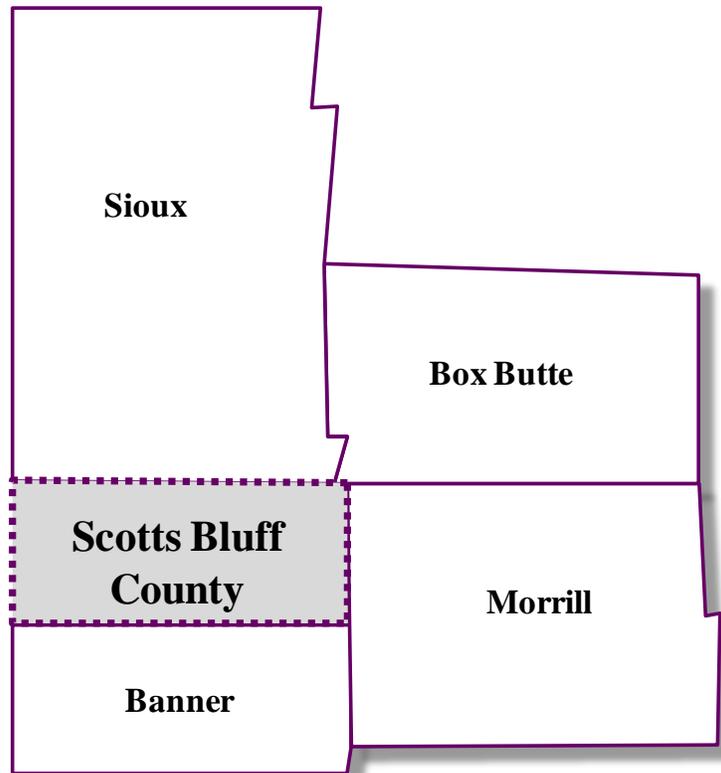


Economic and Demographic Trends

Scotts Bluff County and the Surrounding Area



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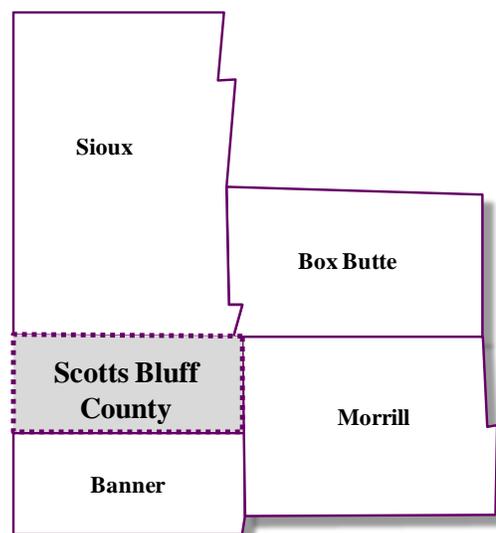
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Economic and Demographic Trends in Scottsbluff, Scotts Bluff County, and the Surrounding Area

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 surrounding area (selected counties and communities). Figure 1 (map) 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 the city of Scottsbluff and eight other similarly sized Nebraska communities.

Figure 1



Labor Force and Employment

The first chart (next page) compares the distribution of non-farm wage and salary (W&S) employment by major economic sector in Scotts Bluff County with the non-metropolitan distribution. Non-metropolitan Nebraska is defined as Nebraska minus the seven metropolitan counties of Cass, Douglas, Lancaster, Sarpy, Saunders, Seward, and Washington. Non-farm wage and salary employment consists of the following 11 sectors:

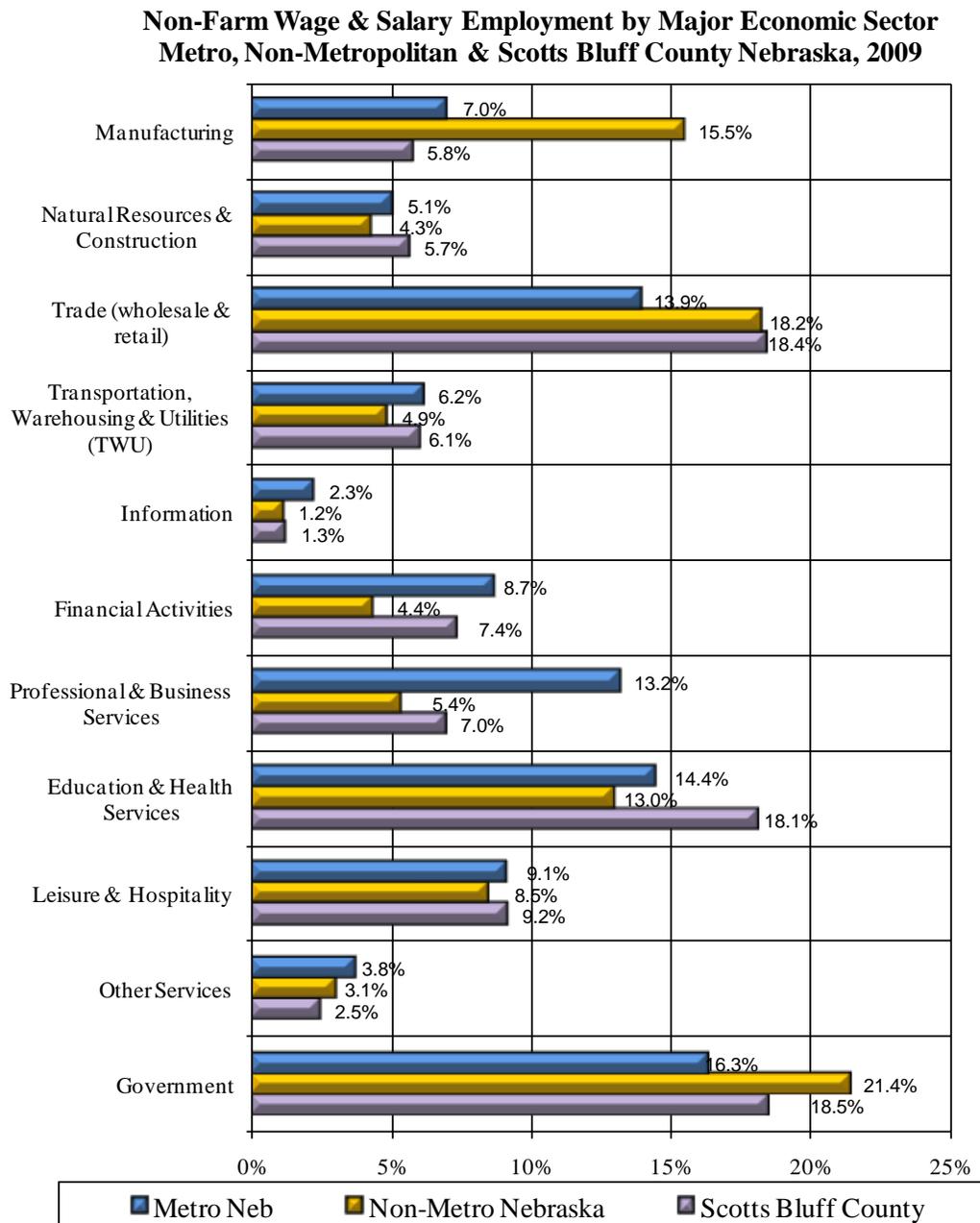
- Manufacturing (Durable & Nondurable)
- Natural Resources & Construction
- Trade (Retail & Wholesale)
- Transportation, Warehousing & Utilities
- Information
- Financial Activities
- Professional & Business Services
- Education & Health Services
- Leisure & Hospitality
- Other Services (except Public)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

When comparing Scotts Bluff County non-farm wage and salary employment sectors to non-metropolitan Nebraska and metropolitan sectors, there are significant differences between the distributions. Deviations from the non-metropolitan and metropolitan state distributions of employment are noted in Chart 1 (next page).

Chart 1 graphically displays the variances among employment by major economic sectors in Scotts Bluff County, metropolitan Nebraska, and non-metro Nebraska. The Manufacturing sector consists of both durable and non-durable goods.

The largest deviation between Scotts Bluff County and non-metropolitan Nebraska employment sectors falls in the Manufacturing sector having 5.8 percent employment (1,000 employees) compared to non-metropolitan Nebraska employment at 15.5 percent of the workforce – a difference of -9.7 percent. Comparing Scotts Bluff County to the overall metropolitan distribution, the largest deviation is found in the Professional & Business Services sector (7.0 percent or 1,213 employees Scotts Bluff County vs. 13.2 percent metropolitan Nebraska; a difference of -6.2 percent).

Chart 1



Source: Nebraska Department of Labor, Labor Market Information, August 2010

Table 1 and Chart 2 (next page) present non-farm wage and salary data for Scotts Bluff County for the period 2001–2009. Non-farm 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). The measure of employment reported in Table 1 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 non-farm wage and salary employment in Scotts Bluff County increased 3.1 percent (529 jobs) between 2001 and 2009.

Table 1 also provides employment data for Scotts Bluff County by major economic sector for years 2001–2009. Of the sectors reporting complete data, the Financial Activities sector recorded the largest percentage increase between 2001 and 2009 (29.0 percent or 288 jobs). The largest actual employment increase between 2001 and 2009 occurred in the Education & Health Services sector with an increase of 325 jobs or 11.6 percent.

