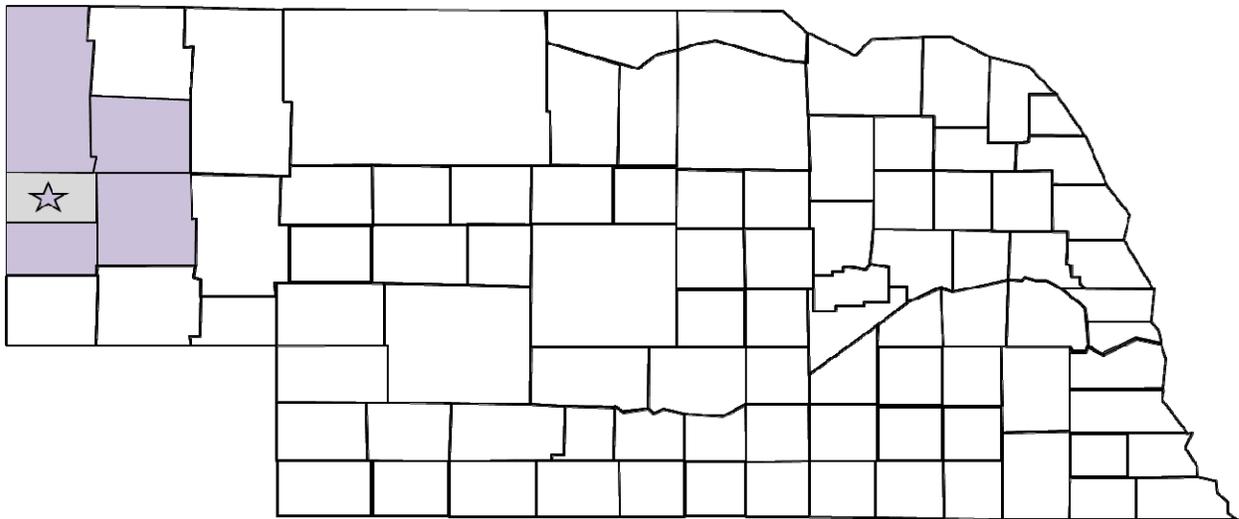


Economic and Demographic Trends

Scottsbluff, Scotts Bluff County, and the Surrounding Area



September 2012

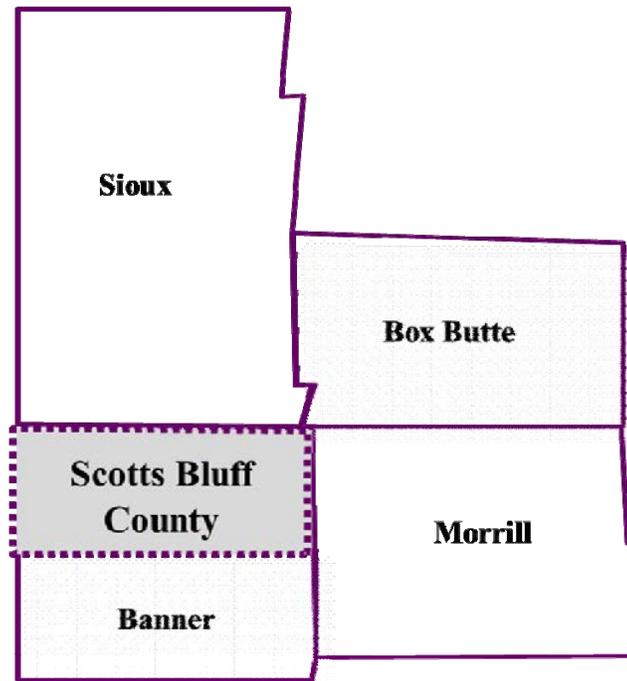
Prepared by: Ken Lemke
Nebraska Public Power District
Economic Development Department
PO Box 499, 1414 15th Street
Columbus, NE 68602-0499
(402) 563-5535
klemke@nppd.com

Available Online @ econdev.nppd.com



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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). 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 2002–2011. 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:

- 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

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 3.0 percent (512 jobs) between 2002 and 2011.

Table 1 also provides employment data for Scotts Bluff County by major economic sector for years 2002–2011. Of the sectors, the Transportation, Warehousing and Utilities portion of the Non-manufacturing sector recorded the largest percentage increase in employment between 2002 and 2011 (27.8 percent or 237 jobs). The Education and Health Services sector recorded the largest actual employment increase between 2002 and 2011 (304 jobs or 10.6 percent).

Table 1

Non-Farm Wage & Salary Employment Trends, Scotts Bluff County, Nebraska
 Selected Years: 2002-2011

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	% Change 2002-2011	# Change 2002-2011
Non-farm Employment (W&S)	16,813	16,708	17,071	16,698	17,357	17,826	17,742	17,392	17,005	17,325	3.0	512
Manufacturing	1,280	1,268	1,341	1,262	1,220	1,247	1,156	1,021	923	944	-26.3	-336
Durable Goods	376	371	391	441	534	556	531	461	398	408	8.5	32
Nondurable Goods	904	897	951	821	686	691	625	560	525	536	-40.7	-368
Non-manufacturing												
Natural Resources & Construction	780	771	986	890	882	983	1,053	972	747	826	5.9	46
Trade	3,210	3,214	3,153	3,210	3,174	3,114	3,113	3,202	3,141	3,143	-2.1	-67
Wholesale Trade	797	792	762	796	821	813	831	792	788	792	-0.6	-5
Retail Trade	2,413	2,423	2,391	2,414	2,353	2,301	2,282	2,410	2,354	2,351	-2.6	-62
Transportation, Warehousing & Utilities	854	869	899	552	1,004	1,118	1,115	1,076	984	1,091	27.8	237
Information	290	265	260	250	218	221	220	229	220	267	-7.9	-23
Financial Activities	969	1,021	1,145	1,181	1,279	1,384	1,297	1,291	1,269	1,237	27.7	268
Professional & Business Services	1,243	1,029	1,062	1,146	1,300	1,413	1,269	1,246	1,285	1,423	14.5	180
Education & Health Services	2,873	2,950	2,981	3,029	3,057	3,087	3,224	3,122	3,174	3,177	10.6	304
Leisure & Hospitality	1,697	1,678	1,602	1,519	1,566	1,613	1,629	1,608	1,634	1,633	-3.8	-64
Other Services, except Public	558	521	532	539	482	462	431	426	435	439	-21.3	-119
Government	3,061	3,122	3,110	3,120	3,176	3,183	3,235	3,199	3,192	3,146	2.8	85
Federal	188	196	187	183	179	178	188	184	195	180	-4.3	-8
State	499	471	470	485	491	497	518	489	502	535	7.2	36
Local	2,374	2,455	2,454	2,452	2,506	2,509	2,530	2,526	2,496	2,439	2.7	65

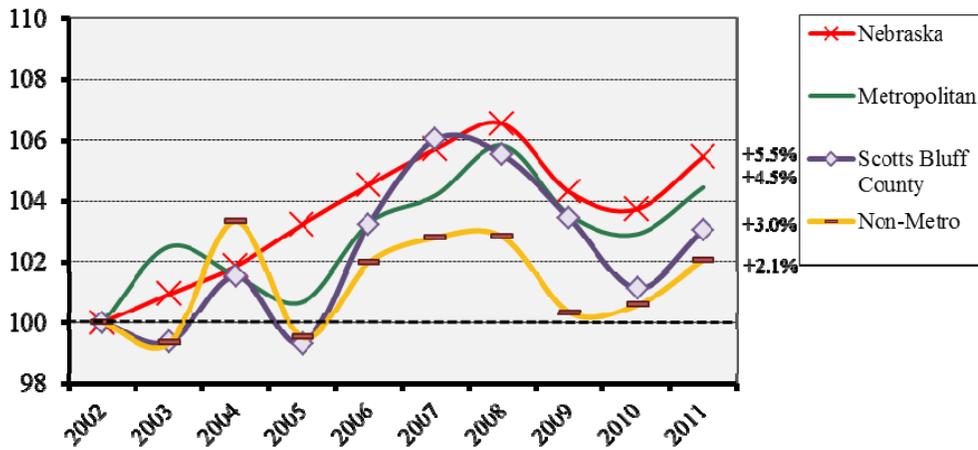
Labor Force & Work Force Summary, 2002-2011, Annually, Scotts Bluff County, Nebraska (March 2012 data)
 Source: Nebraska Department of Labor, Labor Market Information

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 2002–2011. Non-metropolitan Nebraska is defined as Nebraska minus the seven 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 3.0 percent (512 jobs) from 2002 to 2011, compared to a 5.5 percent increase for Nebraska as a whole, a 4.5 percent increase in metropolitan Nebraska, and a 2.1 percent increase in non-metropolitan Nebraska.

