

# **City of Scottsbluff, Nebraska**

**Monday, March 15, 2021**

**Regular Meeting**

## **Item Public Inp2**

**Council to receive a presentation on the Scotts Bluff County Trends Study.**

**Staff Contact: Terry Rajewich, NPPD**

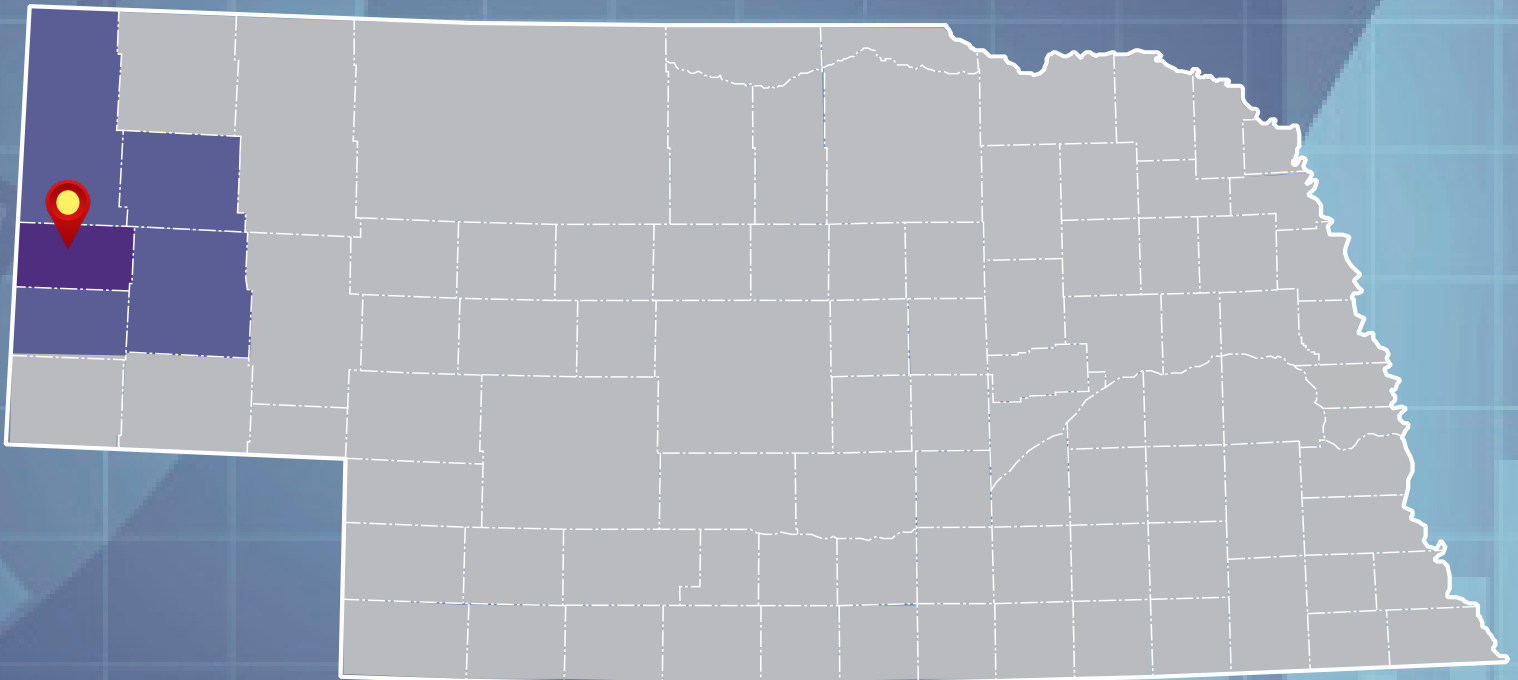
**FEBRUARY 2021 STUDY**



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# ECONOMIC AND DEMOGRAPHIC TRENDS

Scottsbluff, Scotts Bluff County and the Surrounding Area

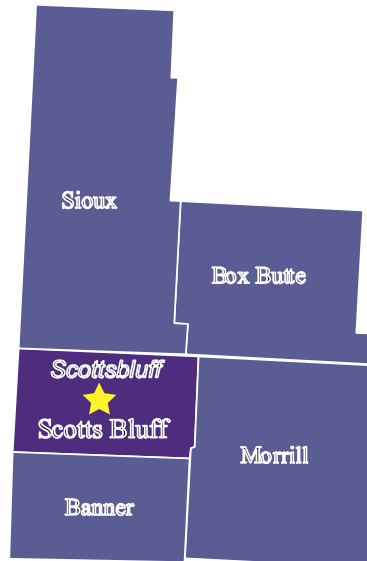


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# ECONOMIC AND DEMOGRAPHIC TRENDS IN **Scotts Bluff County** AND THE SURROUNDING AREA



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 Chart 1 (next page) present nonfarm wage and salary data for Scotts Bluff County for the period 2009–2019. 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 is data on the number of people employed in the Nonfarm Wage and Salary (W&S) 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 4.1 percent (687 jobs) between 2009 and 2019.

Table 1 and Chart 1 also provide employment data for Scotts Bluff County by major economic sector for years 2009–2019. The Other Services, except Public sector recorded the largest percentage increase in employment between 2009 and 2019 (21.1 percent or 76 jobs). The Leisure & Hospitality sector recorded the largest actual employment increase between 2009 and 2019 (165 jobs or 10.3 percent).

**TABLE 1**  
**Nonfarm Wage & Salary Employment Trends • 2009–2019**  
Scotts Bluff County, Nebraska

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% Change 2009-2019	# Change 2009-2019
<b>Nonfarm W&amp;S Employment</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>17,199</b>	<b>16,726</b>	<b>16,623</b>	<b>16,275</b>	<b>-4.1</b>	<b>-687</b>
<b>Total Private Industries</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>13,884</b>	<b>13,441</b>	<b>13,344</b>	<b>13,013</b>	<b>-5.5</b>	<b>-764</b>
<b>Goods Producing</b>	<b>2,264</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>2,171</b>	<b>2,242</b>	<b>-1.0</b>	<b>-22</b>
Natural Resources & Mining	283	279	281	268	266	258	260	280	275	271	280	-1.1	-3
Construction	960	740	823	833	766	745	850	1,133	918	1,003	875	-8.9	-85
Manufacturing	1,021	945	982	1,012	1,122	1,146	1,092	989	978	968	964	-5.6	-57
<b>Service Providing</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>11,481</b>	<b>11,270</b>	<b>11,102</b>	<b>10,895</b>	<b>-5.4</b>	<b>-618</b>
Trade, Transportation & Utilities	3,793	3,704	3,724	3,779	3,701	3,788	3,838	3,832	3,714	3,579	3,458	-8.8	-335
Information	229	221	219	235	265	283	293	300	301	301	274	19.7	45
Financial Activities	1,264	1,240	1,195	1,092	1,045	909	697	703	703	701	696	-44.9	-568
Professional & Business Services	1,246	1,309	1,282	1,290	1,214	1,253	1,519	1,554	1,444	1,406	1,352	8.5	106
Education & Health Services	3,011	3,049	3,020	3,054	3,355	3,160	3,071	2,985	2,962	2,969	2,905	-3.5	-106
Leisure & Hospitality	1,608	1,637	1,616	1,626	1,645	1,658	1,701	1,737	1,673	1,689	1,773	10.3	165
Other Services, except Public	361	365	352	626	376	371	374	369	472	457	437	21.1	76
<b>Government</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>3,285</b>	<b>3,279</b>	<b>3,262</b>	<b>2.4</b>	<b>77</b>
Federal	184	192	177	167	155	157	159	154	154	145	148	-19.6	-36
State	478	490	520	551	579	572	580	594	581	553	542	13.4	64
Local	2,523	2,492	2,482	2,481	2,453	2,462	2,473	2,567	2,550	2,581	2,571	1.9	48

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data, released June 2020  
Labor Force & Work Summary, 2009-2019, Annual, Scotts Bluff County, Nebraska (March 2020 data)

**CHART 1**  
**Employment by Industry • 2009–2019**  
Scotts Bluff County, Nebraska

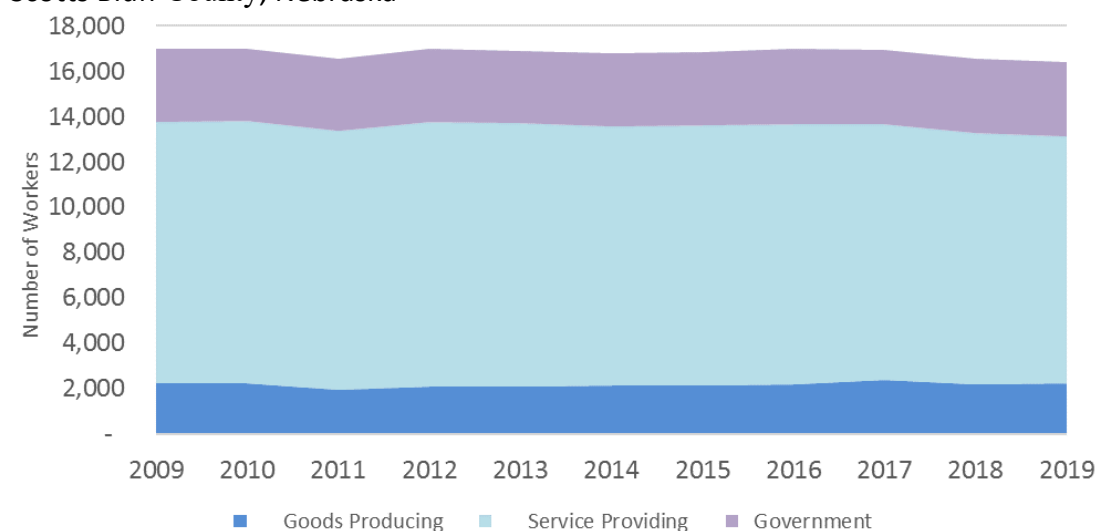


Chart 2 compares total nonfarm wage and salary employment growth in Scotts Bluff County with metropolitan, non-metropolitan and Nebraska as a whole for the review period 2009–2019. Non-metropolitan Nebraska is defined as Nebraska minus the seven Lincoln and Omaha metropolitan counties of Cass, Douglas, Lancaster, Sarpy, Saunders, Seward and Washington.

As this chart indicates, total nonfarm wage and salary employment in Scotts Bluff County decreased 4.1 percent (687 jobs) from 2009 to 2019, compared to a 9.0 percent increase for Nebraska as a whole, a 11.5 percent increase in metropolitan Nebraska and a 5.8 percent increase in non-metropolitan Nebraska.

