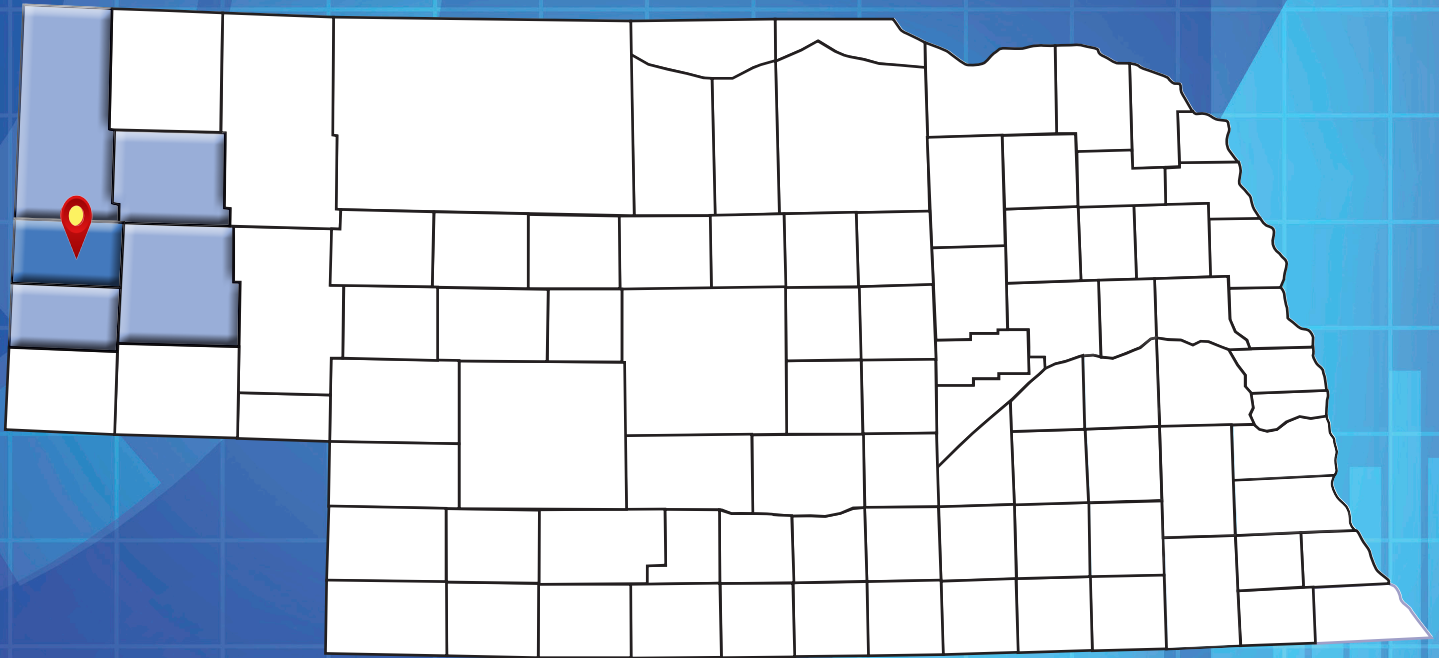


# ECONOMIC AND DEMOGRAPHIC TRENDS

*Scottsbluff, Scotts Bluff County,  
and the Surrounding Area  
February 2018*



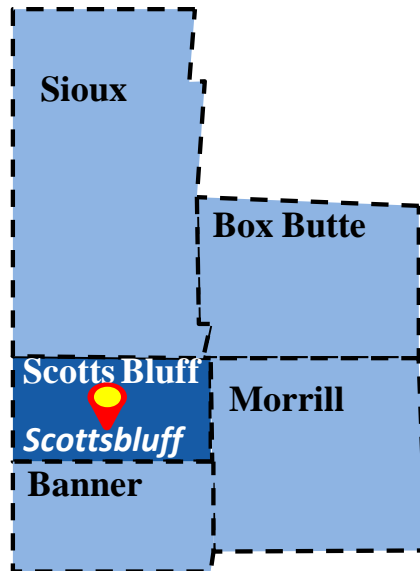
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## **Economic and Demographic Trends in Scottsbluff, Scotts Bluff County, and the Surrounding Area**



This study provides data on labor force, employment, commuting patterns, population, migration, retail sales, and income for Scotts Bluff County. For select measures, comparable data are provided for the City of Scottsbluff 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 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 2007–2016. 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 nonfarm 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 decreased 0.6 percent (100 jobs) between 2007 and 2016.

Table 1 also provides employment data for Scotts Bluff County by major economic sector for years 2007–2016. Of the sectors reporting complete data, the Information sector recorded the largest percentage increase in employment between 2007 and 2016 (35.7 percent or 79 jobs). The Construction sector recorded the largest actual employment increase between 2007 and 2016 (164 jobs or 16.9 percent).

Table 1

**Nonfarm Wage & Salary Employment Trends, Scotts Bluff County, Nebraska  
Selected Years: 2007–2016**

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% Change 2007-2016	# Change 2007-2016
<b>Nonfarm Employment (W&amp;S)</b>	<b>17,308</b>	<b>17,169</b>	<b>16,962</b>	<b>16,662</b>	<b>16,673</b>	<b>17,013</b>	<b>16,942</b>	<b>16,761</b>	<b>16,903</b>	<b>17,208</b>	<b>-0.6</b>	<b>-100</b>
<b>Total Private Industries</b>	<b>14,146</b>	<b>13,996</b>	<b>13,777</b>	<b>13,488</b>	<b>13,493</b>	<b>13,813</b>	<b>13,755</b>	<b>13,571</b>	<b>13,692</b>	<b>13,893</b>	<b>-1.8</b>	<b>-253</b>
<b>Goods Producing</b>	<b>2,461</b>	<b>2,418</b>	<b>2,264</b>	<b>1,964</b>	<b>2,086</b>	<b>2,113</b>	<b>2,154</b>	<b>2,149</b>	<b>2,201</b>	<b>2,403</b>	<b>-2.4</b>	<b>-58</b>
Natural Resources & Mining	245	221	283	279	281	268	266	258	260	280	14.3	35
Construction	969	1,041	960	740	823	833	766	745	850	1,133	16.9	164
Manufacturing	1,247	1,156	1,021	945	982	1,012	1,122	1,146	1,092	989	-20.7	-258
<b>Service Providing</b>	<b>11,685</b>	<b>11,578</b>	<b>11,513</b>	<b>11,524</b>	<b>11,407</b>	<b>11,700</b>	<b>11,601</b>	<b>11,422</b>	<b>11,491</b>	<b>11,490</b>	<b>-1.7</b>	<b>-195</b>
Trade, Transportation & Utilities	3,750	3,742	3,793	3,704	3,724	3,779	3,701	3,788	3,838	3,832	2.2	82
Information	221	220	229	221	219	235	265	283	293	300	35.7	79
Financial Activities	1,365	1,254	1,264	1,240	1,195	1,092	1,045	909	697	703	-48.5	-662
Professional & Business Services	1,413	1,269	1,246	1,309	1,282	1,290	1,214	1,253	1,519	1,554	10.0	141
Education & Health Services	2,909	3,092	3,011	3,049	3,020	3,054	3,355	3,160	3,071	2,986	2.6	77
Leisure & Hospitality	1,613	1,629	1,608	1,637	1,616	1,626	1,645	1,658	1,701	1,746	8.2	133
Other Services, except Public	415	372	361	365	352	626	376	371	374	369	-11.1	-46
<b>Government</b>	<b>3,162</b>	<b>3,173</b>	<b>3,185</b>	<b>3,174</b>	<b>3,180</b>	<b>3,200</b>	<b>3,187</b>	<b>3,190</b>	<b>3,211</b>	<b>3,315</b>	<b>4.8</b>	<b>153</b>
Federal	178	188	184	192	177	167	155	157	159	154	-13.5	-24
State	484	465	478	490	520	551	579	572	580	594	22.7	110
Local	2,500	2,521	2,523	2,492	2,482	2,481	2,453	2,462	2,473	2,567	2.7	67

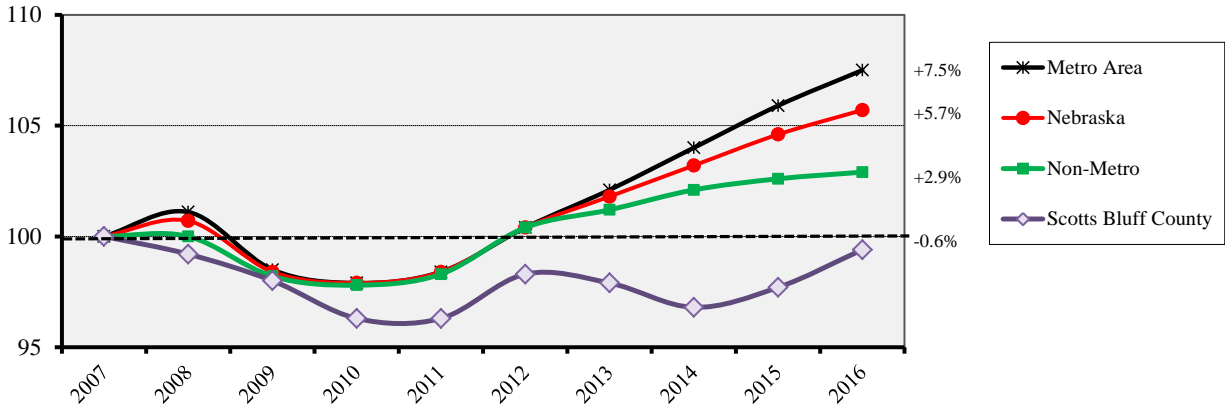
Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data, released June 2017  
Labor Force & Work Force Summary, 2007-2016, Annually, Scotts Bluff County (June 2017 data)

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 2007–2016. Non-metropolitan Nebraska is defined as Nebraska minus the seven Lincoln and Omaha metropolitan counties of Cass, Douglas, Lancaster, Sarpy, Saunders, Seward, and Washington.

As this chart indicates, total nonfarm wage and salary employment in Scotts Bluff County decreased 0.6 percent (100 jobs) from 2007 to 2016, compared to a 5.7 percent increase for Nebraska as a whole, a 7.5 percent increase in metropolitan Nebraska, and a 2.9 percent increase in non-metropolitan Nebraska.