Chart 1

Nonfarm (W&S) Employment, Scotts Bluff County, Nebraska, Metro, and Non-Metro Nebraska, 2002-2011
 (Index, 2002=100)

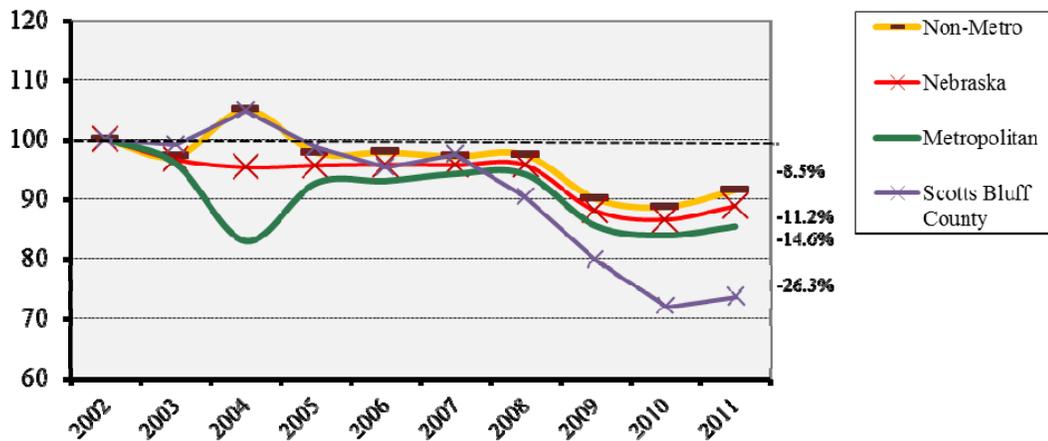


Source: Labor Force & Work Force Summary, March 2012

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 26.3 percent decrease in employment (336 jobs) between 2002 and 2011. This compares to a 8.5 percent decrease in employment for non-metropolitan Nebraska; a 11.2 percent decrease for Nebraska as a whole; and a 14.6 percent decrease for metropolitan Nebraska over the same period.

Chart 2

Manufacturing (W&S) Employment, Scotts Bluff County, Nebraska, Metro, and Non-Metro Nebraska, 2002-2011
 (Index, 2002=100)

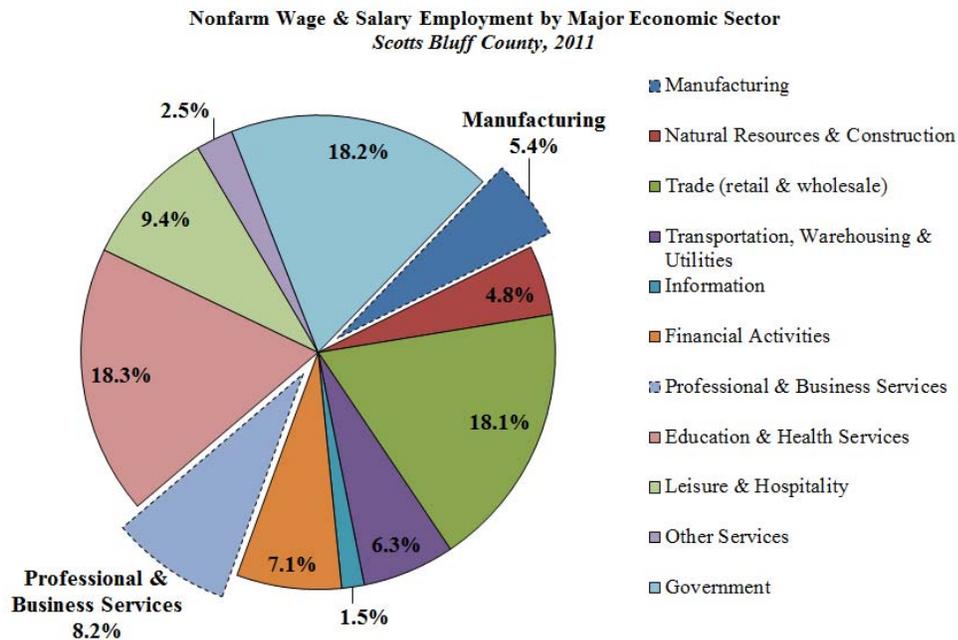


Source: Labor Force & Work Force Summary, March 2012

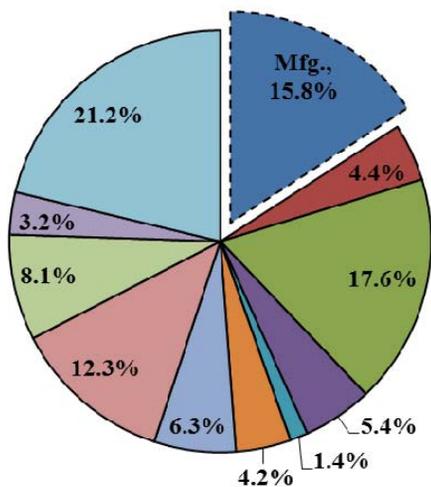
The next series of pie charts (Charts 3, 4 & 5) display the distribution of nonfarm wage and salary (W&S) employment by major economic sector in Scotts Bluff County compared to the non-metropolitan and metropolitan distributions.

When comparing the Scotts Bluff employment sectors to non-metropolitan Nebraska, the largest deviation falls in the Manufacturing sector having 5.4 percent employment (944 employees) compared to non-metropolitan Nebraska employment at 15.8 percent of the workforce; a difference of 10.4 percent. Comparing Scotts Bluff County to the overall metropolitan distribution, the largest deviation is found in the Professional & Business Services sector (8.2 percent Scotts Bluff County vs. 14.0 percent metropolitan Nebraska; a difference of 5.8 percent).

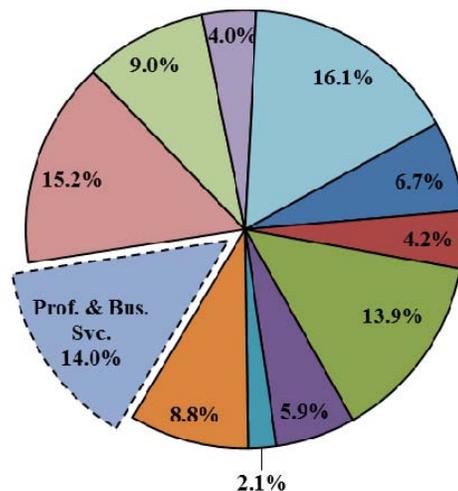
Charts 3, 4, 5



Non-Metro Nebraska W&S Employment, 2011



Metro Nebraska W&S Employment, 2011



The next table (Table 2) shows labor force information for Scotts Bluff County for the time period 2002–2011. 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 2002 and 2011 (2.9 percent or 515 people).

The number of those unemployed in Scotts Bluff County increased by (116 people) between 2002 and 2011. 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 4.9 percent in 2011; above that for non-metro and for metropolitan Nebraska (4.7 percent), Nebraska as a whole (4.4 percent), and non-metropolitan Nebraska (4.1 percent).

Table 2
Labor Force & Employment Trends, Scotts Bluff County, Nebraska
 Selected Years: 2002-2011

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	% Change 2002-2011	# Change 2002-2011
Labor Force	18,841	19,064	19,389	19,086	19,076	19,543	19,586	19,530	19,355	19,472	3.3	631
Unemployment	847	959	849	812	622	572	715	1,015	1,046	963	13.7	116
Unemployment Rate	4.5	5.0	4.4	4.3	3.3	2.9	3.7	5.2	5.4	4.9	(N/A)	(N/A)
Employment	17,994	18,105	18,540	18,274	18,454	18,971	18,871	18,515	18,309	18,509	2.9	515

Labor Force & Work Force Summary, 2002-2011, Annually, Scotts Bluff County, Nebraska (August 2012 data)

Source: Nebraska Department of Labor, Labor Market Information

(N/A) Data not available

Residence and Work Flow Patterns

The next series of tables show residence (Work Destination) and workflow (Home Destination) patterns for 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 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 2010.

Table 3 (pages 6–7) examines the Work Destination area for Scotts Bluff County from three perspectives: by state, by county, and by place (city). In Table 3, the Census Bureau identified 16,074 county labor force participants holding primary jobs. As Table 3 shows, 96.3 percent of Scotts Bluff County’s labor force participants are employed within the state of Nebraska. Approximately 80.2 percent of Scotts Bluff County workers remain within Scotts Bluff County for employment with 19.8 percent leaving the county borders for work (next page). Looking deeper to the locality level, the table also shows the top ten incorporated places where Scotts Bluff County labor force participants are employed (next page).

Table 3

Work Destination Report
Where Workers are Employed Who Live in the Selection Area
 2010

	Count	Share
Total Primary Jobs	16,074	100.0%

By States

Job Counts by States Where Workers are Employed
 2010

	Count	Share
Nebraska	15,472	96.3%
Wyoming	323	2.0%
Colorado	127	0.8%
South Dakota	59	0.4%
Kansas	24	0.1%
California	10	0.1%
Texas	10	0.1%
Iowa	8	0.0%
Missouri	5	0.0%
Florida	4	0.0%
All Other Locations	32	0.2%



Table 3 (continued)

By Counties

Job Counts by Counties Where Workers are Employed
 2010

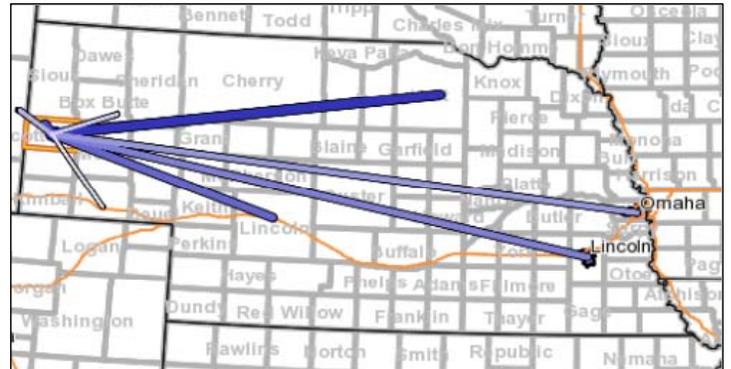
	Count	Share
Scotts Bluff County, NE	12,887	80.2%
Holt County, NE	444	2.8%
Lincoln County, NE	264	1.6%
Goshen County, WY	256	1.6%
Lancaster County, NE	216	1.3%
Box Butte County, NE	191	1.2%
Douglas County, NE	184	1.1%
Cheyenne County, NE	179	1.1%
Morrill County, NE	174	1.1%
Dawes County, NE	128	0.8%
All Other Locations	1,151	7.2%