## CHART 2

### Nonfarm W&S Employment • 2009–2019

Scotts Bluff County, Nebraska, Metro and Non-Metro Nebraska

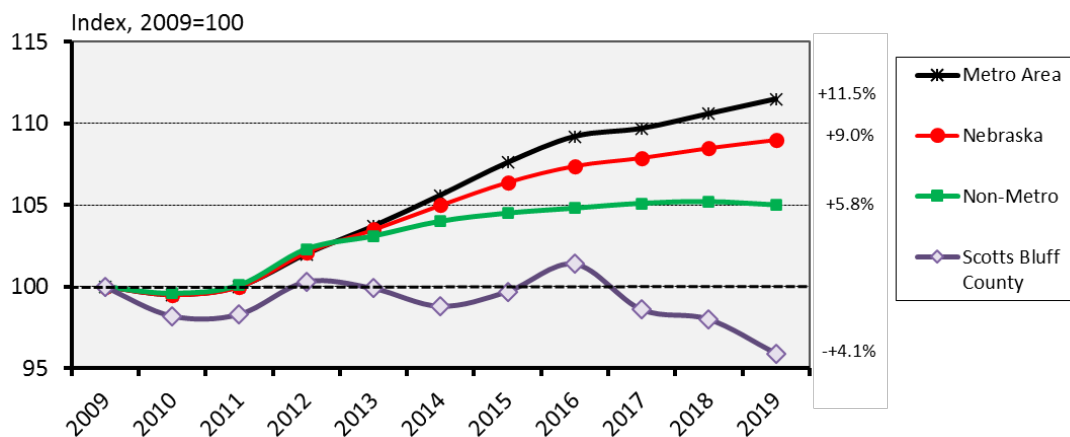
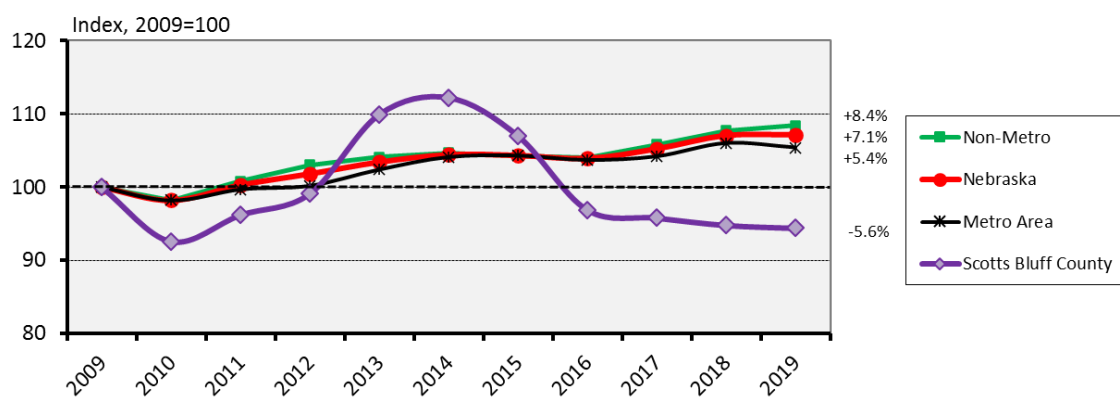


Chart 3 presents data on manufacturing wage and salary employment growth for Scotts Bluff County, Nebraska, metropolitan and non-metropolitan areas. The Manufacturing sector for Scotts Bluff County recorded a 5.6 percent decrease in employment (57 jobs) between 2009 and 2019. This compares to a 8.4 percent increase in employment for non-metropolitan Nebraska; a 7.1 percent increase for Nebraska as a whole; and a 5.4 percent increase for metropolitan Nebraska over the same period.

## CHART 3

### Manufacturing W&S Employment • 2009–2019

Scotts Bluff County, Nebraska, Metro and Non-Metro Nebraska



Source: Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), released June 2020

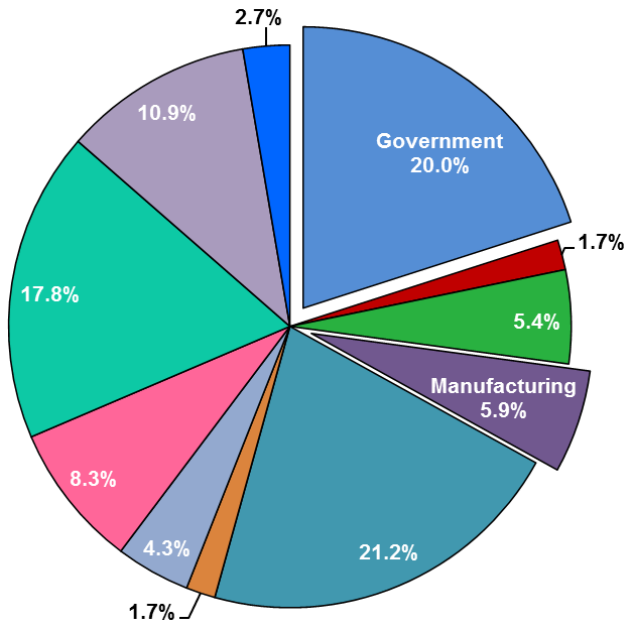
The next series of pie charts (Charts 4, 5 and 6) display the distribution of nonfarm wage and salary (W&S) employment by major economic sector in Scotts Bluff County compared to the non-metropolitan and metropolitan distributions.

When comparing the Scotts Bluff County employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Manufacturing sector which makes up 5.9 percent of the county workforce (964 employees) compared to 15.8 percent for non-metropolitan Nebraska; a difference of 9.9 percent. Comparing Scotts Bluff County to the overall metropolitan distribution, the largest deviation is found in the Government sector (20.0 percent Scotts Bluff County vs. 13.8 percent metropolitan Nebraska; a difference of 6.2 percent).

CHART 4, 5 & 6

### Nonfarm W&S Employment by Major Economic Sector

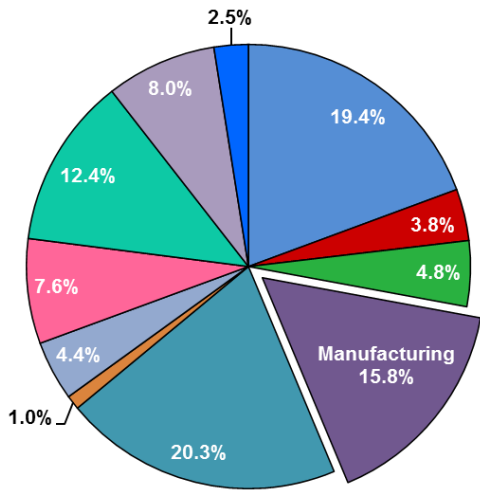
Scotts Bluff County, 2019



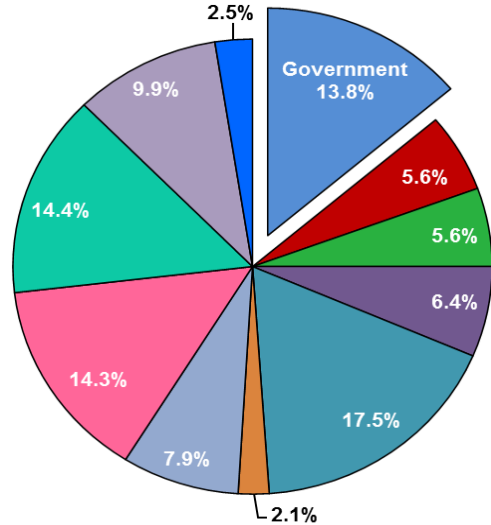
- Government
- Natural Resources and Mining
- Construction
- Manufacturing
- Trade, Transportation, and Utilities
- Information
- Financial Activities
- Professional and Business Services
- Education and Health Services
- Leisure and Hospitality
- Other Services

Source: U.S. Dept. of Labor Statistics

Non-Metropolitan Nebraska, 2019



Metropolitan Nebraska, 2019



The next table (Table 2) shows labor force information for Scotts Bluff County for the time period 2009–2019. Labor force data (labor force, unemployment, and total employment) 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 2009 and 2019 (7.1 percent or 1,403 people).

The number of those unemployed in Scotts Bluff County decreased by 33.6 percent (340 people) between 2009 and 2019. 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 3.7 percent in 2019; above that for metropolitan Nebraska (3.0 percent), above Nebraska as a whole (3.0 percent), and above non-metropolitan Nebraska (3.1 percent).

**TABLE 2**

## Labor Force & Employment Trends

Scotts Bluff County, Nebraska · 2009–2019

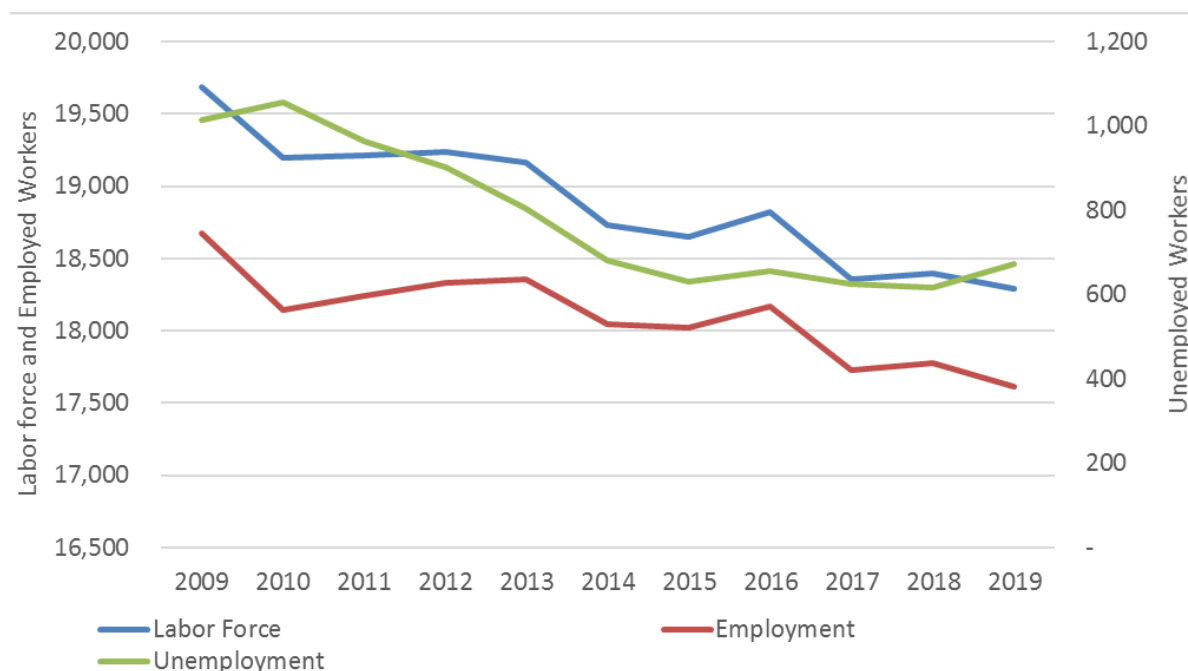
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% Change 2009-2019	# Change 2009-2019
<b>Labor Force</b>	<b>19,690</b>	<b>19,200</b>	<b>19,209</b>	<b>19,236</b>	<b>19,161</b>	<b>18,729</b>	<b>18,649</b>	<b>18,821</b>	<b>18,352</b>	<b>18,394</b>	<b>18,287</b>	<b>-7.1</b>	<b>-1,403</b>
Employment	18,677	18,144	18,245	18,334	18,356	18,049	18,018	18,164	17,727	17,777	17,614	-5.7	-1,063
Unemployment	1,013	1,056	964	902	805	680	631	657	625	617	673	-33.6	-340
Unemployment Rate	5.1	5.5	5.0	4.7	4.2	3.6	3.4	3.5	3.4	3.4	3.7	N/A	N/A

(N/A) - Data not available

**CHART 7**

## Labor Force & Employment Trends

Scotts Bluff County, Nebraska · 2009–2019



Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, Annual Data, released April 2020  
The right axis on Chart 7 refers to Unemployed Workers

## 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 estimates from the U.S. Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program. This program uses a variety of statistical and computing techniques to combine federal and state administrative data on employers and employees with core Census Bureau censuses and surveys while protecting the confidentiality of people and firms that provide the data. The most current data available for Scottsbluff are from 2018.

Table 3 (pages 7–8) examines the Work Destination area for Scottsbluff from three perspectives: by state, by county, and by place (city). In Table 3, the Census identified 6,541 city labor force participants holding primary jobs. As Table 3 shows, 95.9 percent of Scottsbluff's labor force participants are employed within the state of Nebraska. Approximately 77.7 percent of Scottsbluff workers remain within Scotts Bluff County for employment with 22.3 percent leaving the Scotts Bluff County borders for work (next page). The top ten incorporated places where Scottsbluff labor force participants are employed are also shown on the following page.