Table 1

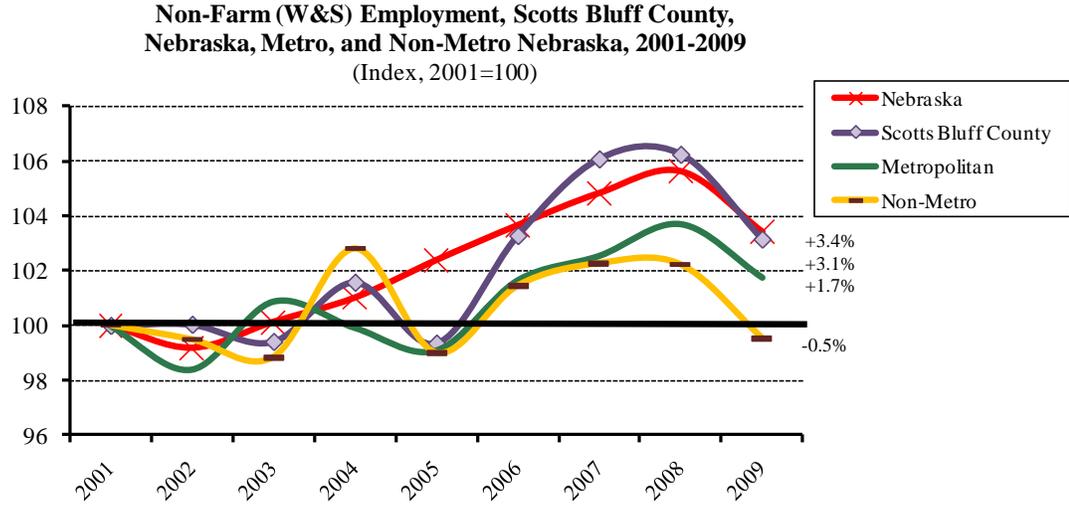
Non-Farm Wage & Salary Employment Trends, Scotts Bluff County, Nebraska
 Selected Years: 2001-2009

	2001	2002	2003	2004	2005	2006	2007	2008	2009	# Change 2001-2009	% Change 2001-2009
Non-farm Employment (W&S)	16,806	16,813	16,708	17,071	16,698	17,357	17,826	17,854	17,335	529	3.1
Manufacturing	1,338	1,280	1,268	1,341	1,262	1,220	1,247	1,201	1,000	-338	-25.3
Durable Goods	372	376	371	391	441	534	556	553	463	91	24.5
Nondurable Goods	966	904	897	951	821	686	691	649	537	-429	-44.4
Non-manufacturing											
Natural Resources & Construction	841	780	771	986	890	882	983	1,080	995	154	18.3
Trade	3,156	3,210	3,214	3,153	3,210	3,174	3,114	3,160	3,189	33	1.0
Wholesale Trade	781	797	792	762	796	821	813	851	787	6	0.8
Retail Trade	2,375	2,413	2,423	2,391	2,414	2,353	2,301	2,309	2,402	27	1.1
Transportation, Warehousing & Utilities	902	854	869	899	552	1,004	1,118	1,070	1,054	152	16.9
Information	350	290	265	260	250	218	221	215	230	-120	-34.3
Financial Activities	994	969	1,021	1,145	1,181	1,279	1,385	1,349	1,282	288	29.0
Professional & Business Services	1,139	1,243	1,029	1,062	1,146	1,300	1,413	1,303	1,213	74	6.5
Education & Health Services	2,812	2,873	2,950	2,981	3,029	3,057	3,087	3,213	3,137	325	11.6
Leisure and Hospitality	1,701	1,697	1,678	1,602	1,519	1,566	1,613	1,650	1,596	-105	-6.2
Other Services, except Public	572	558	521	532	539	482	462	438	431	-141	-24.7
Government	3,001	3,061	3,122	3,110	3,120	3,176	3,183	3,176	3,208	207	6.9
Federal	178	188	196	187	183	179	178	182	187	9	5.1
State	505	499	471	470	485	491	497	521	490	-15	-3.0
Local	2,318	2,374	2,455	2,454	2,452	2,506	2,509	2,474	2,532	214	9.2

Labor Force & Work Force Summary, 2001-2009, Annually, Scotts Bluff County, Nebraska (August 2010 data)
 Source: Nebraska Department of Labor, Labor Market Information

Chart 2 compares total non-farm wage and salary employment growth in Scotts Bluff County with metropolitan, non-metropolitan, and Nebraska as a whole for the review period 2001–2009. As this chart indicates total non-farm wage and salary employment in Scotts Bluff County increased 3.1 percent (529 jobs) from 2001 to 2009, compared to a 3.4 percent increase for Nebraska as a whole, a 1.7 percent increase in metropolitan Nebraska, and a 0.5 percent decrease in non-metropolitan Nebraska.

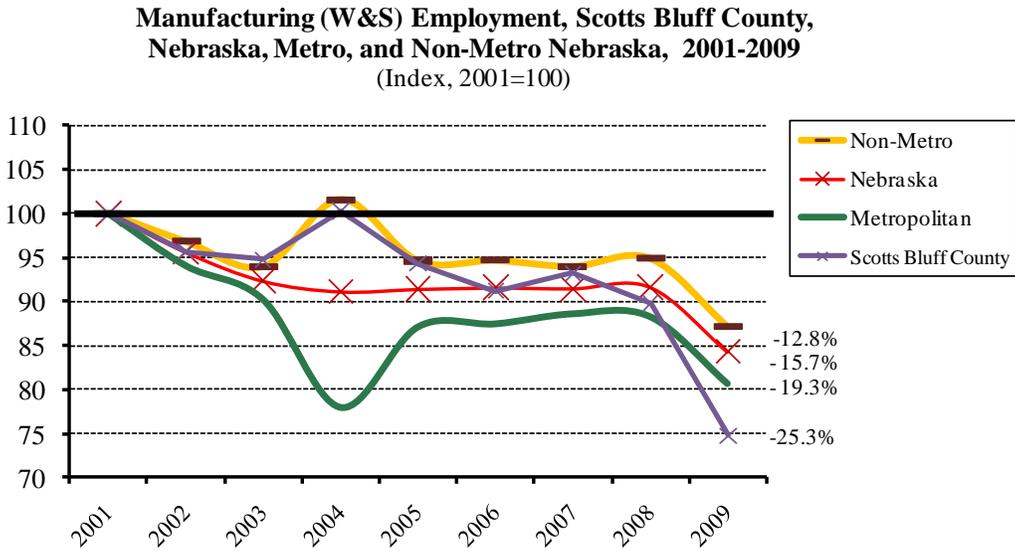
Chart 2



Source: Labor Force & Work Force Summary, August 2010

Chart 3 presents data on manufacturing wage and salary employment growth for Nebraska, metropolitan, and non-metropolitan areas. Scotts Bluff County experienced a 25.3 percent decline in Manufacturing employment (-338 jobs) during the study period. This decrease compares to a 12.8 percent decline in for non-metropolitan Nebraska, 15.7 percent decrease for Nebraska as a whole, and a 19.3 percent decrease for metropolitan Nebraska over the same period.

Chart 3



Source: Labor Force & Work Force Summary, August 2010

The next table (Table 2) shows labor force information for Scotts Bluff County for the time period 2001–2009. 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 3.9 percent increase (729 people) in the number of Scotts Bluff County residents participating in the labor force between 2001 and 2009.

The percent of those unemployed in Scotts Bluff County increased by 33.3 percent (254 people) between 2001 and 2009. 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 5.2 percent in 2009; significantly greater than that for metropolitan Nebraska (4.8 percent), Nebraska as a whole (4.6 percent), and non-metropolitan Nebraska (4.4 percent).

Table 2

Labor Force & Employment Trends, Scotts Bluff County, Nebraska
 Selected Years: 2001-2009

	2001	2002	2003	2004	2005	2006	2007	2008	2009	# Change 2001-2009	% Change 2001-2009
Labor Force	18,755	18,841	19,064	19,389	19,086	19,070	19,535	19,815	19,484	729	3.9
Unemployment	763	847	959	849	812	632	567	731	1,017	254	33.3
Unemployment Rate	4.1	4.5	5.0	4.4	4.3	3.3	2.9	3.7	5.2	---	---
Employment	17,992	17,994	18,105	18,540	18,274	18,438	18,968	19,084	18,467	475	2.6

Labor Force & Work Force Summary, 2001-2009, Annually, Scotts Bluff County, Nebraska (August 2010 data)
 Source: Nebraska Department of Labor, Labor Market Information

Residence and Work Flow Patterns

The next series of tables show residence (commute shed) and workflow (labor shed) patterns for Scotts Bluff County. A commute shed report looks at where residents are working (where they are commuting to work). A labor shed area report looks at the area from which a county 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 Scotts Bluff County are from 2008.

Tables 3A–3C examine the commute shed area for Scotts Bluff County. In Table 3A, the Census identified 16,633 primary jobs within the county borders. As Table 3A shows, 30.4 percent of Scotts Bluff County’s labor force participants (5,061 people) work in a location other than cities within Scotts Bluff County. Table 3B and Figure 2 report 18.1 percent of Scotts Bluff County workforce residents (3,017 people) work outside Scotts Bluff County. Table 3C shows 452 residents or 2.7 percent of Scotts Bluff County workforce residents leave the state boundary for work.

