

Housing and Real Estate Trends in Sublette County, Wyoming

2000 to 2015

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Table of Contents:

Summary of Main Points:.....- 3 -
Introduction & Executive Summary:- 4 -
Population Trends:- 7 -
Permanent Residents -- Trends so far- 7 -
Temporary “Short-term” Residents and Potential Population Impacts:.....- 7 -
Long-Term Workforce Requirements & Potential Population Impacts:- 9 -
Selected Demographic Data: - 11 -
Housing & Real Estate Trends: - 13 -
Housing Construction:.....- 13 -
Housing Sales:.....- 13 -
Realtor Perceptions:- 16 -
Affordability..... - 17 -
Median Family Income:.....- 17 -
Prospective Residents working in the natural gas industry:- 19 -
Sources Referenced: - 22 -

Table of Figures:

Sublette County Homes For Sale by Listing Price 5
Non-Resident Worker Housing Demand 9
Single Family Houses Constructed By Year 11
Single Family Home Sales by Year 12
Median Single Family Home Sales Price 12
Single Family Home Sales by Month 13
2006 Home Sales by Price Range..... 13
Change In Housing Vs. Population 2000-2005 16
Sublette County Median Family Income 2000-2006..... 17
Sublette County For Sale Listings by Price 18
Yearly Wages & and Housing Affordability by Occupation..... 19

Summary of Main Points:

▶ If the Sublette County population growth rate of 20% experienced between 2000 and 2005 continues, about 500 new houses will be built in the county between 2007 and 2010, accommodating 1000 new people. Likewise, about 800 homes will be built between 2010 and 2015, accommodating 1500 more people.

▶ According to federal government statistics, the average family in Sublette County can afford a house valued at about \$225,000. About 14% of all houses listed "For Sale" in the county are valued below \$225,000, and about 35% of the 206 home sales in Sublette County in 2006 were below \$225,000. Income levels have increased by 50% since 2001, but housing costs have been increasing at a greater level. The average family income still has a number of housing choices in the county at this time, but families in the lower 40% of county income levels have very few affordable housing options.

▶ Area realtors have likewise reported that the majority of their housing demand comes from those who can afford \$250,000 or less. Supply for houses priced between \$200,000 and \$250,000 is largely adequate, according to the realtors, but supply of houses priced below \$200,000 is extremely limited. Housing rentals are of short supply in any price range, and near impossible to find for those families in the bottom 50% of the county's income levels.

▶ On average, realtors in the area felt that if supplies were available, 50 additional houses priced around \$150,000 could be sold per year over the current levels. In 2006, there were about 52 houses sold between \$100,000 and \$200,000. If these 50 additional homes were sold in that price range in 2006, it would mean that the median family affordability of \$225,000 would roughly line-up with the median sales price.

▶ In addition, there are between 300 and 1500 current non-resident workers who would consider relocation to the county if housing were made more affordable. This range represents approximately 10% to 30% of "temporary" non-resident gas field workers who are currently working in the area, plus the potential "indirect" service and retail workers that would be needed. The range is large because the number of workers who would relocate greatly depends on how affordable the housing becomes (i.e.: The cheaper the housing, the more workers that would relocate).

Introduction & Executive Summary:

Sublette County is an extremely rural area of western Wyoming currently on track to grow by nearly 40% between 2000 and 2010. The growth is in large part being driven by natural gas extraction and development taking place in the area.

If the trends of the last five years continue and the county does grow at a rate of 40% every decade, the county will add about 500 homes between 2007 and the end of 2010 to accommodate about 1000 new people. Likewise, 700 or so new homes will be added between 2010 and 2015 to accommodate around 1300 additional people.

Short-term workforce

This growth of the last 5 years has occurred despite severe shortages for housing deemed “affordable”, namely rental properties and single family homes costing less than \$200,000. It is likely that hundreds of additional natural gas extraction workers currently seek or would seek permanent housing in the region but are currently not accommodated due to prohibitive housing costs. Currently, an estimated workforce of over 3000 individuals is employed in the natural gas industry in Sublette County but maintain their permanent residency elsewhere. Within the next few years, the workforce requirements needed for natural gas extraction will likely increase an additional 20%-30% over current demands, based on gas field development projections released by the Bureau of Land Management in their 2006 Draft Environmental Impact Statement for the Pinedale Anticline.

