bluff County. As this table indicates, the community of Scottsbluff had the strongest pull factor (2.08) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 1.05 for Scotts Bluff County in 2013.

Table 16

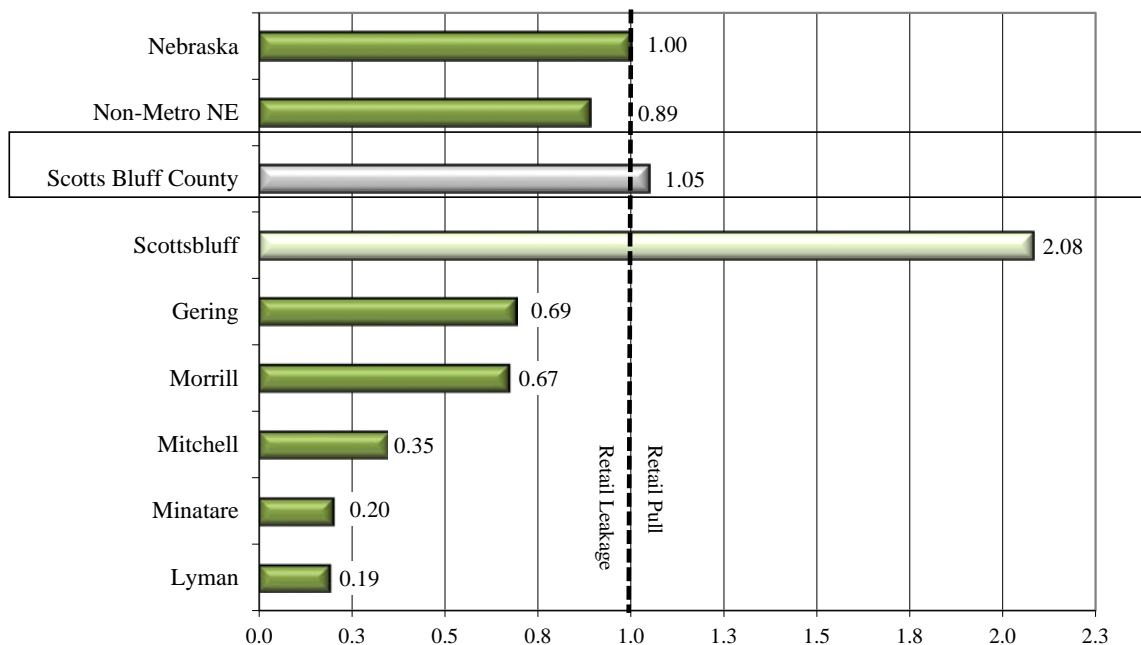
2013 Retail Sales (NMV) Pull Factors Nebraska and Available Scotts Bluff County Area Communities

	2013 Population	2013 Retail Sales (x \$1,000)	2013 Per Cap Sales (\$)	2013 Pull Factor
Nebraska	1,868,516	22,469,705	12,025	1.00
Non-Metro Nebraska	781,295	8,349,191	10,686	0.89
Scotts Bluff County	36,848	464,474	12,605	1.05
Scottsbluff	15,023	376,313	25,049	2.08
Gering	8,480	70,122	8,269	0.69
Mitchell	1,685	7,175	4,258	0.35
Morrill	925	7,494	8,102	0.67
Minatare	808	1,934	2,393	0.20
Lyman	336	761	2,264	0.19

Source: U.S. Census Bureau and the Nebraska Department of Revenue, June 2014

Chart 12

2013 Retail Sales (NMV) Pull Factors, Nebraska and Available Scotts Bluff County Communities



Source: U.S. Census and the Nebraska Department of Revenue, June 2014

Table 17 (sorted by population) and Chart 13 (sorted by pull factor) show the 2013 pull factors for Nebraska, Scottsbluff, and eight other similarly sized communities selected from around the state. Papillion’s pull factor of 2.13 leads the group for 2013 thus indicating Papillion has greater retail pull.