**TABLE 3**

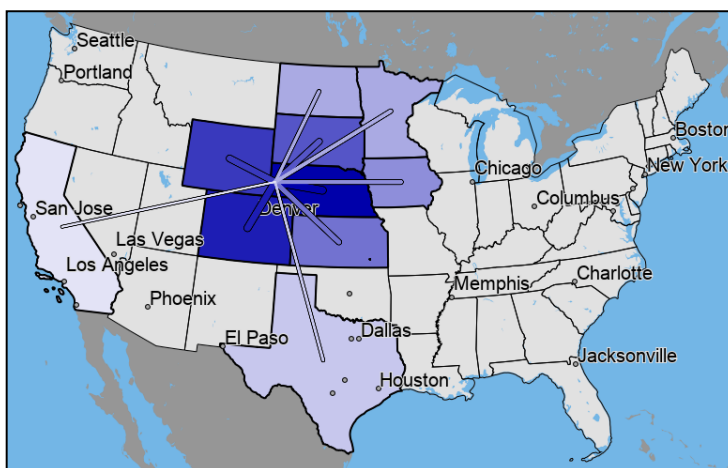
### Work Destination Report • 2018

Where Workers are Employed Who Live in the Selection Area

	Count	Share
<b>Total Primary Jobs</b>	<b>6,541</b>	<b>100.0%</b>

#### By States

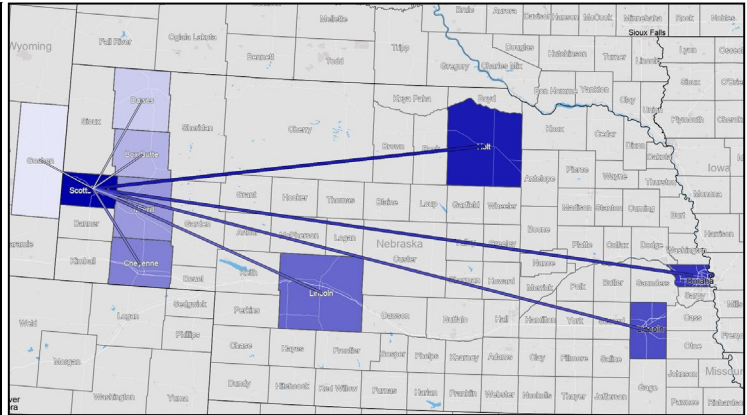
	Count	Share
<b>Nebraska</b>	<b>6,272</b>	<b>95.9%</b>
Colorado	78	1.2%
Wyoming	74	1.1%
South Dakota	55	0.8%
Kansas	15	0.2%
Iowa	8	0.1%
Minnesota	6	0.1%
North Dakota	6	0.1%
Texas	5	0.1%
California	4	0.1%
All Other Locations	18	0.3%



Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2021

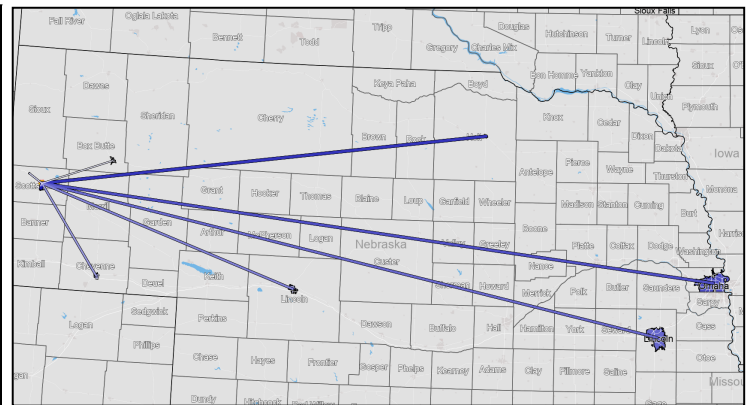
## By Counties

	Count	Share
<b>Scotts Bluff County, NE</b>	<b>5,082</b>	<b>77.7%</b>
Holt County, NE	198	3.0%
Douglas County, NE	137	2.1%
Lancaster County, NE	110	1.7%
Lincoln County, NE	98	1.5%
Cheyenne County, NE	91	1.4%
Morrill County, NE	63	1.0%
Box Butte County, NE	60	0.9%
Dawes County, NE	44	0.7%
Goshen County, WY	38	0.6%
All Other Locations	620	9.5%



## By Places *Top 10 Cities, CDPS, etc.*

	Count	Share
<b>Scottsbluff city, NE</b>	<b>3,531</b>	<b>54.0%</b>
Gering city, NE	709	10.8%
O'Neill city, NE	164	2.5%
Omaha city, NE	133	2.0%
Lincoln city, NE	108	1.7%
North Platte city, NE	82	1.3%
Sidney city, NE	79	1.2%
Terrytown city, NE	72	1.1%
Mitchell city, NE	49	0.7%
Alliance city, NE	47	0.7%
All Other Locations	1,567	24.0%



Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2021

People also travel from other locations to work in Scottsbluff —this is the Home Destination Report or the labor shed area. Table 4 (pages 9–10) depicts the home locations of those employed within Scottsbluff. The Census identified 9,822 primary jobs within Scottsbluff. As Table 4 indicates, 93.2 percent of these jobs are held by Nebraska residents. Approximately 77.1 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**

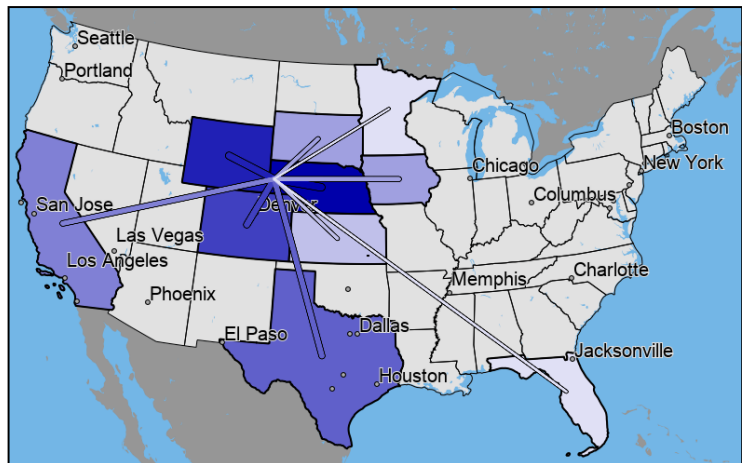
## Home Destination Report • 2018

Where Workers Live Who are Employed in the Selection Area

	Count	Share
<b>Total Primary Jobs</b>	<b>9,822</b>	<b>100.0%</b>

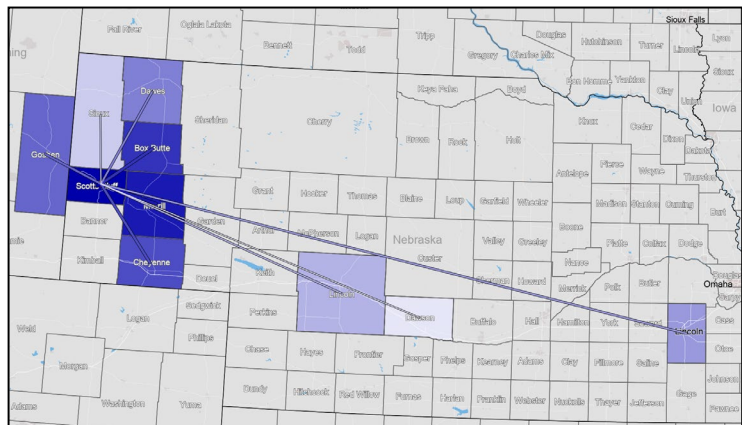
### By States

	Count	Share
<b>Nebraska</b>	<b>9,153</b>	<b>93.2%</b>
Wyoming	275	2.8%
Colorado	137	1.4%
Texas	25	0.3%
California	24	0.2%
Iowa	20	0.2%
South Dakota	20	0.2%
Kansas	17	0.2%
Florida	12	0.1%
Minnesota	12	0.1%
All Other Locations	127	1.3%



### By Counties

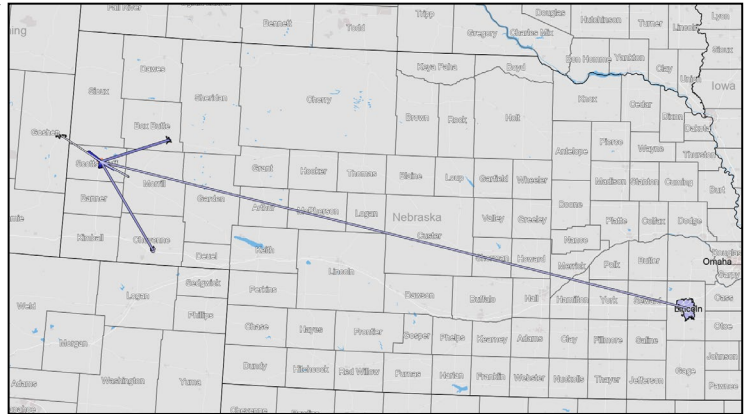
	Count	Share
<b>Scotts Bluff County, NE</b>	<b>7,572</b>	<b>77.1%</b>
Morrill County, NE	290	3.0%
Box Butte County, NE	161	1.6%
Cheyenne County, NE	157	1.6%
Goshen County, WY	146	1.5%
Dawes County, NE	109	1.1%
Lancaster County, NE	95	1.0%
Lincoln County, NE	76	0.8%
Sioux County, NE	61	0.6%
Dawson County, NE	49	0.5%
All Other Locations	1,106	11.3%



Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2021

## By Places *Top 10 cities, CDPS, etc.*

	Count	Share
<b>Scottsbluff city, NE</b>	<b>3,531</b>	<b>35.9%</b>
Gering city, NE	1,741	17.7%
Mitchell city, NE	300	3.1%
Terrytown city, NE	249	2.5%
Minatare city, NE	156	1.6%
Alliance city, NE	140	1.4%
Sidney city, NE	115	1.2%
Lincoln city, NE	88	0.9%
Bayard city, NE	87	0.9%
Torrington city, WY	86	0.9%
All Other Locations	3,329	33.9%



Source: U.S. Census Bureau, LEHD Origin-Destination Data Base, February 2021

The next table and charts (Table 5, page 9, Charts 10–18, pages 11–13) 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. More detailed figures can also be found in Tables 6–8 (pages 10–12).