By Place (top 10)

Job Counts by Places (Cities, CDPs, etc.) Where Workers are Employed
 2010

	Count	Share
Scottsbluff city, NE	7,894	49.1%
Gering city, NE	2,422	15.1%
O'Neill city, NE	378	2.4%
Mitchell city, NE	347	2.2%
North Platte city, NE	223	1.4%
Lincoln city, NE	207	1.3%
Omaha city, NE	176	1.1%
Torrington city, WY	159	1.0%
Alliance city, NE	150	0.9%
Sidney city, NE	140	0.9%
All Other Locations	3,978	24.7%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, August 2012

People also travel from other locations to work in Scotts Bluff County—this is the Home Destination report or the labor shed area. Table 4 (pages 8–9) depicts the home locations of those employed within Scotts Bluff County. The Census identified 16,581 primary jobs within Scotts Bluff County. As Table 4 indicates, 93.9 percent of these jobs are held by Nebraska residents. Approximately 77.7 percent of Scotts Bluff County 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
 2010

	Count	Share
Total Primary Jobs	16,581	100.0%

By States

Job Counts by States Where Workers Live
 2010

	Count	Share
Nebraska	15,564	93.9%
Wyoming	531	3.2%
Colorado	176	1.1%
Iowa	31	0.2%
Kansas	22	0.1%
California	21	0.1%
New Mexico	17	0.1%
Texas	17	0.1%
South Dakota	15	0.1%
Utah	15	0.1%
All Other Locations	172	1.0%



By Counties

Job Counts by Counties Where Workers Live
 2010

	Count	Share
Scotts Bluff County, NE	12,887	77.7%
Morrill County, NE	545	3.3%
Goshen County, WY	313	1.9%
Box Butte County, NE	263	1.6%
Cheyenne County, NE	255	1.5%
Dawes County, NE	171	1.0%
Sioux County, NE	168	1.0%
Lincoln County, NE	123	0.7%
Lancaster County, NE	114	0.7%
Banner County, NE	107	0.6%
All Other Locations	1,635	9.9%

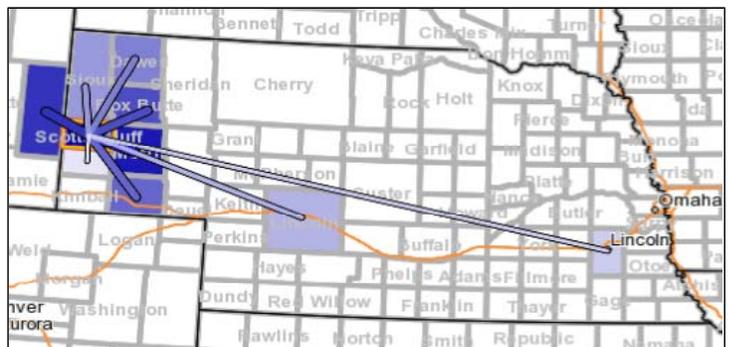


Table 4 (continued)

By Place (top 10)
Job Counts by Places (Cities, CDPs, etc.) Where Workers Live
 2010

	Count	Share
Scottsbluff city, NE	5,163	31.1%
Gering city, NE	3,194	19.3%
Mitchell city, NE	613	3.7%
Terrytown city, NE	497	3.0%
Alliance city, NE	207	1.2%
Sidney city, NE	203	1.2%
Minatare city, NE	202	1.2%
Morrill village, NE	192	1.2%
Torrington city, WY	172	1.0%
Bridgeport city, NE	158	1.0%
All Other Locations	5,980	36.1%



Source: U.S. Census Bureau, LED Origin-Destination Data Base, August 2012

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

Table 5

Inflow/Outflow Report - Scotts Bluff County

Selection Area Labor Market Size (Primary Jobs)	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	16,581	100.0%	16,458	100.0%	16,438	100.0%
Living in the Selection Area	16,074	96.9%	16,025	97.4%	16,636	101.2%
Net Job Inflow (+) or Outflow (-)	507	-	433	-	-198	-

In-Area Labor Force Efficiency (Primary Jobs)	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	16,074	100.0%	16,025	100.0%	16,636	100.0%
Living and Employed in the Selection Area	12,887	80.2%	12,843	80.1%	13,616	81.8%
Living in the Selection Area but Employed Outside	3,187	19.8%	3,182	19.9%	3,020	18.2%

In-Area Employment Efficiency (Primary Jobs)	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	16,581	100.0%	16,458	100.0%	16,438	100.0%
Employed and Living in the Selection Area	12,887	77.7%	12,843	78.0%	13,616	82.8%
Employed in the Selection Area but Living Outside	3,694	22.3%	3,615	22.0%	2,822	17.2%

Table 5 (continued)

Outflow Job Characteristics (Primary Jobs)	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	3,187	100.0%	3,182	100.0%	3,020	100.0%
Workers Aged 29 or younger	862	27.0%	817	25.7%	860	28.5%
Workers Aged 30 to 54	1,624	51.0%	1,631	51.3%	1,464	48.5%
Workers Aged 55 or older	701	22.0%	734	23.1%	696	23.0%
Workers Earning \$1,250 per month or less	853	26.8%	905	28.4%	928	30.7%
Workers Earning \$1,251 to \$3,333 per month	1,486	46.6%	1,398	43.9%	1,349	44.7%
Workers Earning More than \$3,333 per month	848	26.6%	879	27.6%	743	24.6%
Workers in the "Goods Producing" Industry Class	478	15.0%	501	15.7%	497	16.5%
Workers in the "Trade, Transportation, and Utilities" Industry	983	30.8%	1,093	34.3%	1,089	36.1%
Workers in the "All Other Services" Industry Class	1,726	54.2%	1,588	49.9%	1,434	47.5%

Inflow Job Characteristics (Primary Jobs)	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	3,694	100.0%	3,615	100.0%	2,822	100.0%
Workers Aged 29 or younger	987	26.7%	1,068	29.5%	833	29.5%
Workers Aged 30 to 54	1,887	51.1%	1,825	50.5%	1,393	49.4%
Workers Aged 55 or older	820	22.2%	722	20.0%	596	21.1%
Workers Earning \$1,250 per month or less	956	25.9%	1,014	28.0%	874	31.0%
Workers Earning \$1,251 to \$3,333 per month	1,719	46.5%	1,759	48.7%	1,293	45.8%
Workers Earning More than \$3,333 per month	1,019	27.6%	842	23.3%	655	23.2%
Workers in the "Goods Producing" Industry Class	370	10.0%	394	10.9%	336	11.9%
Workers in the "Trade, Transportation, and Utilities" Industry	1,317	35.7%	1,314	36.3%	1,023	36.3%
Workers in the "All Other Services" Industry Class	2,007	54.3%	1,907	52.8%	1,463	51.8%

Interior Flow Job Characteristics (Primary Jobs)	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	12,887	100.0%	12,843	100.0%	13,616	100.0%
Workers Aged 29 or younger	3,101	24.1%	3,191	24.8%	3,484	25.6%
Workers Aged 30 to 54	6,651	51.6%	6,677	52.0%	7,036	51.7%
Workers Aged 55 or older	3,135	24.3%	2,975	23.2%	3,096	22.7%
Workers Earning \$1,250 per month or less	3,114	24.2%	3,387	26.4%	3,606	26.5%
Workers Earning \$1,251 to \$3,333 per month	6,375	49.5%	6,343	49.4%	6,750	49.6%
Workers Earning More than \$3,333 per month	3,398	26.4%	3,113	24.2%	3,260	23.9%
Workers in the "Goods Producing" Industry Class	1,342	10.4%	1,627	12.7%	1,840	13.5%
Workers in the "Trade, Transportation, and Utilities" Industry	2,869	22.3%	2,834	22.1%	2,994	22.0%
Workers in the "All Other Services" Industry Class	8,676	67.3%	8,382	65.3%	8,782	64.5%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap 6.0.1, 8/10/2012.

The Distance/Direction Report depicted in Table 6 and Figure 1 shows the number (count) and percentage (share) of primary job holders living in Scotts Bluff County and the distance they travel to work. Looking at Table 6, the count of primary job holders living within Scotts Bluff County is less than in 2010 compared to 2008. The distribution of miles traveled to work has also shifted since 2008. 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

	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	16,074	100.0%	16,025	100.0%	16,636	100.0%
Less than 10 miles	11,526	71.7%	11,664	72.8%	12,240	73.6%
10 to 24 miles	1,525	9.5%	1,320	8.2%	1,529	9.2%
25 to 50 miles	541	3.4%	616	3.8%	608	3.7%
Greater than 50 miles	2,482	15.4%	2,425	15.1%	2,259	13.6%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap 6.0.1, 8/10/2012.