Table 17

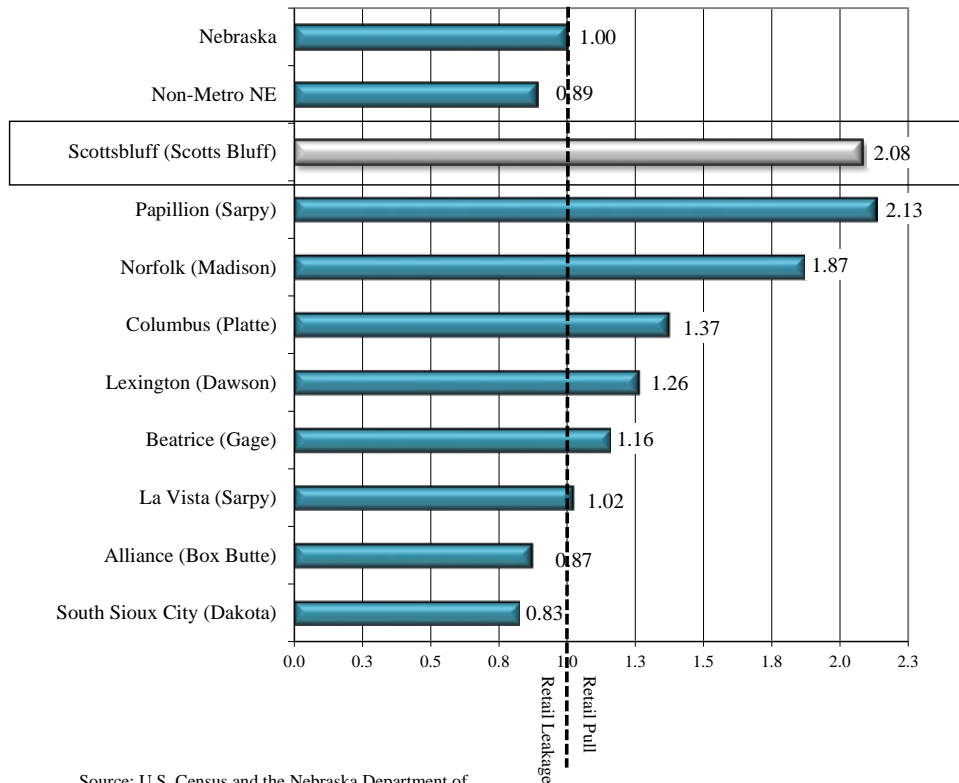
2013 Retail Sales (NMV) Pull Factors Scottsbluff & Other Similarly Sized Nebraska Communities

	2013 Population	2013 Retail Sales (x \$1,000)	2013 Per Cap Sales (\$)	2013 Pull Factor
Nebraska	1,868,516	22,469,705	12,025	1.00
Non-Metro Nebraska	781,295	8,349,191	10,686	0.89
Scottsbluff (Scotts Bluff)	15,023	376,313	25,049	2.08
Alliance (Box Butte)	8,498	89,223	10,499	0.87
Lexington (Dawson)	10,204	154,362	15,128	1.26
Beatrice (Gage)	12,157	168,933	13,896	1.16
South Sioux City (Dakota)	13,424	134,013	9,983	0.83
La Vista (Sarpy)	17,562	215,793	12,287	1.02
Papillion (Sarpy)	21,921	561,342	25,608	2.13
Columbus (Platte)	22,533	371,600	16,491	1.37
Norfolk (Madison)	24,523	551,113	22,473	1.87

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2014

Chart 13

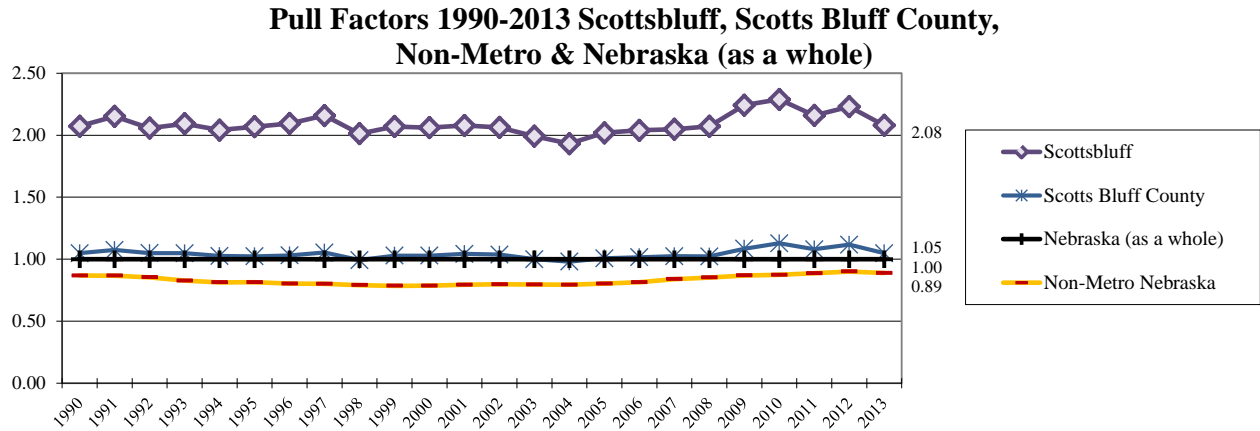
2013 Retail Sales (NMV) Pull Factors, Scottsbluff & Other Similarly Sized Nebraska Communities



