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ECONOMIC AND DEMOGRAPHIC TRENDS

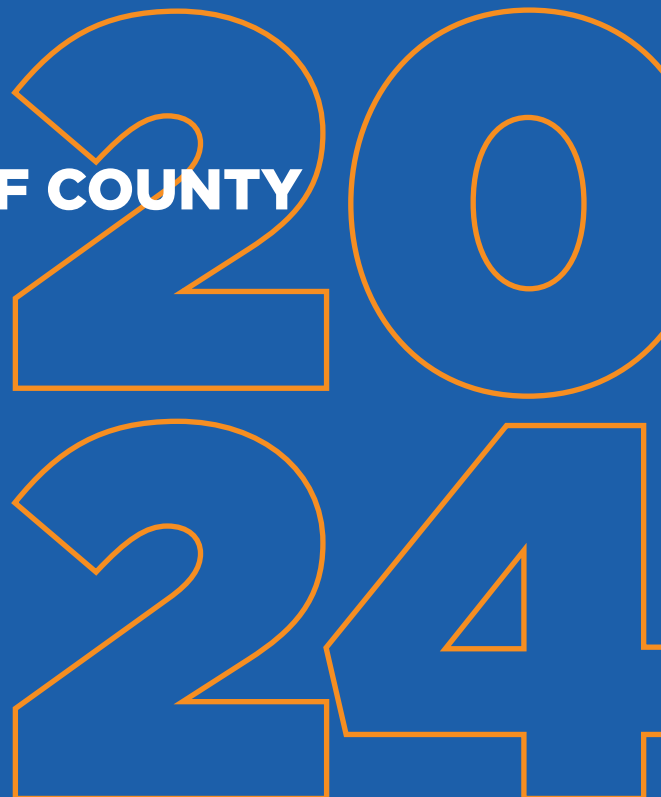
SCOTTSBLUFF, SCOTTS BLUFF COUNTY AND THE SURROUNDING AREA

PREPARED BY:

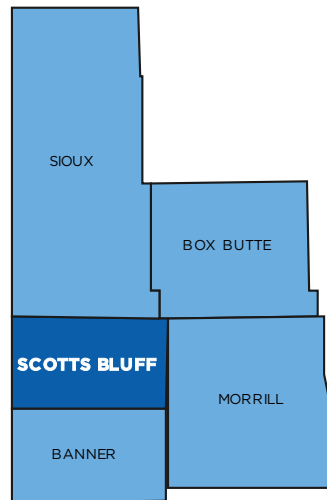
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ECONOMIC AND DEMOGRAPHIC TRENDS IN **Scottsbluff, Scotts Bluff County AND THE SURROUNDING AREA**



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 Chart 1 (next page) present nonfarm wage and salary data for Scotts Bluff County for the period 2012–2022. 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 7.3 percent (1,241 jobs) between 2012 and 2022.

Table 1 and Chart 1 also provide employment data for Scotts Bluff County by major economic sector for years 2012–2022. The Information sector recorded the largest percentage increase in employment between 2012 and 2022 (11.1 percent or 26 jobs). The Leisure & Hospitality sector recorded the largest actual employment increase between 2012 and 2022 (95 jobs or 5.8 percent).

TABLE 1
Nonfarm Wage & Salary Employment Trends • 2012–2022
 Scotts Bluff County, Nebraska

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% Change 2012-2022	# Change 2012-2022
Nonfarm W&S Employment	17,013	16,942	16,761	16,903	17,199	16,726	16,623	16,275	15,768	15,759	15,772	-7.3	-1,241
Total Private Industries	13,814	13,755	13,571	13,692	13,884	13,441	13,344	13,013	12,548	12,536	12,568	-9.0	-1,246
Goods Producing	2,113	2,154	2,149	2,201	2,403	2,171	2,242	2,118	2,105	2,102	2,203	4.3	90
Natural Resources & Mining	268	266	258	260	280	275	271	280	264	251	243	-9.3	-25
Construction	833	766	745	850	1,133	918	1,003	875	915	856	912	9.5	79
Manufacturing	1,012	1,122	1,146	1,092	989	978	968	964	926	995	1,048	3.6	36
Service Providing	11,700	11,601	11,422	11,491	11,481	11,270	11,102	10,895	10,443	10,435	10,365	-11.4	-1,335
Trade, Transportation & Utilities	3,779	3,701	3,788	3,838	3,832	3,714	3,579	3,458	3,468	3,552	3,603	-4.7	-176
Information	235	265	283	293	300	301	301	274	245	246	261	11.1	26
Financial Activities	1,092	1,045	909	697	703	703	701	696	671	657	606	-44.5	-486
Professional & Business Services	1,290	1,214	1,253	1,519	1,554	1,444	1,406	1,352	1,303	1,262	1,252	-2.9	-38
Education & Health Services	3,054	3,355	3,160	3,071	2,985	2,962	2,969	2,905	2,749	2,651	2,521	-17.5	-533
Leisure & Hospitality	1,626	1,645	1,658	1,701	1,737	1,673	1,689	1,773	1,600	1,658	1,721	5.8	95
Other Services, except Public	626	376	371	374	369	472	457	437	407	409	401	-35.9	-225
Government	3,199	3,187	3,190	3,211	3,315	3,285	3,279	3,262	3,220	3,223	3,204	0.2	5
Federal	167	155	157	159	154	154	145	148	153	148	143	-14.4	-24
State	551	579	572	580	594	581	553	542	571	592	595	8.0	44
Local	2,481	2,453	2,462	2,473	2,567	2,550	2,581	2,571	2,496	2,483	2,467	-0.6	-14

Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data, released June 2023
 Labor Force & Work Summary, 2012-2022, Annual, Scotts Bluff County, Nebraska (June 2023 data)

CHART 1
Employment by Industry • 2012–2022
 Scotts Bluff County, Nebraska

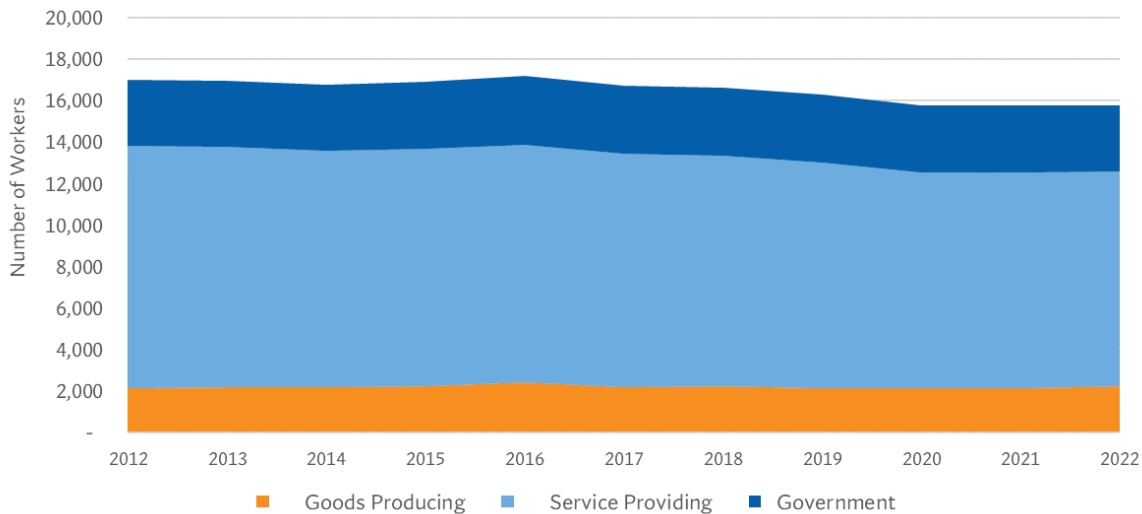


Chart 2 compares total nonfarm wage and salary employment growth in Scotts Bluff County with metropolitan, non-metropolitan and Nebraska as a whole for the review period 2012–2022. Non-metropolitan Nebraska is defined as Nebraska minus the seven Lincoln and Omaha metropolitan counties of Cass, Douglas, Lancaster, Sarpy, Saunders, Seward and Washington.

As this chart indicates, total nonfarm wage and salary employment in Scotts Bluff County decreased 7.3 percent (1,241 jobs) from 2012 to 2022, compared to a 6.8 percent increase for Nebraska as a whole, an 8.0 percent increase in metropolitan Nebraska and a 17.0 percent increase in non-metropolitan Nebraska.

CHART 2
Nonfarm W&S Employment • 2012–2022
 Scotts Bluff County, Nebraska, Metro and Non-Metro Nebraska