Figure 1

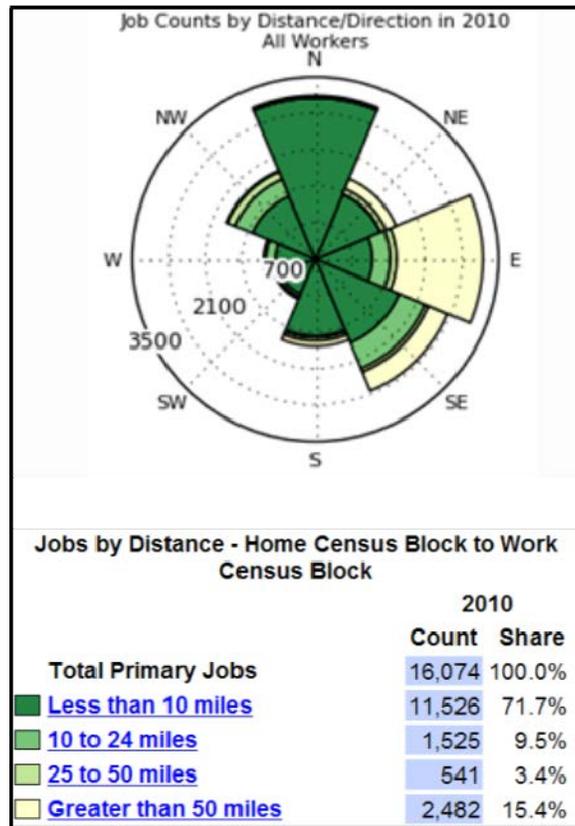


Table 7 and Figure 2 show the number (count) and percentage (share) of people employed within Scotts Bluff County and the distance to their homes. Looking at Table 7, the number of primary jobs held within Scotts Bluff County has increased since 2008. The data also show the majority of Scotts Bluff County 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

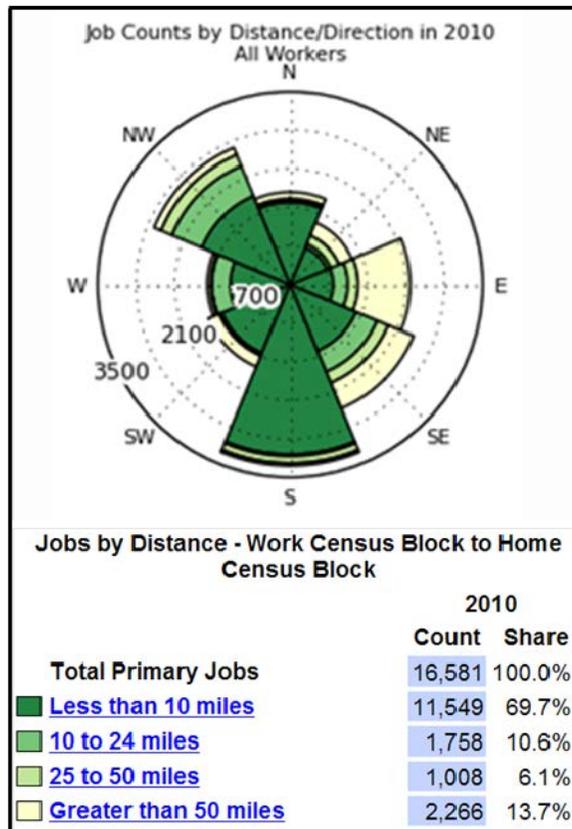
Work within study area - distance to home

Job Counts in Work Blocks by Distance Only

	2010		2009		2008	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	16,581	100.0%	16,458	100.0%	16,438	100.0%
Less than 10 miles	11,549	69.7%	11,680	71.0%	12,247	74.5%
10 to 24 miles	1,758	10.6%	1,544	9.4%	1,685	10.3%
25 to 50 miles	1,008	6.1%	1,054	6.4%	730	4.4%
Greater than 50 miles	2,266	13.7%	2,180	13.2%	1,776	10.8%

Source: U.S. Census Bureau, Labor Area Dynamics, OnTheMap 6.0.1, 8/10/2012.

Figure 2



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 increased 1.5 percent (538 people) between 1970 and 2010. This population increase compares to a 23.0 percent increase for Nebraska as a whole. Scotts Bluff County reported a 0.2 percent increase in population from 2010 to 2011 (74 people).

Table 8

County Population 1970-2011
 Scotts Bluff County and the Surrounding Area

Location	1970	1980	1990	2000	2010	2011	% Change 1970-2010	% Change 2010-2011
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,842,641	23.0	0.9
Scotts Bluff County	36,432	38,344	36,025	36,951	36,970	37,044	1.5	0.2
Banner County	1,034	918	852	819	690	684	-33.3	-0.9
Box Butte County	10,094	13,696	13,130	12,158	11,308	11,383	12.0	0.7
Morrill County	5,813	6,085	5,423	5,440	5,042	4,998	-13.3	-0.9
Sioux County	2,034	1,845	1,549	1,475	1,311	1,336	-35.5	1.9

Source: U.S. Bureau of the Census, Census of Population, April 2012

Table 9 data reveal significant population loss for some Scotts Bluff County communities during the 1970–2010 time period. The city of Scottsbluff reported a 3.7 percent increase in population (532 people) between 1970 and 2010. The unincorporated areas outside of the selected communities experienced a 25.5 percent decrease (2,780 people) during the 1970–2010 time period. The city of Scottsbluff's population increased by 30 (0.2 percent) during the period 2010 to 2011.

Table 9

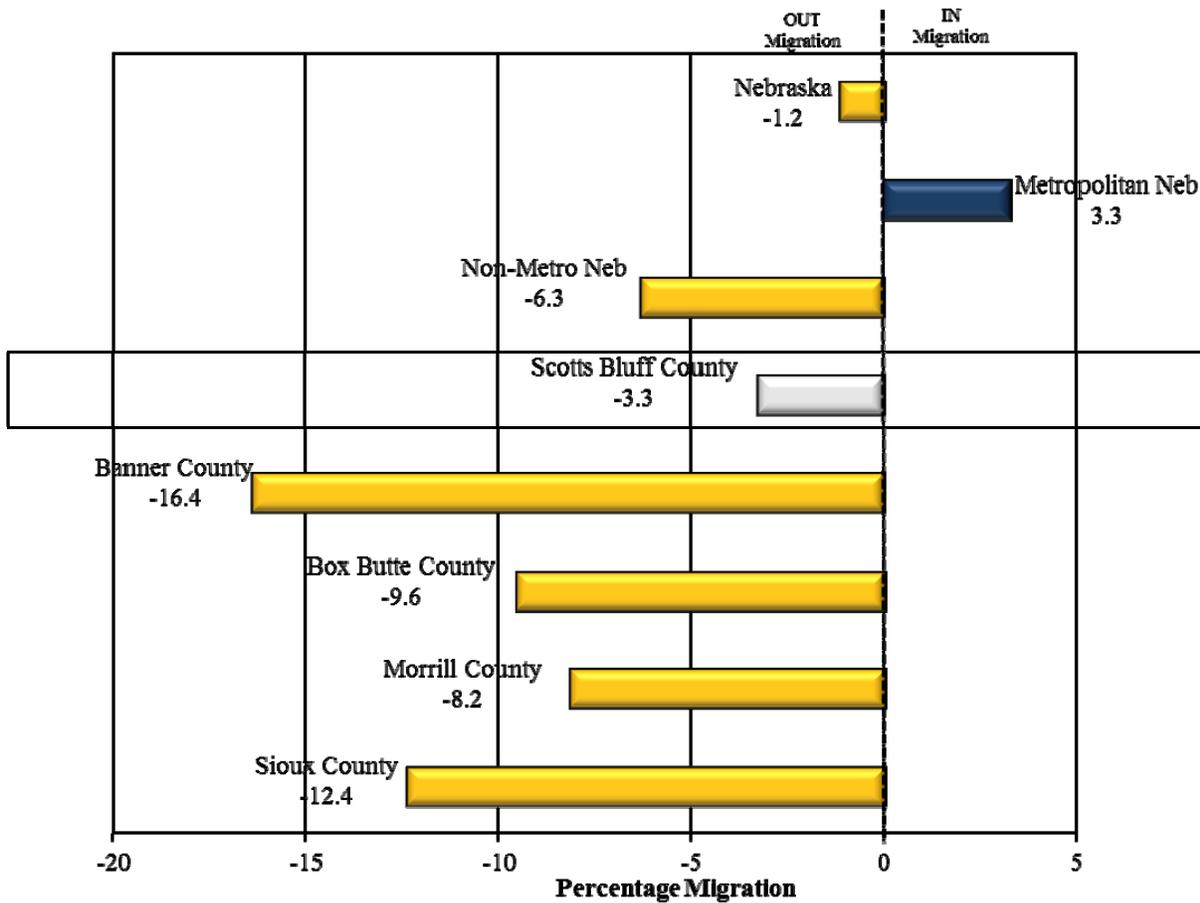
County Population 1970-2011
 Scotts Bluff County, Incorporated, and the Unincorporated Areas

Location	1970	1980	1990	2000	2010	2011	% Change 1970-2010	% Change 2010-2011
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,842,641	23.0	0.9
Scotts Bluff County	36,432	38,344	36,025	36,951	36,970	37,044	1.5	0.2
Scottsbluff	14,507	14,156	14,029	14,732	15,039	15,069	3.7	0.2
Terrytown	747	727	535	646	1,198	1,199	60.4	0.1
Minatare	939	969	807	810	816	818	-13.1	0.2
Mitchell	1,842	1,956	1,742	1,831	1,702	1,705	-7.6	0.2
Melbeta	124	151	116	138	112	112	-9.7	0.0
Morrill	937	1,097	980	957	921	922	-1.7	0.1
Gering	5,639	7,760	8,025	7,751	8,500	8,518	50.7	0.2
McGrew	79	110	99	103	105	105	32.9	0.0
Henry	147	155	145	162	106	106	-27.9	0.0
Lyman	561	551	452	421	341	342	-39.2	0.3
Total Unincorporated Area:	10,910	10,712	9,095	9,400	8,130	8,148	-25.5	0.2

The next two charts (Charts 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, all of the counties in the study area experienced out-migration. Scotts Bluff County experienced 3.3 percent out-migration (a loss of 1,205 people) during this time period.