Table 3A

Scotts Bluff County Commute Shed Report, 2008

Where Scotts Bluff County Workforce Participants are Employed

	Count	Share
Total Primary Jobs	16,633	100%
Live in Scotts Bluff County - Work Elsewhere City		
Jobs in Places (Communities) Where Workers are Employed		
Scottsbluff city, NE	8,405	50.5%
Gering city, NE	2,448	14.7%
Mitchell city, NE	340	2.0%
Morrill village, NE	225	1.4%
Terrytown city, NE	154	0.9%
O'Neill city, NE	399	2.4%
Alliance city, NE	204	1.2%
North Platte city, NE	184	1.1%
Omaha city, NE	181	1.1%
Sidney city, NE	155	0.9%
All Other Locations	3,938	23.7%
Total Scotts Bluff County Residents Working Inside County Cities:	11,572	69.6%
Total Scotts Bluff County Residents Working Outside County Cities:	5,061	30.4%

Table 3B

Live in Scotts Bluff County - Work Elsewhere County Jobs in Counties Where Workers are Employed		
Scotts Bluff County, NE	13,616	81.9%
Holt County, NE	427	2.6%
Box Butte County, NE	248	1.5%
Morrill County, NE	226	1.4%
Lincoln County, NE	209	1.3%
Cheyenne County, NE	202	1.2%
Douglas County, NE	192	1.2%
Goshen County, WY	185	1.1%
Lancaster County, NE	149	0.9%
Dawes County, NE	106	0.6%
All Other Locations	1,073	6.5%
Total Scotts Bluff County Residents Working Inside County:	13,616	81.9%
Total Scotts Bluff County Residents Working Outside County:	3,017	18.1%

Figure 2



Table 3C

Live in Scotts Bluff County - Work Elsewhere State Jobs in States Where Workers are Employed		
Nebraska	16,181	97.3%
Wyoming	250	1.5%
Colorado	89	0.5%
South Dakota	27	0.2%
Kansas	25	0.2%
All Other Locations	61	0.4%
Total Scotts Bluff County Residents Working Inside Nebraska:	16,181	97.3%
Total Scotts Bluff County Residents Working Outside Nebraska:	452	2.7%

U.S. Census Bureau, LED OnTheMap Origin-Destination Database, 2nd Quarter 2008

People also travel from other cities and counties of residence to work in Scotts Bluff County—this is the labor shed area. Tables 4A–4C depict the labor shed area of those employed within Scotts Bluff County. The Census identified 16,438 primary jobs within Scotts Bluff County. As Table 4A indicates, 35.1 percent (5,766 people) who are employed within Scotts Bluff County live outside of county communities. Table 4B and Figure 3 show approximately 17.2 percent (2,822 people) who work inside Scotts Bluff County live outside of the county borders and Table 4C shows 3.8 percent (619 people) live out-of-state.

Table 4A

Scotts Bluff County Labor Shed Report, 2008
 Where Workers Live who are Employed in Scotts Bluff County

	Count	Share
Total Primary Jobs	16,438	100%
Work in Scotts Bluff County - Live Elsewhere City Jobs in Places (Communities) Where Workers Live		
Scottsbluff city, NE	5,658	34.4%
Gering city, NE	3,270	19.9%
Mitchell city, NE	619	3.8%
Terrytown city, NE	528	3.2%
Morrill village, NE	238	1.4%
Minatare city, NE	220	1.3%
Lyman village, NE	139	0.8%
Alliance city, NE	186	1.1%
Sidney city, NE	172	1.0%
Torrington city, WY	128	0.8%
All Other Locations	5,280	32.1%
Total Scotts Bluff County Workers Living Inside County Cities:	10,672	64.9%
Total Scotts Bluff County Workers Living Outside County Cities:	5,766	35.1%

Table 4B

Work in Scotts Bluff County - Live Elsewhere County Jobs in Counties Where Workers Live		
Scotts Bluff County, NE	13,616	82.8%
Morrill County, NE	440	2.7%
Box Butte County, NE	235	1.4%
Cheyenne County, NE	223	1.4%
Goshen County, WY	209	1.3%
Dawes County, NE	157	1.0%
Lincoln County, NE	125	0.8%
Sioux County, NE	100	0.6%
Lancaster County, NE	95	0.6%
Dawson County, NE	93	0.6%
All Other Locations	1,145	7.0%
Total Scotts Bluff County Workers Living Inside County:	13,616	82.8%
Total Scotts Bluff County Workers Living Outside County:	2,822	17.2%

Figure 3

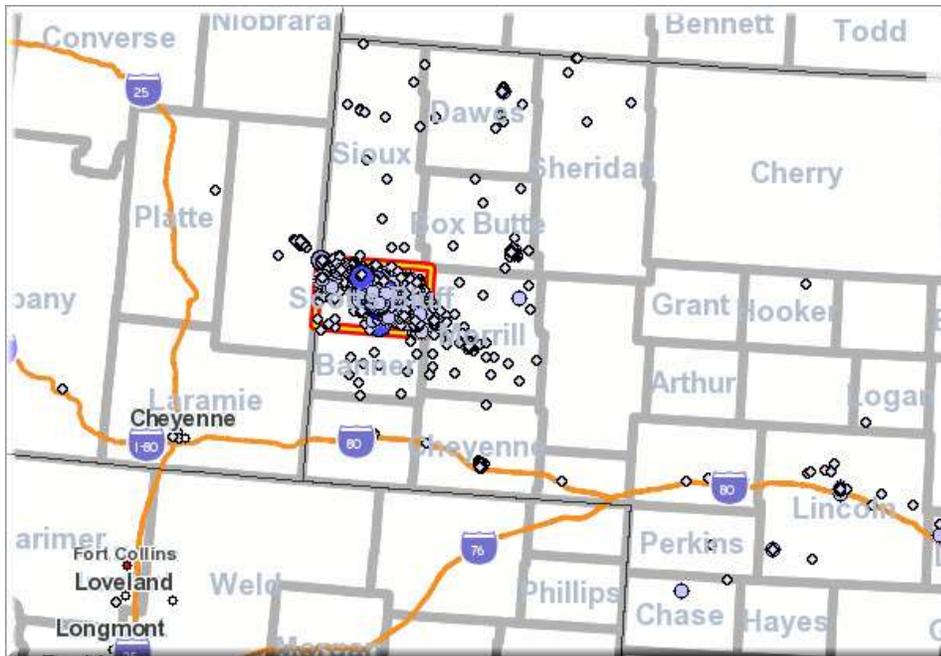


Table 4C

Work in Scotts Bluff County - Live Elsewhere State		
Nebraska	15,819	96.2%
Wyoming	350	2.1%
Colorado	101	0.6%
Iowa	25	0.2%
Texas	24	0.1%
All Other Locations	119	0.7%
Total Scotts Bluff County Workers Living Inside Nebraska:	15,819	96.2%
Total Scotts Bluff County Workers Living Outside Nebraska:	619	3.8%

Population and Migration Trends

The following tables (Tables 5 and 6) present population trend data for Scottsbluff, Scotts Bluff County, and the surrounding area. As Table 5 indicates, Scotts Bluff County's population increased by 8.9 percent (3,012 people) between 1950 and 2000. Scotts Bluff County's population decrease of 0.2 percent (-86 people) between 2000 and 2009 compares to a 5.0 percent increase for Nebraska as a whole.

Table 5

County Population 1950-2009
 Scotts Bluff County and the Surrounding Area

Location	1950	1960	1970	1980	1990	2000	2003	2006	2009	% Change 1950-2000	% Change 2000-2009
Nebraska	1,325,510	1,411,330	1,485,333	1,569,825	1,578,417	1,711,266	1,732,873	1,759,779	1,796,619	29.1	5.0
Scotts Bluff County	33,939	33,809	36,432	38,344	36,025	36,951	36,467	36,245	36,865	8.9	-0.2
Banner County	1,325	1,269	1,034	918	852	819	763	730	647	-38.2	-21.0
Box Butte County	12,279	11,688	10,094	13,696	13,130	12,158	11,498	11,012	10,891	-1.0	-10.4
Morrill County	8,263	7,057	5,813	6,085	5,423	5,440	5,161	4,996	4,911	-34.2	-9.7
Sioux County	3,124	2,575	2,034	1,845	1,549	1,475	1,466	1,369	1,281	-52.8	-13.2

Source: U.S. Bureau of the Census, Census of Population, April 2010

Table 6 data reveal Scotts Bluff County communities experienced a variety of population change during the 1950–2009 time period. The city of Scottsbluff reported a 14.6 percent increase in population (1,874 people) between 1950 and 2000. The city of Scottsbluff experienced a 1.0 percent increase in population (154 people) between 2000 and 2009. The rural areas outside of the selected communities experienced a 22.3 percent decrease (-2,691 people) during the 1950–2000 time period and a population decrease of 8.4 percent (-785 people) during the 2000 to 2009 time period.