**TABLE 5**

## Inflow/Outflow Report

Scottsbluff, Primary Jobs

Selection Area Labor Market Size

	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	9,822	100.0%	9,813	100.0%	10,062	100.0%
Living in the Selection Area	6,541	66.6%	6,627	67.5%	6,817	67.7%
Net Job Inflow (+) or Outflow (-)	3,281	-	3,186	-	3,245	-

In-Area Labor Force Efficiency

	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	6,541	100.0%	6,627	100.0%	6,817	100.0%
Living and Employed in the Selection Area	3,531	54.0%	3,554	53.6%	3,776	55.4%
Living in the Selection Area but Employed Outside	3,010	46.0%	3,073	46.4%	3,041	44.6%

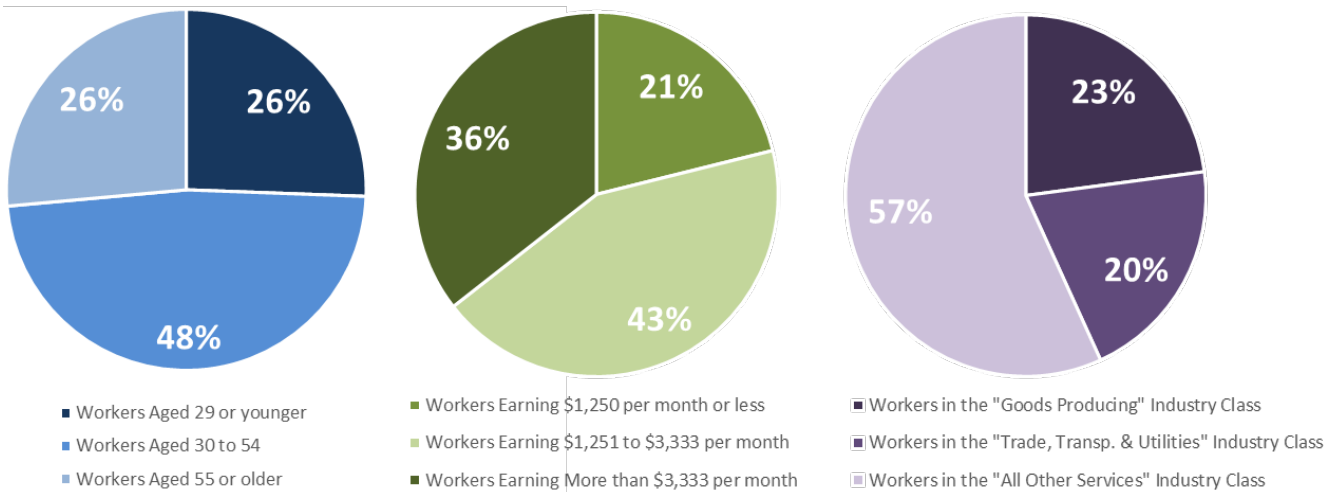
In-Area Employment Efficiency

	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	9,822	100.0%	9,813	100.0%	10,062	100.0%
Employed and Living in the Selection Area	3,531	35.9%	3,554	36.2%	3,776	37.5%
Employed in the Selection Area but Living Outside	6,291	64.1%	6,259	63.8%	6,286	62.5%

**TABLE 6****Worker Outflow by Job Characteristic**

Scottsbluff

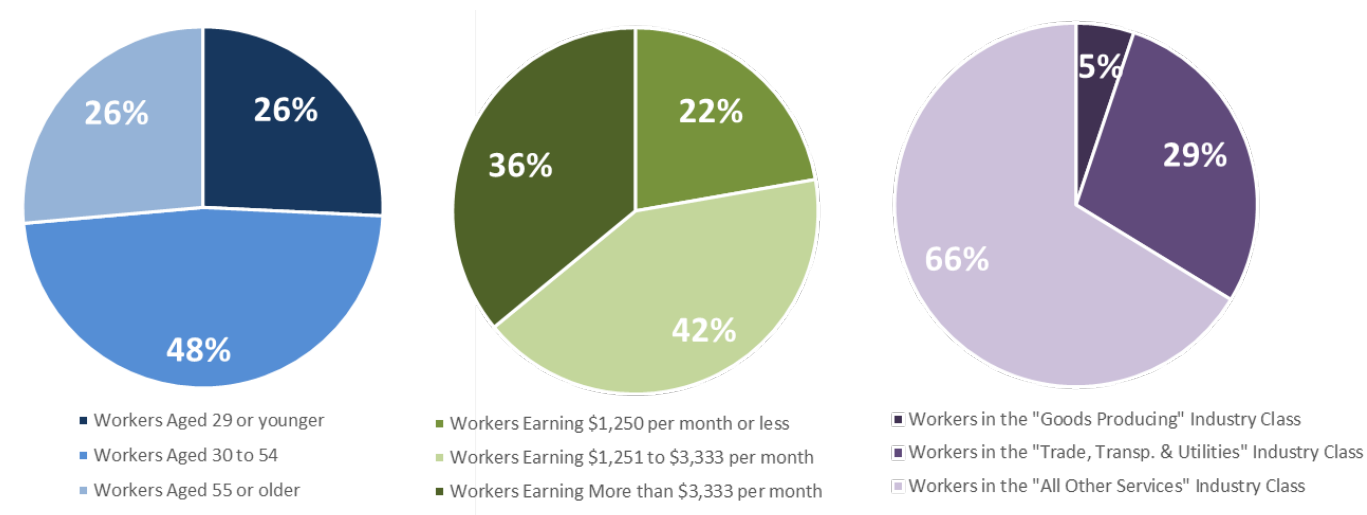
Outflow Job Characteristics	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	<b>3,010</b>	<b>100.0%</b>	3,073	100.0%	3,041	100.0%
Workers Aged 29 or younger	770	25.6%	762	24.8%	718	23.6%
Workers Aged 30 to 54	1,444	48.0%	1,489	48.5%	1,547	50.9%
Workers Aged 55 or older	796	26.4%	822	26.7%	776	25.5%
Workers Earning \$1,250 per month or less	636	21.1%	626	20.4%	653	21.5%
Workers Earning \$1,251 to \$3,333 per month	1,304	43.3%	1,349	43.9%	1,378	45.3%
Workers Earning More than \$3,333 per month	1,070	35.5%	1,098	35.7%	1,010	33.2%
Workers in the "Goods Producing" Industry Class	689	22.9%	621	20.2%	629	20.7%
Workers in the "Trade, Transportation, and Utilities" Industry Class	611	20.3%	656	21.3%	687	22.6%
Workers in the "All Other Services" Industry Class	1,710	56.8%	1,796	58.4%	1,725	56.7%

**CHART 8, 9 & 10**

**TABLE 7****Worker Inflow by Job Characteristic**

Scottsbluff

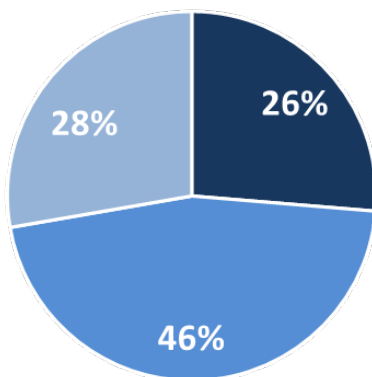
Inflow Job Characteristics	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	<b>6,291</b>	<b>100.0%</b>	6,259	100.0%	6,286	100.0%
Workers Aged 29 or younger	<b>1,620</b>	<b>25.8%</b>	1,603	25.6%	1,636	26.0%
Workers Aged 30 to 54	<b>3,010</b>	<b>47.8%</b>	2,987	47.7%	3,055	48.6%
Workers Aged 55 or older	<b>1,661</b>	<b>26.4%</b>	1,669	26.7%	1,595	25.4%
Workers Earning \$1,250 per month or less	<b>1,400</b>	<b>22.3%</b>	1,437	23.0%	1,509	24.0%
Workers Earning \$1,251 to \$3,333 per month	<b>2,630</b>	<b>41.8%</b>	2,626	42.0%	2,702	43.0%
Workers Earning More than \$3,333 per month	<b>2,261</b>	<b>35.9%</b>	2,196	35.1%	2,075	33.0%
Workers in the "Goods Producing" Industry Class	<b>325</b>	<b>5.2%</b>	324	5.2%	409	6.5%
Workers in the "Trade, Transportation, and Utilities" Industry Class	<b>1,796</b>	<b>28.5%</b>	1,855	29.6%	1,746	27.8%
Workers in the "All Other Services" Industry Class	<b>4,170</b>	<b>66.3%</b>	4,080	65.2%	4,131	65.7%

**CHART 11, 12 & 13**

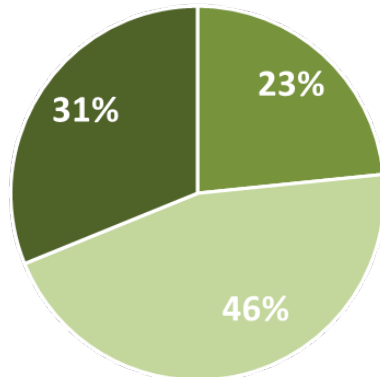
**TABLE 8****Worker Interior by Job Characteristic**

Scottsbluff

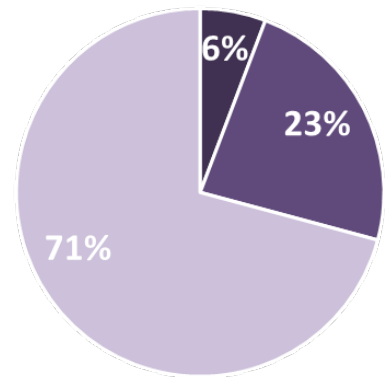
Interior Flow Job Characteristics	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	3,531	100.0%	3,554	100.0%	3,776	100.0%
Workers Aged 29 or younger	929	26.3%	918	25.8%	1,051	27.8%
Workers Aged 30 to 54	1,623	46.0%	1,682	47.3%	1,751	46.4%
Workers Aged 55 or older	979	27.7%	954	26.8%	974	25.8%
Workers Earning \$1,250 per month or less	826	23.4%	780	21.9%	872	23.1%
Workers Earning \$1,251 to \$3,333 per month	1,605	45.5%	1,636	46.0%	1,816	48.1%
Workers Earning More than \$3,333 per month	1,100	31.2%	1,138	32.0%	1,088	28.8%
Workers in the "Goods Producing" Industry Class	204	5.8%	202	5.7%	228	6.0%
Workers in the "Trade, Transportation, and Utilities" Industry Class	826	23.4%	850	23.9%	893	23.6%
Workers in the "All Other Services" Industry Class	2,501	70.8%	2,502	70.4%	2,655	70.3%

**CHART 14, 15 & 16**

- Workers Aged 29 or younger
- Workers Aged 30 to 54
- Workers Aged 55 or older



- Workers Earning \$1,250 per month or less
- Workers Earning \$1,251 to \$3,333 per month
- Workers Earning More than \$3,333 per month



- Workers in the "Goods Producing" Industry Class
- Workers in the "Trade, Transp. & Utilities" Industry Class
- Workers in the "All Other Services" Industry Class

The Distance/Direction Report depicted in Table 9 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 9, the count of primary job holders living within Scottsbluff is less in 2018 compared to 2017 and 2016. The distribution of miles traveled to work has also shifted since 2016. Figure 1 shows the location and concentration of these workplaces.

**TABLE 9 & FIGURE 1**

### Distance/Direction Report · *Home to Work Census Block*

Live within study area – distance to work

Job Counts in Work Blocks	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
<b>Total Primary Jobs</b>	<b>6,541</b>	<b>100.0%</b>	<b>6,627</b>	<b>100.0%</b>	<b>6,817</b>	<b>100.0%</b>
Less than 10 miles	4,998	76.4%	5,068	76.5%	5,323	78.1%
10 to 24 miles	99	1.5%	101	1.5%	89	1.3%
25 to 50 miles	187	2.9%	205	3.1%	216	3.2%
Greater than 50 miles	1,257	19.2%	1,253	18.9%	1,189	17.4%

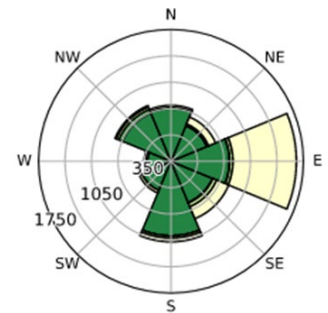


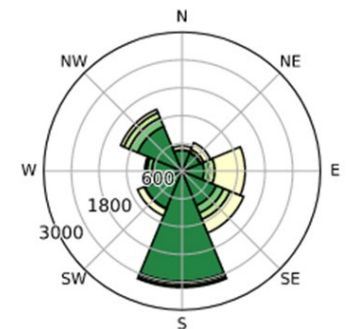
Table 10 and Figure 2 show the number (count) and percentage (share) of people employed within Scottsbluff and the distance to their homes. Looking at Table 10, the number of primary jobs held within Scottsbluff has slightly increased since 2017. The data also show the majority of Scottsbluff employees continue to travel less than 10 miles from work to home. Figure 2 shows the concentration of job counts by distance and direction.

