

SUBLETTE COUNTY

DEMOGRAPHICS

The Census Bureau's intercensal estimates indicate that Sublette County's population increased from 5,920 in 2000 to 8,456 in 2008 or by 42.84 percent. This compares to a statewide population growth of 7.88 percent over the period.¹¹² The number of people from 15 to 24 years of age increased by 63.99 percent, and the number of people from 25 to 44 years of age increased by 43.02 percent. The white population increased by 42.42 percent, while the black population increased by 175.0 percent. The Hispanic population changed from 112 to 380 people between 2000 and 2008, an increase of 239.29 percent. These data are presented in Table II.18.1, below.

Table II.18.1 Profile of Population Characteristics Wyoming vs Sublette County, Census 2000 and 2008 Intercensal Estimates						
Subject	Wyoming			Sublette County		
	Census 2000	July 2008	% Change	Census 2000	July 2008	% Change
Population	493,782	532,668	7.88	5,920	8,456	42.84
Age						
Under 14 years	103,443	106,195	2.66	1,234	1,699	37.68
15 to 24 years	75,358	76,242	1.17	647	1,061	63.99
25 to 44 years	138,619	137,338	-0.92	1,627	2,327	43.02
45 to 54 years	74,079	82,508	11.38	1,049	1,406	34.03
55 to 64 years	44,590	64,771	45.26	652	1,076	65.03
65 & over	57,693	65,614	13.73	711	887	24.75
Race						
White	469,423	500,001	6.51	5,811	8,276	42.42
Black	3,942	6,884	74.63	12	33	175.00
American Indian and Alaskan Native	11,410	13,555	18.80	31	48	54.84
Asian	2,904	3,828	31.82	15	16	6.67
Native Hawaiian or Pacific Islander	329	512	55.62	5	5	0.00
Two or more races	5,774	7,888	36.61	46	78	69.57
Ethnicity (of any race)						
Hispanic or Latino	31,669	41,162	29.98	112	380	239.29

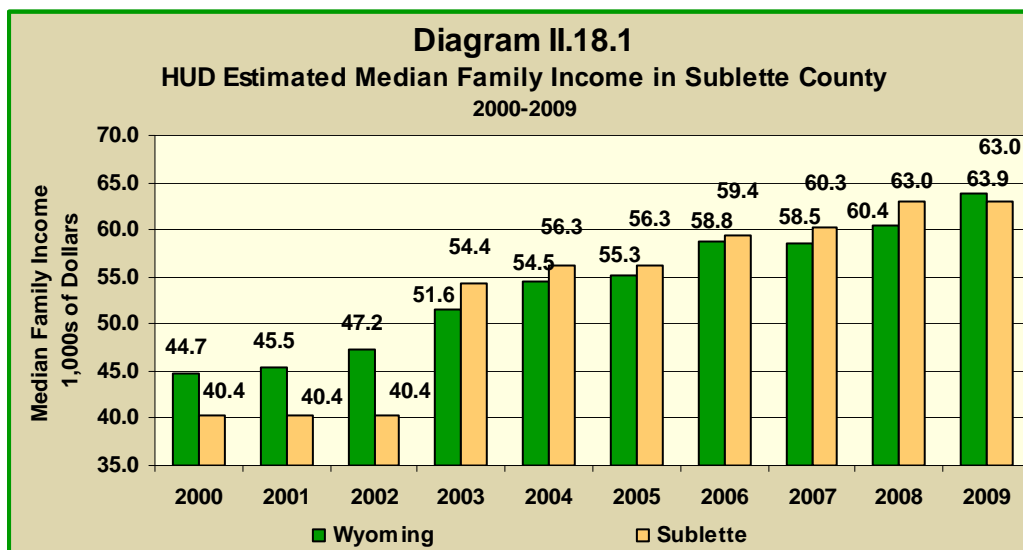
The Wyoming driver's license exchange data for Sublette County indicate a net change of 240 persons during 2009. The driver's license total exchanges for the last ten years for Sublette County are presented in Table II.18.3, which indicate a net increase of 2,004 persons over the time period.

Table II.18.3 Driver's Licenses Exchanged and Surrendered Sublette County: 2000 - 2009			
Year	In-Migrants	Out-Migrants	Net Change
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	523	283	240
Total	3,925	1,921	2,004