Table 6

Population 1950-2009
 Scotts Bluff County Communities / Rural Populations

	1950	1960	1970	1980	1990	2000	2005	2007	2009	% Change 1950-2000	% Change 2000-2009
Scotts Bluff County	33,939	33,809	36,432	38,344	36,025	36,951	36,289	36,390	36,865	8.9	-0.2
Gering	3,842	4,585	5,639	7,760	8,025	7,751	7,639	7,640	7,738	101.7	-0.2
Henry	171	138	147	155	145	162	160	160	161	-5.3	-0.6
Lyman	666	626	561	551	452	421	404	402	405	-36.8	-3.8
McCrew	105	90	79	110	99	103	99	101	101	-1.9	-1.9
Melbeta	138	118	124	151	116	138	139	138	139	0.0	0.7
Minatare	890	894	939	969	807	810	860	865	871	-9.0	7.5
Mitchell	2,101	1,920	1,842	1,956	1,742	1,831	1,774	1,775	1,799	-12.9	-1.7
Morrill	849	884	937	1,097	980	957	928	930	941	12.7	-1.7
Scottsbluff	12,858	13,377	14,507	14,156	14,029	14,732	14,636	14,685	14,886	14.6	1.0
Terrytown	228	164	747	727	535	646	1,202	1,198	1,209	183.3	87.2
Total Rural Areas:	12,091	11,013	10,910	10,712	9,095	9,400	8,448	8,496	8,615	-22.3	-8.4

Source: U.S. Bureau of the Census, Census of Population, June 2010

The next table (Table 7) presents data on population migration by age group for the study area and for Nebraska for the 1990–2000 decade. This table provides further insights into the dynamics of population change. Net migration is the change in population after factoring the natural increase for an area (births minus deaths). The data showing migration patterns by age group indicate that for most counties and for non-metropolitan Nebraska, the most significant out-migration occurred in the ‘15–24’ year age group. The lowest percentage of out-migration typically occurred in the ‘45–64’ and ‘Over 65’ age groups. Scotts Bluff County is no exception to this pattern having 21.1 percent out-migration occurring in the ‘15–24’ year age group (-940 people).

Table 7

**Nebraska Population and Migration,
 by Age Group, 1990 and 2000**

Age Group	Population		% Change	Net	% of 1990
	1990	2000	1990-2000	Migration	Population
NEBRASKA					
0 - 14	363,390	369,427	1.7	15,750	4.3
15 - 24	221,509	255,240	15.2	13,009	5.9
25 - 44	486,020	487,107	0.2	12,644	2.6
45 - 64	284,398	367,294	29.1	6,387	2.2
Over 65	223,068	232,195	4.1	476	0.2
Total:	1,578,385	1,711,263	8.4	48,267	3.1

NON-METRO NEBRASKA					
0 - 14	179,510	169,176	-5.8	9,886	5.5
15 - 24	95,548	109,817	14.9	-12,543	-13.1
25 - 44	214,544	203,423	-5.2	-296	-0.1
45 - 64	147,243	176,709	20.0	6,828	4.6
Over 65	137,212	136,227	-0.7	2,405	1.8
Total:	774,057	795,352	2.8	6,280	0.8

SCOTTS BLUFF COUNTY					
0 - 14	8,399	7,821	-6.9	18	0.2
15 - 24	4,462	4,880	9.4	-940	-21.1
25 - 44	10,335	9,377	-9.3	-65	-0.6
45 - 64	7,014	8,510	21.3	213	3.0
Over 65	5,815	6,363	9.4	443	7.6
Total:	36,025	36,951	2.6	-331	-0.9

Table 7 (continued)

Age Group	Population		% Change 1990-2000	Net Migration	% of 1990 Population
	1990	2000			
BANNER COUNTY					
0 - 14	209	194	-7.2	64	30.7
15 - 24	90	72	-20.0	-70	-78.3
25 - 44	232	199	-14.2	1	0.5
45 - 64	193	223	15.5	5	2.5
Over 65	128	131	2.3	-43	-33.4
Total:	852	819	-3.9	-43	-5.0

BOX BUTTE COUNTY					
0 - 14	3,598	2,705	-24.8	-98	-2.7
15 - 24	1,435	1,619	12.8	-896	-62.4
25 - 44	4,216	3,261	-22.7	-261	-6.2
45 - 64	2,123	2,803	32.0	-281	-13.3
Over 65	1,758	1,770	0.7	76	4.3
Total:	13,130	12,158	-7.4	-1,460	-11.1

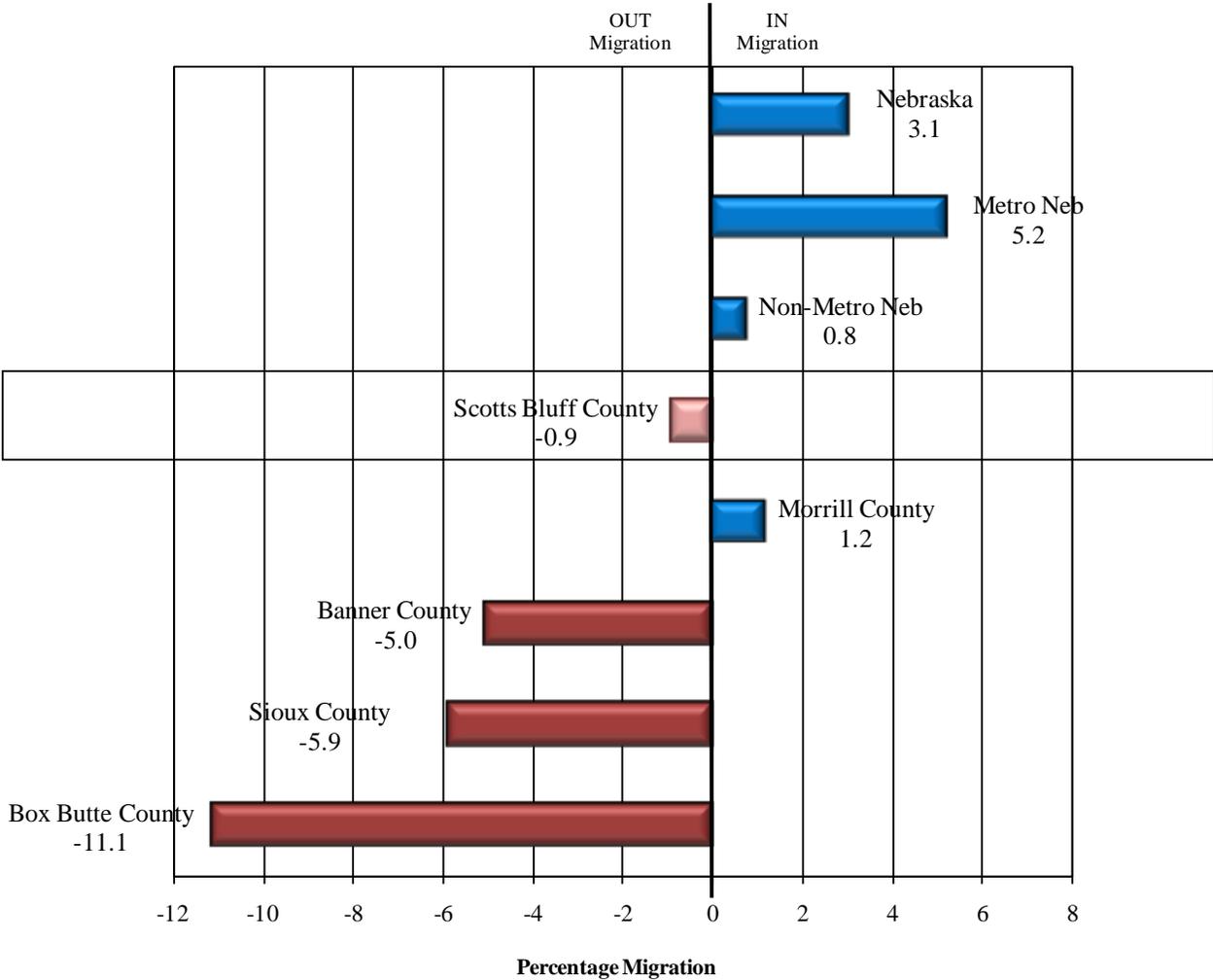
MORRILL COUNTY					
0 - 14	1,258	1,192	-5.2	121	9.6
15 - 24	551	677	22.9	-174	-31.6
25 - 44	1,445	1,330	-8.0	86	6.0
45 - 64	1,149	1,314	14.4	57	5.0
Over 65	1,020	927	-9.1	-24	-2.4
Total:	5,423	5,440	0.3	66	1.2

SIOUX COUNTY					
0 - 14	343	285	-16.9	70	20.5
15 - 24	144	180	25.0	-62	-43.1
25 - 44	422	365	-13.5	21	4.9
45 - 64	389	406	4.4	-2	-0.6
Over 65	251	239	-4.8	-118	-46.9
Total:	1,549	1,475	-4.8	-91	-5.9

Chart 4 graphically depicts the 1990–2000 migration patterns of Nebraska, Scotts Bluff County, and the surrounding area as a percentage of the 1990 population. As these data indicate, Scotts Bluff County experienced out-migration of 0.9 percent of the 1990 population (-331 people) while Nebraska recorded net in-migration of 3.1 percent.

