

## SUBLETTE COUNTY

### POPULATION

The Census Bureau's intercensal estimates indicate that Sublette County's population increased by 42.84 percent between 2000 and 2008, from 5,920 to 8,456. This rate compares to a statewide population growth of 7.88 percent over the period. These data are presented in Table II.18.1, below.

| <b>Table II.18.1</b>  |                |                               |                        |                               |
|---|----------------|-------------------------------|------------------------|-------------------------------|
| <b>Population Estimates for Wyoming and Sublette County</b> |                |                               |                        |                               |
| <b>Census 2000 and 2001-2008 Intercensal Estimates</b>      |                |                               |                        |                               |
| <b>Subject</b>  | <b>Wyoming</b> | <b>% Change<br/>from 2000</b> | <b>Sublette County</b> | <b>% Change<br/>from 2000</b> |
| <b>Population</b>   |                |                               |                        |                               |
| 2000 Census   | 493,782        | .                             | 5,920                  | .                             |
| July 2001 Estimate  | 492,924        | -0.17                         | 5,897                  | -0.39                         |
| July 2002 Estimate  | 496,969        | 0.65                          | 6,145                  | 3.80                          |
| July 2003 Estimate  | 499,056        | 1.07                          | 6,318                  | 6.72                          |
| July 2004 Estimate  | 502,816        | 1.83                          | 6,573                  | 11.03                         |
| July 2005 Estimate  | 506,007        | 2.48                          | 6,876                  | 16.15                         |
| July 2006 Estimate  | 512,573        | 3.81                          | 7,238                  | 22.26                         |
| July 2007 Estimate  | 523,252        | 5.97                          | 7,948                  | 34.26                         |
| July 2008 Estimate  | 532,668        | 7.88                          | 8,456                  | 42.84                         |

### MIGRATION

Total population change is a combination of births, deaths and the net migration of those arriving in and leaving the state. The result of births minus deaths is termed the "natural increase." As calculated from data seen in Table II.18.2, at right, from April 2000 to July 2008, Sublette County's natural increase was estimated to be 303 people. Sublette County has been experiencing net in migration, with over 2,233 persons arriving in the county in the last eight years.<sup>126</sup>

The Wyoming driver's license exchange data for Sublette County indicate a net change of 125 persons during 2009. The driver's license total exchanges for the last nine and one-half years for Sublette County are presented in Table II.18.3, on the following page, which indicate a net increase of 1,889 persons over the time period.

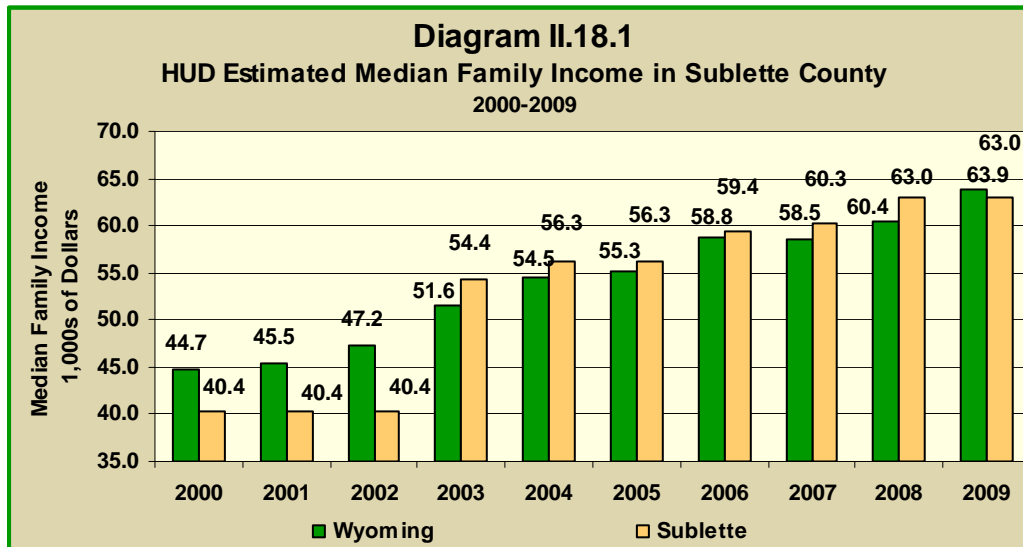
| <b>Table II.18.2</b>                     |              |
|--|--------------|
| <b>Sublette County Population Change</b> |              |
| <b>Census 1980 - 7/2008</b>              |              |
| <b>1980 Population</b>                   | <b>4,548</b> |
| Natural Increase 80-90                   | 519          |
| Net Migration 80-90                      | -224         |
| <b>1990 Population</b>                   | <b>4,843</b> |
| Natural Increase 90-00                   | 207          |
| Net Migration 90-00                      | 870          |
| <b>2000 Population</b>                   | <b>5,920</b> |
| Natural Increase 00-08                   | 303          |
| Net Migration 00-08                      | 2,233        |
| <b>2008 Population Estimate</b>          | <b>8,456</b> |