**TABLE 10 & FIGURE 2**

### Distance/Direction Report · *Work to Home Census Block*

Work within study area – distance to home

Job Counts in Home Blocks	2018		2017		2016	
	Count	Share	Count	Share	Count	Share
<b>Total Primary Jobs</b>	<b>9,822</b>	<b>100.0%</b>	<b>9,813</b>	<b>100.0%</b>	<b>10,062</b>	<b>100.0%</b>
Less than 10 miles	7,113	72.4%	7,020	71.5%	7,477	74.3%
10 to 24 miles	647	6.6%	691	7.0%	724	7.2%
25 to 50 miles	547	5.6%	603	6.1%	583	5.8%
Greater than 50 miles	1,515	15.4%	1,499	15.3%	1,278	12.7%



Source: U.S. Census Bureau, Labor Area Dynamics, February 2021

## POPULATION AND MIGRATION TRENDS

The following tables (Tables 11 and 12) present population trend data for Scotts Bluff County and the surrounding area. As Table 11 indicates, Scotts Bluff County's population experienced an average annual increase of less than 0.1 percent 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 0.4 percent decrease in population from 2010 to 2019 (1,352 people total).

**TABLE 11**

### County Population • 1970–2019

Scotts Bluff County and the Surrounding Area

Location	1970	1980	1990	2000	2010	2019	Avg. Annual % Change 1970-2010	Avg. Annual % Change 2010-2019
<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>1,934,408</b>	<b>0.5</b>	<b>0.6</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>35,618</b>	<b>0.0</b>	<b>-0.4</b>
Banner County	1,034	918	852	819	690	745	-1.0	0.9
Box Butte County	10,094	13,696	13,130	12,158	11,308	10,783	0.3	-0.5
Morrill County	5,813	6,085	5,423	5,440	5,042	4,642	-0.4	-0.9
Sioux County	2,034	1,845	1,549	1,475	1,311	1,166	-1.1	-1.3

Table 12 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 0.4 percent from 2010 to 2019 for a total increase of 8.9 percent (2,264 people) from 1970 to 2019. Scottsbluff, the county's largest city, reported a 0.3 percent increase in population (49 people) between 1970 and 2019. The unincorporated areas outside of the selected communities experienced a 28.2 percent decrease (3,078 people) during the period 1970–2019.

**TABLE 12**

### Population • 1970–2019

Scotts Bluff County Communities/Rural Populations

Location	1970	1980	1990	2000	2010	2019	Avg. Annual % Change 1970-2010	Avg. Annual % Change 2010-2019
<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>1,934,408</b>	<b>0.5</b>	<b>0.6</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>35,618</b>	<b>0.0</b>	<b>-0.4</b>
Gering	5,639	7,760	8,025	7,751	8,500	8,128	1.0	-0.5
Henry	147	155	145	162	106	100	-0.8	-0.6
Lyman	561	551	452	421	341	323	-1.2	-0.6
McGrew	79	110	99	103	105	101	0.7	-0.4
Melbeta	124	151	116	138	112	108	-0.3	-0.4
Minatare	939	969	807	810	816	789	-0.4	-0.4
Mitchell	1,842	1,956	1,742	1,831	1,702	1,623	-0.2	-0.5
Morrill	937	1,097	980	957	921	889	0.0	-0.4
<b>Scottsbluff</b>	<b>14,507</b>	<b>14,156</b>	<b>14,029</b>	<b>14,732</b>	<b>15,039</b>	<b>14,556</b>	<b>0.1</b>	<b>-0.4</b>
Terrytown	747	727	535	646	1,198	1,169	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>27,786</b>	<b>0.3</b>	<b>-0.4</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>7,832</b>	<b>-0.7</b>	<b>-0.4</b>

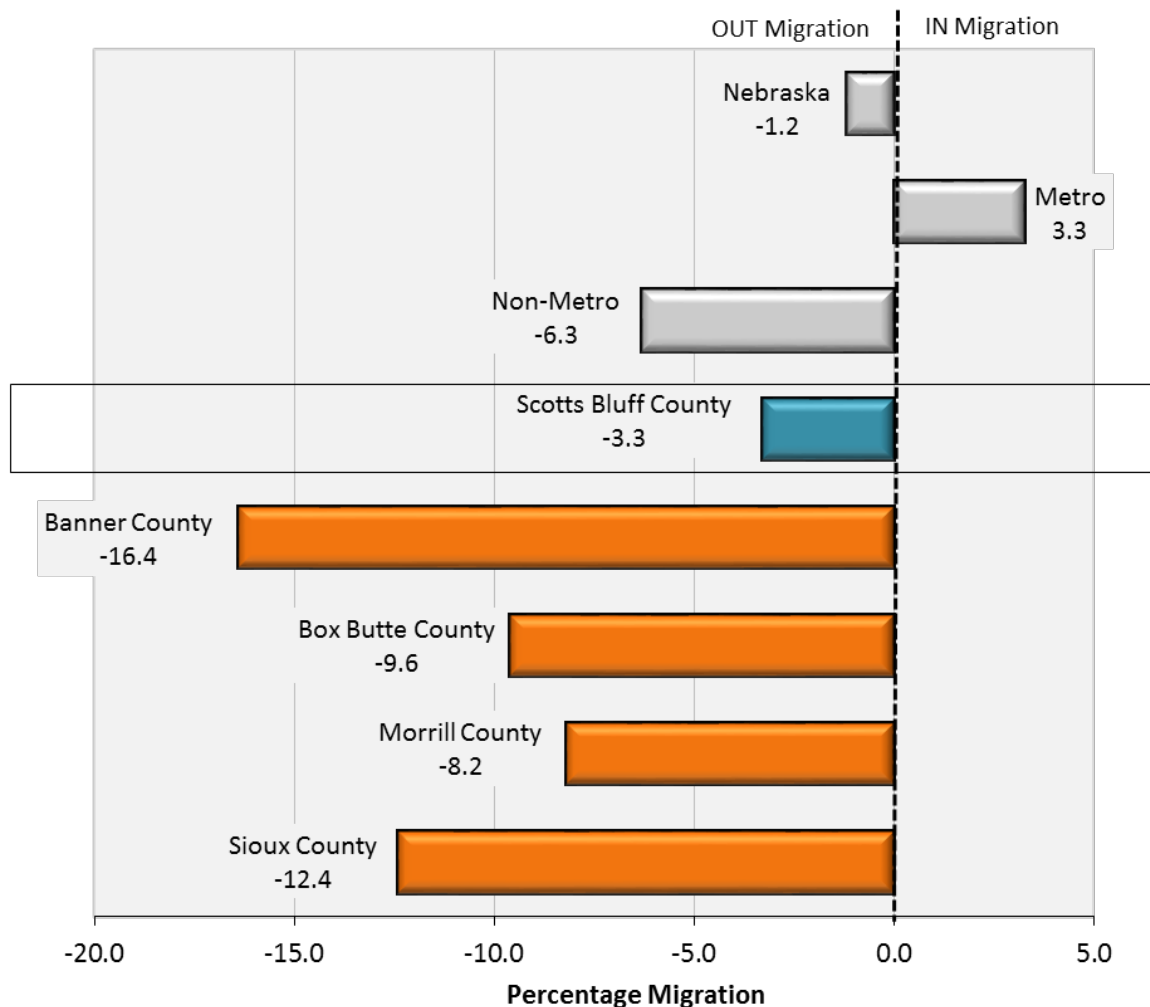
Source: U.S. Bureau of the Census, Census of Population, May 2020

The next two charts (Chart 17 and 18, next page) graphically depict the migration patterns for Nebraska, Scotts Bluff County, and the surrounding area as a percentage of the previous decade. Net migration is the change in population after factoring the natural increase for an area (births minus deaths). For the 2000–2010 decade, Scotts Bluff County experienced a net decrease in 1,205 people or 3.3 percent of its 2000 population.

#### CHART 17

### Net Migration as Percent of 2000 Population • 2000–2010

Scotts Bluff County and the Surrounding Area



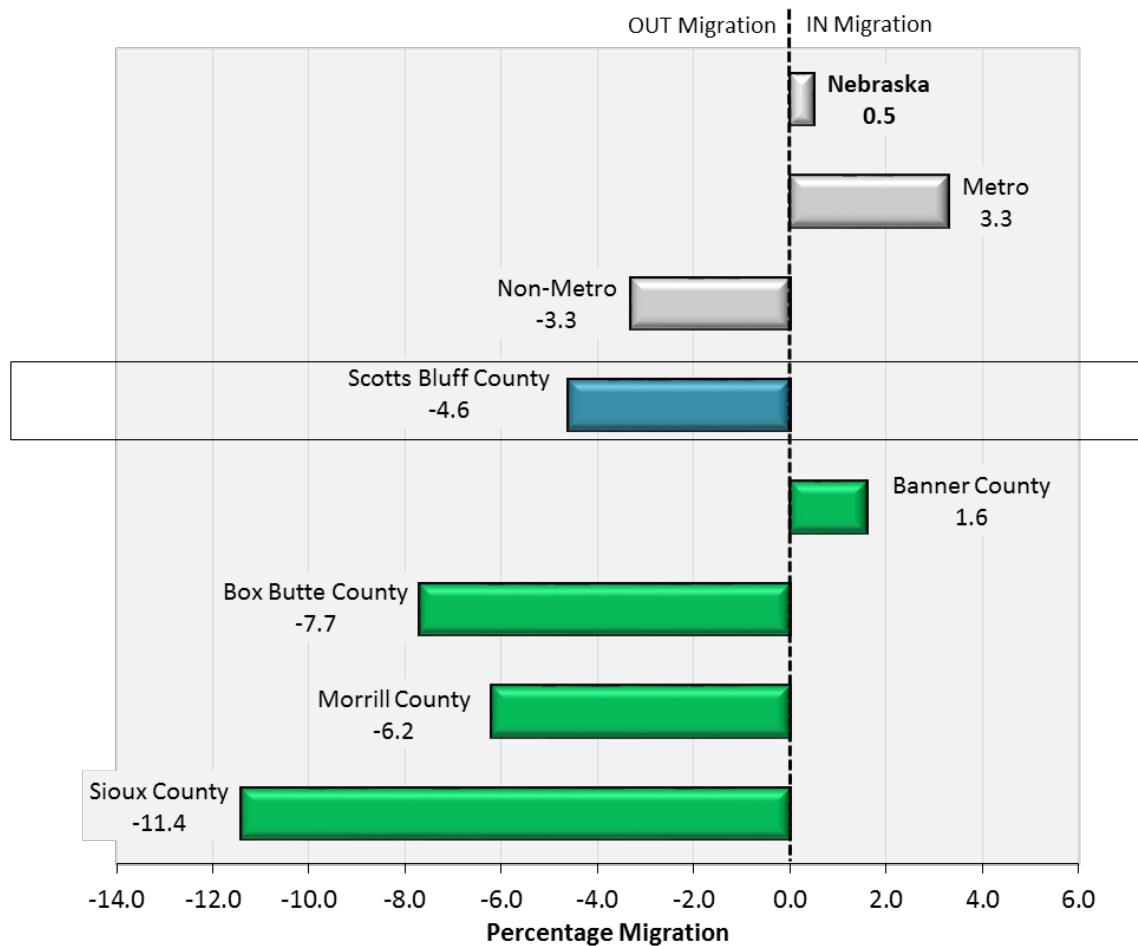
Source: U.S. Census Bureau, County population and estimated components of population change, July 2016

Looking at the years 2010–2019 (Chart 18), Scotts Bluff County experienced a net decrease of 1,709 people or 4.6 percent of its 2010 population.