Chart 4

**1990-2000 Migration as Percent of 1990 Population
 Scotts Bluff County and the Surrounding Area**

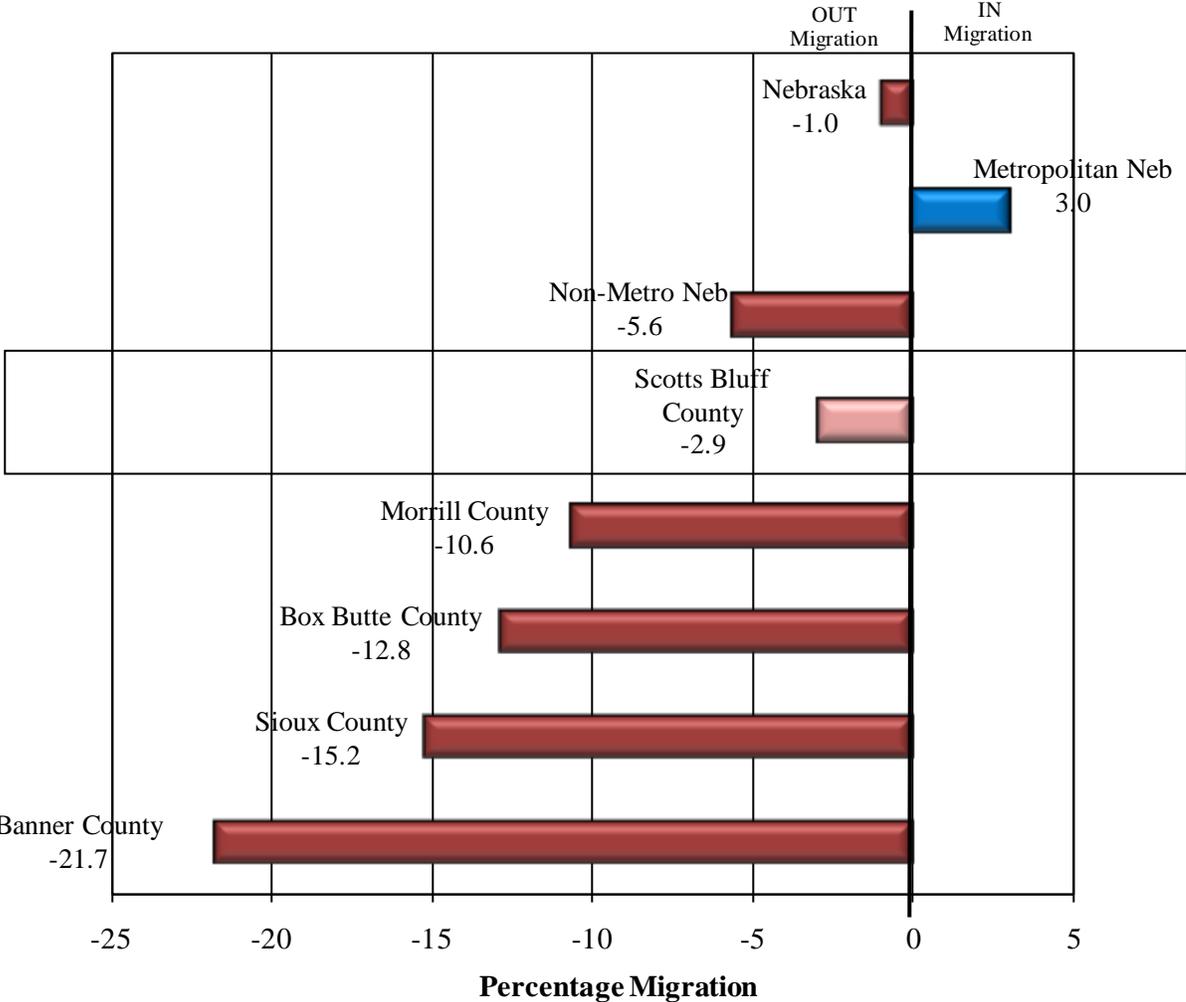


Source: U.S. Census Bureau, Population Estimates and Population Change, July 2005

Chart 5 shows the 2000–2009 migration pattern for the study area as a percentage of the 2000 population. Scotts Bluff County’s 2.9 percent out-migration (-1,086 people) compares to a 1.0 percent out-migration for Nebraska as a whole, a 5.6 percent out-migration for non-metropolitan Nebraska, and a 3.0 percent in-migration for Metropolitan Nebraska during the 2000 to 2009 time period.

Chart 5

**2000-2009 Migration as Percent of 2000 Population
 Scotts Bluff County and the Surrounding Area**



Source: U.S. Census Bureau, Population Estimates and Population Change, June 2010

The next two tables (Tables 8 and 9) provide further detail on migration between 2007 and 2008. Migration patterns are influenced by employment opportunities, cost-of-living, and quality-of-life factors. While these data provide further insight to where counties are gaining and losing population due to migration, it is important to recognize these data reflect migration activities of tax filing households.

Table 8 data show 37.9 percent of those moving in to Scotts Bluff County between 2007 and 2008 moved from other Nebraska locations (601 people). Data also reveal 984 people (62.1 percent) also migrated in from other states. Table 8 also shows migration flows. In-migration to Scotts Bluff County came primarily from Morrill, Box Butte, and Lancaster Counties.

Table 8

**Migration Inflow 2007-2008
 Scotts Bluff County, Nebraska**

Moved to Scotts Bluff County From:		
Location	#	%
Total U.S.	1,585	100.0%
Total Foreign	0	0.0%
Nebraska	601	37.9%
Different State	984	62.1%

County Specific Flows:		
Location	#	%
Morrill County, NE	119	7.5%
Box Butte County, NE	61	3.8%
Lancaster County, NE	51	3.2%
Goshen County, WY	48	3.0%
Larimer County, CO	37	2.3%
Cheyenne County, NE	32	2.0%
Dawes County, NE	30	1.9%
Maricopa County, AZ	32	2.0%
Douglas County, NE	32	2.0%
Sioux County, NE	31	2.0%
Buffalo County, NE	28	1.8%
Lincoln County, NE	25	1.6%
Natrona County, WY	24	1.5%
Kimball County, NE	22	1.4%
Jefferson County, CO	26	1.6%
Banner County, NE	15	0.9%
Pennington County, SD	17	1.1%
Weld County, CO	26	1.6%
Albany County, WY	19	1.2%
Laramie County, WY	17	1.1%
Platte County, WY	20	1.3%
Other Flows - Same State	155	9.8%
Other Flows - Diff State	718	45.3%

Source: SOI Tax Stats, County-to-County Migration Data Files, IRS, November 2009

Table 9 data reveal 31.4 percent of people migrating out of Scotts Bluff County between 2007 and 2008 remained in the state of Nebraska (482 people). Data show 1,055 Scotts Bluff County residents (68.6 percent) also moved to other states during this time period. Table 9 shows the majority of people leaving Scotts Bluff County went to Lancaster, Morrill, and Goshen (WY) Counties during this time period. Employment, housing, and educational opportunities located in these counties play a major role in this migration pattern.

Table 9

**Migration Outflow 2007-2008
 Scotts Bluff County, Nebraska**

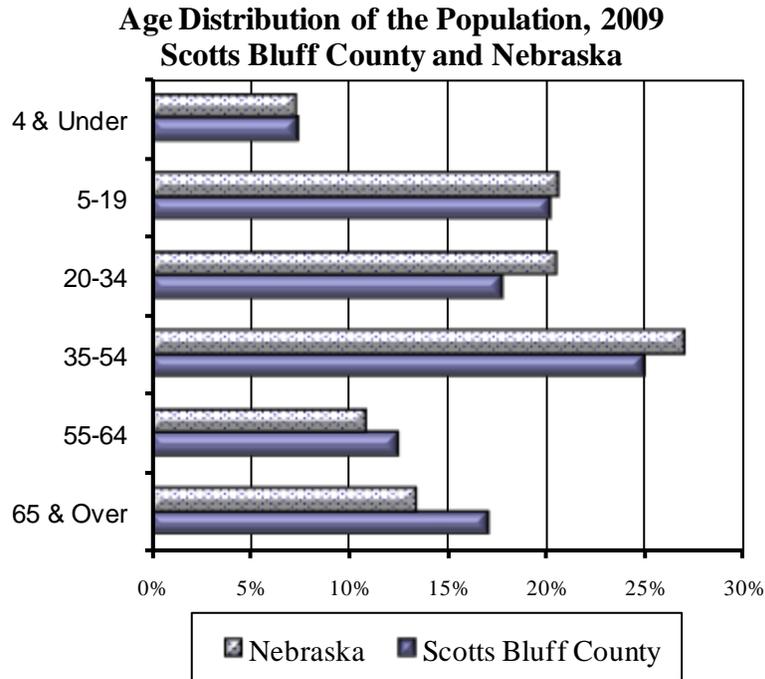
Moved from Scotts Bluff County To:		
Location	#	%
Total U.S.	1,537	100%
Total Foreign	0	0%
Nebraska	482	31.4%
Different State	1,055	68.6%

County Specific Flows:		
Location	#	%
Lancaster County, NE	80	5.2%
Morrill County, NE	81	5.3%
Goshen County, WY	69	4.5%
Laramie County, WY	61	4.0%
Box Butte County, NE	42	2.7%
Larimer County, CO	32	2.1%
Dawes County, NE	34	2.2%
Douglas County, NE	23	1.5%
Maricopa County, AZ	25	1.6%
Lincoln County, NE	23	1.5%
Arapahoe County, CO	26	1.7%
Pennington County, SD	27	1.8%
Denver County, CO	23	1.5%
Cheyenne County, NE	16	1.0%
El Paso County, CO	28	1.8%
Jefferson County, CO	19	1.2%
Kimball County, NE	18	1.2%
Clark County, NV	18	1.2%
Campbell County, WY	17	1.1%
Other Flows - Same State	165	10.7%
Other Flows - Diff State	710	46.2%

Source: SOI Tax Stats, County-to-County Migration Data Files, IRS, November 2009

The following charts (Charts 6 and 7) compare the age distribution of population for Scotts Bluff County and Nebraska as a whole. The population of Scotts Bluff County is older than Nebraska as a whole. The median age for Scotts Bluff County residents in 2009 was 39.2 years of age compared to 35.8 years of age for residents of Nebraska as a whole.