Chart 1

**Nonfarm (W&S) Employment, Scotts Bluff County, Nebraska, Metro, and Non-Metro Nebraska, 2007–2016  
(Index, 2007=100)**

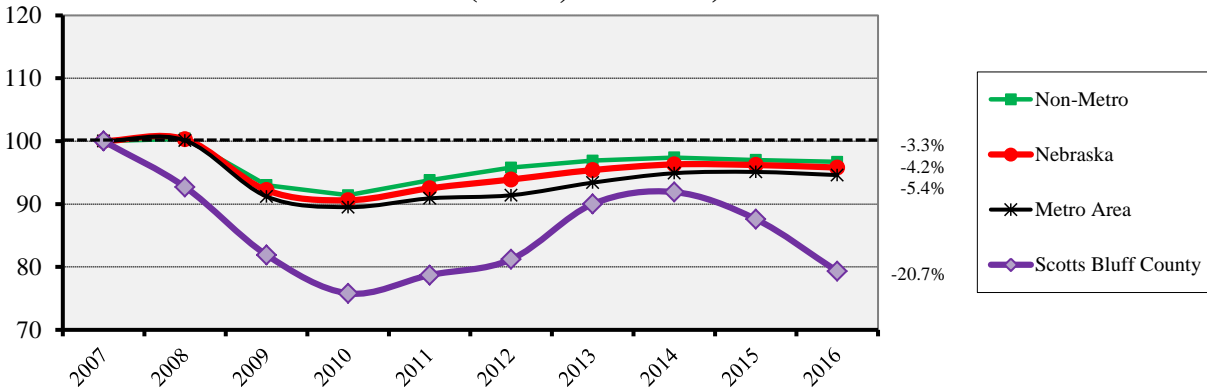


Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), Released June 2017

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 20.7 percent decrease in employment (258 jobs) between 2007 and 2016. This compares to a 3.3 percent decrease in employment for non-metropolitan Nebraska; a 4.2 percent decrease for Nebraska as a whole; and a 5.4 percent decrease for metropolitan Nebraska over the same period.

Chart 2

**Manufacturing (W&S) Employment, Scotts Bluff County, Nebraska, Metro, and Non-Metro Nebraska, 2007–2016  
(Index, 2007=100)**



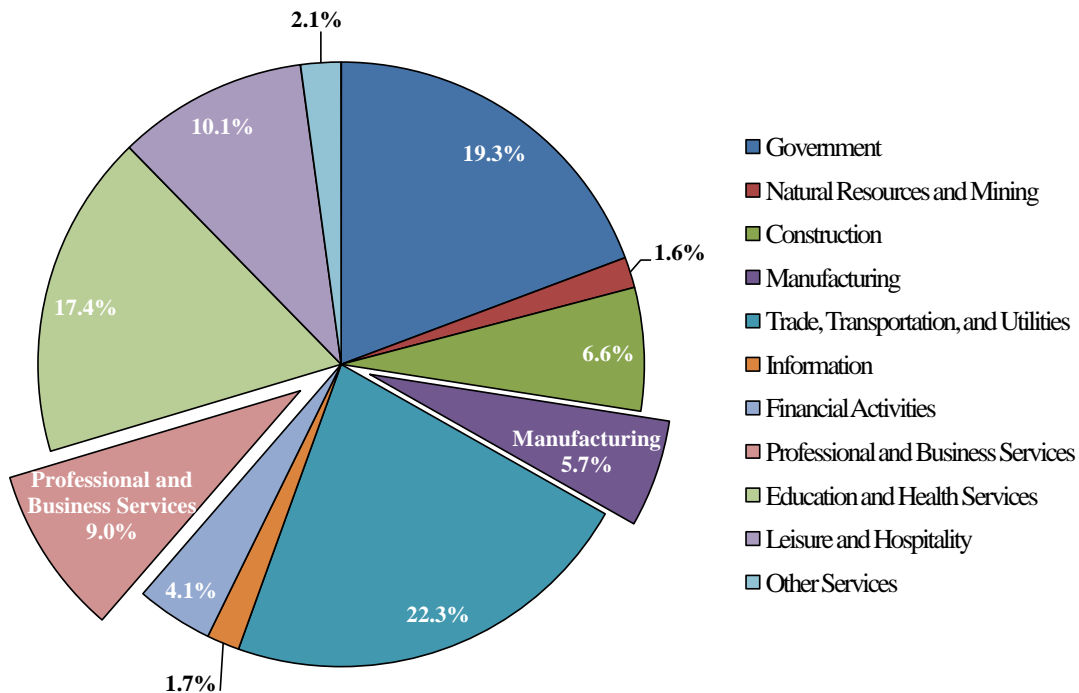
Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), Released June 2017

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

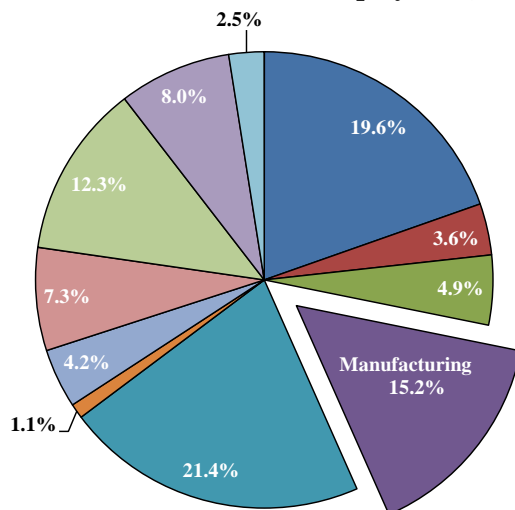
When comparing the Scotts Bluff County employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Manufacturing sector which makes up 5.7 percent of the county workforce (989 employees) compared to 15.2 percent for non-metropolitan Nebraska; a difference of 9.5 percent. Comparing Scotts Bluff County to the overall metropolitan distribution, the largest deviation is found in the Professional and Business Services sector (9.0 percent Scotts Bluff County vs. 15.1 percent metropolitan Nebraska; a difference of 6.1 percent).

Charts 3, 4, 5

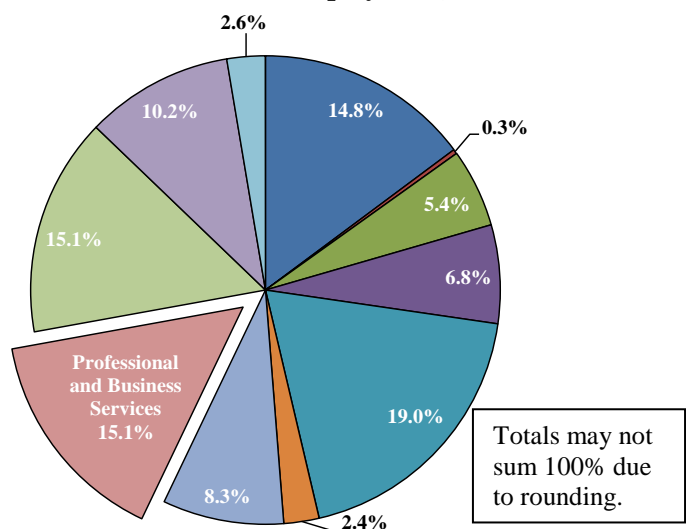
### Nonfarm Wage & Salary Employment by Major Economic Sector Scotts Bluff County, 2016



Non-Metro Area W&S Employment, 2016



Metro Area W&S Employment, 2016



Totals 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 2007–2016. 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 a decrease in the number of Scotts Bluff County residents participating in the labor force between 2007 and 2016 (2.3 percent or 450 people).

The number of those unemployed in Scotts Bluff County increased by 19.8 percent (114 people) between 2007 and 2016. 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 3.6 percent in 2016; above that for metropolitan Nebraska (3.2 percent), above Nebraska as a whole (3.2 percent), and above non-metropolitan Nebraska (3.2 percent).

Table 2

**Labor Force & Employment Trends, Scotts Bluff County, Nebraska  
Selected Years: 2007–2016**

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	% Change 2007-2016	# Change 2007-2016
<b>Labor Force</b>	<b>19,485</b>	<b>19,525</b>	<b>19,690</b>	<b>19,200</b>	<b>19,209</b>	<b>19,236</b>	<b>19,161</b>	<b>18,746</b>	<b>18,675</b>	<b>19,035</b>	<b>-2.3</b>	<b>-450</b>
Unemployment	576	723	1,013	1,056	964	902	812	682	640	690	19.8	114
Unemployment Rate	3.0	3.7	5.1	5.5	5.0	4.7	4.2	3.6	3.4	3.6	(N/A)	(N/A)
Employment	18,909	18,802	18,677	18,144	18,245	18,334	18,349	18,064	18,035	18,345	-3.0	-564

(N/A) - Data not available

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, Annual Data, released March 2017

## Residence and Work Flow Patterns

The next series of tables show residence (Work Destination) and workflow (Home Destination) patterns for the City of 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 the City of Scottsbluff are from 2015.

Table 3 (pages 6–7) examines the Work Destination area for the Scottsbluff from three perspectives: by state, by county, and by place (city). In Table 3, the Census identified 6,408 city labor force participants holding primary jobs. As Table 3 shows, 97.1 percent of Scottsbluff’s labor force participants are employed within the state of Nebraska. Approximately 80.7 percent of Scottsbluff workers remain within Scotts Bluff County for employment with 19.3 percent leaving the county borders for work (next page). The top ten incorporated places where the Scottsbluff’s labor force participants are employed are also shown on the following page.