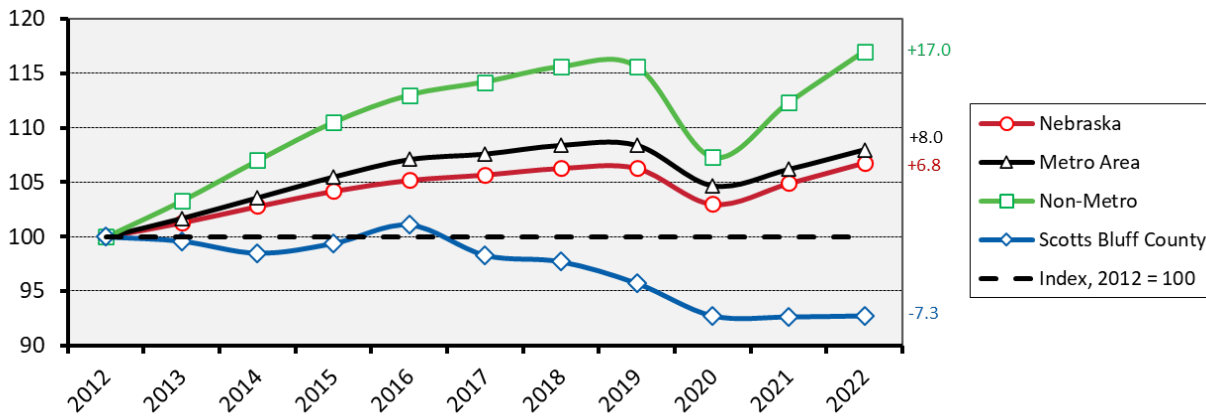
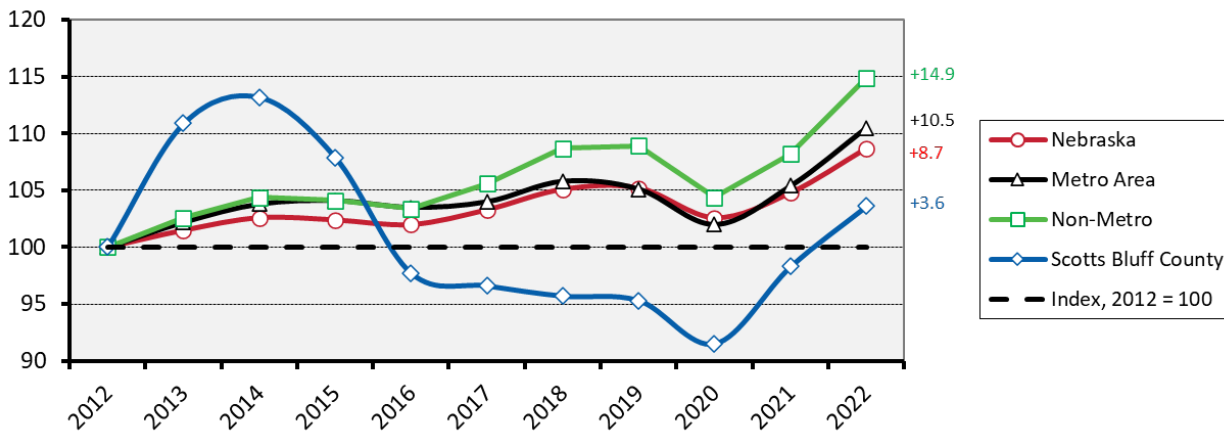


Chart 3 presents data on manufacturing wage and salary employment growth for Scotts Bluff County, Nebraska, metropolitan and non-metropolitan areas. The Manufacturing sector for Scotts Bluff County recorded a 3.60 percent increase in employment (36 jobs) between 2012 and 2022. This compares to a 14.9 percent increase in employment for non-metropolitan Nebraska, an 8.7 percent increase for Nebraska as a whole, and a 10.5 percent increase for metropolitan Nebraska over the same period.

CHART 3
Manufacturing W&S Employment • 2012–2022
 Scotts Bluff County, Nebraska, Metro and Non-Metro Nebraska



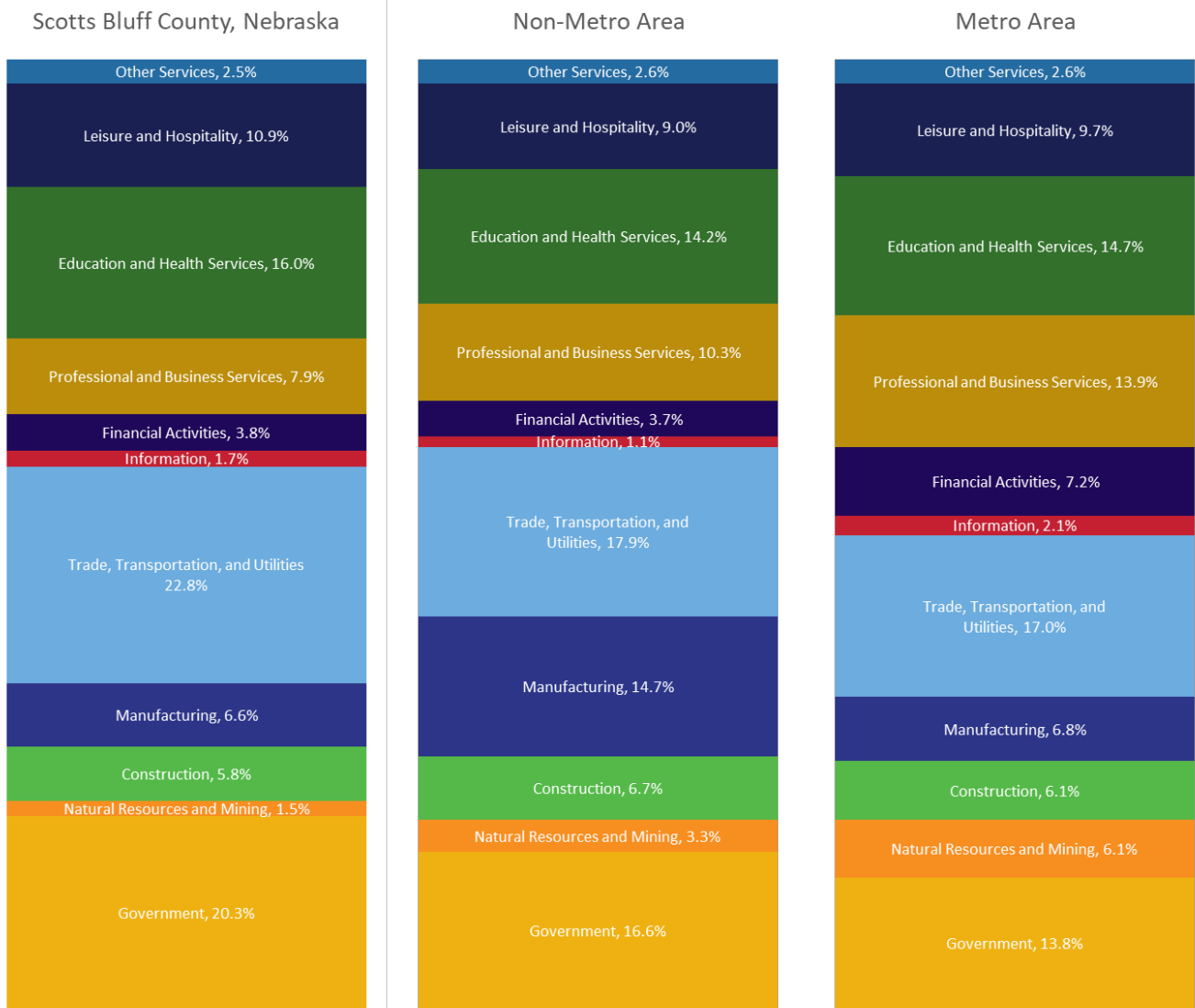
Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), released June 2023

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

When comparing the Scotts Bluff County employment sectors to non-metropolitan Nebraska, the largest deviation occurs in the Manufacturing sector, which makes up 6.6 percent of the county workforce (1,048 employees) compared to 14.7 percent for non-metropolitan Nebraska; a difference of 8.1 percent. Comparing Scotts Bluff County to the overall metropolitan distribution, the largest deviation is found in the Government sector (20.3 percent Scotts Bluff County vs. 13.8 percent metropolitan Nebraska; a difference of 6.5 percent).

CHART 4, 5 & 6

Nonfarm W&S Employment by Major Economic Sector



U.S. Bureau of Labor Statistics

The next table (Table 2) shows labor force information for Scotts Bluff County for the time period 2012–2022. 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 2012 and 2022 (5.9 percent or 1,136 people).

The number of those unemployed in Scotts Bluff County decreased by 45.7 percent (400 people) between 2012 and 2022. 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 2.6 percent in 2022; below that for metropolitan Nebraska (4.6 percent), below Nebraska as a whole (4.3 percent), and below non-metropolitan Nebraska (3.6 percent).

TABLE 2
Labor Force & Employment Trends · 2012–2022

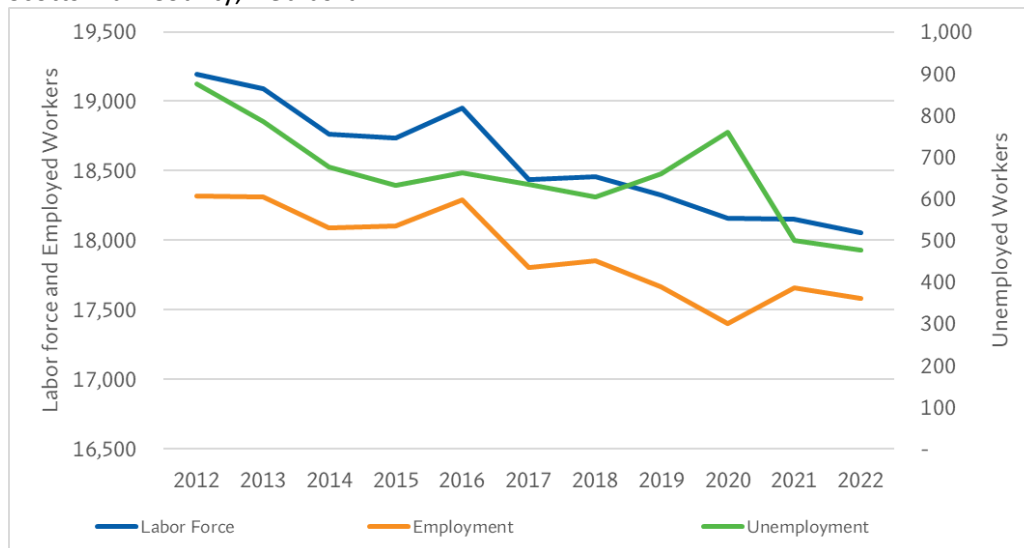
Scotts Bluff County, Nebraska

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% Change 2012-2022	# Change 2012-2022
Labor Force	19,192	19,093	18,764	18,734	18,951	18,437	18,455	18,325	18,160	18,154	18,056	-5.9	-1,136
Employment	18,316	18,309	18,088	18,102	18,290	17,804	17,852	17,665	17,402	17,654	17,580	-4.0	-736
Unemployment	876	784	676	632	661	633	603	660	758	500	476	-45.7	-400
Unemployment Rate	4.6	4.1	3.6	3.4	3.5	3.4	3.3	3.6	4.2	2.8	2.6	N/A	N/A

(N/A) - Data not available

CHART 7
Labor Force & Employment Trends · 2012–2022

Scotts Bluff County, Nebraska



Bureau of Labor Statistics, Local Area Unemployment Statistics, Annual Data, released April 2023
 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 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 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 Scotts Bluff County are from 2021.