Chart 6



Source: U.S. Census Bureau, July 2010

Chart 7

	2009 Population		Percent	
	Nebraska	Scotts Bluff County	Nebraska	Scotts Bluff County
4 & Under	132,092	2,760	7.4%	7.5%
5-19	368,255	7,445	20.6%	20.2%
20-34	365,740	6,540	20.5%	17.7%
35-54	481,660	9,203	27.0%	25.0%
55-64	194,838	4,627	10.9%	12.6%
65 & Over	240,847	6,290	13.5%	17.1%
Total	1,783,432	36,865	100%	100%
Median Age	35.8	39.2		

Source: Age Group, Median Age, U.S. Census Bureau, July 2010

Retail Sales

Table 10 and Chart 8 show the retail sales (non-motor vehicle) pull factors for Scotts Bluff County and the surrounding area for 2009. 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 10

**2009 Retail Sales (Non-Motor Vehicle) Pull Factors
 Nebraska, Scotts Bluff County, and Surrounding Counties**

	2009 Population	2009 Retail Sales (x \$1,000)	2009 Per Cap Sales (\$)	2009 Pull Factor
Nebraska	1,796,619	19,368,221	10,780	1.00
Non-Metro Nebraska	769,644	7,208,503	9,366	0.87
Scotts Bluff County	36,865	431,089	11,694	1.08
Banner County	647	362	560	0.05
Box Butte County	10,891	132,561	12,172	1.13
Morrill County	4,911	25,603	5,213	0.48
Sioux County	1,281	2,996	2,339	0.22

Source: U.S. Census Bureau and Nebraska Department of Revenue, April 2010

Reviewing the pull factors at the county level indicates Scotts Bluff County maintains an expected level of retail pull. The 2009 pull factor of 1.08 indicates, on a per capita basis, retail sales in Scotts Bluff County are approximately .08 percent greater than 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 (1.08) with the pull factor for the non-metropolitan area of Nebraska (0.87) indicates per capita retail sales in Scotts Bluff County are approximately 24.9 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

Chart 8

2009 Retail Sales (NMV) Pull Factors, Nebraska, Scotts Bluff County & Surrounding Counties

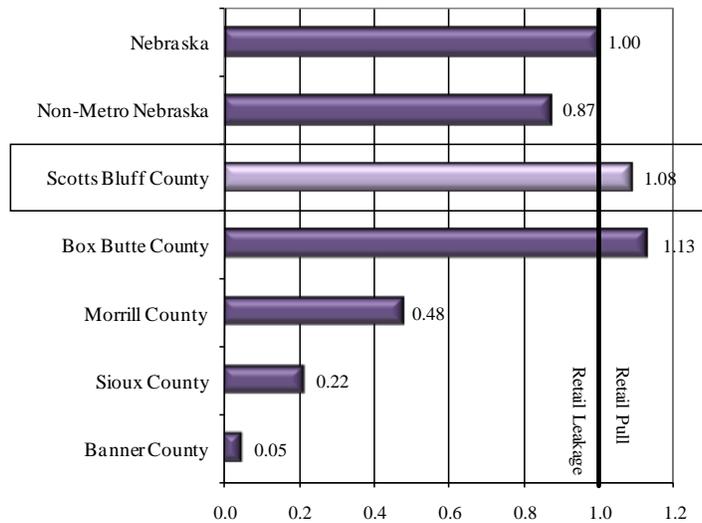


Table 11 and Chart 9 compare the 2009 pull factors for Scottsbluff and selected area communities. The community of Scottsbluff’s pull factor of 2.24 indicates that, on a per capita basis, non-motor vehicle retail sales in Scottsbluff are approximately 124 percent greater than the state’s average per capita sales.

Table 11

**2009 Retail Sales (NMV) Pull Factors
 Nebraska, Scottsbluff, and Selected Area Cities**

	2009 Population	2009 Retail Sales (x \$1,000)	2009 Per Cap Sales (\$)	2009 Pull Factor
Nebraska	1,796,619	19,368,221	10,780	1.00
Non-Metro Nebraska	769,644	7,208,503	9,366	0.87
Scottsbluff (Scotts Bluff)	14,886	359,763	24,168	2.24
Harrisburg (Banner)	(NA)	(D)	(NA)	(NA)
Alliance (Box Butte)	8,002	126,811	15,847	1.47
Bridgepot (Morrill)	1,430	17,544	12,268	1.14
Harrison (Sioux)	240	2,816	11,733	1.09

Source: U.S. Census Bureau and Nebraska Department of Revenue, July 2010

(NA) Data not available

(D) Data withheld to avoid individual disclosure

Chart 9

**2009 Retail Sales (NMV) Pull Factors
 Nebraska, Scottsbluff, and Selected Area Cities**

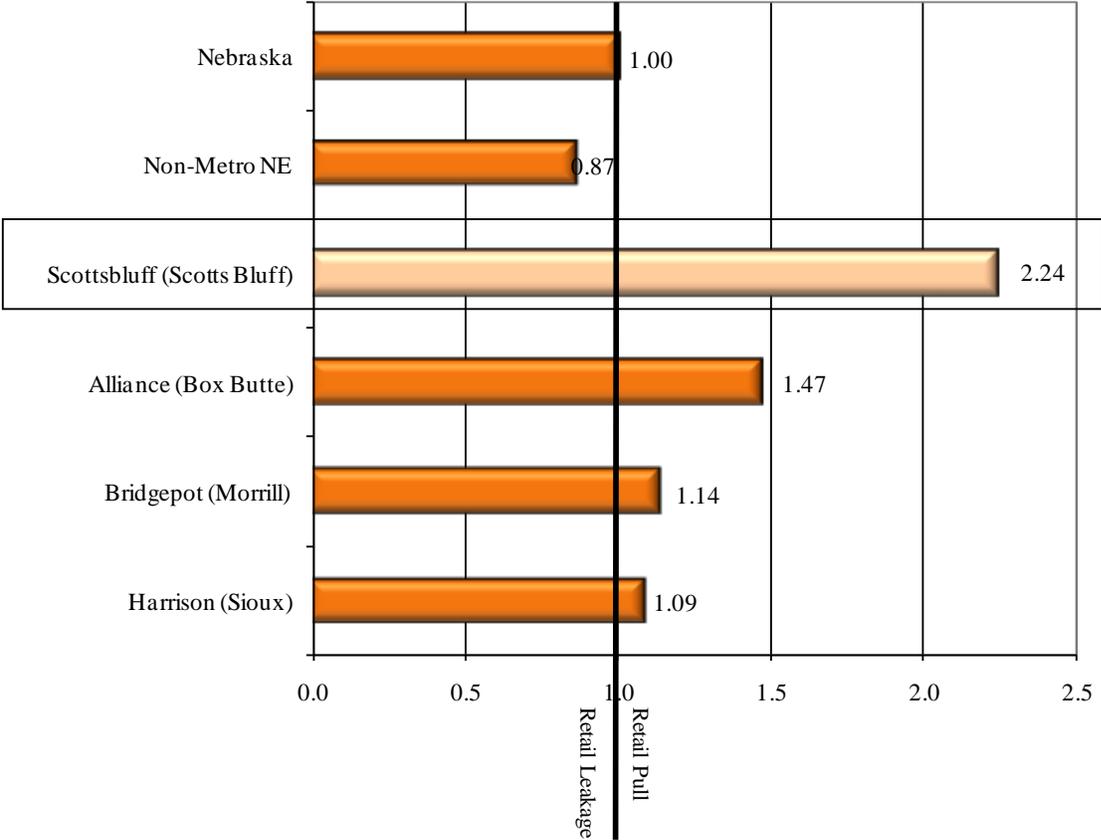


Table 12 and Chart 10 further breakdown the 2009 pull factors into the communities reporting retail sales figures within Scotts Bluff County. As this table indicates, the community of Scottsbluff had the strongest pull factor (2.24) compared to the other communities reporting within the county. Together, these communities contributed to an overall pull factor of 1.08 for Scotts Bluff County in 2009.