Table 3

### **Work Destination Report**

*Where Workers are Employed Who Live in the Selected Area*

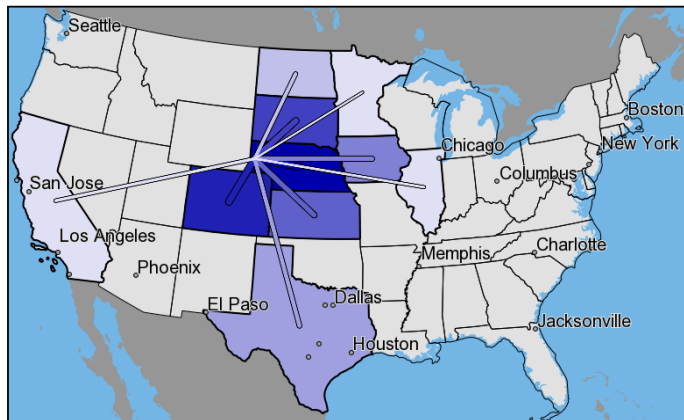
2015

	Count	Share
<b>Total Primary Jobs</b>	<b>6,408</b>	<b>100.0%</b>

#### **Job Counts by States Where Workers are Employed**

2015

	Count	Share
<b>Nebraska</b>	<b>6,222</b>	<b>97.1%</b>
Colorado	70	1.1%
South Dakota	39	0.6%
Kansas	18	0.3%
Iowa	12	0.2%
Texas	5	0.1%
North Dakota	4	0.1%
California	3	0.0%
Illinois	3	0.0%
Minnesota	3	0.0%
All Other Locations	29	0.5%



Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2018

Table 3 (continued)

**By Counties**  
**Job Counts by Counties Where Workers are Employed**  
**2015**

	Count	Share
<b>Scotts Bluff County, NE</b>	<b>5,170</b>	<b>80.7%</b>
Holt County, NE	162	2.5%
Lincoln County, NE	91	1.4%
Douglas County, NE	86	1.3%
Morrill County, NE	86	1.3%
Lancaster County, NE	82	1.3%
Cheyenne County, NE	77	1.2%
Box Butte County, NE	73	1.1%
Kimball County, NE	47	0.7%
Dawes County, NE	44	0.7%
All Other Locations	490	7.6%



**By Places (top 10)**  
**Job Count by Places (Cities, CDPs, etc.) Where Workers are Employed**  
**2015**

	Count	Share
<b>Scottsbluff city, NE</b>	<b>3,658</b>	<b>57.1%</b>
Gering city, NE	779	12.2%
O'Neill city, NE	138	2.2%
Omaha city, NE	81	1.3%
North Platte city, NE	80	1.2%
Lincoln city, NE	76	1.2%
Alliance city, NE	57	0.9%
Terrytown city, NE	54	0.8%
Sidney city, NE	53	0.8%
Bridgeport city, NE	51	0.8%
All Other Locations	1,381	21.6%



Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2018



People also travel from other locations to work in the City of 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 10,051 primary jobs within the City of Scottsbluff. As Table 4 indicates, 93.2 percent of these jobs are held by Nebraska residents. Approximately 79.3 percent of Scottsbluff workers live within the Scotts Bluff 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*

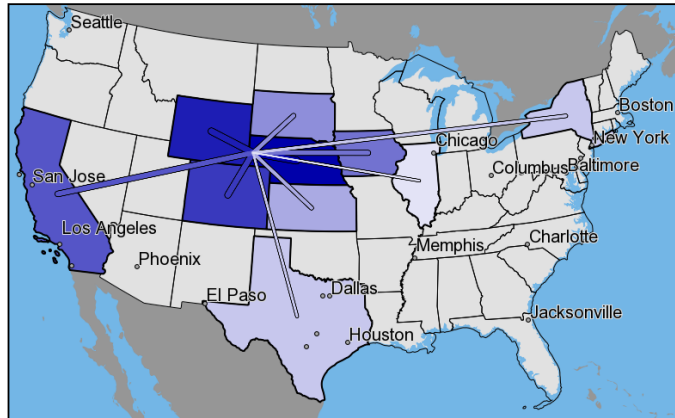
**2015**

	Count	Share
<b>Total Primary Jobs</b>	<b>10,051</b>	<b>100.0%</b>

### Job Counts by States Where Workers Live

**2015**

	Count	Share
<b>Nebraska</b>	<b>9,369</b>	<b>93.2%</b>
Wyoming	285	2.8%
Colorado	167	1.7%
California	29	0.3%
Iowa	23	0.2%
South Dakota	20	0.2%
Kansas	14	0.1%
New York	12	0.1%
Texas	12	0.1%
Illinois	10	0.1%
All Other Locations	110	1.1%

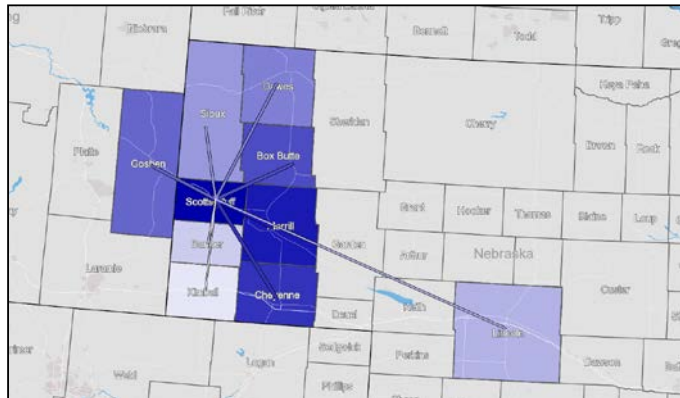


### By Counties

#### Job Counts by Counties Where Workers Live

**2015**

	Count	Share
<b>Scotts Bluff County, NE</b>	<b>7,974</b>	<b>79.3%</b>
Morrill County, NE	265	2.6%
Cheyenne County, NE	174	1.7%
Box Butte County, NE	167	1.7%
Goshen County, WY	148	1.5%
Dawes County, NE	115	1.1%
Sioux County, NE	77	0.8%
Lincoln County, NE	58	0.6%
Banner County, NE	56	0.6%
Kimball County, NE	45	0.4%
All Other Locations	972	9.7%

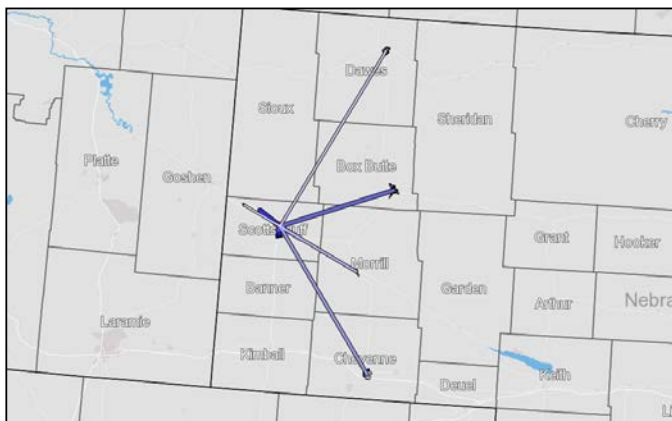


Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2018

Table 4 (continued)

**By Places (top 10)**  
**Job Counts by Places (Cities, CDPs, etc.) Where Workers Live**  
**2015**

	Count	Share
Scottsbluff city, NE	3,658	36.4%
Gering city, NE	1,892	18.8%
Mitchell city, NE	332	3.3%
Terrytown city, NE	248	2.5%
Alliance city, NE	136	1.4%
Minatare city, NE	124	1.2%
Sidney city, NE	120	1.2%
Bridgeport city, NE	87	0.9%
Chadron city, NE	79	0.8%
Morrill village, NE	77	0.8%
All Other Locations	3,298	32.8%



Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2018

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)**

	2015		2014		2013	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	10,051	100.0%	10,369	100.0%	10,312	100.0%
Living in the Selection Area	6,408	63.8%	6,463	62.3%	6,377	61.8%
Net Job Inflow (+) or Outflow (-)	3,643	-	3,906	-	3,935	-

**In-Area Labor Force Efficiency (Primary Jobs)**

	2015		2014		2013	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	6,408	100.0%	6,463	100.0%	6,377	100.0%
Living and Employed in the Selection Area	3,658	57.1%	3,506	54.2%	3,558	55.8%
Living in the Selection Area but Employed Outside	2,750	42.9%	2,957	45.8%	2,819	44.2%

**In-Area Employment Efficiency (Primary Jobs)**

	2015		2014		2013	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	10,051	100.0%	10,369	100.0%	10,312	100.0%
Employed and Living in the Selection Area	3,658	36.4%	3,506	33.8%	3,558	34.5%
Employed in the Selection Area but Living Outside	6,393	63.6%	6,863	66.2%	6,754	65.5%

Table 5 (continued)

<b>Outflow Job Characteristics (Primary Jobs)</b>	<b>2015</b>		<b>2014</b>		<b>2013</b>	
	<b>Count</b>	<b>Share</b>	<b>Count</b>	<b>Share</b>	<b>Count</b>	<b>Share</b>
External Jobs Filled by Residents	2,750	100.0%	2,957	100.0%	2,819	100.0%
Workers Aged 29 or younger	671	24.4%	716	24.2%	641	22.7%
Workers Aged 30 to 54	1,375	50.0%	1,523	51.5%	1,471	52.2%
Workers Aged 55 or older	704	25.6%	718	24.3%	707	25.1%
Workers Earning \$1,250 per month or less	661	24.0%	667	22.6%	648	23.0%
Workers Earning \$1,251 to \$3,333 per month	1,226	44.6%	1,361	46.0%	1,336	47.4%
Workers Earning More than \$3,333 per month	863	31.4%	929	31.4%	835	29.6%
Workers in the "Goods Producing" Industry Class	671	24.4%	653	22.1%	636	22.6%
Workers in the "Trade, Transportation, and Utilities" Industry Class	661	24.0%	658	22.3%	691	24.5%
Workers in the "All Other Services" Industry Class	1,418	51.6%	1,646	55.7%	1,492	52.9%

<b>Inflow Job Characteristics (Primary Jobs)</b>	<b>2015</b>		<b>2014</b>		<b>2013</b>	
	<b>Count</b>	<b>Share</b>	<b>Count</b>	<b>Share</b>	<b>Count</b>	<b>Share</b>
Internal Jobs Filled by Outside Workers	6,393	100.0%	6,863	100.0%	6,754	100.0%
Workers Aged 29 or younger	1,544	24.2%	1,742	25.4%	1,731	25.6%
Workers Aged 30 to 54	3,168	49.6%	3,325	48.4%	3,327	49.3%
Workers Aged 55 or older	1,681	26.3%	1,796	26.2%	1,696	25.1%
Workers Earning \$1,250 per month or less	1,574	24.6%	1,813	26.4%	1,800	26.7%
Workers Earning \$1,251 to \$3,333 per month	2,846	44.5%	2,994	43.6%	2,967	43.9%
Workers Earning More than \$3,333 per month	1,973	30.9%	2,056	30.0%	1,987	29.4%
Workers in the "Goods Producing" Industry Class	364	5.7%	321	4.7%	306	4.5%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,740	27.2%	1,923	28.0%	1,887	27.9%
Workers in the "All Other Services" Industry Class	4,289	67.1%	4,619	67.3%	4,561	67.5%

<b>Interior Flow Job Characteristics (Primary Jobs)</b>	<b>2015</b>		<b>2014</b>		<b>2013</b>	
	<b>Count</b>	<b>Share</b>	<b>Count</b>	<b>Share</b>	<b>Count</b>	<b>Share</b>
Internal Jobs Filled by Residents	3,658	100.0%	3,506	100.0%	3,558	100.0%
Workers Aged 29 or younger	987	27.0%	873	24.9%	959	27.0%
Workers Aged 30 to 54	1,736	47.5%	1,723	49.1%	1,714	48.2%
Workers Aged 55 or older	935	25.6%	910	26.0%	885	24.9%
Workers Earning \$1,250 per month or less	905	24.7%	926	26.4%	967	27.2%
Workers Earning \$1,251 to \$3,333 per month	1,709	46.7%	1,636	46.7%	1,629	45.8%
Workers Earning More than \$3,333 per month	1,044	28.5%	944	26.9%	962	27.0%
Workers in the "Goods Producing" Industry Class	219	6.0%	188	5.4%	194	5.5%
Workers in the "Trade, Transportation, and Utilities" Industry Class	876	23.9%	819	23.4%	786	22.1%
Workers in the "All Other Services" Industry Class	2,563	70.1%	2,499	71.3%	2,578	72.5%

Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2018

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 less in 2015 compared to 2014. The distribution of miles traveled to work has also shifted since 2014. Figure 1 shows the location and concentration of these workplaces.