Source: U.S. Census and the Nebraska Department of Revenue, June 2014

Chart 14 illustrates the pull factor trend for Scottsbluff, Scotts Bluff County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2013. In examining the time line, the city of Scottsbluff shows retail pull fluctuating well above the state average throughout the entire study period. Data within Scotts Bluff 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.

Chart 14



Source: U.S. Census Bureau and Nebraska Department of Revenue, 2014

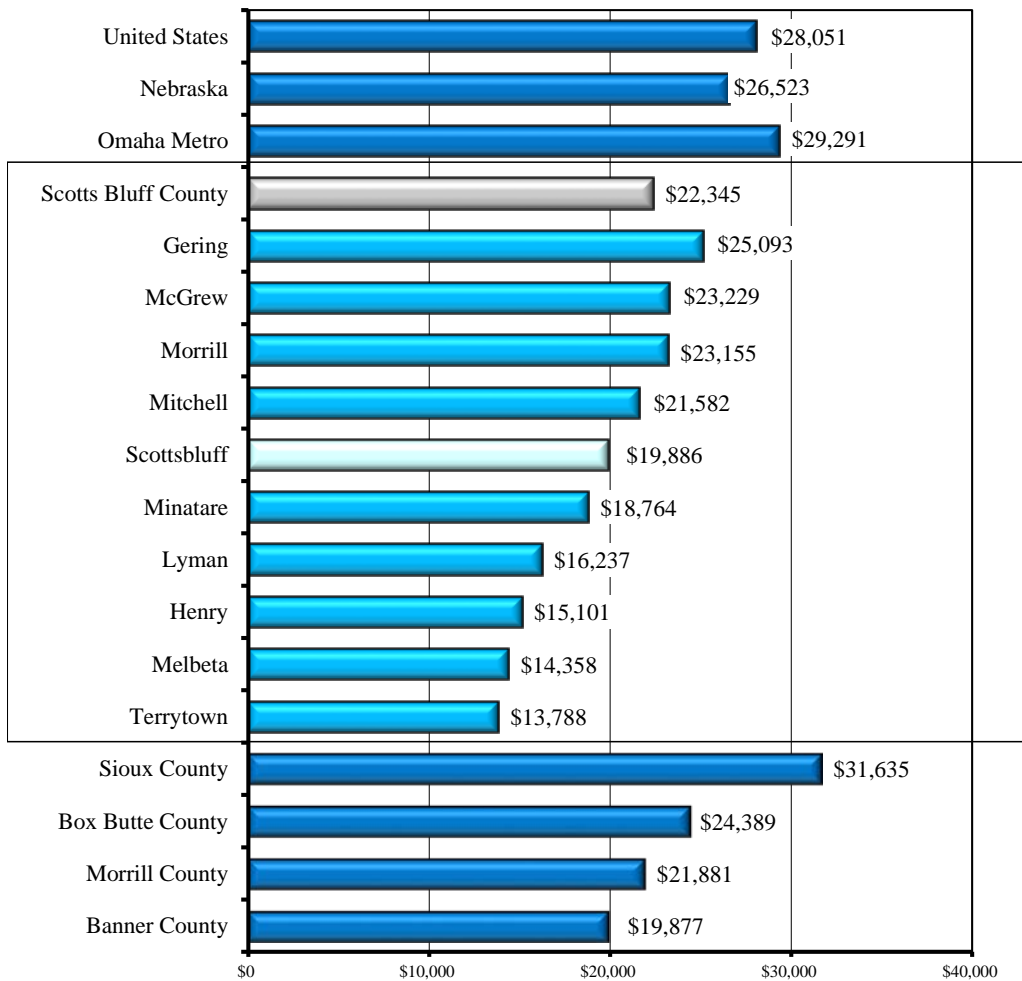
Per Capita Personal Income

Chart 15 examines the per capita personal income levels within the study area. The American Community Survey data allows us to look more closely at non-metropolitan areas in Nebraska. Information on income distribution comes from various sources including earnings, retirement income, and public assistance.