# CHART 18

## Net Migration as Percent of 2010 Population • 2010–2019

Scotts Bluff County and the Surrounding Area



Source: U.S. Census Bureau, County population and estimated components of population change, May 2020

The next table and chart (Table 13 and Chart 19, next page) provide detail on migration patterns. Data reported in the table and chart are 2014–2018, 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.

Table 13 data show the current population one-year or older is 312 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 13**  
**5-Year Estimate Population Change**  
**Due to Migration and Mortality • 2014–2018**

Scotts Bluff County, Nebraska	
Current population one-year or older	35,798
Number of people living in the area one-year ago	35,486
Population change due to migration and mortality	312

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 April 2020

The 2014–2018, five-year estimates in Chart 19 reveal a net loss of 70 people from other Nebraska counties and a net gain of 359 people from other states for a total net gain of 289 people one-year or older. As shown in Chart 19, net gains occurred in the age groups Age 1 to 17 (gain of 100), Age 18 to 24 (gain of 82), Age 25 to 44 (gain of 112), Age 45 to 64 (gain of 136) and a net loss in age group Age 65 and over (loss of 141).

Chart 19 also shows the net gains and losses by educational attainment for persons ages 25 and older. There was a gain in residents with a bachelor's degree, associate's degree, or some college (gain of 275) and a loss of residents with a HS diploma or less (loss of 121) and a loss of residents with a graduate or professional degree (loss of 47).

#### CHART 19

### Population Change Due to Migration and Mortality Five-Year Estimate • 2014–2018

Scotts Bluff County and Nebraska

-- Part A: By Age Group --							
Age Group	Moved to Different Nebraska County	Moved From Different 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	106	164	58	163	205	42	100
Age 18 to 24	261	158	-103	135	320	185	82
Age 25 to 44	163	210	47	298	363	65	112
Age 45 to 64	169	142	-27	53	216	163	136
Age 65 and over	69	24	-45	133	37	-96	-141
<b>Total</b>	<b>768</b>	<b>698</b>	<b>-70</b>	<b>782</b>	<b>1,141</b>	<b>359</b>	<b>289</b>
-- Part B: By Educational Attainment --							
Educational Attainment	Moved to Different Nebraska County	Moved From Different 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	260	144	-116	207	202	-5	-121
Bachelor's or some college	117	208	91	163	347	184	275
Grad. or Prof. degree	24	24	0	114	67	-47	-47
<b>Total</b>	<b>401</b>	<b>376</b>	<b>-25</b>	<b>484</b>	<b>616</b>	<b>132</b>	<b>107</b>

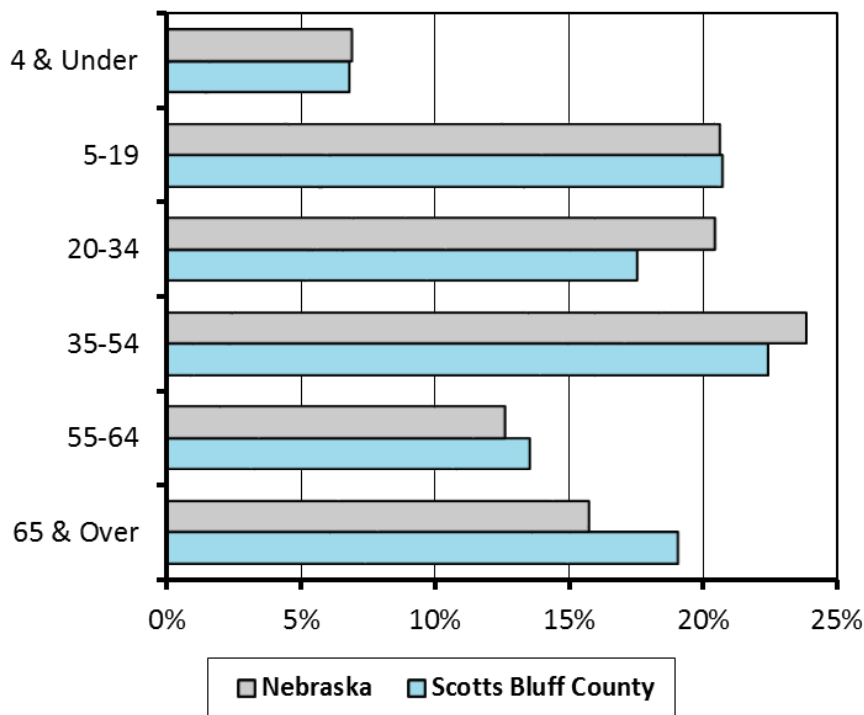
Source: American Community Survey, *Geographic Mobility By Selected Characteristics In The United States & Geographical Mobility In The Past Year By Age For Residence 1 Year Ago In The United States; Geographical Mobility In The Past Year By Educational Attainment For Current Residence In The United States & Geographical Mobility In The Past Year By Educational Attainment For Residence 1 Year Ago In The United States*; accessed April 2020

The following chart and table (Chart 20; Table 14) 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 2018 was 39.1 years of age compared to 36.6 years of age for residents of Nebraska as a whole.

**CHART 20**

## Age Distribution of the Population • 2018

Scotts Bluff County and Nebraska



**TABLE 14**

	2018 Population		Percent	
	Nebraska	Scotts Bluff County	Nebraska	Scotts Bluff County
4 & Under	132,968	2,448	6.9%	6.8%
5-19	397,401	7,447	20.6%	20.7%
20-34	392,903	6,309	20.4%	17.5%
35-54	459,282	8,065	23.8%	22.4%
55-64	243,048	4,871	12.6%	13.5%
65 & Over	303,666	6,849	15.7%	19.0%
<b>Total</b>	<b>1,929,268</b>	<b>35,989</b>	<b>100%</b>	<b>100%</b>
<b>Median Age</b>	<b>36.6</b>	<b>39.1</b>		

Source: U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," April 2020

Table 15 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 21 graphically depicts the median age distribution for the study area.

**TABLE 15**

## Median Age by Location and Gender • 2018

Scotts Bluff County and the Surrounding Area

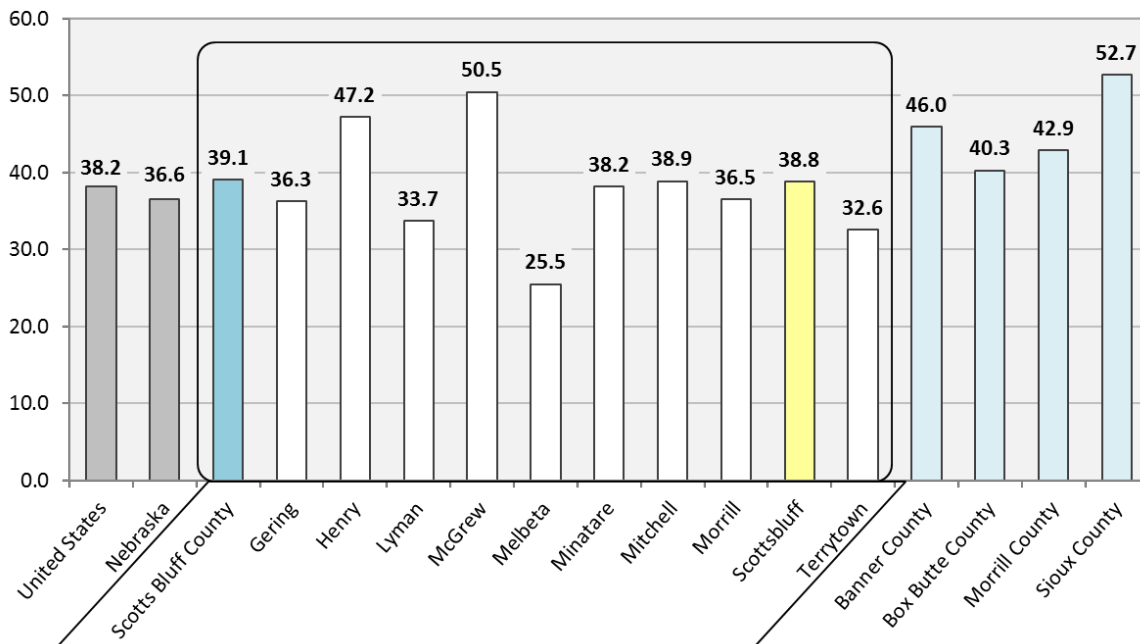
	Median Age		
	Total	Male	Female
<b>United States</b>	<b>38.2</b>	<b>36.9</b>	<b>39.5</b>
<b>Nebraska</b>	<b>36.6</b>	<b>35.6</b>	<b>37.6</b>
<b>Scotts Bluff County</b>	<b>39.1</b>	<b>37.4</b>	<b>40.9</b>
Gering	36.3	35.9	36.6
Henry	47.2	46.0	47.3
Lyman	33.7	31.0	35.2
McGrew	50.5	57.6	40.9
Melbeta	25.5	25.5	26.0
Minatare	38.2	39.6	34.9
Mitchell	38.9	37.1	40.0
Morrill	36.5	38.8	35.2
Scottsbluff	38.8	38.7	38.9
Terrytown	32.6	32.3	33.7

Banner County	46.0	49.0	41.0
Box Butte County	40.3	40.0	40.7
Morrill County	42.9	42.2	43.9
Sioux County	52.7	53.9	51.8

**CHART 21**

## Median Age by Location • 2018

Scotts Bluff County and the Surrounding Area



Source: U.S. Census Bureau, 2014-2018 American Community Survey, May 2020

## RETAIL SALES

Table 16 and Chart 22 show the retail sales (non-motor vehicle) pull factors for Scotts Bluff County and the surrounding area for 2019. 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.

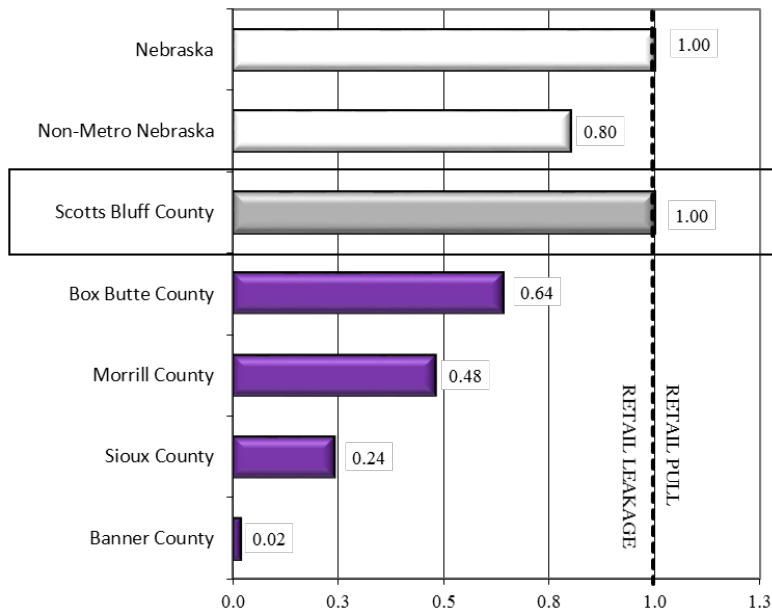
**TABLE 16**

### Retail Sales Non-Motor Vehicles Pull Factors • 2019

Nebraska, Scotts Bluff County and Surrounding Counties

	2019 Population	2019 Retail Sales (x \$1,000)	2019 Per Cap Sales (\$)	2019 Pull Factor
Nebraska	1,934,408	25,298,845	13,078	1.00
Non-Metro Nebraska	856,795	8,914,021	10,404	0.80
<b>Scotts Bluff County</b>	<b>35,618</b>	<b>464,078</b>	<b>13,029</b>	<b>1.00</b>
Banner County	745	147	198	0.02
Box Butte County	10,783	90,525	8,395	0.64
Morrill County	4,642	29,133	6,276	0.48
Sioux County	1,166	3,731	3,200	0.24

**CHART 22**



Reviewing the pull factors at the county level indicates Scotts Bluff County experiences net positive retail injections. The 2019 pull factor of 1.00 indicates, on a per capita basis, retail sales in Scotts Bluff County are equal 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 (1.00) with the pull factor for the non-metropolitan area of Nebraska (0.80) indicates per capita retail sales in Scotts Bluff County are 25.2 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2019

Table 17 and Chart 23 compare the 2019 pull factors for selected area communities. The community of Scottsbluff's pull factor of 1.97 indicates that, on a per capita basis, non-motor vehicle retail sales in Scottsbluff are approximately 97.0 percent greater than the state's average per capita sales.