Table 6

## Distance/Direction Report - Home to Work Census Block

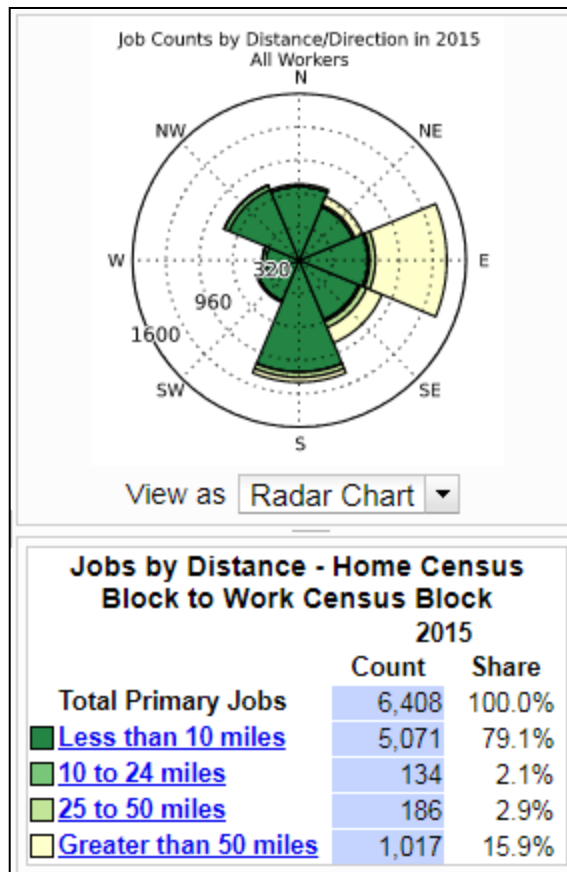
*Live within study area - distance to work*

### Job Counts in Work Blocks by Distance Only

	2015		2014		2013	
	Count	Share	Count	Share	Count	Share
<b>Total Primary Jobs</b>	<b>6,408</b>	<b>100.0%</b>	<b>6,463</b>	<b>100.0%</b>	<b>6,377</b>	<b>100.0%</b>
Less than 10 miles	5,071	79.1%	4,864	75.3%	4,893	76.7%
10 to 24 miles	134	2.1%	94	1.5%	98	1.5%
25 to 50 miles	186	2.9%	168	2.6%	216	3.4%
Greater than 50 miles	1,017	15.9%	1,337	20.7%	1,170	18.3%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, February 2018

Figure 1



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, February 2018

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 2013 and 2014. 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

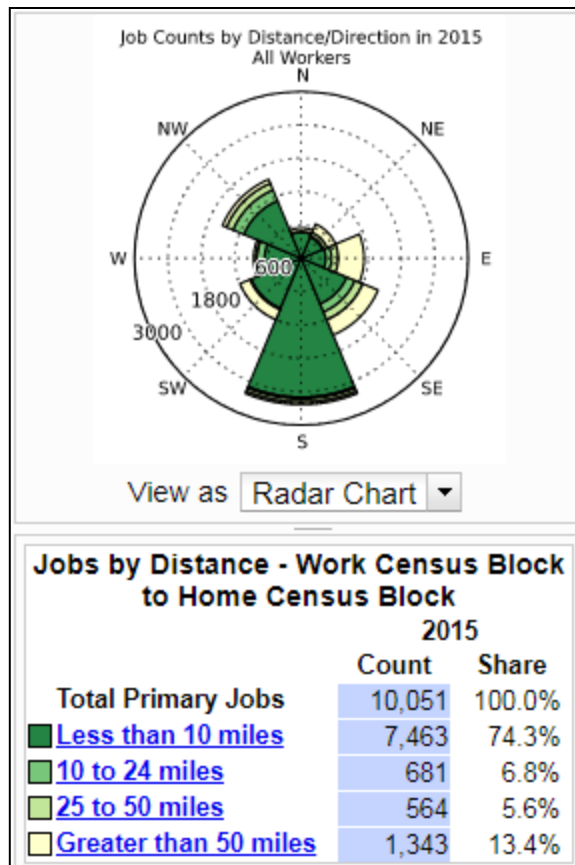
*Live within study area - distance to home*

### Job Counts in Home Blocks by Distance Only

	2015		2014		2013	
	Count	Share	Count	Share	Count	Share
<b>Total Primary Jobs</b>	<b>10,051</b>	<b>100.0%</b>	<b>10,369</b>	<b>100.0%</b>	<b>10,312</b>	<b>100.0%</b>
Less than 10 miles	7,463	74.3%	7,387	71.2%	7,232	70.1%
10 to 24 miles	681	6.8%	715	6.9%	740	7.2%
25 to 50 miles	564	5.6%	634	6.1%	583	5.7%
Greater than 50 miles	1,343	13.4%	1,633	15.7%	1,757	17.0%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, February 2018

Figure 2



Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap, February 2018

## 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 minor increase of less than 0.1 percent average annual change 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 0.2 percent decrease in population from 2010 to 2016 (548 people total).

Table 8

### **County Population 1970–2016 Scotts Bluff County and the Surrounding Area**

Location	----Year----						Avg. Annual % Change	Avg. Annual % Change
	1970	1980	1990	2000	2010	2016	1970-2010	2010-2016
<b>Nebraska</b>	<b>1,485,333</b>	<b>1,569,825</b>	<b>1,578,417</b>	<b>1,711,265</b>	<b>1,826,341</b>	<b>1,907,116</b>	<b>0.5</b>	<b>0.7</b>
<b>Scotts Bluff County</b>	<b>36,432</b>	<b>38,344</b>	<b>36,025</b>	<b>36,951</b>	<b>36,970</b>	<b>36,422</b>	<b>0.0</b>	<b>-0.2</b>
Banner County	1,034	918	852	819	690	798	-1.0	2.5
Box Butte County	10,094	13,696	13,130	12,158	11,308	11,194	0.3	-0.2
Morrill County	5,813	6,085	5,423	5,440	5,042	4,787	-0.4	-0.9
Sioux County	2,034	1,845	1,549	1,475	1,311	1,242	-1.1	-0.9

Source: U.S. Bureau of the Census, Census of Population, May 2017

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 an average annual decrease of 0.2 percent from 2010 to 2016 for a total increase of 11.5 percent (2,932 people) from 1970 to 2016. Scottsbluff, the county's largest city, reported a 2.6 percent increase in population (376 people) between 1970 and 2016. The unincorporated areas outside of the selected communities experienced a 27.0 percent decrease (2,942 people) during the period 1970–2016.