Chart 6

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

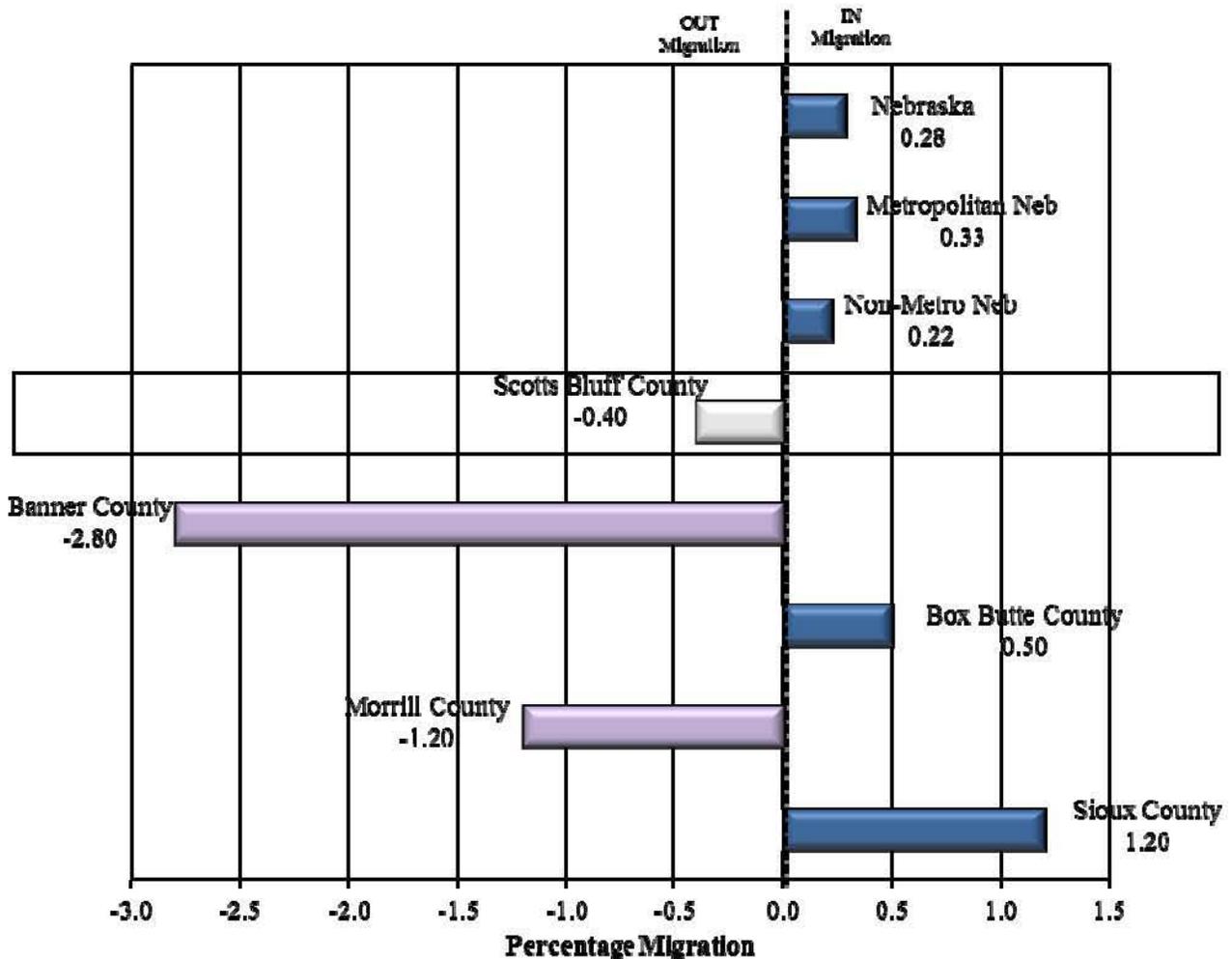


Source: U.S. Census Bureau, County population and estimated components of population change, April 2012

Looking at the year 2010–2011 (Chart 7), three of the five counties experienced out-migration within the study area. Scotts Bluff County recorded 0.4 percent out-migration (a loss of 148 people).

Chart 7

**2010-2011 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, April 2012

The next two tables (Tables 10 and 11) provide detail on migration between 2009 and 2010, the latest data available. 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 citizens.

Table 10 data show 32.9 percent (543 people) of those moving into Scotts Bluff County between 2009 and 2010 moved from other Nebraska locations. Data also reveal 1,108 people (67.1 percent) migrated in from other states.

Table 10

**Migration Inflow 2009-2010
 Scotts Bluff County, Nebraska**

Moved to Scotts Bluff County From:		
Location	#	%
Total U.S.	1,651	100.0%
Nebraska (NE)	543	32.9%
Different State	1,108	67.1%

County Specific Flows:		
Location	#	%
Goshen County, WY	95	5.8%
Morrill County	94	5.7%
Lancaster County	63	3.8%
Box Butte County	60	3.6%
Other Flows - Same State	326	19.7%
Other Flows - Diff State	1,013	61.4%

Source: SOI TaxStats, County-to-County Migration Data Files, www.irs.gov, December 2011

Table 11 data reveal 32.0 percent (458 people) of people migrating out of Scotts Bluff County between 2009 and 2010 remained in the state of Nebraska. Data show 974 Scotts Bluff County residents (68.0 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

**Migration Outflow 2009-2010
 Scotts Bluff County, Nebraska**

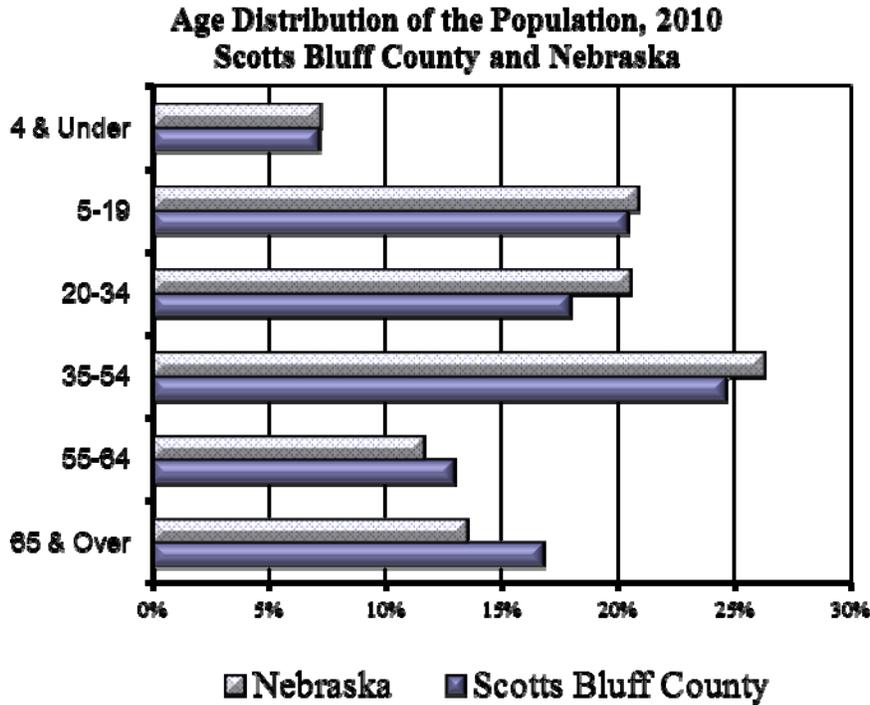
Moved from Scotts Bluff County To:		
Location	#	%
Total U.S.	1,432	100.0%
Nebraska (NE)	458	32.0%
Different State	974	68.0%

County Specific Flows:		
Location	#	%
Morrill County	90	6.3%
Lancaster County	66	4.6%
Goshen County, WY	61	4.3%
Douglas County	52	3.6%
Other Flows - Same State	250	17.5%
Other Flows - Diff State	913	63.8%

Source: SOI Tax Stats, County-to-County Migration Data Files, www.irs.gov, December 2011

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 2010 was 39.0 years of age compared to 36.2 years of age for residents of Nebraska as a whole.