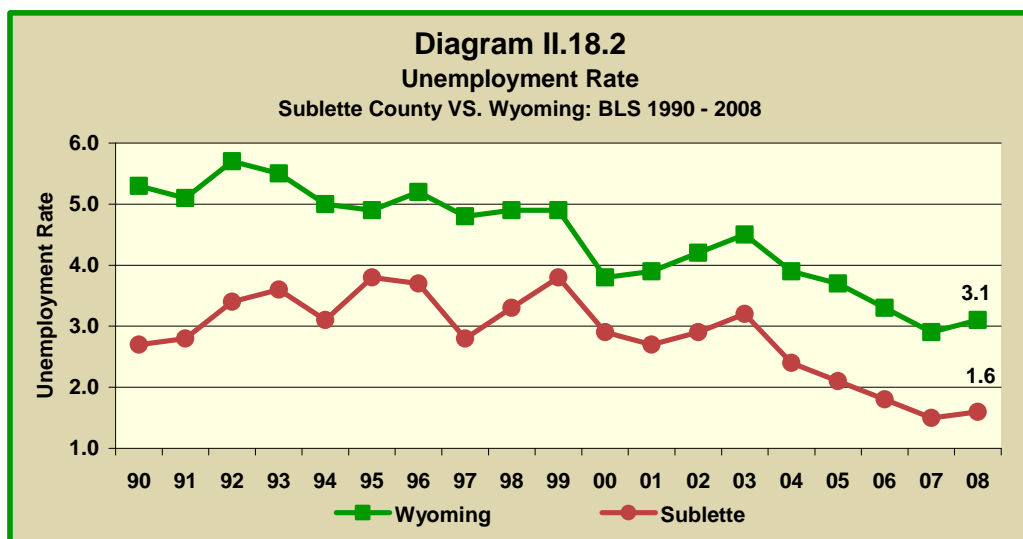
¹¹² On December 22, 2009, the Census Bureau released a statewide population estimate for 2009, indicating that the population increased to 544,270.

ECONOMICS

The HUD estimated median family income (MFI) for Sublette County was \$63,000 in 2009.¹¹³ 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, as seen in Diagram II.18.2.



¹¹³ 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 7.32 percent between 2007 and 2008, changing from a total of 5,190 to 5,570 workers. Over the second quarter of 2009, preliminary estimates indicate an increasing trend with employment rising to 5,600 persons in June.

Table II.18.4									
Sublette County Total Monthly Employment									
BLS Quarterly Census of Employment and Wages, 2001 – 2009p									
Year	2001	2002	2003	2004	2005	2006	2007	2008	2009p
Jan	2,123	2,348	2,446	2,798	3,098	3,790	4,827	5,054	5,887
Feb	2,098	2,330	2,424	2,836	3,110	3,838	4,843	5,087	5,644
Mar	2,132	2,373	2,434	2,841	3,122	3,855	4,935	5,331	5,535
Apr	2,174	2,405	2,484	2,859	3,207	3,930	4,992	5,224	5,403
May	2,359	2,613	2,717	3,026	3,433	4,242	5,205	5,448	5,446
Jun	2,582	2,780	2,980	3,330	3,851	4,554	5,535	5,810	5,600
Jul	2,589	2,770	3,106	3,366	4,003	4,612	5,418	5,844	.
Aug	2,617	2,790	3,088	3,357	4,015	4,582	5,491	5,840	.
Sep	2,562	2,713	3,077	3,319	4,019	4,545	5,488	5,877	.
Oct	2,477	2,606	2,957	3,252	3,891	4,417	5,354	5,858	.
Nov	2,378	2,528	2,741	3,172	3,765	4,404	5,155	5,801	.
Dec	2,373	2,480	2,713	3,158	3,687	4,417	5,033	5,661	.
Annual	2,372	2,561	2,764	3,110	3,600	4,266	5,190	5,570	.
% Change	.	7.97	7.93	12.52	15.76	18.50	21.66	7.32	.

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 11.17 percent between 2007 and 2008, changing from a total of 994 to 1,105 dollars.

Table II.18.5						
Average Weekly Wages in Sublette County						
BLS Quarterly Census of Employment and Wages, 2001 – 2009p						
Year	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Annual	% Change
2001	474	477	463	534	487	.
2002	516	524	488	587	528	8.42
2003	551	579	522	637	572	8.33
2004	611	579	579	684	613	7.17
2005	658	653	714	788	707	15.33
2006	806	710	784	950	814	15.13
2007	1,005	930	963	1,082	994	22.11
2008	1,073	1,193	1,069	1,086	1,105	11.17
2009p	1,144	977	.	.	.	.

Total business establishments reported by the QCEW are displayed in Table II.18.6. Annual establishments increased by 3.57 percent between 2007 and 2008, changing from a total of 616 to 638 establishments. Preliminary 2009 estimates indicate an increase, with establishments rising to 641 in the second quarter of 2009.

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 \$47,740. Average earnings per job in the county were \$51,767 in 2007, while Wyoming average earnings per job were \$44,409.

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.

Table II.18.7 Housing Unit Estimates for Wyoming and Sublette County Census 2000 2001 - 2008 Intercensal Estimates				
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

According to the Wyoming cost of living index, average apartment rent in Sublette County decreased by 0.7 percent, from \$872 in second quarter 2008 to \$866 in second quarter 2009. Detached single-family home rents increased by 1.9 percent. Rents for mobile home on a lot decreased by 11.1 percent.