<sup>126</sup> Net migration includes a residual, a change the Census Bureau has not attributed to any cause.

| <b>Table II.18.3</b>  |                    |                     |                   |
|---|--------------------|---------------------|-------------------|
| <b>Driver's Licenses Exchanged and Surrendered</b>          |                    |                     |                   |
| <b>Sublette County: 2000 Through the First Half of 2009</b> |                    |                     |                   |
| <b>Year</b>   | <b>In-Migrants</b> | <b>Out-Migrants</b> | <b>Net Change</b> |
| 2000  | 220                | 179                 | 41                |
| 2001  | 264                | 155                 | 109               |
| 2002  | 286                | 148                 | 138               |
| 2003  | 276                | 104                 | 172               |
| 2004  | 339                | 175                 | 164               |
| 2005  | 338                | 182                 | 156               |
| 2006  | 444                | 183                 | 261               |
| 2007  | 582                | 259                 | 323               |
| 2008  | 653                | 253                 | 400               |
| 2009 – First Half   | 260                | 135                 | 125               |
| <b>Total</b>  | <b>3,662</b>       | <b>1,773</b>        | <b>1,889</b>      |

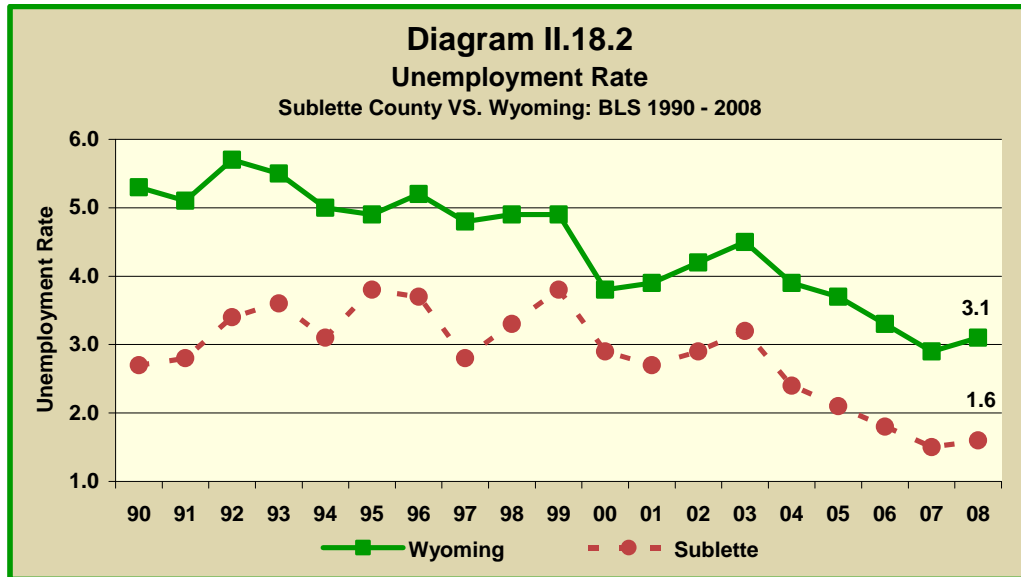
## ECONOMICS

The HUD estimated median family income (MFI) for Sublette County was \$63,000 in 2009.<sup>127</sup> This compares to Wyoming's MFI of \$63,900. Diagram II.18.1, below, illustrates the estimated MFI for the years 2000 through 2009.