Chart 8



Source: U.S. Census Bureau, June 2011

Table 12

**Age Distribution of the Population, 2010
 Scotts Bluff County and Nebraska**

	2010 Population		Percent	
	Nebraska	Scotts Bluff County	Nebraska	Scotts Bluff County
4 & Under	131,908	2,655	7.2%	7.2%
5-19	380,564	7,547	20.8%	20.4%
20-34	374,452	6,640	20.5%	18.0%
35-54	479,564	9,114	26.3%	24.7%
55-64	213,176	4,799	11.7%	13.0%
65 & Over	246,677	6,215	13.5%	16.8%
Total	1,826,341	36,970	100%	100%
Median Age	36.2	39.0		

Source: Age Group, Median Age, U.S. Census Bureau, June 2011

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, 2010
Scotts Bluff County and the Surrounding Area

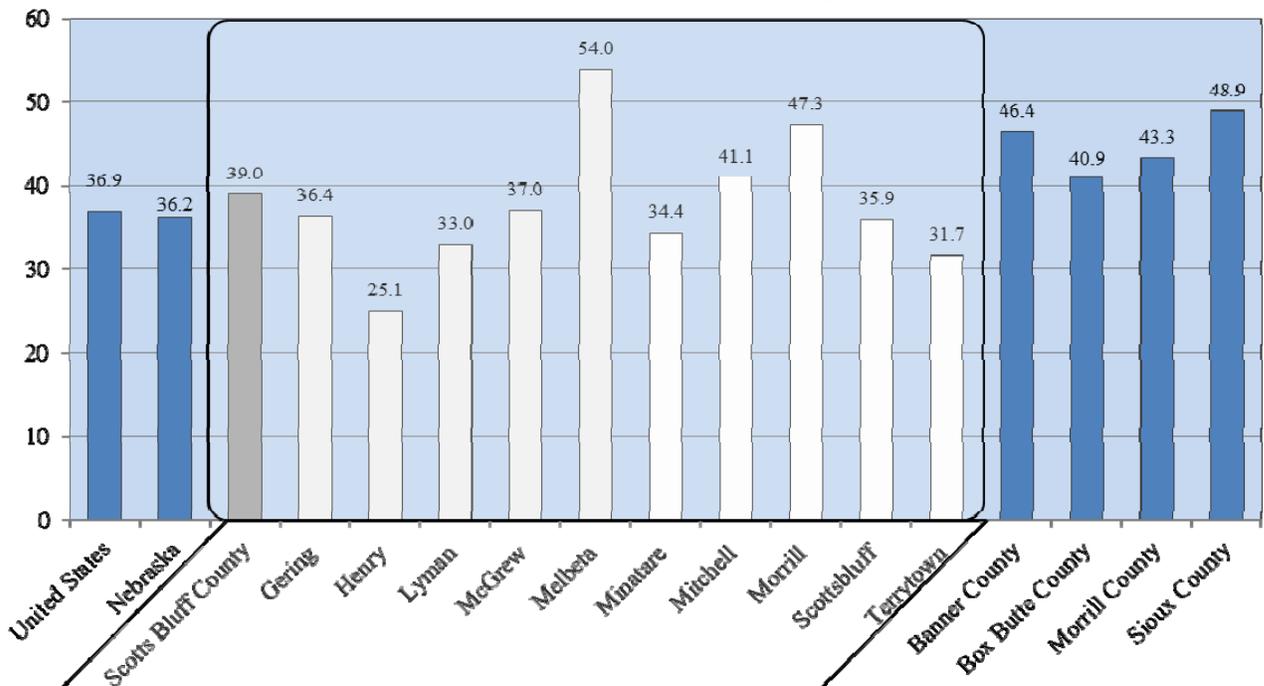
	Median Age 2010		
	Total	Male	Female
United States	36.9	35.6	38.1
Nebraska	36.2	35.0	37.4
Scotts Bluff County	39.0	37.2	40.9
Gering	36.4	35.5	37.0
Henry	25.1	21.8	27.3
Lyman	33.0	33.2	33.0
McGrew	37.0	30.9	43.3
Melbeta	54.0	54.5	52.9
Minatare	34.4	28.6	41.0
Mitchell	41.1	40.8	41.6
Morrill	47.3	48.4	46.1
Scottsbluff	35.9	33.5	38.5
Terrytown	31.7	22.9	40.1
Banner County	46.4	46.5	45.9
Box Butte County	40.9	40.2	42.0
Morrill County	43.3	42.9	44.3
Sioux County	48.9	46.5	51.2

Data Set: 2006-2010 American Community Survey 5-Year Estimates

Source: U.S. Census Bureau, 2006-2010 American Community Survey, March 2012

Chart 9

Median Age by Location, 2010
Scotts Bluff County and the Surrounding Area



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 2011. 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

**2011 Retail Sales (Non-Motor Vehicle) Pull Factors
 Nebraska, Scotts Bluff County, and Surrounding Counties**

	2011 Population	2011 Retail Sales (x \$1,000)	2011 Per Cap Sales (\$)	2011 Pull Factor
Nebraska	1,842,641	20,794,827	11,285	1.00
Non-Metro Nebraska	782,366	7,822,513	9,999	0.89
Scotts Bluff County	37,044	450,325	12,156	1.08
Banner County	684	265	387	0.03
Box Butte County	11,383	88,238	7,752	0.69
Morrill County	4,998	27,880	5,578	0.49
Sioux County	1,336	3,038	2,274	0.20

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2012

Reviewing the pull factors at the county level indicates Scotts Bluff County is pulling retail trade from other areas. The 2010 pull factor of 1.08 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 (1.08) with the pull factor for the non-metropolitan area of Nebraska (0.89) indicates per capita retail sales in Scotts Bluff County are 21.6 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

Chart 10

**2011 Retail Sales (NMV) Pull Factors, Nebraska,
 Scotts Bluff County & Surrounding Counties**

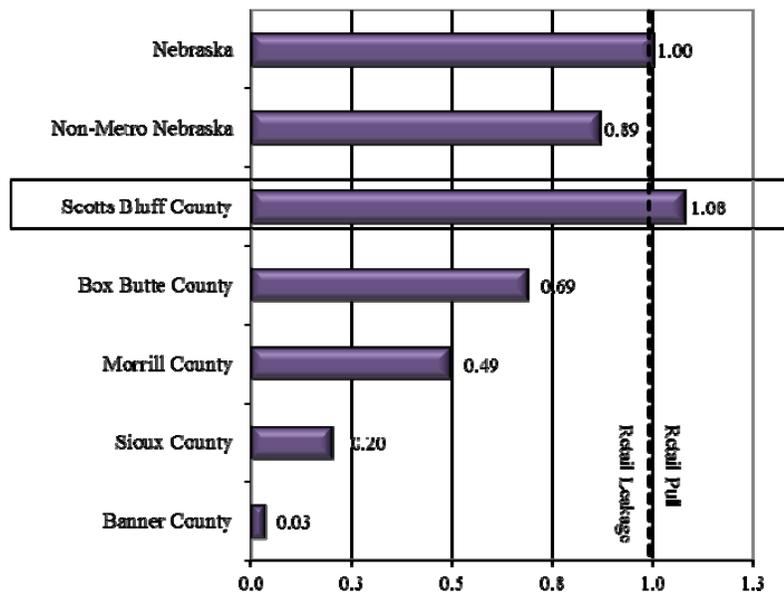


Table 15 and Chart 11 compare the 2010 pull factors for selected area communities. The community of Scottsbluff's pull factor of 2.15 indicates that, on a per capita basis, non-motor vehicle retail sales in Scottsbluff are approximately 115 percent greater than the state's average per capita sales.

Table 15

**2011 Retail Sales (NMV) Pull Factors
 Nebraska and Selected Study Area Cities**

	2011 Population	2011 Retail Sales (x \$1,000)	2011 Per Cap Sales (\$)	2011 Pull Factor
Nebraska	1,842,641	20,794,827	11,285	1.00
Non-Metro Nebraska	782,366	7,822,513	9,999	0.89
Scottsbluff (Scotts Bluff)	15,069	365,839	24,278	2.15
Alliance (Box Butte)	8,548	81,680	9,555	0.85
Bridgeport (Morrill)	1,532	19,883	12,978	1.15
Harrison (Sioux)	256	2,869	11,206	0.99

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2012

Chart 11

**2011 Retail Sales (NMV) Pull Factors
 Nebraska and Selected Study Area Cities**

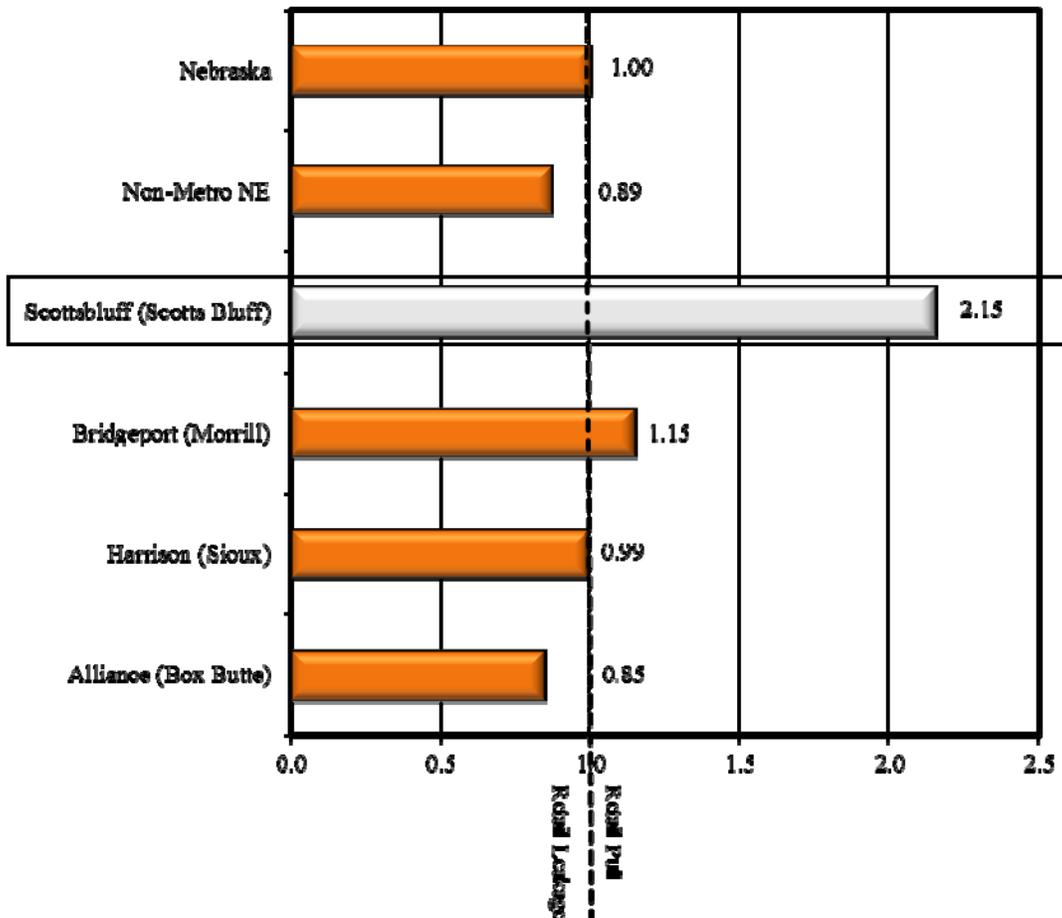


Table 16 and Chart 12 further breakdown the 2011 pull factors into the communities reporting retail sales figures within Scotts Bluff County. As this table indicates, the community of Scottsbluff had the strongest pull factor (2.15) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 1.08 for Scotts Bluff County in 2011.