Table 12

**2009 Retail Sales (NMV) Pull Factors
 Nebraska, Scottsbluff, and Available Scotts Bluff County Communities**

	2009 Population	2009 Retail Sales (x \$1,000)	2009 Per Cap Sales (\$)	2009 Pull Factor
Nebraska	1,796,619	19,368,221	10,780	1.00
Non-Metro Nebraska	769,644	7,208,503	9,366	0.87
Scotts Bluff County	36,865	431,089	11,694	1.08
Gering	7,738	54,957	7,102	0.66
Henry	161	(D)	(NA)	(NA)
Lyman	405	855	2,110	0.20
McGrew	101	(D)	(NA)	(NA)
Melbeta	139	114	817	0.08
Minatare	871	1,588	1,824	0.17
Mitchell	1,799	6,030	3,352	0.31
Morrill	941	6,245	6,637	0.62
Scottsbluff	14,886	359,763	24,168	2.24
Terrytown	1,209	(D)	(NA)	(NA)

Source: U.S. Census Bureau and Nebraska Department of Revenue, July 2010

(D) Data withheld to avoid individual disclosure

(NA) Data not available

Chart 10

**2009 Retail Sales (NMV) Pull Factors, Nebraska,
 Scottsbluff, and Available Scotts Bluff County Communities**

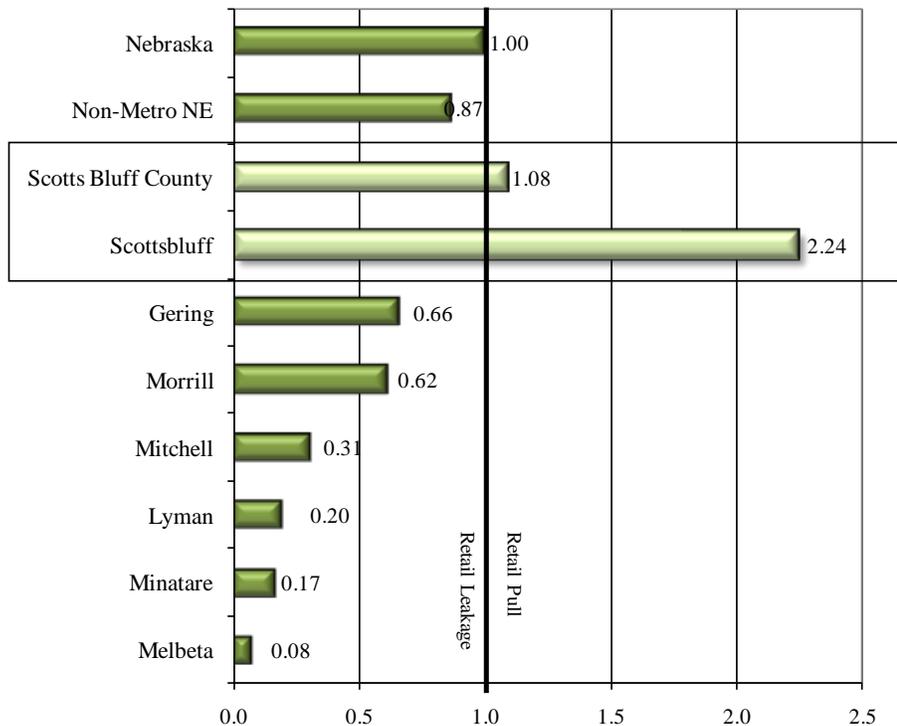


Table 13 (sorted by population) and Chart 11 (sorted by pull factor) show the 2009 pull factors for Nebraska, Scottsbluff, and eight other similarly sized communities selected from around the state. Scottsbluff's pull factor of 2.24 leads the group for 2009 thus indicating Scottsbluff has greater retail pull.

Table 13

**2009 Retail Sales (NMV) Pull Factors
 Scottsbluff & Other Similarly Sized Nebraska Communities**

	2009 Population	2009 Retail Sales (x \$1,000)	2009 Per Cap Sales (\$)	2009 Pull Factor
Nebraska	1,796,619	19,368,221	10,780	1.00
Non-Metro Nebraska	769,644	7,208,503	9,366	0.87
Scottsbluff (Scotts Bluff)	14,886	359,763	24,168	2.24
Alliance (Box Butte)	8,002	126,811	15,847	1.47
Lexington (Dawson)	10,275	135,430	13,180	1.22
South Sioux City (Daktoa)	12,213	127,664	10,453	0.97
Beatrice (Gage)	12,564	156,497	12,456	1.16
La Vista (Sarpy)	16,887	182,170	10,788	1.00
Columbus (Platte)	21,914	331,861	15,144	1.40
Norfolk (Madison)	23,272	468,323	20,124	1.87
North Platte (Lincoln)	24,137	419,226	17,369	1.61

Source: U.S. Census Bureau and Nebraska Department of Revenue, July 2010

Chart 11

**2009 Retail Sales (NMV) Pull Factors, Nebraska,
 Scottsbluff & Other Similarly Sized Nebraska Communities**

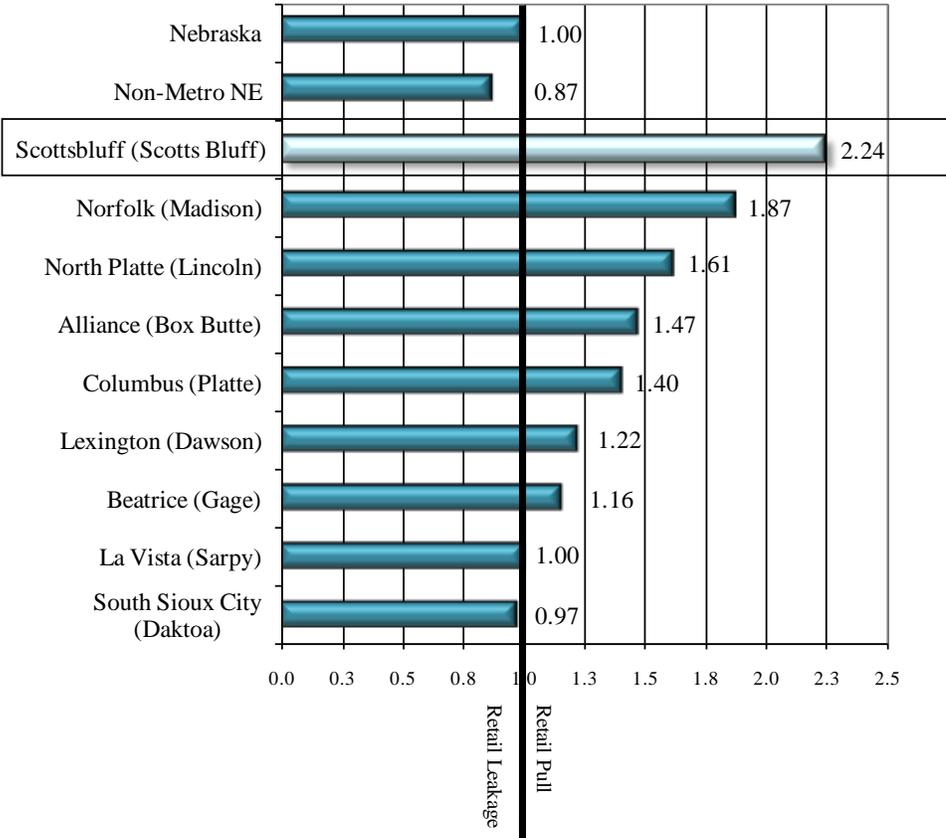
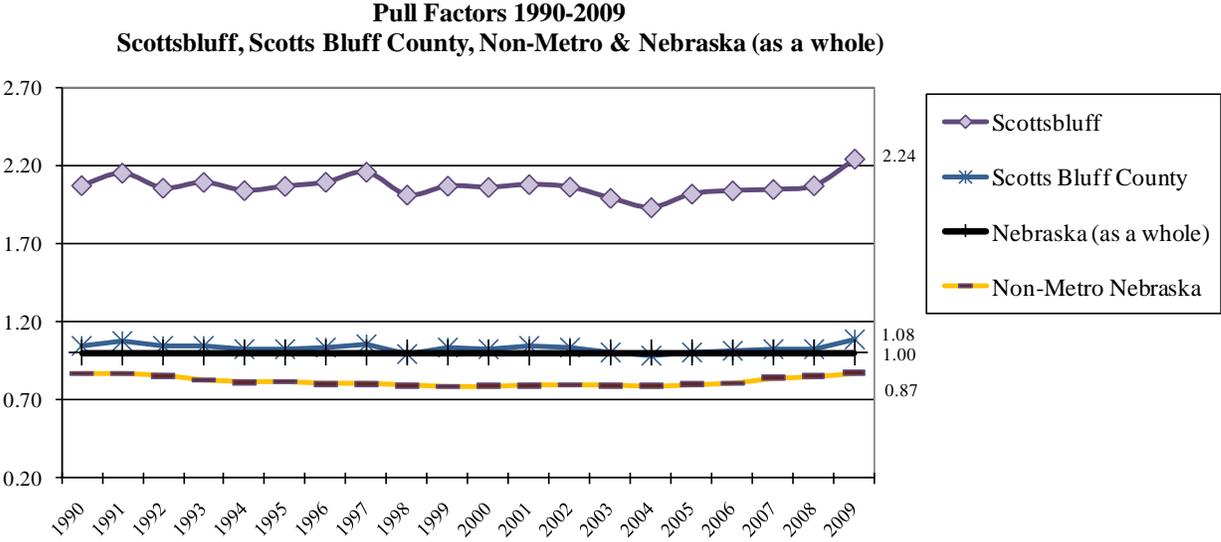


Chart 12 illustrates the pull factor trend for Scottsbluff, Scotts Bluff County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2009. In examining the time line, the city of Scottsbluff shows significant retail pull throughout the time period. Data within Scotts Bluff County (as a whole) shows the pull factor has remained similar to the Nebraska average throughout the time period shown.