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 identified 15,056 county labor force participants holding primary jobs. As Table 3 shows, 95.1 percent of Scotts Bluff County’s labor force participants are employed within the state of Nebraska. Approximately 75.4 percent of Scotts Bluff County workers remain within Scotts Bluff County for employment with 24.6 percent leaving the county borders for work (next page). The top ten incorporated places where Scotts Bluff County labor force participants are employed are also shown on the following page.

TABLE 3

Work Destination Report • 2021

Where Workers are Employed Who Live in the Selection Area

	Count	Share
Total Primary Jobs	15,056	100.0%

By States

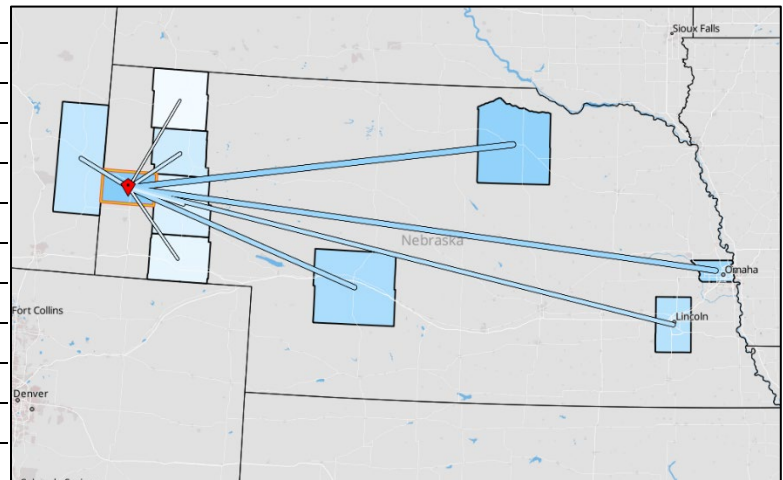
	Count	Share
Nebraska	14,323	95.1%
Wyoming	328	2.2%
Colorado	172	1.1%
South Dakota	102	0.7%
Kansas	44	0.3%
Iowa	14	0.1%
California	10	0.1%
Minnesota	9	0.1%
Oklahoma	8	0.1%
Missouri	7	0.0%
All Other Locations	39	0.3%



U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2021).

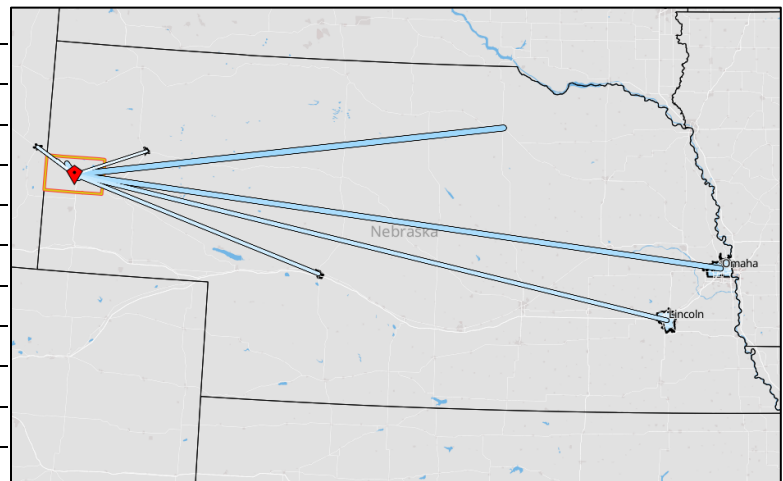
By Counties

	Count	Share
Scotts Bluff County, NE	11,354	75.4%
Holt County, NE	456	3.0%
Douglas County, NE	318	2.1%
Lincoln County, NE	227	1.5%
Lancaster County, NE	223	1.5%
Goshen County, WY	222	1.5%
Box Butte County, NE	214	1.4%
Morrill County, NE	213	1.4%
Cheyenne County, NE	174	1.2%
Dawes County, NE	118	0.8%
All Other Locations	1,537	10.2%



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

	Count	Share
Scottsbluff city, NE	6,949	46.2%
Gering city, NE	2,215	14.7%
O'Neill city, NE	382	2.5%
Omaha city, NE	312	2.1%
Mitchell city, NE	272	1.8%
Lincoln city, NE	216	1.4%
North Platte city, NE	192	1.3%
Torrington city, WY	176	1.2%
Alliance city, NE	166	1.1%
Morrill village, NE	156	1.0%
All Other Locations	4,020	26.7%



U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2021).

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 14,917 primary jobs within Scotts Bluff County. As Table 4 indicates, 92.1 percent of these jobs are held by Nebraska residents. Approximately 76.1 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 • 2021

Where Workers Live Who are Employed in the Selection Area

	Count	Share
Total Primary Jobs	14,917	100.0%

By States

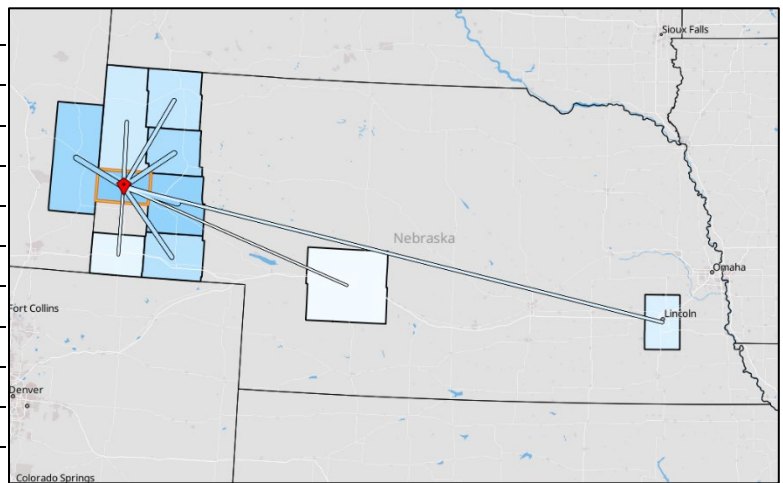
	Count	Share
Nebraska	13,736	92.1%
Wyoming	605	4.1%
Colorado	199	1.3%
California	45	0.3%
Iowa	43	0.3%
Texas	31	0.2%
South Dakota	30	0.2%
Utah	19	0.1%
New York	18	0.1%
Florida	15	0.1%
All Other Locations	176	1.2%



U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2021).

By Counties

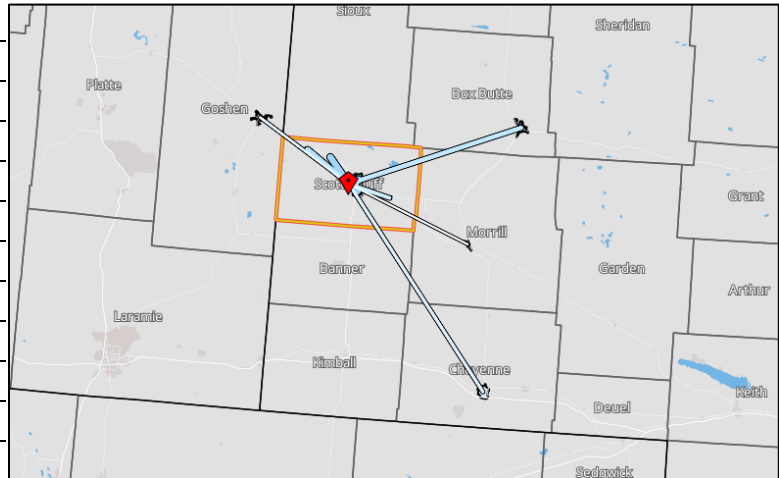
	Count	Share
Scotts Bluff County, NE	11,354	76.1%
Morrill County, NE	415	2.8%
Goshen County, WY	308	2.1%
Box Butte County, NE	275	1.8%
Cheyenne County, NE	248	1.7%
Dawes County, NE	176	1.2%
Sioux County, NE	118	0.8%
Lancaster County, NE	114	0.8%
Kimball County, NE	95	0.6%
Lincoln County, NE	88	0.6%
All Other Locations	1,726	11.6%



U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2021).

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

	Count	Share
Scottsbluff city, NE	4,636	31.1%
Gering city, NE	2,891	19.4%
Mitchell city, NE	476	3.2%
Terrytown city, NE	397	2.7%
Morrill village, NE	217	1.5%
Alliance city, NE	209	1.4%
Minatare city, NE	200	1.3%
Sidney city, NE	160	1.1%
Torrington city, WY	157	1.1%
Bridgeport city, NE	139	0.9%
All Other Locations	5,435	36.4%



U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2021).

The next table and charts (Table 5, page 9, Charts 8–16, pages 10–12) show 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. More detailed figures can also be found in Tables 6–8 (pages 10–12).