Table 16

**2011 Retail Sales (NMV) Pull Factors
 Nebraska and Available Scotts Bluff County Communities**

	2011 Population	2011 Retail Sales (x \$1,000)	2011 Per Cap Sales (\$)	2011 Pull Factor
Nebraska	1,842,641	20,794,827	11,285	1.00
Non-Metro Nebraska	782,366	7,822,513	9,999	0.89
Scotts Bluff County	37,044	450,325	12,156	1.08
Scottsbluff	15,069	365,839	24,278	2.15
Gering	8,518	67,279	7,898	0.70
Morrill	922	7,221	7,832	0.69
Mitchell	1,705	6,936	4,068	0.36
Lyman	342	810	2,368	0.21
Melbeta	112	205	1,830	0.16
Minatare	818	1,408	1,721	0.15

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2012

Chart 12

**2011 Retail Sales (NMV) Pull Factors
 Nebraska and Available Scotts Bluff County Communities**

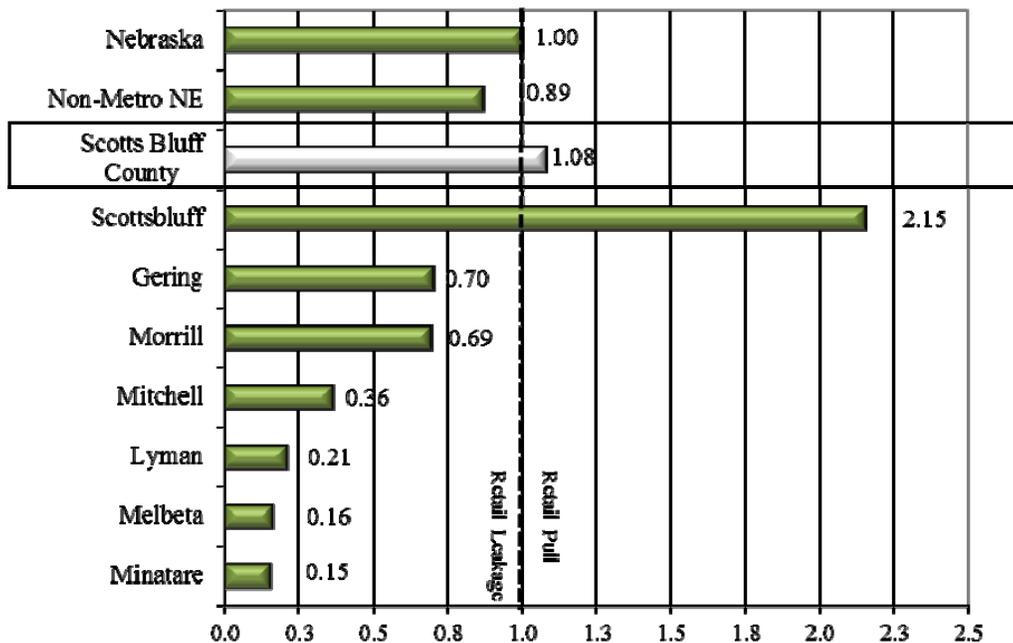


Table 17 (sorted by pull factor) and Chart 13 (also sorted by pull factor) show the 2011 pull factors for Nebraska, Scottsbluff, and eight other similarly sized communities selected from around the state. Scottsbluff's pull factor of 2.15 leads the group for 2011 thus indicating Scottsbluff has greater retail pull.

Table 17

**2011 Retail Sales (NMV) Pull Factors
 Scottsbluff & Other Similarly Sized Nebraska Communities**

	2011 Population	2011 Retail Sales (x \$1,000)	2011 Per Cap Sales (\$)	2011 Pull Factor
Nebraska	1,842,641	20,794,827	11,285	1.00
Non-Metro Nebraska	782,366	7,822,513	9,999	0.89
Scottsbluff (Scotts Bluff)	15,069	365,839	24,278	2.15
Norfolk (Madison)	24,248	518,311	21,375	1.89
Papillion (Sarpy)	19,331	359,372	18,590	1.65
Columbus (Platte)	22,381	345,166	15,422	1.37
Lexington (Dawson)	10,257	147,490	14,379	1.27
Beatrice (Gage)	12,302	160,522	13,048	1.16
La Vista (Sarpy)	16,129	186,821	11,583	1.03
South Sioux City (Dakota)	13,293	133,056	10,010	0.89
Alliance (Box Butte)	8,548	81,680	9,555	0.85

Source: U.S. Census Bureau and Nebraska Department of Revenue, June 2012

Chart 13

**2011 Retail Sales (NMV) Pull Factors, Nebraska,
 Scottsbluff & Other Similarly Sized Nebraska Communities**

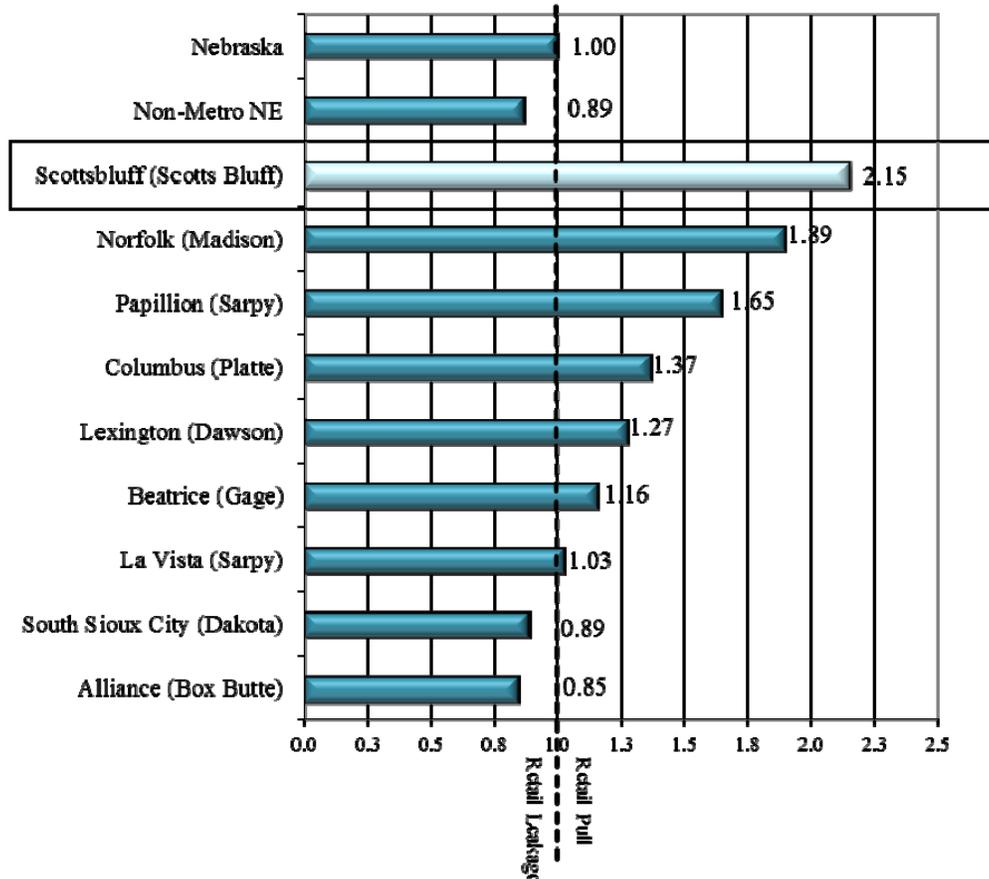
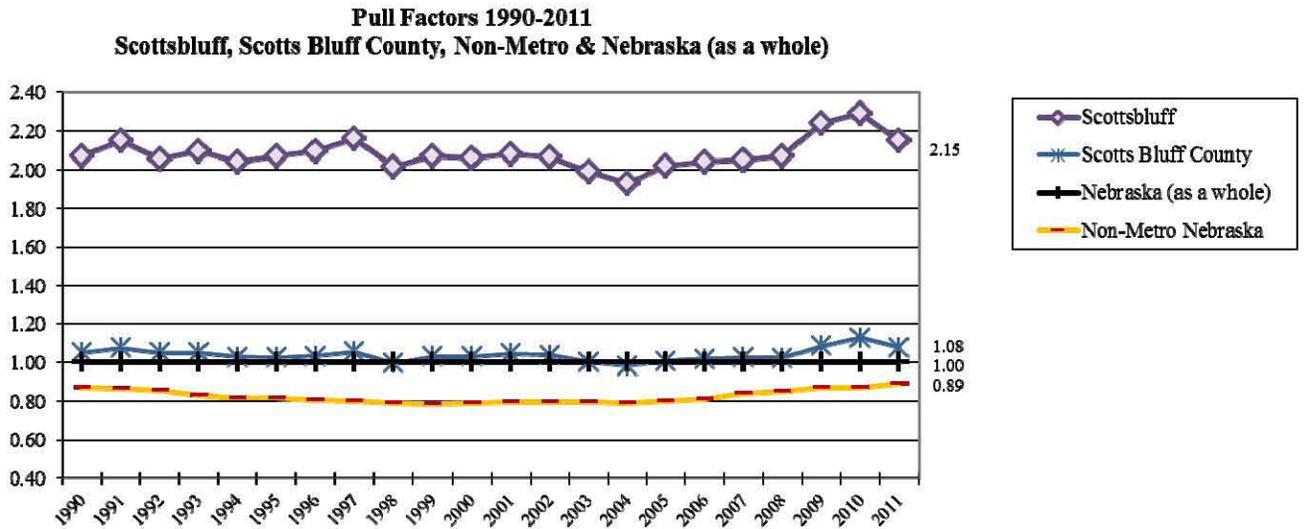


Chart 14 illustrates the pull factor trend for Scottsbluff, Scotts Bluff County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2011. In examining the time line, the city of Scottsbluff shows retail pull fluctuating well above the state average throughout the entire study period. Data within Scotts Bluff County (as a whole) also shows the pull factor similar to the non-metropolitan county average and Nebraska (as a whole) average throughout the time period.