Labor force and employment statistics were derived from Bureau of Labor Statistics (BLS) data. Sublette County's labor force, defined as the number of people working or actively seeking work, increased by 317 persons, from 6,650 in 2007 to 6,967 in 2008. Employment increased by 304 persons. Unemployment, therefore, increased by 13 persons and the unemployment rate, the number of unemployed persons as a percentage of the labor force, increased from 1.5 percent in 2007 to 1.6 in 2008. Sublette County continued to enjoy better labor force utilization than the state of Wyoming, as seen in Diagram II.18.2, on the following page.

<sup>127</sup> Starting from the year 2003 HUD MFI estimates were re-benchmarked using 2000 census income limits, hence the unusual increase in estimates compared to earlier years.



The BLS, in conjunction with the State Employment Security Agencies (SESAs), produces the Quarterly Census of Employment and Wages (QCEW), which reports monthly data on employment and quarterly data on wages and number of business establishments.

QCEW employment data represents the number of covered workers who worked during, or received pay for the pay period. Members of the armed forces, the self-employed, proprietors, domestic workers and unpaid family workers are not included in QCEW estimates. As seen in Table II.18.4 below, annual total monthly employment increased by 21.66 percent between 2006 and 2007, changing from a total of 4,266 to 5,190 workers. Over the third quarter of 2008, preliminary estimates indicate an increasing trend with employment rising to 5,842 persons in September.

| <b>Table II.18.4</b><br><b>Sublette County Total Monthly Employment</b><br><b>BLS Quarterly Census of Employment and Wages, 2001 – 2008p</b> |       |       |       |       |       |       |       |       |
|--|-------|-------|-------|-------|-------|-------|-------|-------|
| Year   | 2001  | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  | 2008p |
| Jan  | 2,123 | 2,348 | 2,446 | 2,798 | 3,098 | 3,790 | 4,827 | 5,054 |
| Feb  | 2,098 | 2,330 | 2,424 | 2,836 | 3,110 | 3,838 | 4,843 | 5,087 |
| Mar  | 2,132 | 2,373 | 2,434 | 2,841 | 3,122 | 3,855 | 4,935 | 5,331 |
| Apr  | 2,174 | 2,405 | 2,484 | 2,859 | 3,207 | 3,930 | 4,992 | 5,224 |
| May  | 2,359 | 2,613 | 2,717 | 3,026 | 3,433 | 4,242 | 5,205 | 5,448 |
| Jun  | 2,582 | 2,780 | 2,980 | 3,330 | 3,851 | 4,554 | 5,535 | 5,810 |
| Jul  | 2,589 | 2,770 | 3,106 | 3,366 | 4,003 | 4,612 | 5,418 | 5,828 |
| Aug  | 2,617 | 2,790 | 3,088 | 3,357 | 4,015 | 4,582 | 5,491 | 5,801 |
| Sep  | 2,562 | 2,713 | 3,077 | 3,319 | 4,019 | 4,545 | 5,488 | 5,842 |
| Oct  | 2,477 | 2,606 | 2,957 | 3,252 | 3,891 | 4,417 | 5,354 | .     |
| Nov  | 2,378 | 2,528 | 2,741 | 3,172 | 3,765 | 4,404 | 5,155 | .     |
| Dec  | 2,373 | 2,480 | 2,713 | 3,158 | 3,687 | 4,417 | 5,033 | .     |
| Annual   | 2,372 | 2,561 | 2,764 | 3,110 | 3,600 | 4,266 | 5,190 | .     |
| % Change   | .     | 7.97  | 7.93  | 12.52 | 15.76 | 18.50 | 21.66 | .     |

The QCEW also reports average weekly wages, which represent total compensation paid during the calendar quarter, regardless of when services were performed. As seen in Table II.18.5, at right, annual average weekly wages increased by 22.11 percent between 2006 and 2007, changing from a total of 814 to 994 dollars.