TABLE 5
Inflow/Outflow Report

Scotts Bluff County, Primary Jobs

Selection Area Labor Market Size (Primary Jobs)	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	14,917	100.0%	14,785	100.0%	15,115	100.0%
Living in the Selection Area	15,056	100.9%	15,095	102.1%	15,540	102.8%
Net Job Inflow (+) or Outflow (-)	-139	-	-310	-	-425	-

In-Area Labor Force Efficiency (Primary Jobs)	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
Living in the Selection Area	15,056	100.0%	15,095	100.0%	15,540	100.0%
Living and Employed in the Selection Area	11,354	75.4%	11,466	76.0%	11,815	76.0%
Living in the Selection Area but Employed Outside	3,702	24.6%	3,629	24.0%	3,725	24.0%

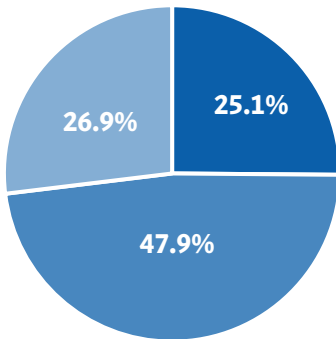
In-Area Employment Efficiency (Primary Jobs)	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
Employed in the Selection Area	14,917	100.0%	14,785	100.0%	15,115	100.0%
Employed and Living in the Selection Area	11,354	76.1%	11,466	77.6%	11,815	78.2%
Employed in the Selection Area but Living Outside	3,563	23.9%	3,319	22.4%	3,300	21.8%

TABLE 6**Worker Outflow by Job Characteristic**

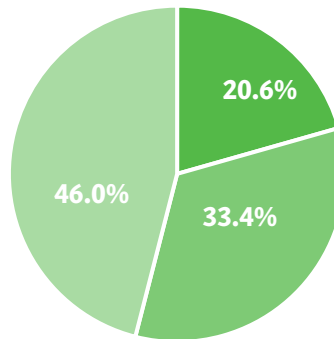
Scotts Bluff County

Outflow Job Characteristics

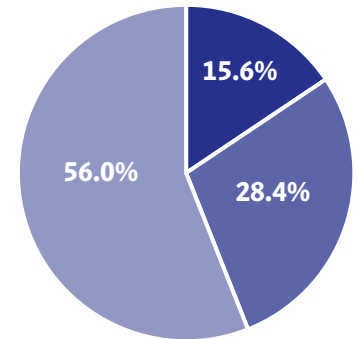
Outflow Job Characteristics	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
External Jobs Filled by Residents	3,702	100.0%	3,629	100.0%	3,725	100.0%
Workers Aged 29 or younger	930	25.1%	906	25.0%	894	24.0%
Workers Aged 30 to 54	1,775	47.9%	1,742	48.0%	1,822	48.9%
Workers Aged 55 or older	997	26.9%	981	27.0%	1,009	27.1%
Workers Earning \$1,250 per month or less	764	20.6%	758	20.9%	828	22.2%
Workers Earning \$1,251 to \$3,333 per month	1,236	33.4%	1,281	35.3%	1,315	35.3%
Workers Earning More than \$3,333 per month	1,702	46.0%	1,590	43.8%	1,582	42.5%
Workers in the "Goods Producing" Industry Class	578	15.6%	557	15.3%	582	15.6%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,052	28.4%	1,061	29.2%	1,069	28.7%
Workers in the "All Other Services" Industry Class	2,072	56.0%	2,011	55.4%	2,074	55.7%

CHART 8, 9 & 10

- 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



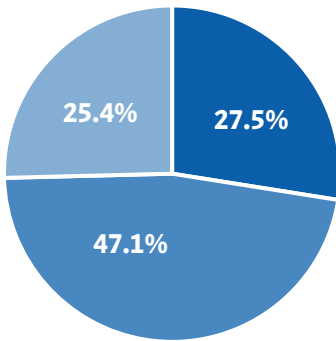
- Workers in the "Goods Producing" Industry Class
- Workers in the "Trade, Transportation, and Utilities" Industry Class
- Workers in the "All Other Services" Industry Class

TABLE 7**Worker Inflow by Job Characteristic**

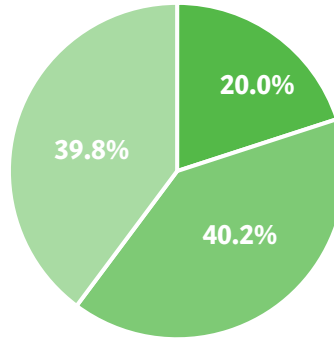
Scotts Bluff County

Inflow Job Characteristics

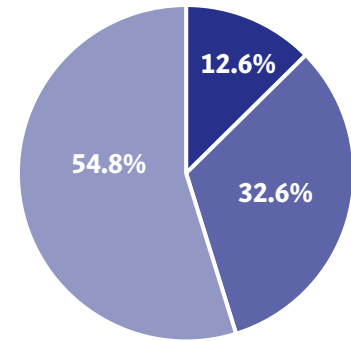
Inflow Job Characteristics	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Outside Workers	3,563	100.0%	3,319	100.0%	3,300	100.0%
Workers Aged 29 or younger	980	27.5%	828	24.9%	887	26.9%
Workers Aged 30 to 54	1,677	47.1%	1,625	49.0%	1,561	47.3%
Workers Aged 55 or older	906	25.4%	866	26.1%	852	25.8%
Workers Earning \$1,250 per month or less	714	20.0%	738	22.2%	748	22.7%
Workers Earning \$1,251 to \$3,333 per month	1,432	40.2%	1,348	40.6%	1,323	40.1%
Workers Earning More than \$3,333 per month	1,417	39.8%	1,233	37.1%	1,229	37.2%
Workers in the "Goods Producing" Industry Class	450	12.6%	423	12.7%	382	11.6%
Workers in the "Trade, Transportation, and Utilities" Industry Class	1,160	32.6%	1,011	30.5%	971	29.4%
Workers in the "All Other Services" Industry Class	1,953	54.8%	1,885	56.8%	1,947	59.0%

CHART 11, 12 & 13

- 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, Transportation, and Utilities" Industry Class
- Workers in the "All Other Services" Industry Class

TABLE 8

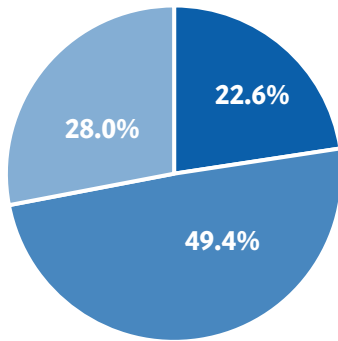
Worker Interior by Job Characteristic

Scotts Bluff County

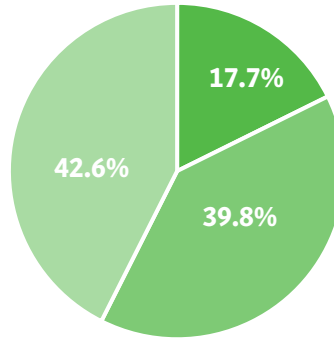
Interior Flow Job Characteristics

	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
Internal Jobs Filled by Residents	11,354	100.0%	11,466	100.0%	11,815	100.0%
Workers Aged 29 or younger	2,562	22.6%	2,529	22.1%	2,648	22.4%
Workers Aged 30 to 54	5,609	49.4%	5,637	49.2%	5,749	48.7%
Workers Aged 55 or older	3,183	28.0%	3,300	28.8%	3,418	28.9%
Workers Earning \$1,250 per month or less	2,005	17.7%	2,210	19.3%	2,233	18.9%
Workers Earning \$1,251 to \$3,333 per month	4,514	39.8%	4,709	41.1%	5,130	43.4%
Workers Earning More than \$3,333 per month	4,835	42.6%	4,547	39.7%	4,452	37.7%
Workers in the "Goods Producing" Industry Class	1,572	13.8%	1,556	13.6%	1,549	13.1%
Workers in the "Trade, Transportation, and Utilities" Industry Class	2,328	20.5%	2,257	19.7%	2,382	20.2%
Workers in the "All Other Services" Industry Class	7,454	65.7%	7,653	66.7%	7,884	66.7%

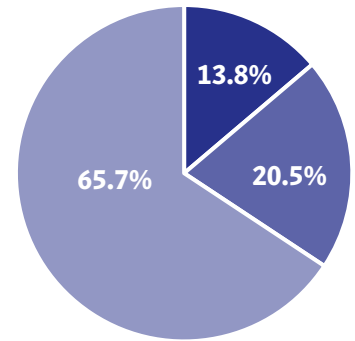
CHART 14, 15 & 16



- 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, Transportation, and 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 Scotts Bluff County and the distance they travel to work. Looking at Table 9, the count of primary job holders living within Scotts Bluff County is fewer in 2021 compared to 2019. The distribution of miles traveled to work has not shifted significantly since 2019. 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	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	15,056	100.0%	15,095	100.0%	15,540	100.0%
Less than 10 miles	10,192	67.7%	10,302	68.2%	10,695	68.8%
10 to 24 miles	1,335	8.9%	1,375	9.1%	1,356	8.7%
25 to 50 miles	579	3.8%	575	3.8%	567	3.6%
Greater than 50 miles	2,950	19.6%	2,843	18.8%	2,922	18.8%

U.S. Census Bureau, Labor Area Dynamics, OnTheMap, February 2023

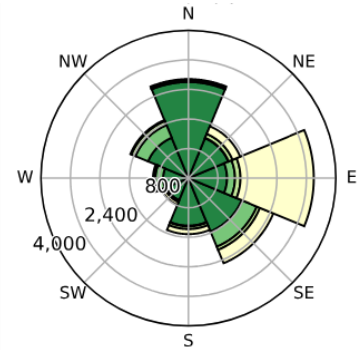


Table 10 and Figure 2 show the number (count) and percentage (share) of people employed within Scotts Bluff County and the distance to their homes. Looking at Table 10, the number of primary jobs held within Scotts Bluff County has decreased since 2019. The data also show the majority of Scotts Bluff County employees continue to live less than 10 miles from work to home. Figure 2 shows the concentration of job counts by distance and direction.

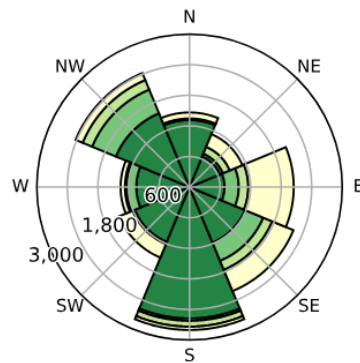
TABLE 10 & FIGURE 2

Distance/Direction Report · Work to Home Census Block

Work within study area – distance to home

Job Counts in Work Blocks	2021		2020		2019	
	Count	Share	Count	Share	Count	Share
Total Primary Jobs	14,917	100.0%	14,785	100.0%	15,115	100.0%
Less than 10 miles	10,195	68.3%	10,300	69.7%	10,691	70.7%
10 to 24 miles	1,499	10.0%	1,492	10.1%	1,455	9.6%
25 to 50 miles	908	6.1%	875	5.9%	845	5.6%
Greater than 50 miles	2,315	15.5%	2,118	14.3%	2,124	14.1%

U.S. Census Bureau, Labor Area Dynamics, OnTheMap, February 2023



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 0.0 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 percent total, for Nebraska as a whole. Scotts Bluff County reported an average annual decrease of 0.3 percent in population from 2010 to 2022 (3.7 percent total).