Sublette County rental prices have experienced average annualized increases of 7.6 percent per year for apartments, 9.0 percent per year for houses and 3.4 percent per year for mobile homes plus a lot since second quarter 1998 through second quarter 2009. These figures compare to state average annualized increases in rental prices of 3.7 percent for apartments, 4.4 percent for houses, 3.8 percent for mobile homes plus a lot and 3.4 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 high of \$259,470 in 2000 and 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.

Table II.18.8 Wyoming Cost of Living Index¹¹⁴ for Sublette County Rental Housing Costs, 1986 – 2008				
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
Q2.09	866	.	1,416	600

¹¹⁴ Data from 1986 to 1997 for Sublette County is not reported by the Wyoming Economic Analysis Division.

Table II.18.9 Building Permits and Valuation in Sublette County 1980 - 2008								
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.

Table II.18.10 Average Sales Prices in Sublette County and Wyoming Assessor Data, 1999 - 2008				
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 eighteen times semiannually during the past nine years, with the most recent survey conducted in December 2009.¹¹⁵ During December 2009, a total of 35 surveys were completed by property managers in Sublette County. Of the 328 rental units surveyed, 27 were vacant, indicating a vacancy rate of 8.23 percent. This compares to a 3.44 percent vacancy rate one year ago and a statewide December 2009 vacancy rate of 6.78 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.

The calendar year 2009 Housing Needs Assessment Survey, fielded by the Wyoming Department of Transportation, had 18 respondents in Sublette County. Of the incoming population who were unsatisfied with their current housing, all residents said they were seeking to own a home. Of those seeking to own a home, 100.0 percent wished to build existing units, of which all respondents sought homes for above \$100,000. Additional survey data are presented in Section C of Volume II, Technical Appendix.

Table II.18.11 Semi-Annual Rental Vacancy Survey Sublette County 2001- 2009				
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
2009b	35	328	27	8.23

2010 HOUSING NEEDS FORECAST

Three alternative housing forecasts were prepared: a *moderate growth* scenario, a *strong growth* scenario and a *very strong growth* scenario. While all three predictions are available in the *2010 Wyoming Housing Needs Forecast*, only the *strong growth* forecast is presented on the following page. The forecast of household formation by tenure was segmented by income, as a percentage of median family income (MFI). The income groupings for the counties were separated into five categories: 0 to 30 percent, 31 to 50 percent, 51 to 80 percent, 81 to 95 percent and more than 95 percent of median family income.

The household forecast indicates a total increase of 5,328 households in Sublette County, from 2,371 in 2000 to 7,699 in 2030. Homeowners are expected to increase from 1,737 in 2000 to 5,698 by 2030. Renters are anticipated to increase from 634 in 2000 to 2,001 in 2030.

Homeownership from the year 2000 to 2030 is expected to increase by 328 households for homeowners with extremely low incomes, 30 percent or less of MFI. Homeownership for those with incomes from 31 to 50 percent of MFI is expected to increase by 355 households, and to increase by 598 for those with 51 to 80 percent of MFI.

¹¹⁵Those 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.

Rental demand from the year 2000 to 2030 is expected to increase by 190 households for renters with extremely low incomes, 30 percent or less of MFI. Further, rental demand for those with 31 to 50 percent of MFI is expected to increase by 216 households over the period. Table II.18.11, below, provides details of the household forecast by tenure and income.

Table II.18.11						
Strong Growth Household Forecast by Tenure and Income						
Sublette 2000 Through 2030						
Year	0-30%	31-50%	51-80%	81-95%	96+%	Total
Homeowners by Percent of Median Family Income						
2000	144	156	262	135	1,040	1,737
2005	176	191	321	165	1,275	2,129
2010	255	276	464	239	1,844	3,079
2015	311	337	566	291	2,248	3,753
2020	377	408	687	353	2,728	4,554
2025	423	459	771	397	3,062	5,111
2030	472	511	860	442	3,413	5,698
Renters by Percent of Median Family Income						
2000	88	100	146	78	222	634
2005	97	110	162	86	245	699
2010	139	158	231	123	350	1,000
2015	177	201	295	156	447	1,277
2020	225	256	375	199	568	1,622
2025	251	285	418	222	634	1,811
2030	278	315	462	245	700	2,001
Total Households by Percent of Median Family Income						
2000	232	256	408	212	1,262	2,371
2005	273	301	483	251	1,520	2,828
2010	394	434	696	361	2,194	4,079
2015	488	538	861	448	2,695	5,029
2020	602	664	1,062	552	3,295	6,176
2025	675	744	1,189	618	3,695	6,922
2030	750	827	1,322	687	4,113	7,699