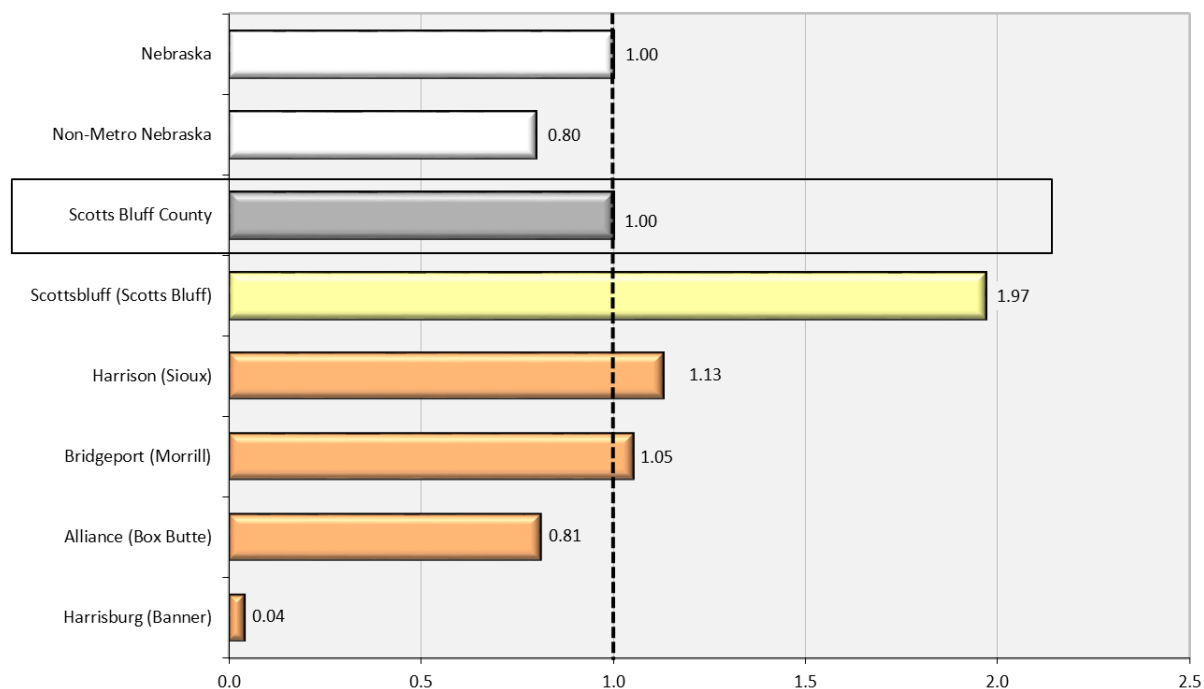
**TABLE 17**

## Retail Sales Non-Motor Vehicles Pull Factors • 2019

Nebraska and Selected Study Area Cities

	2019 Population	2019 Retail Sales (x \$1,000)	2019 Per Cap Sales (\$)	2019 Pull Factor
Nebraska	1,934,408	25,298,845	13,078	1.00
Non-Metro Nebraska	856,795	8,914,021	10,404	0.80
<b>Scotts Bluff County</b>	<b>35,618</b>	<b>464,078</b>	<b>13,029</b>	<b>1.00</b>
Scottsbluff (Scotts Bluff)	14,556	374,787	25,748	1.97
Harrisburg (Banner)	249	146	585	0.04
Alliance (Box Butte)	8,092	85,373	10,550	0.81
Bridgeport (Morrill)	1,472	20,290	13,784	1.05
Harrison (Sioux)	223	3,286	14,735	1.13

**CHART 23**



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2019

Table 18 (sorted by population) and Chart 24 (sorted by pull factor) further breakdown the 2019 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 (1.97) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 1.00 for Scotts Bluff County in 2019.

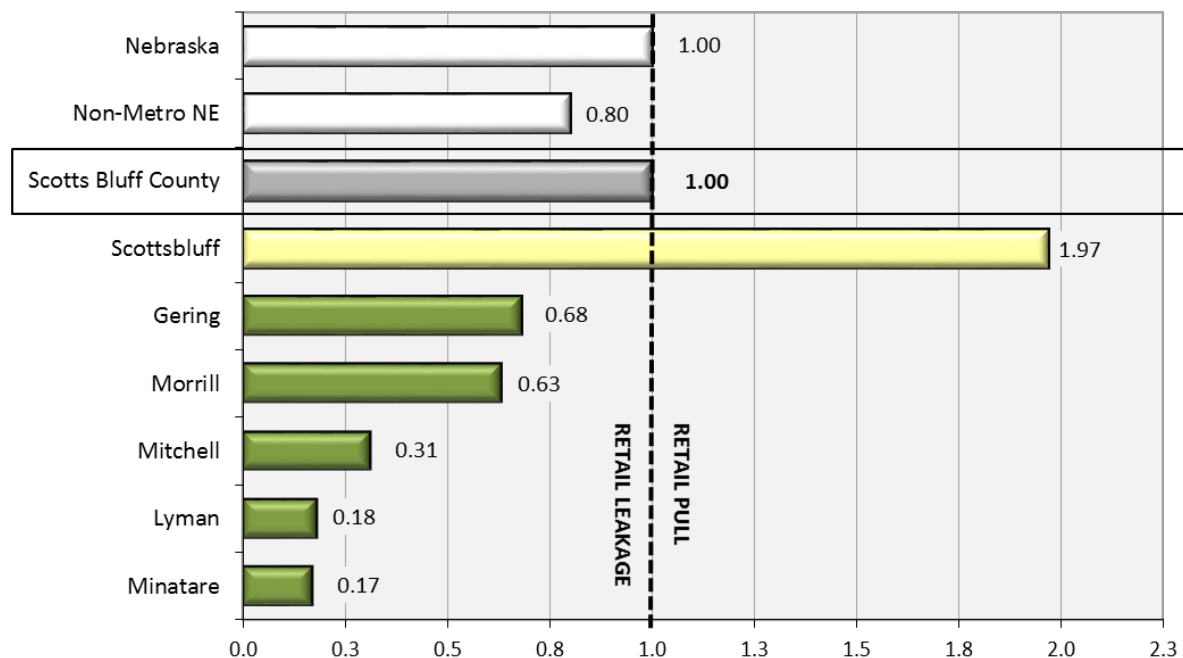
**TABLE 18**

## Retail Sales Non-Motor Vehicles Pull Factors • 2019

Nebraska and Available Scotts Bluff County Communities

	2019 Population	2019 Retail Sales (x \$1,000)	2019 Per Cap Sales (\$)	2019 Pull Factor
Nebraska	1,934,408	25,298,845	13,078	1.00
Non-Metro Nebraska	856,795	8,914,021	10,404	0.80
<b>Scotts Bluff County</b>	<b>35,618</b>	<b>464,078</b>	<b>13,029</b>	<b>1.00</b>
Scottsbluff	14,556	374,787	25,748	1.97
Gering	8,128	72,396	8,907	0.68
Morrill	889	7,275	8,183	0.63
Mitchell	1,623	6,637	4,089	0.31
Minatare	789	1,720	2,180	0.17
Lyman	323	760	2,352	0.18

**CHART 24**



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2020

Table 19 (sorted by population) and Chart 25 (sorted by pull factor) show the 2019 pull factors for Nebraska, Scottsbluff, and eight other similarly sized communities selected from around the state. Papillion's pull factor of 2.46 leads the group for 2019 thus indicating Papillion has greater retail pull.

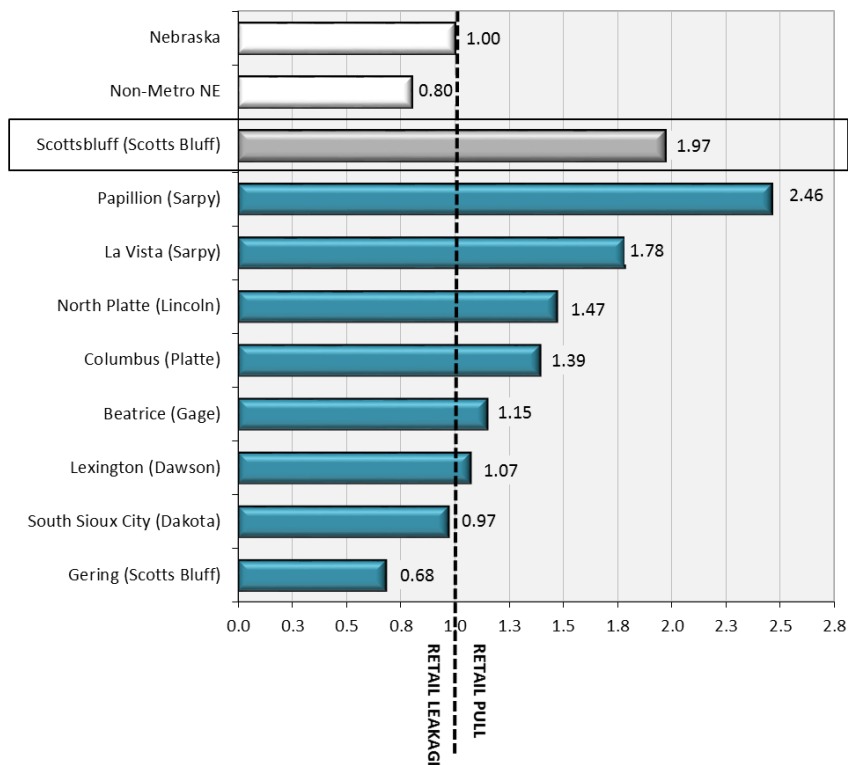
**TABLE 19**

## Retail Sales Non-Motor Vehicles Pull Factors • 2019

Scottsbluff & Other Similarly Sized Nebraska Communities

	2019 Population	2019 Retail Sales (x \$1,000)	2019 Per Cap Sales (\$)	2019 Pull Factor
Nebraska	1,934,408	25,298,845	13,078	1.00
Non-Metro Nebraska	856,795	8,914,021	10,404	0.80
<b>Scottsbluff (Scotts Bluff)</b>	<b>14,556</b>	<b>374,787</b>	<b>25,748</b>	<b>1.97</b>
Gering (Scotts Bluff)	8,128	72,396	8,907	0.68
Lexington (Dawson)	10,115	142,117	14,050	1.07
Beatrice (Gage)	12,279	185,122	15,076	1.15
South Sioux City (Dakota)	12,809	162,999	12,725	0.97
La Vista (Sarpy)	17,170	398,729	23,222	1.78
Papillion (Sarpy)	20,471	658,916	32,188	2.46
Columbus (Platte)	23,468	427,077	18,198	1.39
North Platte (Lincoln)	23,639	454,232	19,215	1.47