TABLE 11

County Population • 1970–2022

Scotts Bluff County and the Surrounding Area

Location	1970	1980	1990	2000	2010	2020	2022	Avg. Annual % Change	Avg. Annual % Change
								1970-2010	2010-2022
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,962,642	1,967,923	0.5	0.6
Scotts Bluff County	36,432	38,344	36,025	36,951	36,970	36,036	35,603	0.0	-0.3
Banner County	1,034	918	852	819	690	677	660	-1.0	-0.4
Box Butte County	10,094	13,696	13,130	12,158	11,308	10,826	10,672	0.3	-0.5
Morrill County	5,813	6,085	5,423	5,440	5,042	4,553	4,527	-0.4	-0.9
Sioux County	2,034	1,845	1,549	1,475	1,311	1,144	1,127	-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 2022 for a total increase of 7.8 percent (1,988 people) from 1970 to 2022. Scottsbluff, the county’s largest city, reported a 1.5 percent decrease in population (224 people) between 1970 and 2022. The unincorporated areas outside of the selected communities experienced a 25.8 percent decrease (2,817 people) during the period 1970–2022.

TABLE 12

Population • 1970–2022

Scotts Bluff County Communities/Rural Populations

Location	1970	1980	1990	2000	2010	2020	2022	Avg. Annual % Change	Avg. Annual % Change
								1970-2010	2010-2022
Nebraska	1,485,333	1,569,825	1,578,417	1,711,265	1,826,341	1,962,642	1,967,923	0.5	0.6
Scotts Bluff County	36,432	38,344	36,025	36,951	36,970	36,965	35,603	0.0	-0.3
Gering	5,639	7,760	8,025	7,751	8,500	8,493	8,478	1.0	0.0
Henry	147	155	145	162	106	110	127	-0.8	1.5
Lyman	561	551	452	421	341	341	253	-1.2	-2.5
McGrew	79	110	99	103	105	105	63	0.7	-4.2
Melbeta	124	151	116	138	112	112	110	-0.3	-0.2
Minatare	939	969	807	810	816	816	709	-0.4	-1.2
Mitchell	1,842	1,956	1,742	1,831	1,702	1,698	1,524	-0.2	-0.9
Morrill	937	1,097	980	957	921	909	920	0.0	0.0
Scottsbluff	14,507	14,156	14,029	14,732	15,039	15,046	14,283	0.1	-0.4
Terrytown	747	727	535	646	1,198	1,197	1,043	1.2	-1.1
Total Incorporated Places	25,522	27,632	26,930	27,551	28,840	28,827	27,510	0.3	-0.4
Unincorporated Areas	10,910	10,712	9,095	9,400	8,130	8,138	8,093	-0.7	0.0

U.S. Bureau of the Census, Annual Estimates of the Resident Population for Incorporated Places in the United States: April 2020 to July 1, 2022, May 2023

The next table and chart (Tables 13 and Chart 17, next page) provide detail on migration patterns. Data reported in these tables are 2018-2022, 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 90 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 · 2018-2022

Scotts Bluff County, Nebraska

Current population one-year or older	35,650
Number of people living in the area one-year ago	35,560
Population change due to migration and mortality	90

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

The 2018-2022 five-year estimates in Chart 17 reveal a net gain of 437 people from other Nebraska counties and a net loss of 529 people from other states for a total net loss of 92 people one year or older. As shown in Chart 19, net gains occurred in the age groups Age 1 to 17 (gain of 21), Age 25 to 44 (gain of 54), Age 45 to 64 (gain of 73), Age 45 to 64 (gain of 73) and net losses in age groups Age 18 to 24, (loss of 168), Age 65 and over, (loss of 72).

Chart 17 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 202), and a loss of residents with a HS diploma or less (loss of 77), and graduate or professional degree (loss of 70).

CHART 17
Population Change Due to Migration and Mortality
Five-Year Estimate · 2018-2022

Scotts Bluff County and Nebraska

-- Part A: By Age Group --							
Age Group	Moved			Moved			Net Gain From Nebraska Counties and Other States
	Moved to Different Nebraska County	From Different Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	From Different State	Net Gain From Other States	
Age 1 to 17	122	270	148	206	79	-127	21
Age 18 to 24	328	262	-66	353	251	-102	-168
Age 25 to 44	178	531	353	580	281	-299	54
Age 45 to 64	48	90	42	203	234	31	73
Age 65 and over	108	68	-40	77	45	-32	-72
Total	784	1,221	437	1,419	890	-529	-92

-- Part B: By Educational Attainment --							
Educational Attainment	Moved			Moved			Net Gain From Nebraska Counties and Other States
	Moved to Different Nebraska County	From Different Nebraska County	Net Gain From Nebraska Counties	Moved to Different State	From Different State	Net Gain From Other States	
HS diploma or less	231	311	80	353	196	-157	-77
Bachelor’s or some college	93	276	183	302	321	19	202
Grad. or Prof. degree	10	102	92	205	43	-162	-70
Total	334	689	355	860	560	-300	55

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 December 2023.

The following chart and table (Chart 18; 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 slightly older than Nebraska as a whole. The median age for Scotts Bluff County residents in 2022 was 39.9 years of age compared to 37.3 years of age for residents of Nebraska as a whole.

CHART 18

Age Distribution of the Population • 2022

Scotts Bluff County and Nebraska

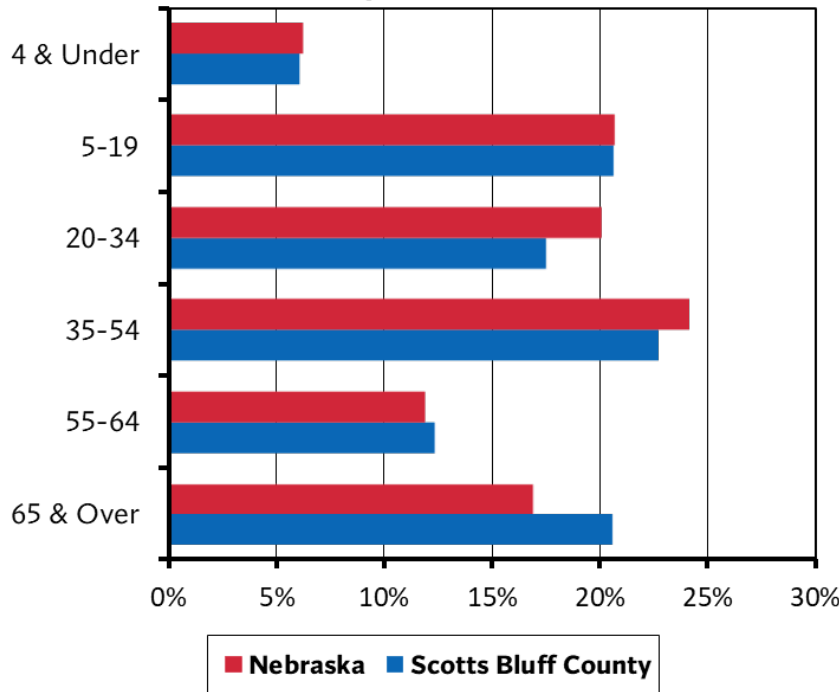


TABLE 14

	2022 Population		Percent	
	Nebraska	Scotts Bluff County	Nebraska	Scotts Bluff County
4 & Under	123,837	2,176	6.3%	6.1%
5-19	406,957	7,357	20.7%	20.7%
20-34	395,053	6,232	20.1%	17.5%
35-54	474,870	8,093	24.1%	22.7%
55-64	234,150	4,407	11.9%	12.4%
65 & Over	333,056	7,338	16.9%	20.6%
Total	1,967,923	35,603	100%	100%
Median Age	37.3	39.9		

U.S. Census Bureau, "Annual Estimates of the Resident Population for Selected Age Groups by Sex," April 2023

Table 15 shows additional median ages as estimated by the American Community Survey for communities within Scotts Bluff County and the surrounding counties as a total and by gender. These five-year estimates differ from the U.S. Census Bureau’s single-year distributions. Chart 19 graphically depicts the median age distribution for the study area.