Total business establishments reported by the QCEW are displayed in Table II.18.6. Annual establishments increased by 10.20 percent between 2006 and 2007, changing from a total of 559 to 616 establishments. Preliminary 2008 estimates indicate an increase, with establishments rising to 639 in the third quarter of 2008.

The Bureau of Economic Analysis (BEA) also measures employment, defined as the total number of full- and part-time jobs by place of work. In 2007, the most recent year for which data are available, Sublette County recorded 7,663 jobs. Total real personal income, comprising all wage and salary earnings, proprietorship income, dividends, interest, rents and transfer payments, adjusted for place of residence, was \$498,447,000, and real per capita income was \$62,713 in 2007. This figure compares with a statewide average real per capita income of \$48,045. Average earnings per job in the county were \$51,767 in 2007, while Wyoming average earnings per job were \$43,407.<sup>128</sup>

## HOUSING

The Census Bureau estimates that total housing units saw an increase of 29.34 percent in Sublette County between 2000 and 2008, from 3,552 to 4,594. This compares to a 10.07 percent estimated increase statewide, as seen in Table II.18.7, below.

| <b>Table II.18.7</b><br><b>Housing Unit Estimates for Wyoming and Sublette County</b><br><b>Census 2000 2001 - 2008 Intercensal Estimates</b> |         |                    |                 |                    |
|---|---------|--------------------|-----------------|--------------------|
| Subject   | Wyoming | % Change from 2000 | Sublette County | % Change from 2000 |
| 2000 Census   | 223,854 | .                  | 3,552           | .                  |
| July 2001 Estimate  | 225,959 | 0.94               | 3,620           | 1.91               |
| July 2002 Estimate  | 227,773 | 1.75               | 3,693           | 3.97               |
| July 2003 Estimate  | 229,637 | 2.58               | 3,773           | 6.22               |
| July 2004 Estimate  | 232,556 | 3.89               | 3,859           | 8.64               |
| July 2005 Estimate  | 235,654 | 5.27               | 3,944           | 11.04              |
| July 2006 Estimate  | 239,175 | 6.84               | 4,118           | 15.93              |
| July 2007 Estimate  | 242,332 | 8.25               | 4,345           | 22.33              |
| July 2008 Estimate  | 246,393 | 10.07              | 4,594           | 29.34              |

<sup>128</sup> Section D of Volume II, Technical Appendix provides additional BEA data for years 1969 through 2007.

According to the Wyoming cost of living index, average apartment rent in Sublette County changed by 0.5 percent, from \$860 in fourth quarter 2007 to \$864 in fourth quarter 2008. Detached single-family home rents increased by 0.7 percent. Rents for mobile home on a lot decreased by 0.6 percent.

Sublette County rental prices have experienced average annualized increases of 3.7 percent per year for apartments, 4.4 percent per year for houses and 2.2 percent per year for mobile homes plus a lot since second quarter 1998 through fourth quarter 2008. These figures compare to state average annualized increases in rental prices of 3.5 percent for apartments, 4.4 percent for houses, 3.6 percent for mobile homes plus a lot and 2.8 percent for mobile home lots. Table II.18.8, at right, presents the Sublette County data for each rental type.

The U.S. Census Bureau reports building permit authorizations and “per unit” valuation of building permits by county annually. Single-family construction usually represents most residential development in the county. Single-family building permit authorizations in Sublette County decreased from 257 in 2007 to 100 in 2008. Total residential units authorized decreased from 263 in 2007 to 114 in 2008.