Table 9

### **County Population 1970–2016 Scotts Bluff County Communities and Unincorporated Areas**

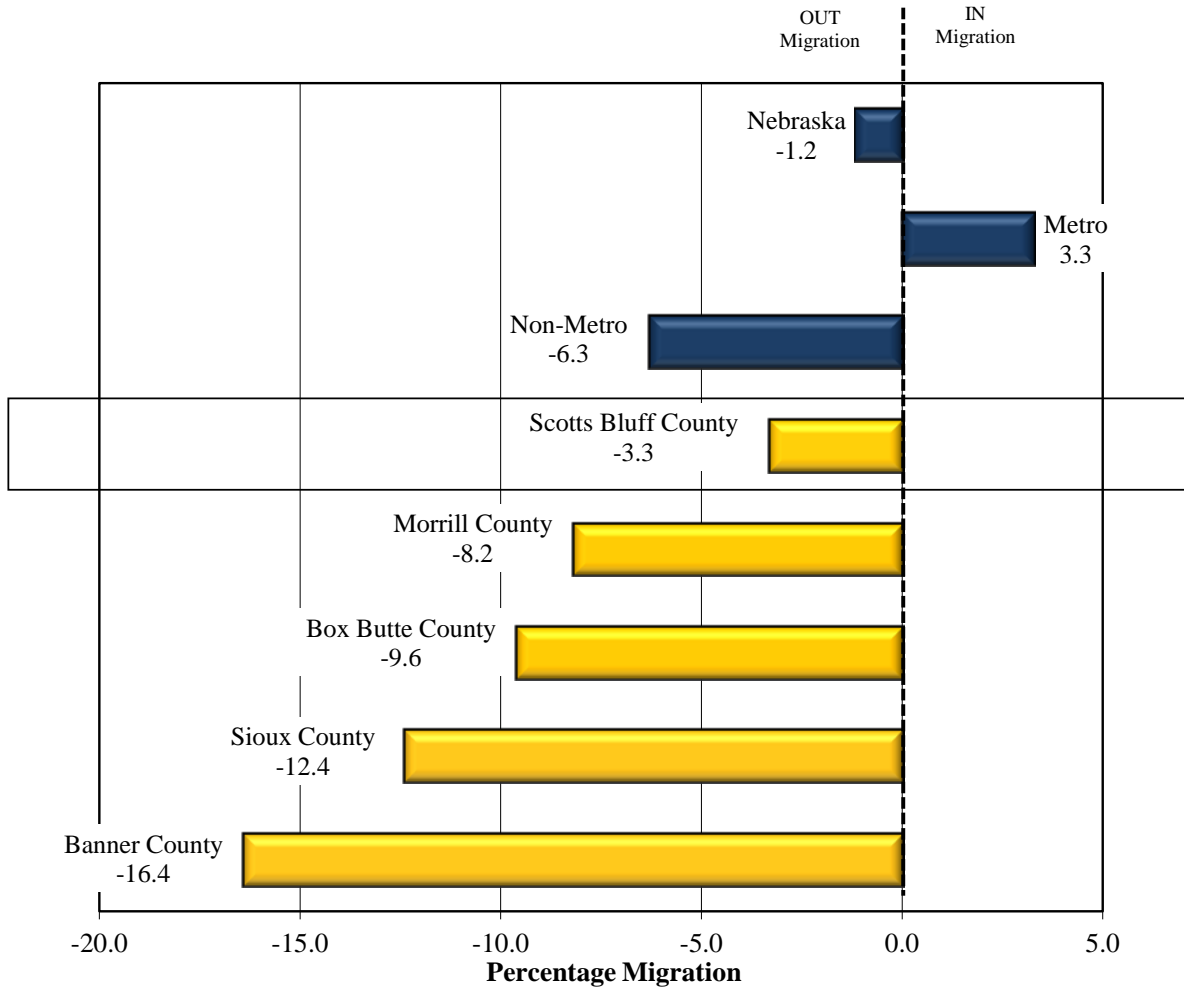
Location	----Year----						Avg. Annual % Change	Avg. Annual % Change
	1970	1980	1990	2000	2010	2016	1970-2010	2010-2016
<b>Nebraska</b>	<b>1,485,333</b>	<b>1,569,825</b>	<b>1,578,417</b>	<b>1,711,265</b>	<b>1,826,341</b>	<b>1,907,116</b>	<b>0.5</b>	<b>0.7</b>
<b>Scotts Bluff County</b>	<b>36,432</b>	<b>38,344</b>	<b>36,025</b>	<b>36,951</b>	<b>36,970</b>	<b>36,422</b>	<b>0.0</b>	<b>-0.2</b>
Gering	5,639	7,760	8,025	7,751	8,500	8,360	1.0	-0.3
Henry	147	155	145	162	106	105	-0.8	-0.2
Lyman	561	551	452	421	341	328	-1.2	-0.6
McGrew	79	110	99	103	105	104	0.7	-0.2
Melbeta	124	151	116	138	112	111	-0.3	-0.1
Minatare	939	969	807	810	816	802	-0.4	-0.3
Mitchell	1,842	1,956	1,742	1,831	1,702	1,669	-0.2	-0.3
Morrill	937	1,097	980	957	921	915	0.0	-0.1
Scottsbluff	14,507	14,156	14,029	14,732	15,039	14,883	0.1	-0.2
Terrytown	747	727	535	646	1,198	1,177	1.2	-0.3
<b>Total Incorporated Places</b>	<b>25,522</b>	<b>27,632</b>	<b>26,930</b>	<b>27,551</b>	<b>28,840</b>	<b>28,454</b>	<b>0.3</b>	<b>-0.2</b>
<b>Unincorporated Areas</b>	<b>10,910</b>	<b>10,712</b>	<b>9,095</b>	<b>9,400</b>	<b>8,130</b>	<b>7,968</b>	<b>-0.7</b>	<b>-0.3</b>

Source: U.S. Bureau of the Census, Census of Population, May 2017

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 3.3 percent decrease from its 2000 population, a total of 19 people.

Chart 6

### 2000–2010 Net Migration as Percent of 2000 Population Scotts Bluff County and the Surrounding Area

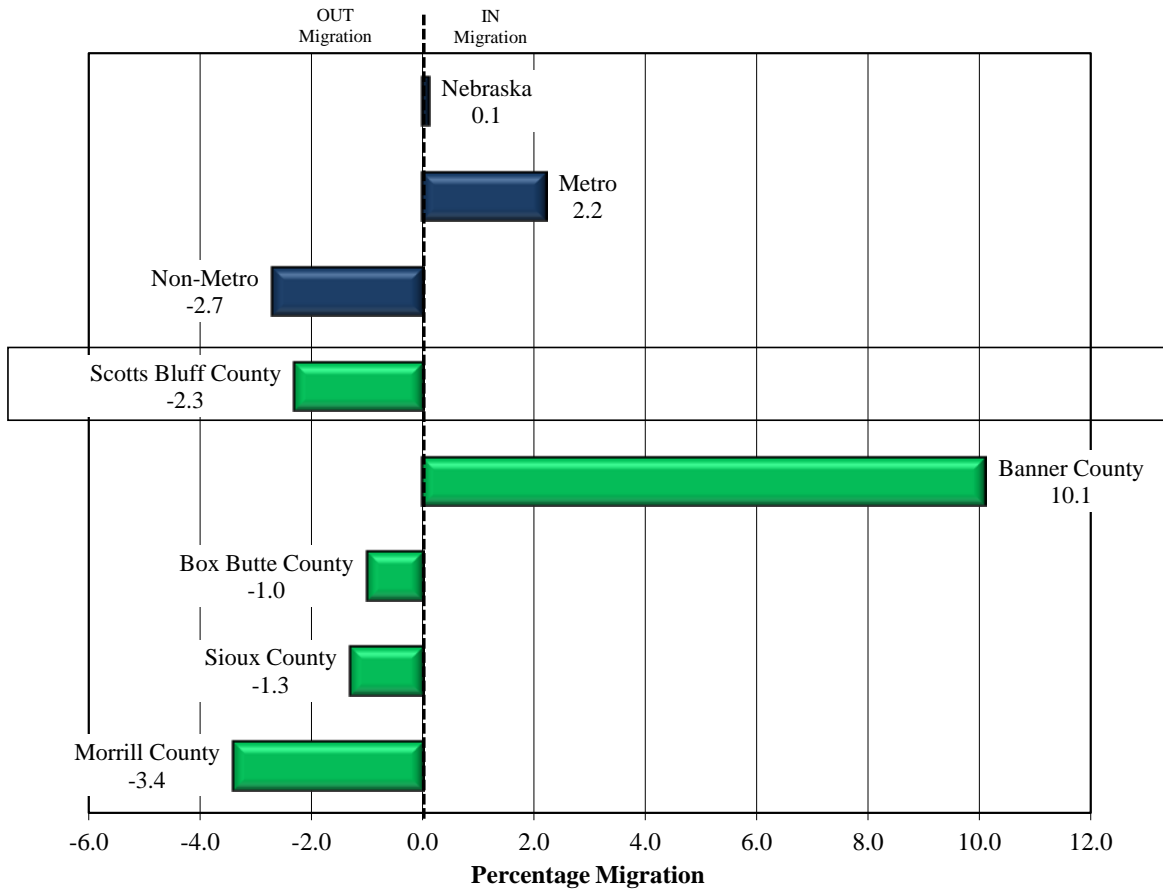


Source: U.S. Census Bureau, County population and estimated components of population change, July 2016

Looking at the years 2010–2015 (Chart 7), Scotts Bluff County experienced a 2.3 percent decrease in population, 195 people, from its 2010 population.

Chart 7

### 2010–2015 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, July 2016



The next two tables (Tables 10 and 11) provide detail on migration patterns. Data reported in these tables are 2011–2015, 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 the current population one-year or older is 116 greater than the number of people living in Scotts Bluff County one-year ago. This indicates Scotts Bluff County experienced a net increase in its population age one and older and in-migration was greater than out-migration plus the number of deaths.

Table 10

**Scotts Bluff County, Nebraska, 2011–2015 Five-Year Estimate  
Population Change Due to Migration and Mortality**

Current population one-year or older	36,182
Number of people living in the area one-year ago	36,066
<u>Population change due to migration and mortality</u>	<u>116</u>

Source: American Community Survey, *Geographic Mobility By Selected Characteristics In The United States* & *Geographical Mobility In The Past Year By Age For Residence 1 Year Ago In The United States* accessed March 2017.

The 2011–2015, five-year estimates in Table 11 reveal a net loss of 218 people from other Nebraska counties and a net gain of 265 people from other states for a total net gain of 47 people one-year or older. As shown in Table 11, net gains occurred in the age groups Age 18 to 24 (gain of 73), Age 25 to 44 (gain of 105), Age 45 to 64 (gain of 106) and net losses in age groups Age 1 to 17 (loss of 117) and Age 65 and over (loss of 120).

Table 11 also shows the net gains and losses by educational attainment for persons ages 25 and older. There was a gain in residents with a HS diploma or less (gain of 139) and a gain in graduate or professional degree (gain of 56) and a loss of residents with a bachelor's degree, associate's degree, or some college (loss of 106).

Table 11

**Scotts Bluff County, Nebraska, 2011–2015, Five-Year Estimate  
Population Change Due to Migration and Mortality**

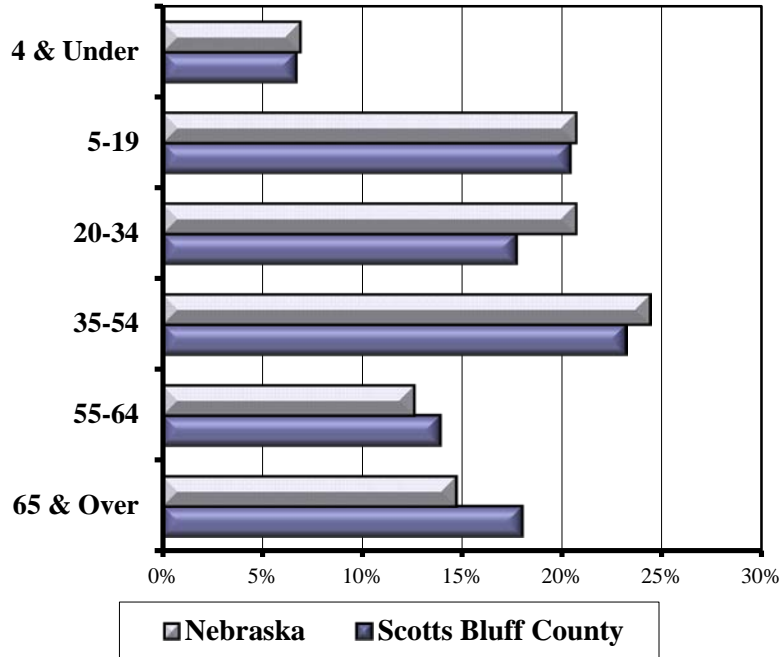
-- Part A: By Age Group --							
Age Group	Moved to Different Nebraska County	Moved From Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	Moved From Different State	Net Gain From Other States	Net Gain From Nebraska Counties and Other States
Age 1 to 17	272	119	-153	216	252	36	-117
Age 18 to 24	180	226	46	158	185	27	73
Age 25 to 44	213	171	-42	389	536	147	105
Age 45 to 64	200	128	-72	72	250	178	106
Age 65 and over	41	44	3	199	76	-123	-120
<b>Total</b>	<b>906</b>	<b>688</b>	<b>-218</b>	<b>1,034</b>	<b>1,299</b>	<b>265</b>	<b>47</b>
-- Part B: By Educational Attainment --							
Educational Attainment	Moved to Different Nebraska County	Moved From Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	Moved From Different State	Net Gain From Other States	Net Gain From Nebraska Counties and Other States
HS diploma or less	209	125	-84	201	424	223	139
Bachelor's or some college	245	176	-69	414	377	-37	-106
Grad. or Prof. degree	0	43	43	45	58	13	56
<b>Total</b>	<b>454</b>	<b>344</b>	<b>-110</b>	<b>660</b>	<b>859</b>	<b>199</b>	<b>89</b>

Source: American Community Survey, *Geographic Mobility By Selected Characteristics In The United States; Geographical Mobility In The Past Year By Age For Residence 1 Year Ago In The United States; Geographical Mobility In The Past Year By Educational Attainment For Current Residence In The United States & Geographical Mobility In The Past Year By Educational Attainment For Residence 1 Year Ago In The United States*; accessed March 2017.