It is true that 10 years from now the workforce needed for gas extraction will probably decline sharply as extraction activity wanes; however, much of the locally-based workforce will still have job opportunities during later stages of field development as the more numerous non-resident workers will likely be the first to leave the workforce.

Even if a small percentage of these current out-of-town workers were to relocate, it would require adding hundreds of houses to the area. For example, 10% relocation would require more than 300 houses, a 20% relocation would require 600 houses. The actual numbers of people who would relocate is unknown; however, as a general rule, the less expensive the housing options, the more workers that would seek permanent residence in the region. A relocation rate of greater than 10% would probably require the availability of single family homes at \$150,000 or less. *Expanded discussion of temporary workforce relocation is on pages 7 through 9.*

Long-term Workforce

In addition, the growth rate of the last 5 years has created large indirect demand for employment in the service and retail sectors, and this indirect

demand will continue to increase with the overall population. Even with traditionally “minimum wage” occupations such as cashiers and clerks earning starting wages at \$9 to \$10/hr, it is unlikely that many affordable housing accommodations exist for these workers. If these workers could also be accommodated, the population would grow further. Regional Input/Output economic modeling suggests that each energy extraction job indirectly create as many as 2.8 additional jobs throughout the regional economy.

A number of long-term natural gas production jobs will also be added to the local economy within the next decade. A large portion of these workers will already be accounted for by the above-mentioned general growth trend of 40% every ten years, although the jobs and the associated indirect employment it creates could increase the growth rate over these current levels of 40% growth every 10 years.

Affordability:

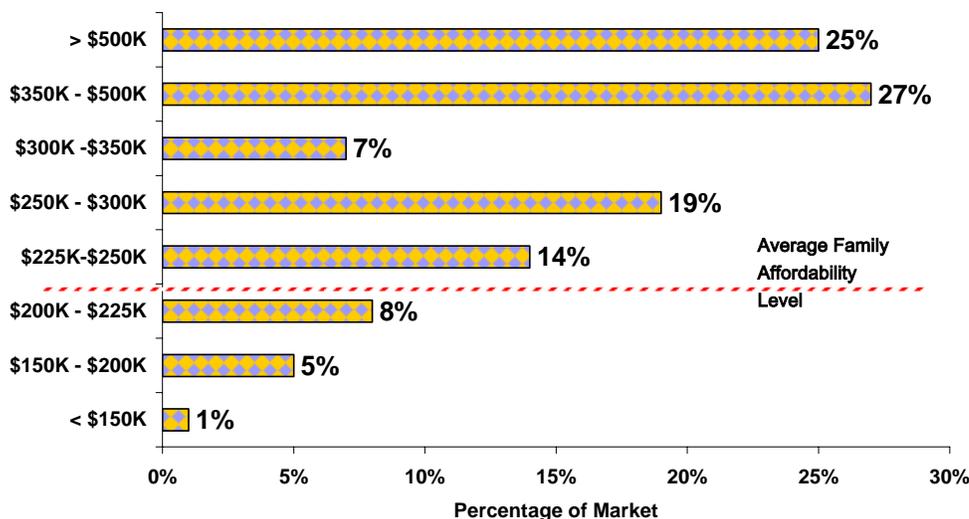
The area - with its natural beauty and proximity to the resort town of Jackson, WY - has traditionally been popular with amenity-seeking second home owners and others who are looking for relatively expensive homes. At the time of the 2000 census, large portions of the County’s housing infrastructure were predominately populated by people who register a permanent residence elsewhere. Realtors have indicated that this high-end demand has only very recently declined in strength. Many of these amenity-seeking residents have large investment or other non wage-related incomes and their residences in Sublette County are thought to be financially out of reach for the average home buyer in the county.

Sublette County Homes For Sale by Listing Price As of Dec 18th 2006

- Of all Homes Listed "For Sale" -

1st Number: # of Listings - 2nd Number: % of listings

Source: Teton MLS



The influx of workers needed to staff the natural gas extraction and development industry has changed the housing demand in that these workers can afford housing that costs much less than the traditional amenity-led buyers. These workers often earn higher salaries than most other wage earners in the county, however much of the available housing stock is still too expensive.