The real value of single-family building permits increased from \$196,780 in 2007 to \$210,970 in 2008. The value over the past several years, in real dollars, has fluctuated from a high of \$210,970 in 2008 to a low of \$144,380 in 2005. These figures compare to the state average eight-year high of \$259,470 in 2000 and an eight-year low of \$175,810 in 2003. Additional details of permit activity and per unit valuations are given in Table II.18.9, on the following page.

| <b>Table II.18.8</b><br><b>Wyoming Cost of Living Index<sup>129</sup> for Sublette County</b><br><b>Rental Housing Costs, 1986 – 2008</b> |            |                 |       |             |
|---|------------|-----------------|-------|-------------|
| Quarter Year  | Apartments | Mobile Home Lot | House | Mobile Home |
| Q4.86   | .          | .               | .     | .           |
| Q2.87   | .          | .               | .     | .           |
| Q4.87   | .          | .               | .     | .           |
| Q2.88   | .          | .               | .     | .           |
| Q4.88   | .          | .               | .     | .           |
| Q2.89   | .          | .               | .     | .           |
| Q4.89   | .          | .               | .     | .           |
| Q2.90   | .          | .               | .     | .           |
| Q4.90   | .          | .               | .     | .           |
| Q2.91   | .          | .               | .     | .           |
| Q4.91   | .          | .               | .     | .           |
| Q2.92   | .          | .               | .     | .           |
| Q4.92   | .          | .               | .     | .           |
| Q2.93   | .          | .               | .     | .           |
| Q4.93   | .          | .               | .     | .           |
| Q2.94   | .          | .               | .     | .           |
| Q4.94   | .          | .               | .     | .           |
| Q2.95   | .          | .               | .     | .           |
| Q4.95   | .          | .               | .     | .           |
| Q2.96   | .          | .               | .     | .           |
| Q4.96   | .          | .               | .     | .           |
| Q2.97   | .          | .               | .     | .           |
| Q4.97   | .          | .               | .     | .           |
| Q2.98   | 387        | 150             | 546   | 415         |
| Q4.98   | 501        | 150             | 575   | 365         |
| Q2.99   | 425        | 150             | 588   | 338         |
| Q4.99   | 463        | 175             | 581   | 371         |
| Q2.00   | 433        | 175             | 624   | 435         |
| Q4.00   | 464        | 165             | 566   | 325         |
| Q2.01   | 455        | 165             | 608   | .           |
| Q4.01   | 441        | 175             | 613   | 350         |
| Q2.02   | 472        | 200             | 611   | .           |
| Q4.02   | 534        | 165             | 655   | 457         |
| Q2.03   | 520        | 200             | 769   | 472         |
| Q4.03   | 611        | 200             | 794   | .           |
| Q2.04   | 647        | 225             | 808   | 624         |
| Q4.04   | 765        | 240             | 888   | 600         |
| Q2.05   | 699        | 240             | 882   | 590         |
| Q4.05   | 728        | 275             | 1,083 | 595         |
| Q2.06   | 781        | 265             | 1,195 | 643         |
| Q4.06   | 750        | 275             | 1,238 | 693         |
| Q2.07   | 822        | 275             | 1,338 | 667         |
| Q4.07   | 860        | 275             | 1,387 | 674         |
| Q2.08   | 872        | 275             | 1,390 | 675         |
| Q4.08   | 864        | .               | 1,397 | 670         |

<sup>129</sup> Data from 1986 to 1997 for Sublette County is not reported by the Wyoming Economic Analysis Division.