**CHART 25**



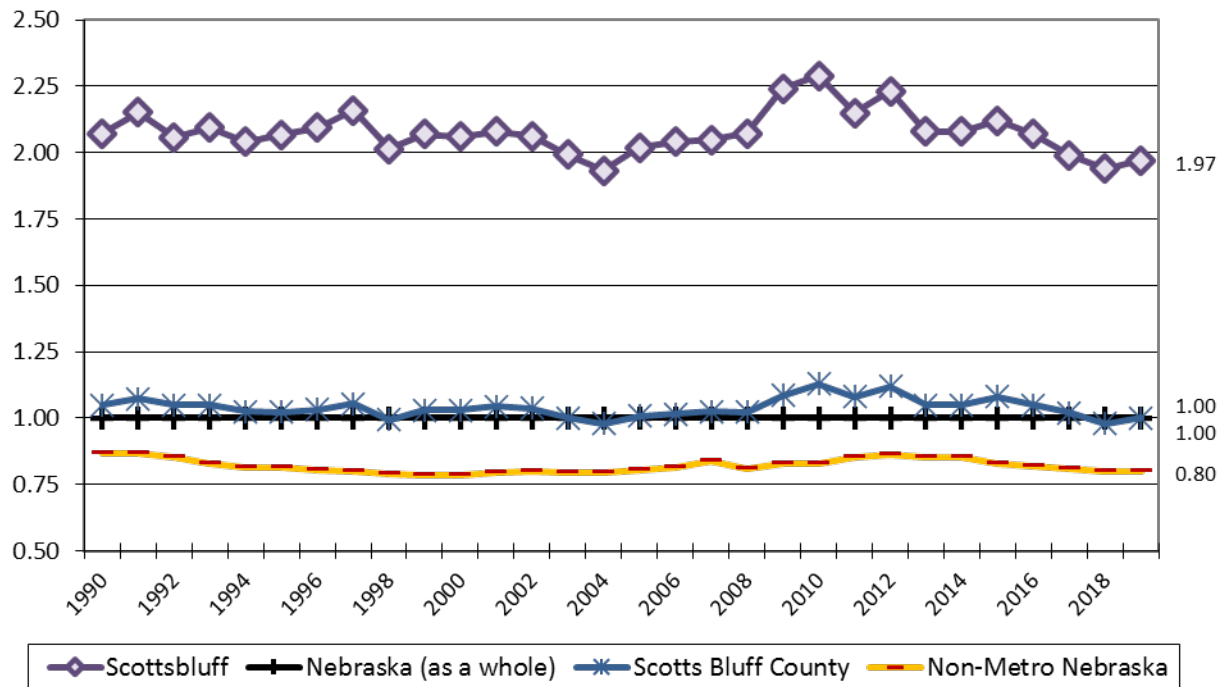
Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2020

Chart 26 illustrates the pull factor trend for Scottsbluff, Scotts Bluff County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2019. In examining the timeline, 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) shows the pull factor similar to the Nebraska (as a whole) average throughout the time period.

#### CHART 26

### Pull Factors • 1990–2019

Scottsbluff, Scotts Bluff County, Non-Metro & Nebraska (as a whole)



Source: U.S. Census Bureau and Nebraska Department of Revenue, May 2020

## PER CAPITA PERSONAL INCOME

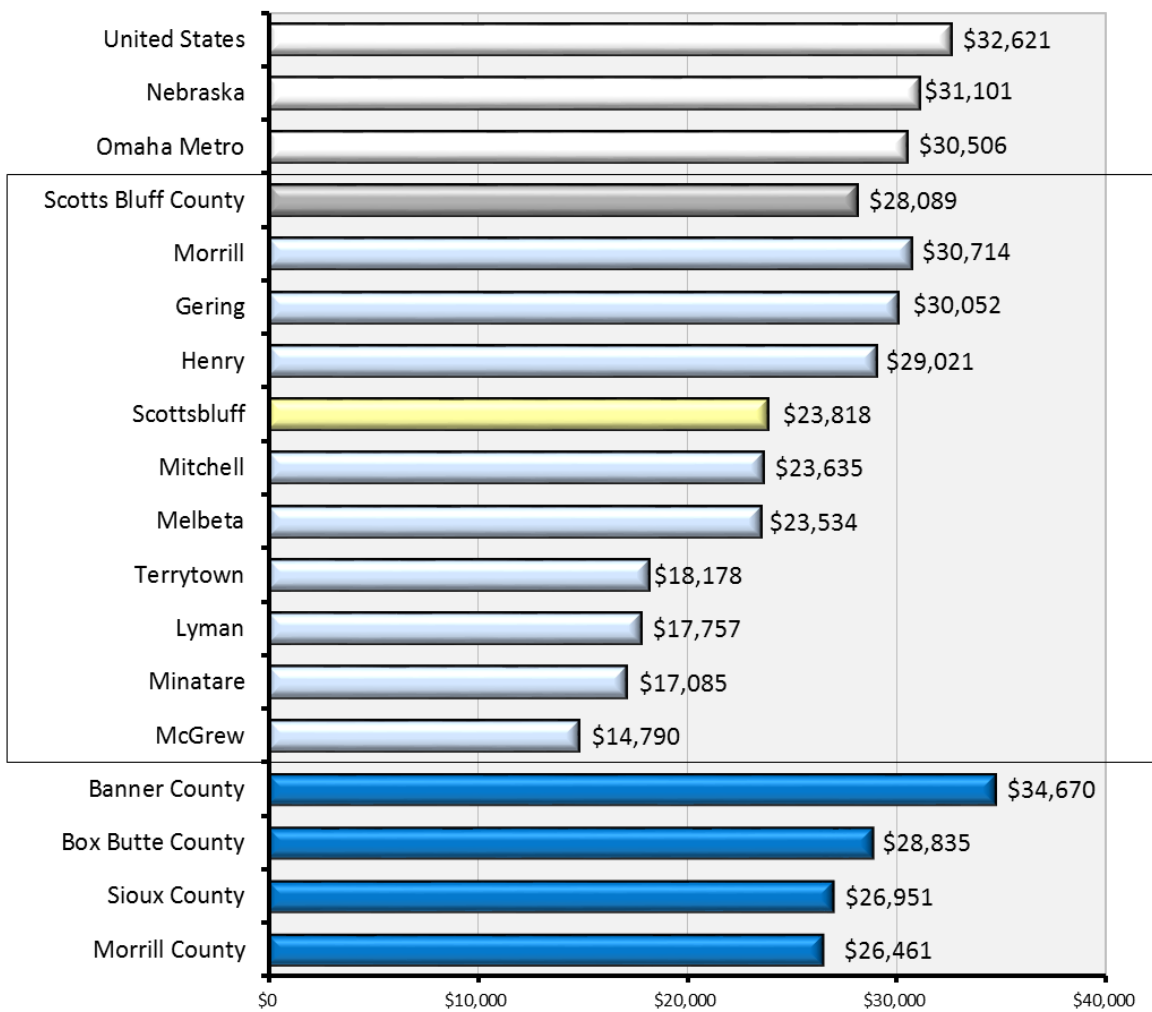
Chart 27 examines the per capita personal income levels within the study area. The American Community Survey data allows us to look more closely at non-metropolitan areas in Nebraska. Information on income distribution comes from various sources including earnings, retirement income, and public assistance.

The 2014–2018, five-year estimates show per capita personal income for Scotts Bluff County is estimated to be \$28,089 compared to \$31,101 for Nebraska as a whole.

### CHART 27

#### Per Capita Personal Income • 2014–2018

Nebraska, Scotts Bluff County & Surrounding Counties



Census Bureau 2014–2018 American Community Survey, accessed April 2020.

Source: U.S.

## MEDIAN HOUSEHOLD INCOME

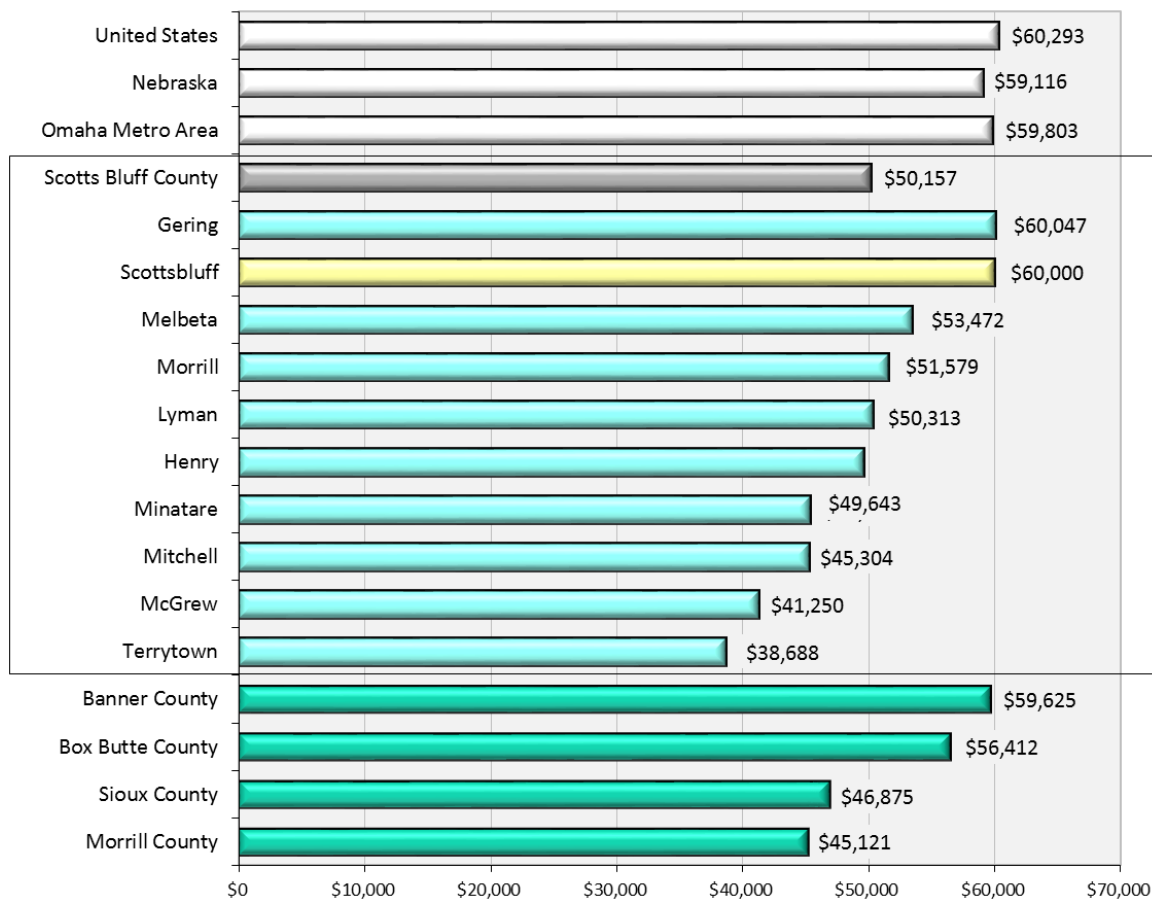
Median household income provides a different perspective of income levels than median family or per capita income. Family income is defined as having two or more related people in a household. Household income (used in this study) can consist of multiple family members or can be represented by a single person.

The 2014–2018, five-year estimates show median household income for Scotts Bluff County is estimated to be \$50,157 compared to \$59,116 for Nebraska as a whole.

### CHART 28

## Median Household Income • 2014–2018

Nebraska, Scotts Bluff County & Surrounding Counties



Source: U.S. Census Bureau 2014–2018 American Community Survey, accessed April 2020