TABLE 15

Median Age by Location and Gender · 2018-2022

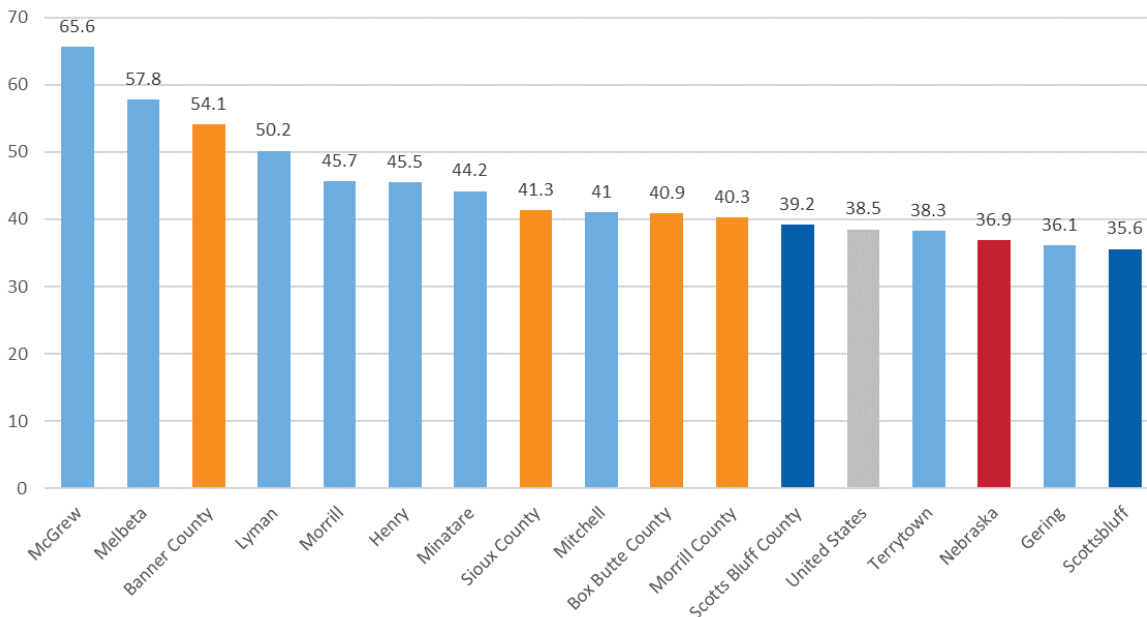
Scotts Bluff County and the Surrounding Area

	Median Age		
	Total	Male	Female
United States	38.5	37.4	39.7
Nebraska	36.9	36.1	37.7
Scotts Bluff County	39.2	38.3	40.5
Gering	36.1	34.8	37.4
Henry	45.5	45.7	40.0
Lyman	50.2	45.4	52.3
McGrew	65.6	57.7	66.2
Melbeta	57.8	58.5	57.5
Minatare	44.2	44.7	42.9
Mitchell	41.0	47.6	33.5
Morrill	45.7	43.5	52.1
Scottsbluff	35.6	32.4	38.8
Terrytown	38.3	34.3	41.8
Banner County	54.1	60.5	45.5
Box Butte County	40.9	39.5	41.9
Morrill County	40.3	38.5	42.6
Sioux County	41.3	41.7	41.1

CHART 19

Median Age by Location · 2018-2022

Scotts Bluff County and the Surrounding Area



U.S. Census Bureau, 2018-2022 American Community Survey, April 2023

RETAIL SALES

Table 16 and Chart 20 show the retail sales (non-motor vehicle) pull factors for Scotts Bluff County and the surrounding area for 2022. 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.

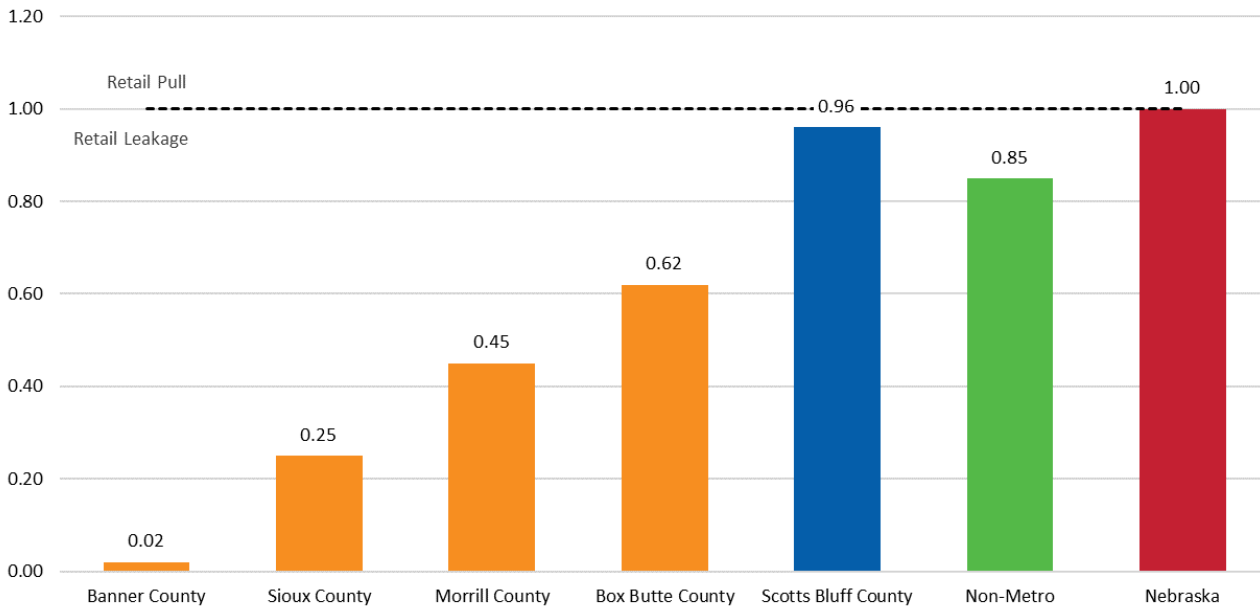
TABLE 16

Retail Sales Non-Motor Vehicles Pull Factors · 2022

Nebraska, Scotts Bluff County and Surrounding Counties

	2022 Population	2022 Retail Sales (x \$1,000)	2022 Per Cap Sales (\$)	2022 Pull Factor
Nebraska	1,967,923	30,977,448	15,741	1.00
Non-Metro Nebraska	771,188	10,279,275	13,329	0.85
Scotts Bluff County	35,603	539,594	15,156	0.96
Banner County	660	192	291	0.02
Box Butte County	10,672	104,252	9,769	0.62
Morrill County	4,527	32,348	7,145	0.45
Sioux County	1,127	4,410	3,913	0.25

CHART 20



U.S. Census Bureau and Nebraska Department of Revenue, June 2023

Reviewing the pull factors at the county level indicates Scotts Bluff County experiences net retail leakages. The 2022 pull factor of 0.96 indicates, on a per capita basis, retail sales in Scotts Bluff County are less 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 (0.96) with the pull factor for the non-metropolitan area of Nebraska (0.85) indicates per capita retail sales in Scotts Bluff County are 13.7 percent above the average per capita retail sales in the non-metropolitan area of Nebraska.

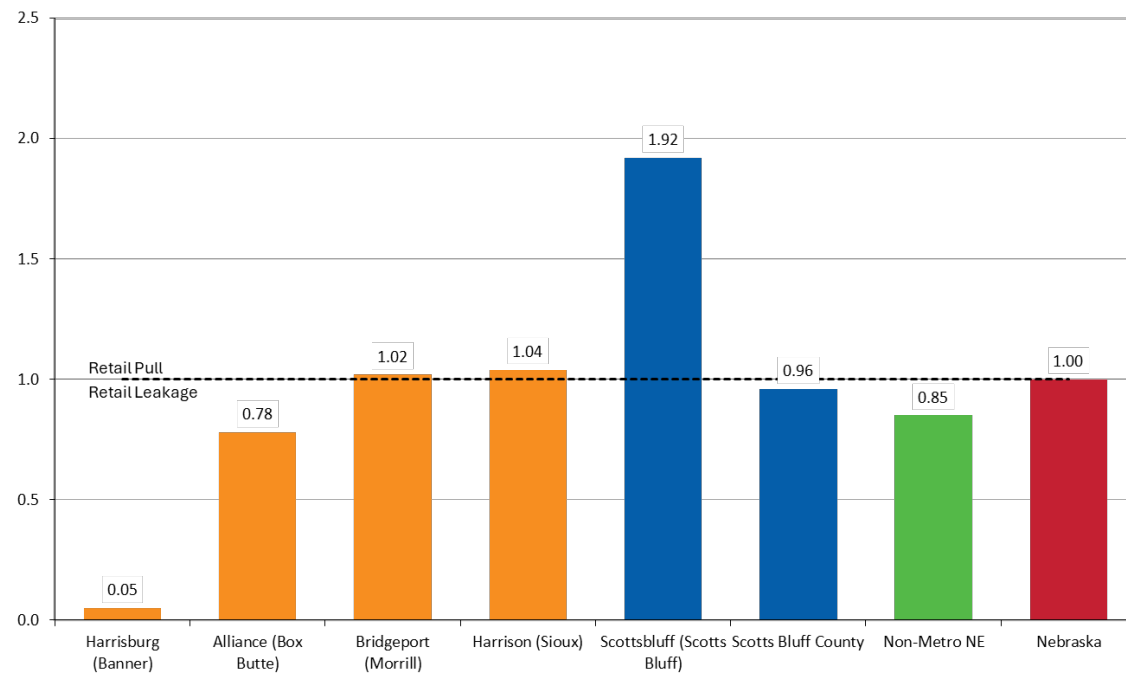
Table 17 and Chart 21 compare the 2022 pull factors for selected area communities. The Scotts Bluff County community of Scottsbluff’s pull factor of 1.92 indicates that, on a per capita basis, non-motor vehicle retail sales in Scottsbluff are approximately 91.9 percent greater than the state’s average per capita sales.

TABLE 17
Retail Sales Non-Motor Vehicles Pull Factors • 2022

Nebraska and Selected Study Area Cities

	2022 Population	2022 Retail Sales (x \$1,000)	2022 Per Cap Sales (\$)	2022 Pull Factor
Nebraska	1,967,923	30,977,448	15,741	1.00
Non-Metro Nebraska	771,188	10,279,275	13,329	0.85
Scotts Bluff County	35,603	539,594	15,156	0.96
Scottsbluff (Scotts Bluff)	14,283	431,465	30,208	1.92
Harrisburg (Banner)	233	129	555	0.05
Alliance (Box Butte)	8,037	98,062	12,201	0.78
Bridgeport (Morrill)	1,457	23,330	16,012	1.02
Harrison (Sioux)	233	3,797	16,296	1.04

CHART 21



U.S. Census Bureau and Nebraska Department of Revenue, June 2023

Table 18 (sorted by population) and Chart 22 (sorted by pull factor) further break down the 2022 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 (1.92) compared to the other communities reporting in the county. Together, these communities contributed to an overall pull factor of 0.96 for Scotts Bluff County in 2022.