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 older in age than Nebraska as a whole. The median age for Scotts Bluff County residents in 2015 was 39.4 years of age compared to 36.3 years of age for residents of Nebraska as a whole.

Chart 8

### Age Distribution of the Population, 2015 Scotts Bluff County and Nebraska



Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," July 2016

Table 12

### Age Distribution of the Population, 2015 Scotts Bluff County and Nebraska

	2015 Population		Percent	
	Nebraska	Scotts Bluff County	Nebraska	Scotts Bluff County
4 & Under	130,631	2,421	6.9%	6.7%
5-19	392,651	7,401	20.7%	20.4%
20-34	392,362	6,432	20.7%	17.7%
35-54	463,120	8,415	24.4%	23.2%
55-64	238,715	5,049	12.6%	13.9%
65 & Over	278,711	6,543	14.7%	18.0%
<b>Total</b>	<b>1,896,190</b>	<b>36,261</b>	<b>100%</b>	<b>100%</b>
<b>Median Age</b>	<b>36.3</b>	<b>39.4</b>		

Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," July 2016

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 five-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

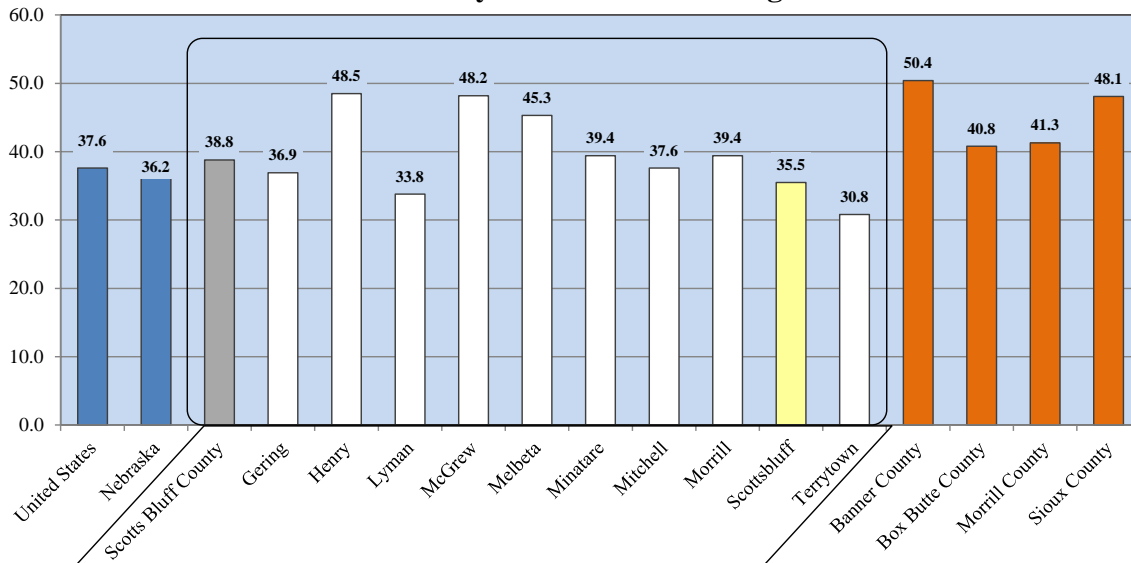
**Median Age by Location and Gender**  
**Five-Year Estimate, 2011–2015**  
**Scotts Bluff County and the Surrounding Area**

	Median Age		
	Total	Male	Female
<b>United States</b>	<b>37.6</b>	<b>36.2</b>	<b>38.9</b>
<b>Nebraska</b>	<b>36.2</b>	<b>35.1</b>	<b>37.5</b>
<b>Scotts Bluff County</b>	<b>38.8</b>	<b>37.7</b>	<b>39.5</b>
Gering	36.9	33.9	39.1
Henry	48.5	50.5	47.8
Lyman	33.8	21.9	35.8
McGrew	48.2	49.5	44.3
Melbeta	45.3	46.5	40.5
Minatare	39.4	39.6	39.2
Mitchell	37.6	31.3	42.4
Morrill	39.4	40.0	38.0
Scottsbluff	35.5	35.1	36.0
Terrytown	30.8	30.5	30.9
<b>Banner County</b>	<b>50.4</b>	<b>51.4</b>	<b>49.6</b>
<b>Box Butte County</b>	<b>40.8</b>	<b>35.9</b>	<b>44.8</b>
<b>Morrill County</b>	<b>41.3</b>	<b>41.1</b>	<b>41.7</b>
<b>Sioux County</b>	<b>48.1</b>	<b>51.2</b>	<b>45.9</b>

Source: U.S. Census Bureau, 2011-2015 American Community Survey, March 2017

Chart 9

**Median Age by Location, Five-Year Estimate, 2011–2015**  
**Scotts Bluff County and the Surrounding Area**



Source: U.S. Census Bureau, 2011-2015 American Community Survey, March 2017

## 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 2016. 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

### 2016 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska, Scotts Bluff County, and Surrounding Counties

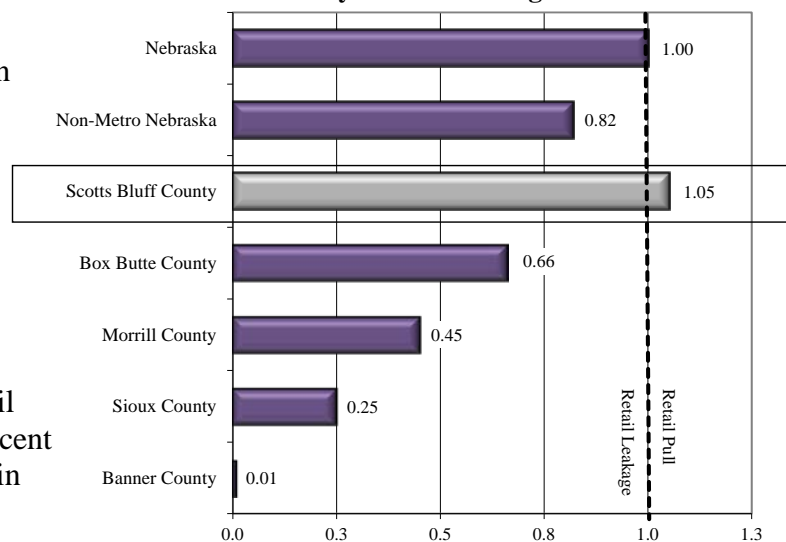
	2016 Population	2016 Retail Sales (x \$1,000)	2016 Per Cap Sales (\$)	2016 Pull Factor
<b>Nebraska</b>	<b>1,907,116</b>	<b>23,471,035</b>	<b>12,307</b>	<b>1.00</b>
<b>Non-Metro Nebraska</b>	<b>863,461</b>	<b>8,673,355</b>	<b>10,045</b>	<b>0.82</b>
<b>Scotts Bluff County</b>	<b>36,422</b>	<b>469,373</b>	<b>12,887</b>	<b>1.05</b>
Banner County	798	139	174	0.01
Box Butte County	11,194	91,146	8,142	0.66
Morrill County	4,787	26,234	5,480	0.45
Sioux County	1,242	3,814	3,071	0.25

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2017

Chart 10

Reviewing the pull factors at the county level indicates Scotts Bluff County experiences net positive retail injections. The 2016 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 (0.82) indicates per capita retail sales in Scotts Bluff County are 28.3 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

2016 Retail Sales (NMV) Pull Factors, Nebraska, Scotts Bluff County & Surrounding Counties



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2017

Table 15 and Chart 11 compare the 2016 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

### 2016 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska, Scotts Bluff County, and Selected Study Area Communities

	2016 Population	2016 Retail Sales (x \$1,000)	2016 Per Cap Sales (\$)	2016 Pull Factor
<b>Nebraska</b>	<b>1,907,116</b>	<b>23,471,035</b>	<b>12,307</b>	<b>1.00</b>
<b>Non-Metro Nebraska</b>	<b>863,461</b>	<b>8,673,355</b>	<b>10,045</b>	<b>0.82</b>
<b>Scotts Bluff County</b>	<b>36,422</b>	<b>469,373</b>	<b>12,887</b>	<b>1.05</b>
Scottsbluff (Scotts Bluff)	14,883	380,161	25,543	2.08
Harrisburg (Banner)	238	116	485	0.04
Alliance (Box Butte)	8,403	85,398	10,163	0.83
Bridgeport (Morrill)	1,497	17,904	11,960	0.97
Harrison (Sioux)	238	3,471	14,586	1.19