The U.S. Dept. of Housing and Urban Development (HUD) estimates the median family income in Sublette County to be about \$59,000. Given a 30-year mortgage at about 7% interest, this average family with good credit and few debts can afford a house that costs approximately \$225,000. Currently, 14% of houses for sale in the county are listed at \$225,000 or less. Many of the gas field workers will make more than the median family income, but only if there are two or more wage-earners in the family. Even with above-average wage earnings, the majority of available housing options in Sublette County are too expensive.

Introduction to Natural Gas Drilling:

When analyzing the employment requirements of natural gas extraction, it is useful to break the requirements into two phases:

1. The Development Phase: By far the most labor-intensive, this phase includes the drilling of the natural gas well and the associated activities needed to make the well produce gas. It is estimated that the current development phase workforce in Sublette County is over 3000 workers. These jobs are short-term, in the sense that the work ends when the wells are drilled. Current estimates place the end of the development phase in Sublette County at about 2017. The majority of these workers remain transitory/rotational in nature as work tends to rotate from field to field around the country. However, much of the work from excavation, maintenance, and other associated activities is not necessarily transitory in nature and of a lower pay scale than the drilling rig workers. In addition, this phase often creates large “secondary” workforce demands in the local economy.
2. The Production Phase: This phase consists of monitoring and maintaining the wells and pipeline facilities for as long as the wells produce gas. These jobs are typically well paying and are considered long term as the expected life of these wells is about 40yrs. The workforce requirements for this phase are much smaller: if the fields in Sublette County are fully developed, a long-term production workforce of perhaps 450 additional people will be required by 2017.

Population Trends:

Permanent Residents -- Trends so far

The U.S. Census Bureau estimates Sublette County's population to have grown by about 1000 people (or 17%) from 2000-2005, growing from 5952 people in 2000 to 6926 people in 2005¹. The Bureau uses birth and death statistics, building permit applications, driver's license renewals, and other indicators to estimate the population. In fast-growing populations such as Sublette County, however, it is likely that this estimate is an undercount, as indicators such as birth/death rates and building permits cannot account for all new permanent residents.

The majority of this growth has occurred either in the Town of Pinedale or areas outside of the towns (most of which are just outside Pinedale or along the Wind River Range). Pinedale's population grew 17% between 2000 and 2005 (239 persons), while these "rural" areas outside of the towns grew by about 19% (603 Persons). The towns of Marbleton and Big Piney grew by about 13% (88 persons) and 10% (40 persons), respectively.

Given a growth rate of about 20% in the last 5 years, the county appears on track to grow nearly twice as fast as it did during the 1990's, when the county grew by 22% between 1990-2000. The majority of this growth can be attributed to the natural gas drilling activity. The state of Wyoming's Quarterly Census of Employment and Wages has shown over a 300% increase during that timeframe in those employed in the Mining Sector in Sublette County, having risen from 204 people in 2000 to 881 in 2006². This number is certainly an undercount, as the counting methodology only counts locally-based employers. However, even within the methodological constraints, it shows significant gains in that sector.

A continued rate of growth of about 20% every 5 years would mean that about 1000 more people will move here between 2007 and 2010. Given an average family size of 3.25, as an example, this would equate a need for about 300 new houses.

Temporary "Short-term" Residents and Potential Population Impacts:

Sublette County is hosting several thousand individuals who live in Sublette County on a temporary or rotational basis, but maintain a permanent residence elsewhere. These workers come for employment opportunities related to natural gas drilling activities and reside in motels, so-called "man-camps", housing rentals, and R.V's located throughout the county. On their stretches of days off, they typically commute to other regions or states where they have permanent residences and families.

When considering the workforce requirements needed for the current level of drilling activity, it is estimated that these individuals total about 3000,

although only about half of this number are living in the county at a given time³. In addition, several hundred workers commute daily to Sublette County from other regional cities such as Rock Springs, Wyoming. A recent informal census of local temporary housing units appears to confirm these numbers. During the first week of December, about 250 RV's were counted in Sublette County, at least 350 "man-camp" beds were counted, and the Sublette County Visitor's Bureau estimated about 400 motel rooms were typically filled with natural gas workers⁴.

It is likely that at least half of these 3000 people choose to reside permanently elsewhere due to the transitory nature of the energy extraction industry (most of them drilling rig workers, or "roughnecks"), although it is also likely that a significant percentage remain temporary residents due to the high cost of living and housing in Sublette County. In addition, several major gas-industry employers have indicated that they would ideally like a more locally-based workforce, but that the cost of housing is a major prohibitive factor when recruiting employees, and that a non-local workforce is one of the few options available when filling job vacancies.