Chart 12



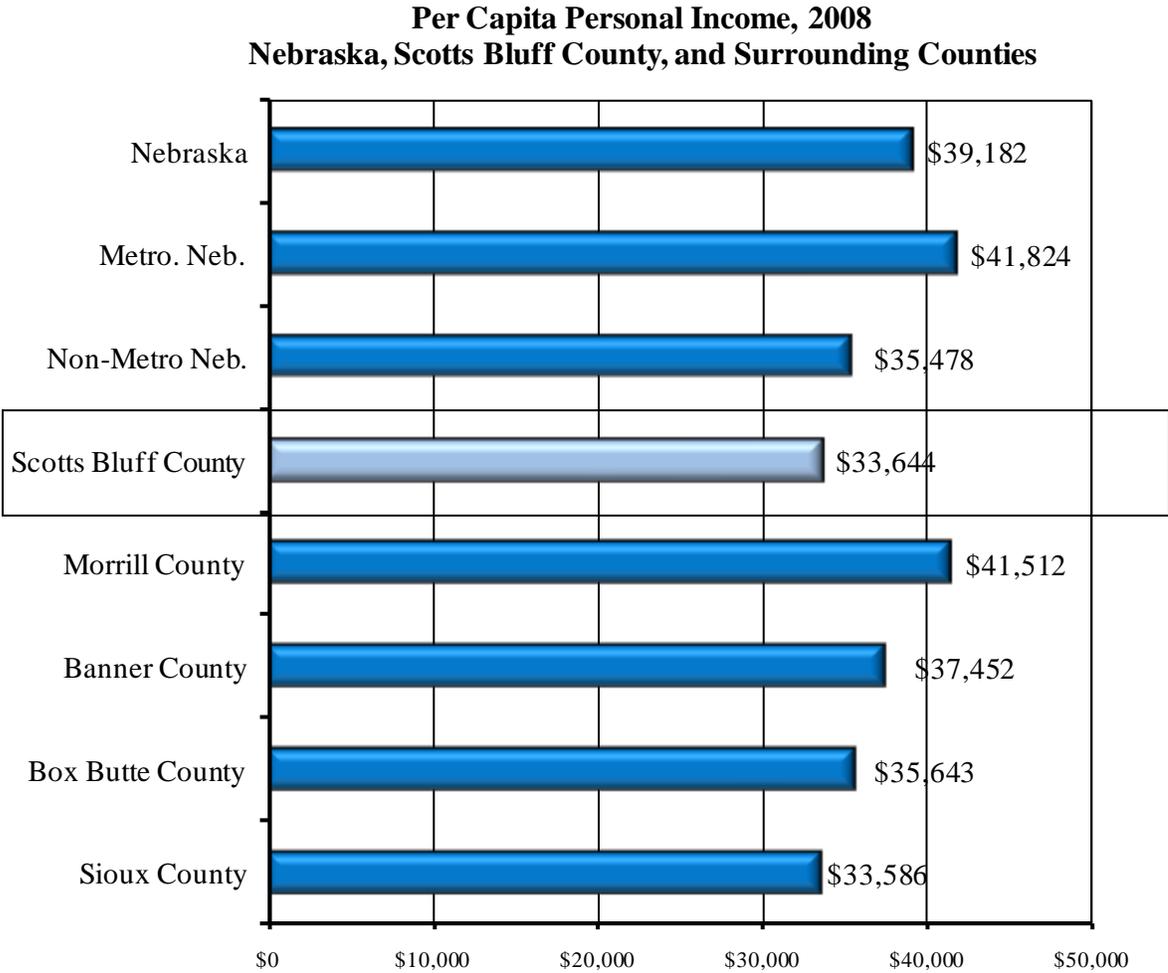
Source: U.S. Census Bureau and Nebraska Department of Revenue, 2010

Per Capita Personal Income

Per capita personal income in Scotts Bluff County was \$33,644 in 2008 the last year in which such data are available. This amount is:

- \$5,538 or 14.1 percent less than Nebraska as a whole,
- \$8,180 or 19.6 percent less than Metropolitan Nebraska, and
- \$1,834 or 5.2 percent less than Non-Metropolitan Nebraska.

Chart 13



Source: Bureau of Economic Analysis, U.S. Department of Commerce, May 2010

Median Family Income

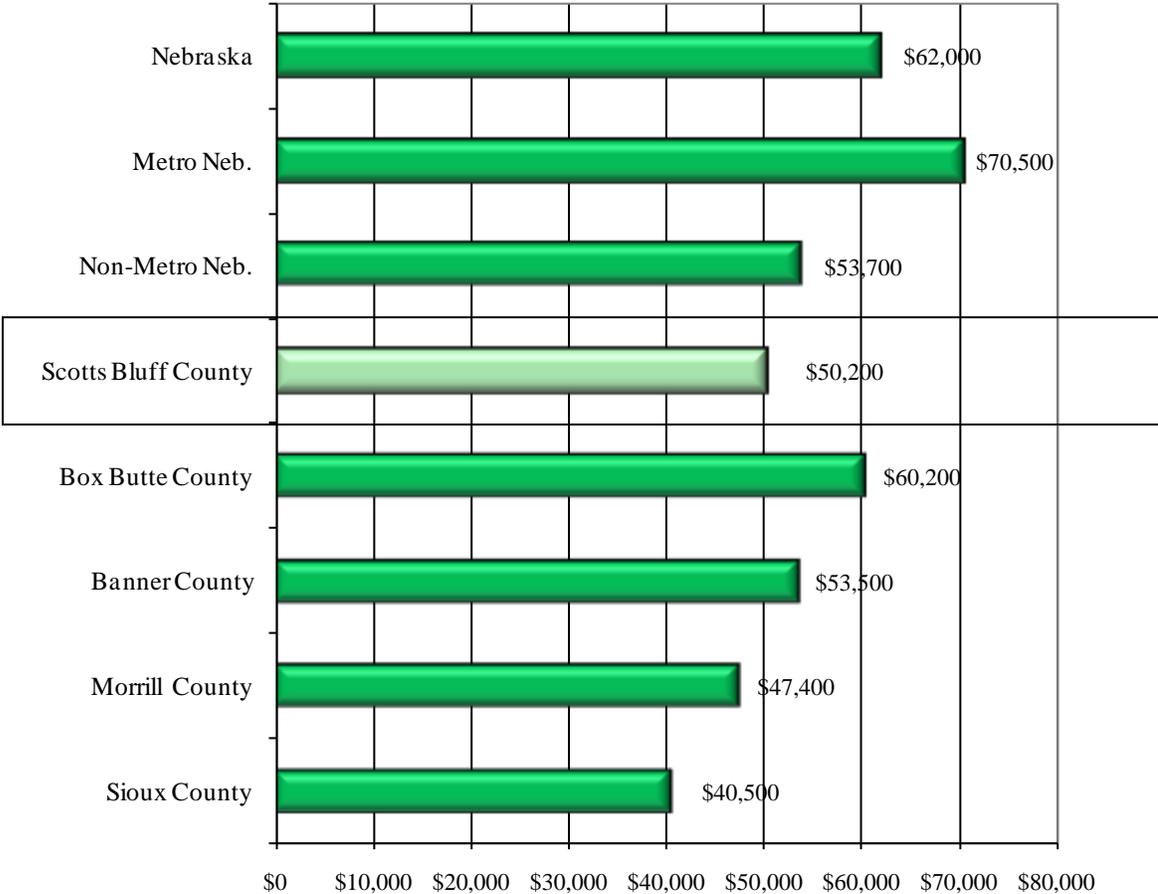
Median family income provides a different perspective of income levels in Nebraska, Scotts Bluff County, and the surrounding area. Median family income is the midpoint in the ranked distribution of the sum of income for all family members 15 years of age and older. The U.S. Department of Housing and Urban Development (HUD) estimates median family income based on 2000 Census data updated with a combination of Bureau of Labor Statistics and Census Divisional data.

Median family income in Scotts Bluff County is estimated to be \$50,200 in 2009. This amount is:

- \$11,800 or 19.0 percent less than Nebraska as a whole,
- \$20,300 or 28.8 percent less than Metropolitan Nebraska, and
- \$3,500 or 6.5 percent less than Non-Metropolitan Nebraska.

Chart 14

**Median Family Income 2009
 Nebraska, Scotts Bluff County & Surrounding Counties**



Source: U.S. Department of Housing and Urban Development, est. October 2009