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2017

Chart 11

### 2016 Retail Sales (NMV) Pull Factors, Nebraska, Scotts Bluff County & Selected Study Area Communities

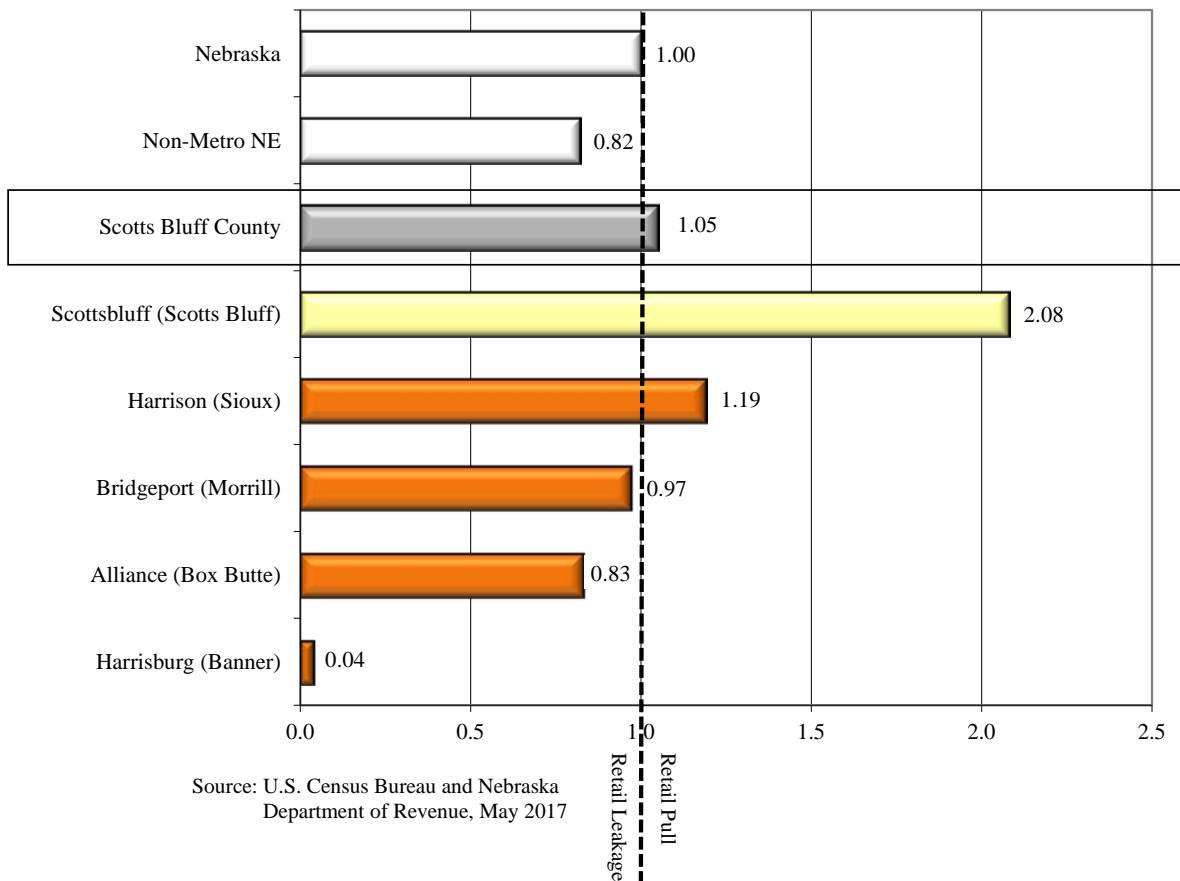


Table 16 (sorted by population) and Chart 12 (sorted by pull factor) further breakdown the 2016 pull factors into the communities reporting retail sales figures within Scotts Bluff County. As this table indicates, the community of Scottsbluff had the strongest pull factor (2.08) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 1.05 for Scotts Bluff County in 2016.

Table 16

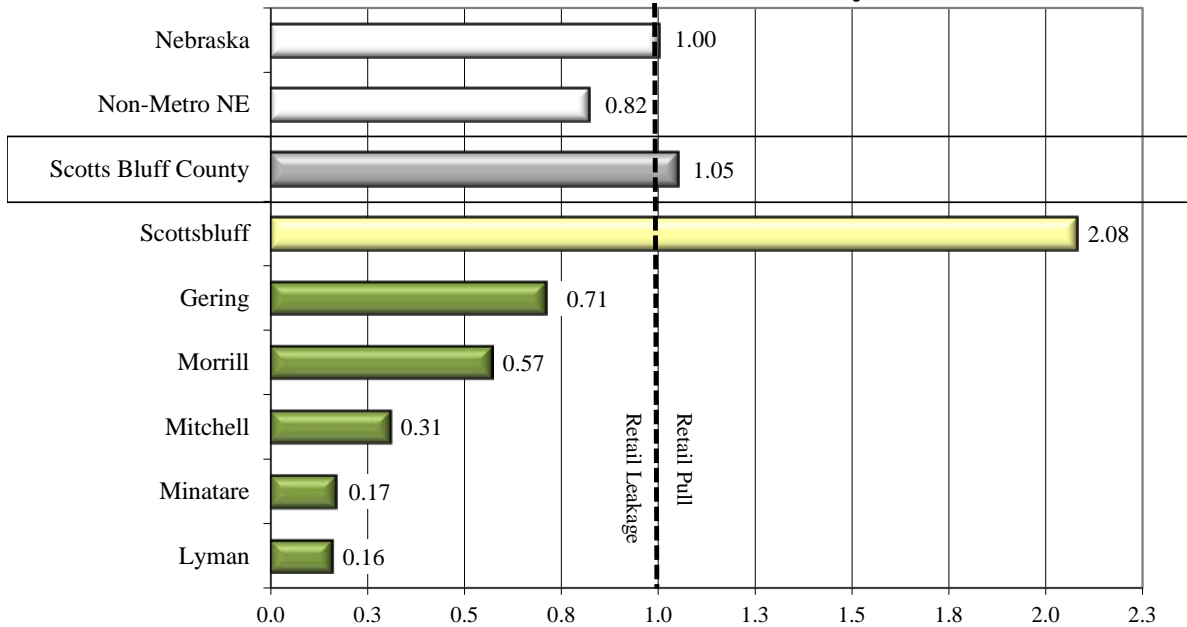
### 2016 Retail Sales (Non-Motor Vehicle) Pull Factors Nebraska and Available Scotts Bluff County Area Communities

	2016 Population	2016 Retail Sales (x \$1,000)	2016 Per Cap Sales (\$)	2016 Pull Factor
<b>Nebraska</b>	<b>1,907,116</b>	<b>23,471,035</b>	<b>12,307</b>	<b>1.00</b>
<b>Non-Metro Nebraska</b>	<b>863,461</b>	<b>8,673,355</b>	<b>10,045</b>	<b>0.82</b>
<b>Scotts Bluff County</b>	<b>36,422</b>	<b>469,373</b>	<b>12,887</b>	<b>1.05</b>
Scottsbluff	14,883	380,161	25,543	2.08
Gering	8,360	73,175	8,753	0.71
Mitchell	1,669	6,312	3,782	0.31
Morrill	915	6,462	7,062	0.57
Minatare	802	1,672	2,085	0.17
Lyman	328	628	1,914	0.16

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2017

Chart 12

### 2016 Retail Sales (NMV) Pull Factors, Nebraska and Available Scotts Bluff County Communities



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2017

Table 17 (sorted by population) and Chart 13 (sorted by pull factor) show the 2016 pull factors for Nebraska, Scottsbluff, and eight other similarly sized communities selected from around the state. Papillion’s pull factor of 2.45 leads the group for 2016 thus indicating Papillion has greater retail pull.

Table 17

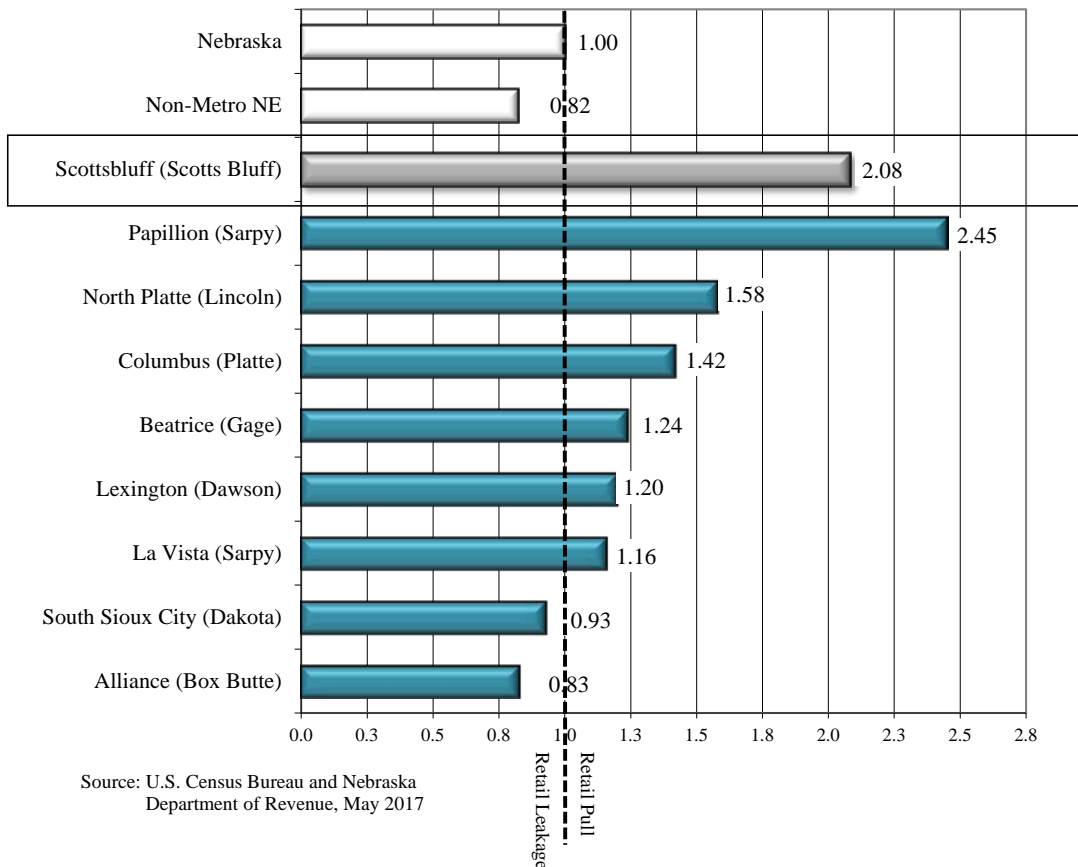
### 2016 Retail Sales (Non-Motor Vehicle) Pull Factors Scottsbluff & Other Similarly Sized Nebraska Communities