Chart 14



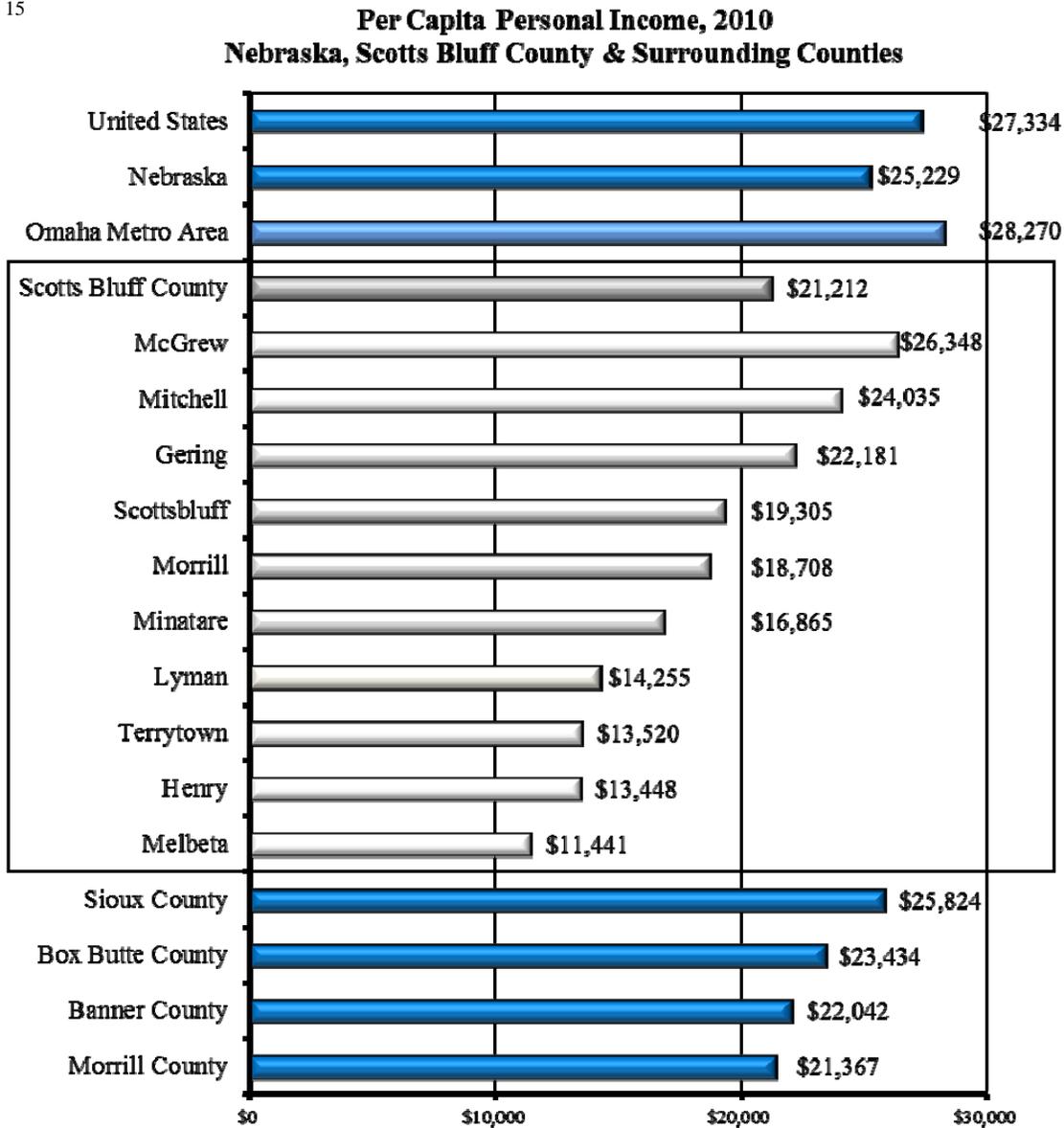
Source: U.S. Census Bureau and Nebraska Department of Revenue, 2012

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.

Data show per capita personal income in 2010 for Scotts Bluff County is estimated to be \$21,212 compared to \$25,229 for Nebraska as a whole.

Chart 15



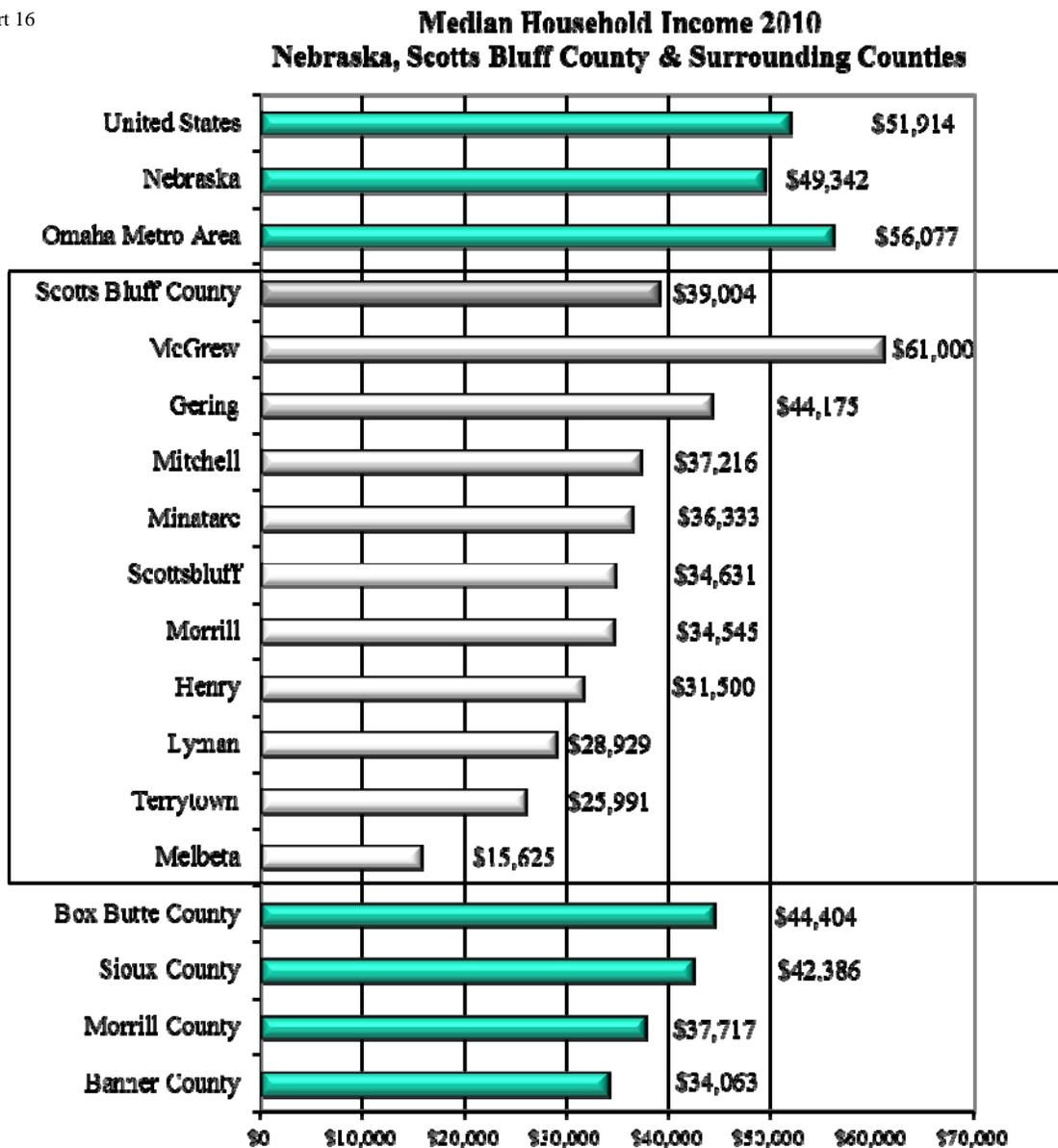
Source: U.S. Census Bureau, 2010 inflation adjusted past 12-months, 2006-2010 American Community Survey, released December 2011

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.

Median household income for Scotts Bluff County is estimated to be \$39,004 in 2010 compared to \$49,342 for Nebraska as a whole.

Chart 16



Source: U.S. Census Bureau, 2006-2010 American Community Survey, released December 2011