| <b>Table II.18.9</b><br><b>Building Permits and Valuation in Sublette County</b><br><b>1980 - 2008</b> |   |              |                          |                    |             |                     |               |  |
|--|---|--------------|--------------------------|--------------------|-------------|---------------------|---------------|--|
| Year   | Authorized Construction in Permit Issuing Areas |              |                          |                    |             | WCDA                |               | Per Unit Valuation, 1000s of Real 2008 Dollars |
|  | Single-Family Units                             | Duplex Units | Tri- and Four-Plex Units | Multi-Family Units | Total Units | Tax Credit Projects | HOME Projects | Single-Family Units                            |
| 1980   | 82  | .            | .                        | .                  | 82          | .                   | .             | 95.26  |
| 1981   | 90  | 2            | 12                       | .                  | 104         | .                   | .             | 97.45  |
| 1982   | 90  | 2            | 4                        | 5                  | 101         | .                   | .             | 89.55  |
| 1983   | 87  | .            | 8                        | 5                  | 100         | .                   | .             | 90.76  |
| 1984   | 72  | .            | .                        | .                  | 72          | .                   | .             | 73.57  |
| 1985   | 58  | 4            | .                        | 5                  | 67          | .                   | .             | 84.51  |
| 1986   | 64  | 4            | .                        | .                  | 68          | .                   | .             | 100.07   |
| 1987   | 34  | .            | .                        | .                  | 34          | .                   | .             | 101.18   |
| 1988   | 21  | .            | .                        | .                  | 21          | .                   | .             | 112.73   |
| 1989   | 19  | .            | .                        | .                  | 19          | .                   | .             | 118.78   |
| 1990   | 37  | .            | .                        | .                  | 37          | .                   | .             | 122.99   |
| 1991   | 59  | .            | .                        | .                  | 59          | .                   | .             | 124.28   |
| 1992   | 50  | .            | .                        | .                  | 50          | .                   | .             | 122.06   |
| 1993   | 49  | 4            | .                        | .                  | 53          | .                   | .             | 121.70   |
| 1994   | 70  | .            | 4                        | .                  | 74          | .                   | .             | 129.56   |
| 1995   | 86  | 4            | 4                        | .                  | 94          | .                   | .             | 130.19   |
| 1996   | 58  | 2            | 9                        | .                  | 69          | .                   | .             | 129.82   |
| 1997   | 44  | 2            | .                        | .                  | 46          | .                   | .             | 134.82   |
| 1998   | 68  | .            | .                        | .                  | 68          | .                   | .             | 145.60   |
| 1999   | 75  | .            | .                        | .                  | 75          | .                   | .             | 154.43   |
| 2000   | 54  | .            | .                        | .                  | 54          | .                   | .             | 159.78   |
| 2001   | 72  | 4            | .                        | .                  | 76          | .                   | .             | 167.35   |
| 2002   | 74  | 6            | 8                        | .                  | 88          | .                   | .             | 175.18   |
| 2003   | 83  | 4            | 8                        | .                  | 95          | .                   | .             | 176.57   |
| 2004   | 77  | 12           | 4                        | .                  | 93          | .                   | .             | 190.92   |
| 2005   | 179   | .            | .                        | 6                  | 185         | .                   | .             | 144.38   |
| 2006   | 232   | .            | .                        | 6                  | 197         | .                   | .             | 159.44   |
| 2007   | 257   | 6            | .                        | .                  | 263         | .                   | .             | 196.78   |
| 2008   | 100   | 4            | 10                       | .                  | 114         | .                   | .             | 210.97   |

The average sales price of existing, detached, single-family homes was provided by the County Assessor's office. In 2008, the average sales price in Sublette County was \$296,638. This represented a decrease of 11.2 percent from the previous year. In contrast, the state of Wyoming's average was \$256,045, a decrease of 3.4 percent over the previous year. A comparison of average sales prices between 1999 and 2008 is displayed in Table II.18.10, below.

| <b>Table II.18.10</b><br><b>Average Sales Prices in Sublette County and Wyoming</b><br><b>Assessor Data, 1999 - 2008</b> |                                    |                                 |                       |                         |
|--|------------------------------------|---------------------------------|-----------------------|-------------------------|
| Year   | Sublette County Average Price (\$) | Sublette County Annual % Change | Wyoming Average Price | Wyoming Annual % Change |
| 1999   | 114,020                            | 9.24                            | 101,517               | 4.76                    |
| 2000   | 125,922                            | 10.44                           | 111,437               | 9.77                    |
| 2001   | 149,179                            | 18.47                           | 116,469               | 4.52                    |
| 2002   | 163,473                            | 9.58                            | 121,140               | 4.01                    |
| 2003   | 173,116                            | 5.90                            | 132,708               | 9.55                    |
| 2004   | 218,343                            | 26.13                           | 142,501               | 7.38                    |
| 2005   | 249,029                            | 14.05                           | 159,776               | 12.12                   |
| 2006   | 269,795                            | 8.34                            | 187,869               | 17.58                   |
| 2007   | 334,073                            | 23.82                           | 265,044               | 41.08                   |
| 2008   | 296,638                            | -11.2                           | 256,045               | -3.4                    |