The 2008–2012, five-year data show per capita personal income for Scotts Bluff County is estimated to be \$22,345 compared to \$26,523 for Nebraska as a whole.

Chart 15

Per Capita Income, 2008-2012, Five-Year Estimate, Nebraska, Scotts Bluff County & Surrounding Counties



Source: U.S. Census Bureau, 2012 inflation adjusted past 12-months, 2008-2012 American Community Survey, accessed February 2014.

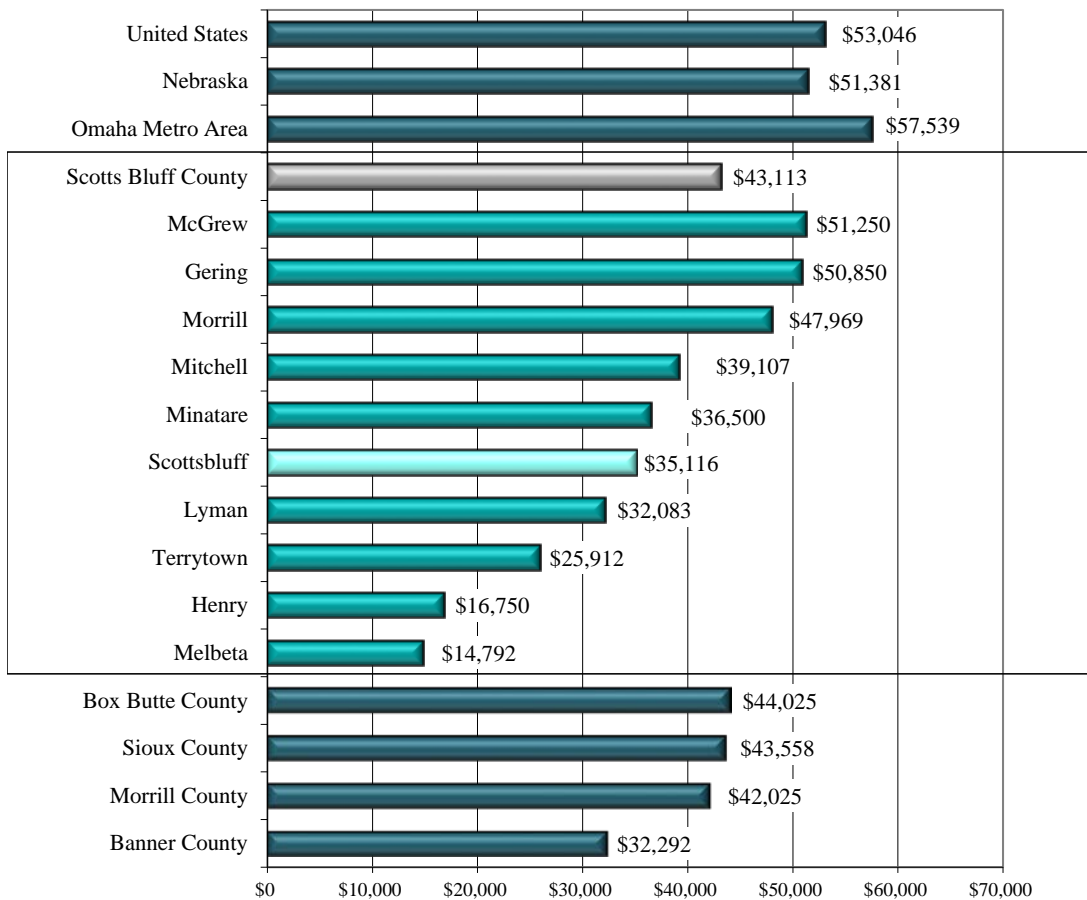
Median Household Income

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 2008–2012, five-year data show median household income for Scotts Bluff County is estimated to be \$43,113 compared to \$51,381 for Nebraska as a whole.

Chart 16

Median Household Income, 2008-2012 Five -Year Estimate Nebraska, Scotts Bluff County & Surrounding Counties



Source: U.S. Census Bureau, 2008-2012 American Community Survey, accessed February 2014.