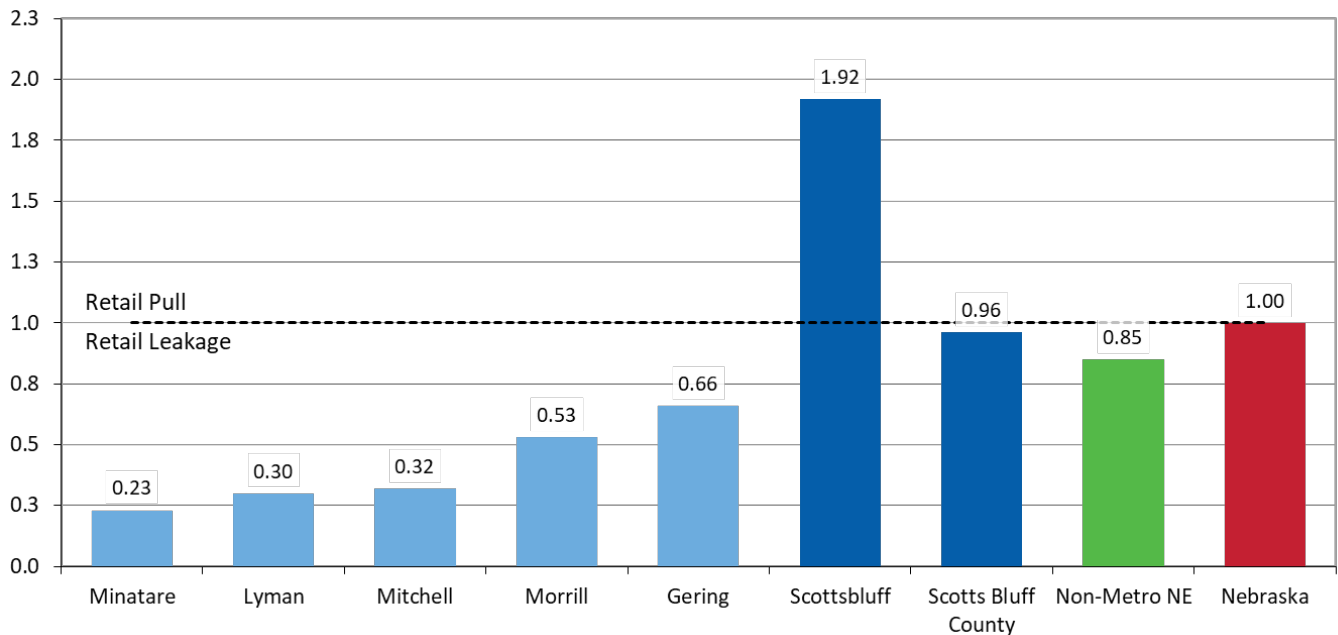
TABLE 18

Retail Sales Non-Motor Vehicles Pull Factors · 2022

Nebraska and Available Scotts Bluff County Communities

	2022 Population	2022 Retail Sales (x \$1,000)	2022 Per Cap Sales (\$)	2022 Pull Factor
Nebraska	1,967,923	30,977,448	15,741	1.00
Non-Metro Nebraska	771,188	10,279,275	13,329	0.85
Scotts Bluff County	35,603	539,594	15,156	0.96
Scottsbluff	14,283	431,465	30,208	1.92
Gering	8,478	88,214	10,405	0.66
Mitchell	1,524	7,589	4,980	0.32
Morrill	920	7,607	8,269	0.53
Minatare	709	2,553	3,601	0.23
Lyman	253	1,204	4,760	0.30

CHART 22



U.S. Census Bureau and Nebraska Department of Revenue, June 2023

Table 19 (sorted by population) and Chart 23 (sorted by pull factor) show the 2022 pull factors for Nebraska, Scottsbluff, and eight similarly sized communities selected from around the state. Gretna (Sarpy)'s pull factor of 2.79 leads the group for 2022, thus indicating that Gretna (Sarpy) has a greater retail pull.

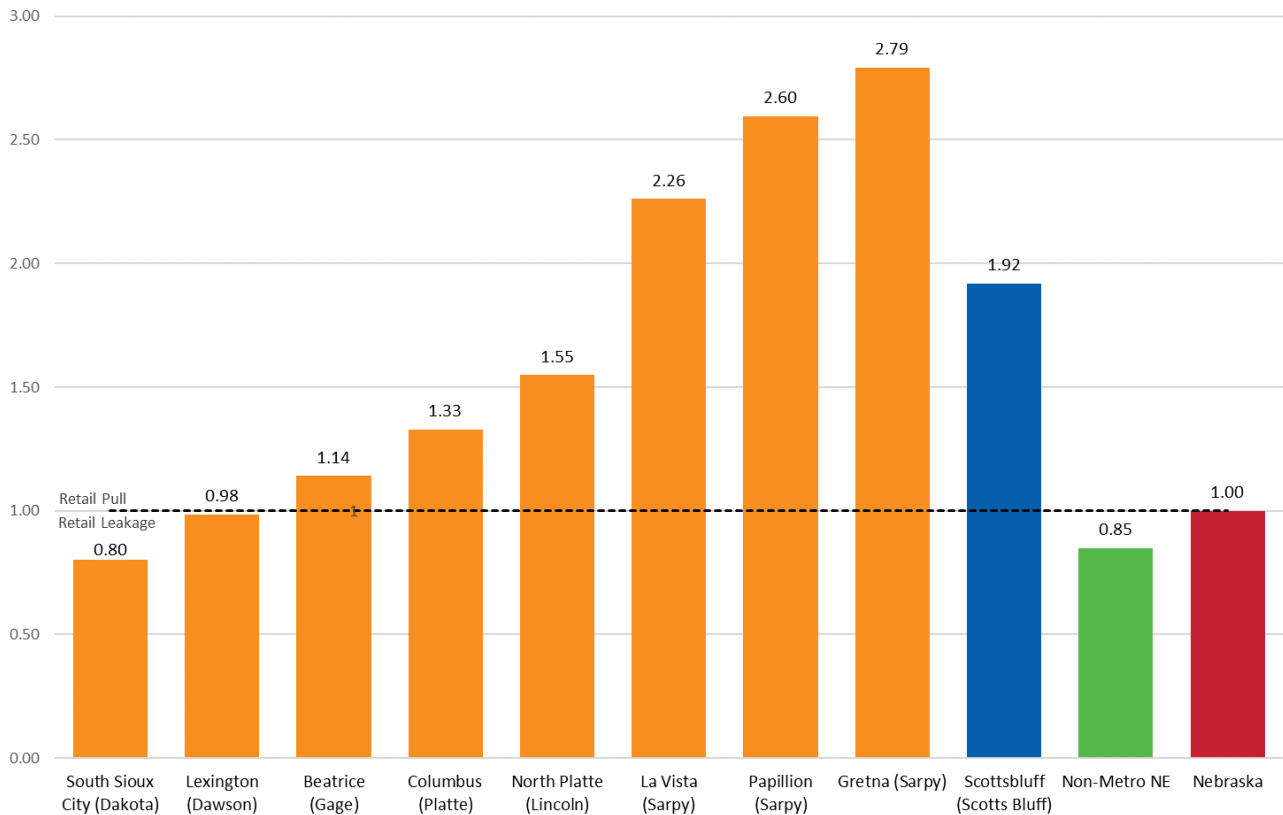
TABLE 19

Retail Sales Non-Motor Vehicles Pull Factors • 2022

Scottsbluff & Other Similarly Sized Nebraska Communities

	2022 Population	2022 Retail Sales (x \$1,000)	2022 Per Cap Sales (\$)	2022 Pull Factor
Nebraska	1,967,923	30,977,448	15,741	1.00
Non-Metro Nebraska	771,188	10,279,275	13,329	0.85
Scottsbluff (Scotts Bluff)	14,283	431,465	30,208	1.92
Columbus (Platte)	24,195	505,845	20,907	1.33
Papillion (Sarpy)	23,794	972,391	40,867	2.60
North Platte (Lincoln)	22,722	554,075	24,385	1.55
La Vista (Sarpy)	16,379	582,871	35,586	2.26
South Sioux City (Dakota)	13,706	173,417	12,653	0.80
Beatrice (Gage)	12,223	219,616	17,967	1.14
Lexington (Dawson)	10,725	166,117	15,489	0.98
Gretna (Sarpy)	9,071	398,776	43,962	2.79

CHART 23

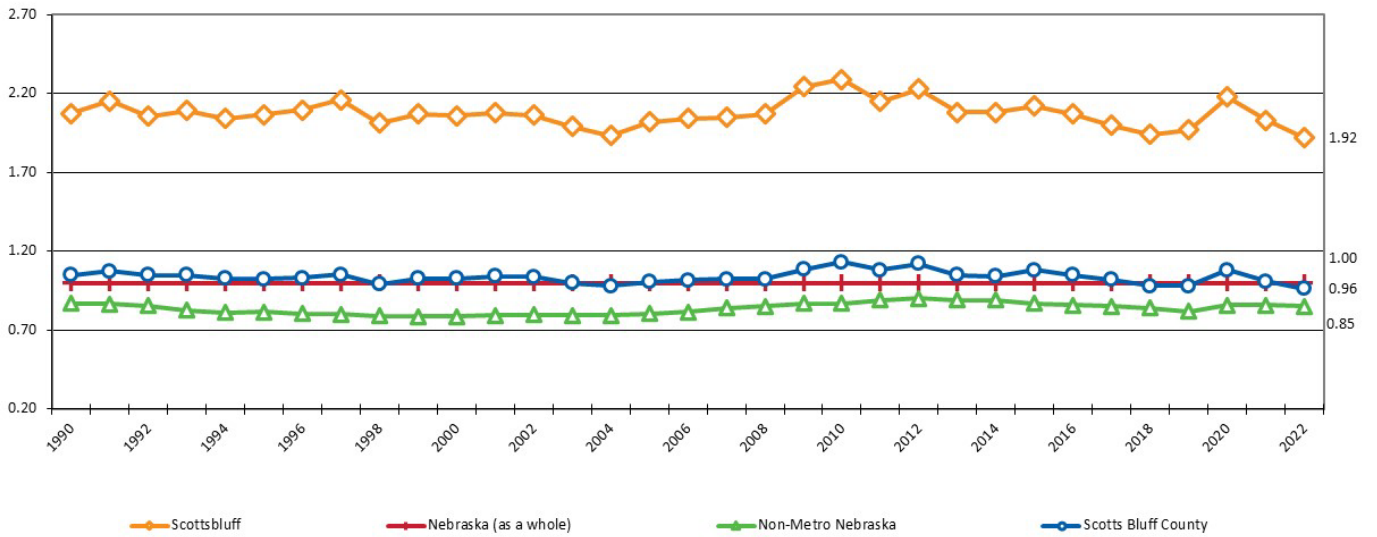


U.S. Census Bureau and Nebraska Department of Revenue, June 2023

Chart 24 illustrates the pull factor trend for Scottsbluff, Scotts Bluff County, non-metropolitan Nebraska, and Nebraska as a whole from 1990 to 2022. 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) also shows the pull factor similar to the non-metropolitan county average and the Nebraska (as a whole) average throughout the time period.