The Wyoming Rental Vacancy Survey has been completed seventeen times semiannually during the past nine years, with the most recent survey conducted in June, 2009.<sup>130</sup> During June of 2009, a total of 27 surveys were completed by property managers in Sublette County. Of the 226 rental units surveyed, 26 were vacant, indicating a vacancy rate of 11.50 percent. This compares to a 2.84 percent vacancy rate one year ago and a statewide June 2009 vacancy rate of 6.06 percent. The spike in the vacancy rate can be attributed to a general softening in the rental market, with most observations consisting of medium size apartment complexes exhibiting an increase in vacant units.

| <b>Table II.18.11</b><br><b>Semi-Annual Rental Vacancy Survey</b><br><b>Sublette County 2001- 2009</b> |        |             |              |              |
|--|--------|-------------|--------------|--------------|
| Year   | Sample | Total Units | Vacant Units | Vacancy Rate |
| 2001a  | 4      | 41          | 2            | 4.88         |
| 2001b  | 2      | 39          | .            | .            |
| 2002a  | 3      | 41          | .            | .            |
| 2002b  | 5      | 37          | 2            | 5.41         |
| 2003a  | 7      | 50          | 2            | 4.00         |
| 2003b  | 6      | 55          | 2            | 3.64         |
| 2004a  | 6      | 59          | 1            | 1.69         |
| 2004b  | 9      | 75          | 4            | 5.33         |
| 2005a  | 12     | 96          | 4            | 4.17         |
| 2005b  | 13     | 154         | 7            | 4.55         |
| 2006a  | 13     | 159         | 3            | 1.89         |
| 2006b  | 11     | 157         | 1            | 0.64         |
| 2007a  | 9      | 131         | 3            | 2.29         |
| 2007b  | 13     | 111         | 1            | 0.90         |
| 2008a  | 17     | 141         | 4            | 2.84         |
| 2008b  | 33     | 320         | 11           | 3.44         |
| 2009a  | 27     | 226         | 26           | 11.50        |

The fiscal year 2009 Housing Needs Assessment Survey, fielded by the Wyoming Department of Transportation, had 115 respondents in Sublette County. Of the incoming population who were unsatisfied with their current housing, 90.0 percent said they were seeking to own a home and 10.0 percent wished to rent. Of those seeking to own a home, 31.6 percent wished to buy existing units, of which 50 percent sought homes in the range of \$50,000 to \$99,999 and 50 percent sought housing for more than \$100,000. The remainder of those seeking to own a home, 68.4 percent, wished to build, of which 15.4 percent of respondents expected to build for less than \$100,000, and 84.6 percent sought housing for more than \$100,000. Additional survey data are presented in Section C of Volume II, Technical Appendix.

Of those currently renting or seeking to rental 50.0 percent of respondents hoped to spend less than \$365 per month, and the remainder, 50.0 percent anticipated spending more than \$600. Additional survey data are presented in Section C of Volume II, *Technical Appendix*.

The Wyoming Community Development Authority (WCDA) began purchasing home loans in 1978, to provide affordable housing in Wyoming. There were a total of 273 loans purchased in Sublette County during 1979-2009, with 1 in fiscal 2009. The average home size over the period was 1,303 square feet and 2,052 square feet on average in fiscal 2009. For homes receiving a WCDA loan in fiscal 2009, the average year a home was built was 2008. The average household income in fiscal 2009 in nominal terms, without the effects of inflation being taken into consideration, was \$51,540. The average purchase price in fiscal 2009 was \$205,763. In fiscal 2009, 100 percent of loans purchased were for new construction, and 100 percent had female heads of household. Fiscal year data over the entire operating history of the WCDA can be found in the August 2009 Volume II, Technical Appendix, Section E.

<sup>130</sup>Those signified as 'a' in the "year" column of Table II.18.11 are conducted in June/July of each year. Those signified as 'b' are conducted each November/December. Conducting the surveys in June and December of each year allows one to view the prospective seasonality of vacancy rates, as well as year-to-year changes.