	2016 Population	2016 Retail Sales (x \$1,000)	2016 Per Cap Sales (\$)	2016 Pull Factor
<b>Nebraska</b>	<b>1,907,116</b>	<b>23,471,035</b>	<b>12,307</b>	<b>1.00</b>
<b>Non-Metro Nebraska</b>	<b>863,461</b>	<b>8,673,355</b>	<b>10,045</b>	<b>0.82</b>
<b>Scottsbluff (Scotts Bluff)</b>	<b>14,883</b>	<b>380,161</b>	<b>25,543</b>	<b>2.08</b>
Alliance (Box Butte)	8,403	85,398	10,163	0.83
Lexington (Dawson)	10,004	147,793	14,773	1.20
Beatrice (Gage)	12,362	189,279	15,311	1.24
South Sioux City (Dakota)	13,120	150,618	11,480	0.93
La Vista (Sarpy)	17,143	245,433	14,317	1.16
Papillion (Sarpy)	19,597	591,235	30,170	2.45
Columbus (Platte)	22,851	400,268	17,516	1.42
North Platte (Lincoln)	24,110	468,787	19,444	1.58

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2017

Chart 13

### 2016 Retail Sales (NMV) Pull Factors, Scottsbluff & Other Similarly Sized Nebraska Communities



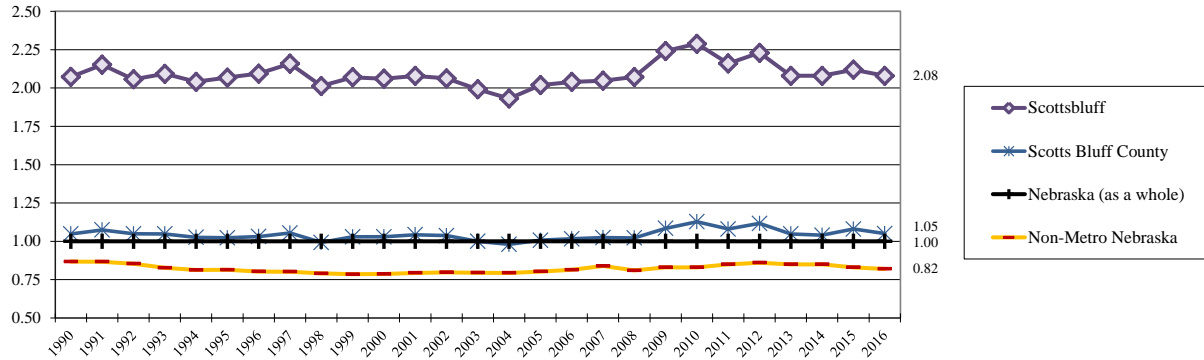
Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2017



Chart 14 illustrates the pull factor trend for Scottsbluff, Scotts Bluff County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2016. 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

**Pull Factors 1990–2016 Scottsbluff, Scotts Bluff County, Non-Metro & Nebraska (as a whole)**



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2016

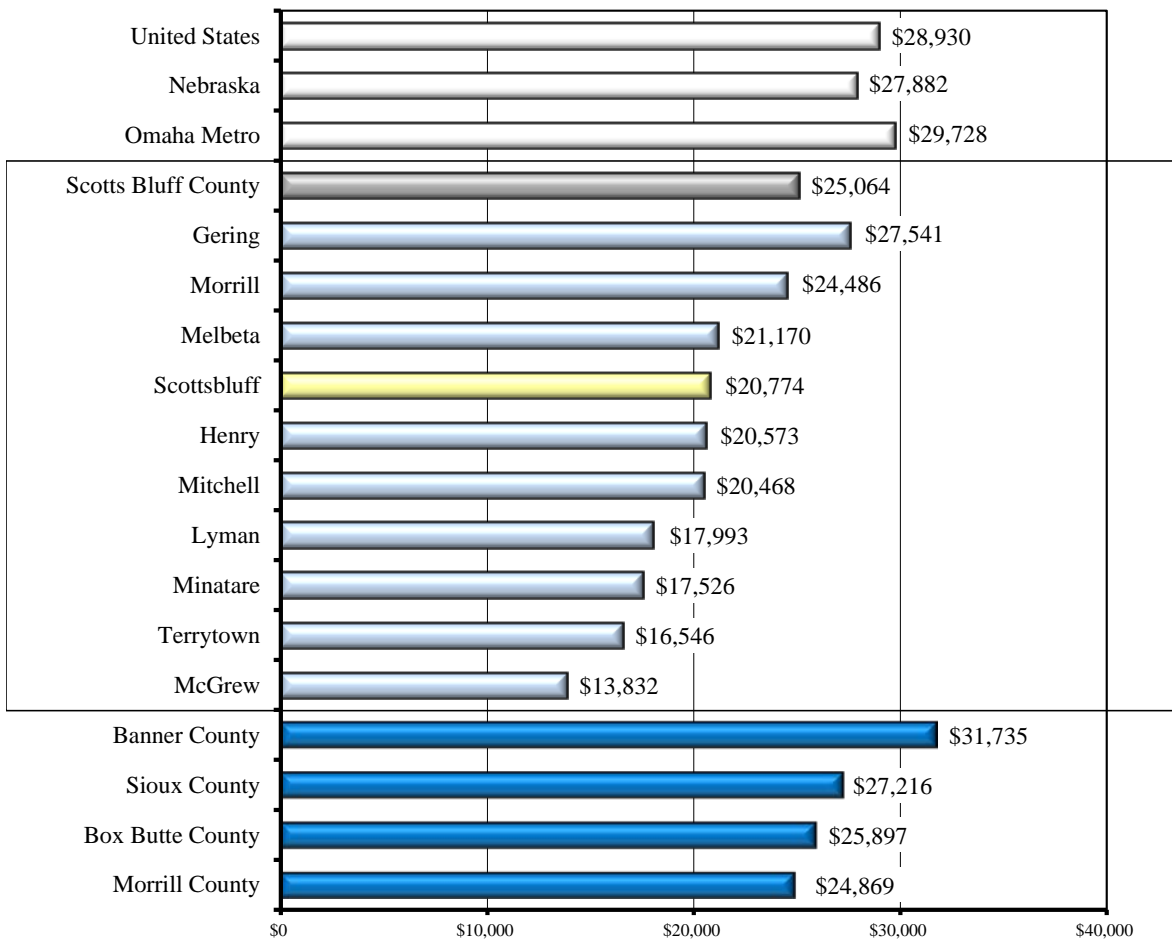
**Per Capita Personal Income**

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 2011–2015, five-year estimates show per capita personal income for Scotts Bluff County is estimated to be \$25,064 compared to \$27,882 for Nebraska as a whole.

Chart 15

**Per Capita Personal Income, 2011–2015, Five-Year Estimate, Nebraska, Scotts Bluff County & Surrounding Counties**



Source: U.S. Census Bureau, 2015 inflation adjusted past 12-months, 2011-2015 American Community Survey, accessed May 2017.

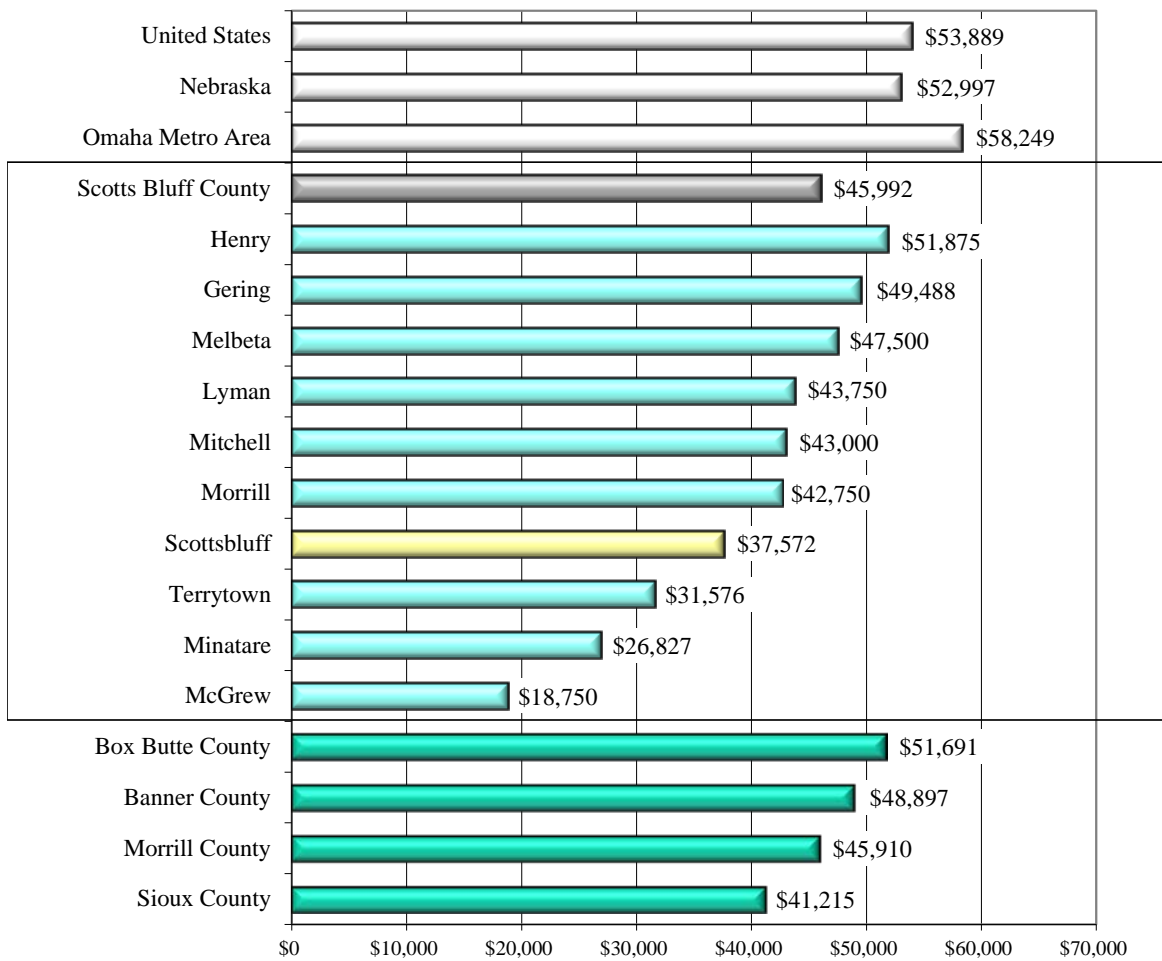
## Median Household Income

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 2011–2015, five-year estimates show median household income for Scotts Bluff County is estimated to be \$45,992 in 2015 compared to \$52,997 for Nebraska as a whole.

Chart 16

### **Median Household Income, 2011–2015, Five-Year Estimate Nebraska, Scotts Bluff County & Surrounding Counties**



Source: U.S. Census Bureau, 2011-2015 American Community Survey, accessed May 2017.