CHART 24
Pull Factors · 1990–2022

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



U.S. Census Bureau and Nebraska Department of Revenue, June 2023

PER CAPITA PERSONAL INCOME

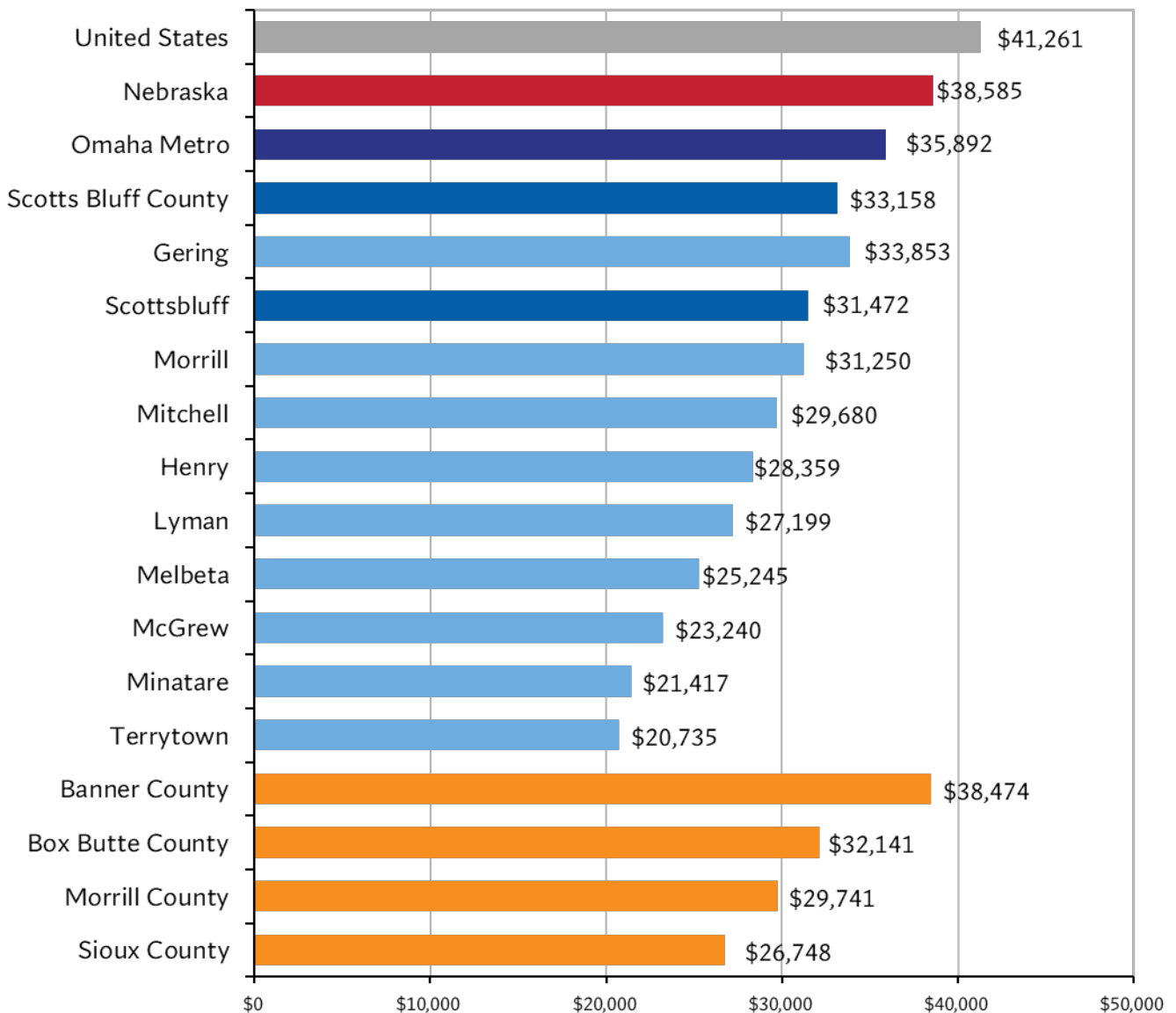
Chart 27 examines the per capita personal income levels within the study area. The American Community Survey data allows us to look more closely at non-metropolitan areas in Nebraska. Information on income distribution comes from various sources, including earnings, retirement income, and public assistance.

The 2018-2022 five-year estimates show that per capita personal income for Scotts Bluff County is estimated to be \$33,158 compared to \$38,585 for Nebraska.

CHART 27

Per Capita Personal Income • 2018-2022

Nebraska, Scotts Bluff County & Surrounding Counties



U.S. Census Bureau 2018–2022 American Community Survey, accessed March 2023

MEDIAN HOUSEHOLD INCOME

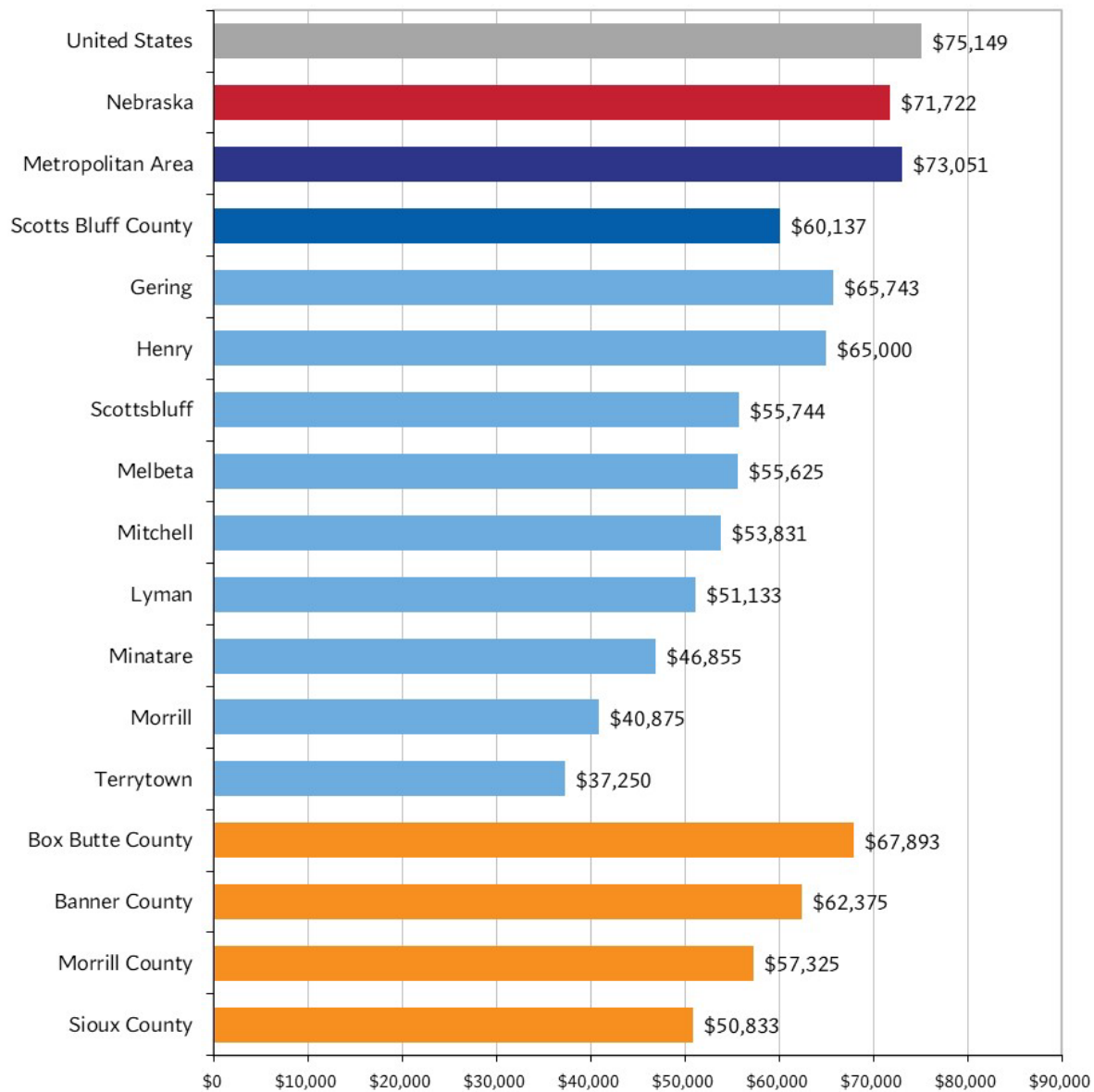
Median household income provides a different perspective of income levels than median family or per capita income. Family income is defined as having two or more related people in a household. Household income (used in this study) can consist of multiple family members or can be represented by a single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

The 2018-2022 five-year estimates show median household income for Scotts Bluff County is estimated to be \$60,137 compared to \$71,722 for Nebraska as a whole.

CHART 28

Median Household Income • 2018-2022

Nebraska, Scotts Bluff County & Surrounding Counties



U.S. Census Bureau 2018–2022 American Community Survey, accessed March 2023