Survey Research:

Question: How many of these 3000+ temporary residents would relocate to Sublette County?

Answer: At least 50% will probably not relocate under any circumstances, and the remainder might relocate depending on the circumstances (the biggest circumstance being housing affordability).

A survey of about 250 non-resident natural gas workers taken in the Fall of 2005 found that over 50% said that they were either "thinking or planning" on relocating to Sublette County. 60% of these respondents indicated they wished to purchase a home, 10% wishing to rent a house, about 10% wishing to rent an apartment or mobile home, and an additional 10% looking for "anything".

However, the majority of these possible relocatees (65%) said that the cost and/or availability of housing was the major consideration regarding their relocation, and many respondents included comments regarding the prohibitively high housing prices. When the survey asked the respondents how much they would be willing to pay per month in housing costs, about 22% indicated they would be willing to pay less than \$500/month, 47% said between \$500 and \$750 per month, 13% said between \$750 to \$1000 a month, 15% said between \$1000 to \$1250 a month. 4% said they would pay more than \$1250 per month for housing costs.

According to the housing price statistics from the Wyoming Department of Administration and Information Economic Analysis Division⁵ (EADIV) and the Sublette County Assessor's Office, the majority of these respondents could

have afforded the average house sale or rental as recently as recently as the year 2000 (see *affordability discussion below on pages 13-15*). In 2006, however, only the 4% willing to pay over \$1250 per month are likely to find acceptable prices.

In summary, if a total non-resident workforce of 3000 is assumed, the survey found housing demand as follows:

Sublette County Non-Resident Worker Housing Demand

According to a Survey of 250 non-residents, assuming a total non-resident worker population of 3000. Sales price assumes a 30-year fixed mortgage at 7% APR

Sales Price	-or-	Rental Price	Demand	% of total non-residents
\$75,000 - \$105,000		\$500 - \$750	720 Homes	23.50%
\$105,000 - \$130,000		\$750 - \$1000	195 Homes	6.50%
\$130,000 - \$160,000		\$1000 - \$1250	225 Homes	7.50%
\$160,000+		\$1250+	60 Homes	2.00%
Total:			1200 Homes	39.50%

Long-Term Workforce Requirements & Potential Population Impacts:

The natural gas fields in Sublette County will require substantial long-term workforce requirements that will exist long after the drilling phases subside. These jobs will pertain to monitoring the producing wells and pipeline facilities and will exist for as long as the wells are producing gas. The production life of the wells being developed in Sublette County has been estimated by the Bureau of Land Management to be 40 years⁶. Industry officials have repeatedly expressed interests for nearly this entire long-term workforce to reside locally.

In 2004, The Sonoran Institute released a study entitled "Recent Growth Trends & Future Growth Projections for Sublette County 2004-2014"⁷ in which they use the BLM's estimated workforce requirement of about .05 production workers per well. Using this calculation, the estimated 7,600 additional wells expected in Sublette County over the next 10-12 years (3,100 in the Jonah Field and 4,500 wells in the Pinedale Anticline) will yield a long-term workforce requirement of approximately 375.

After discussions with industry personnel, however, it is felt this number is low because the BLM estimates do not include roustabout or pipeline personnel. In addition, several industry officials have mentioned that there are likely dozens of long-term workers who should have moved to the area by now for production of wells already drilled but haven't due to housing constraints. Therefore, it is estimated that additional long-term production workforce requirements in Sublette County may be closer to 450.

In addition to these long-term jobs, there is the consideration of what economic stimulus an additional 450 well paying jobs will have on the local economy. A regional Input/Output model and analysis performed by state BLM economist Roy Allen found that, typically, every production-end natural gas industry job will create 2.8 additional jobs in the regional economy. If even 1 of these almost 3 regional jobs were located in Sublette County, this would yield an additional 450 jobs.

Given that Sublette has already experienced an influx of a couple hundred of these long-term production jobs between 2000 and 2005, it is likely that the 40% rate of growth every 10 years would accommodate a large portion of these 450 long-term jobs. However, the indirect employment opportunities created may be greater than the rates of the previous 10 years. In other words, these long-term natural gas production jobs will help to sustain the already strong rate of population growth but will not significantly increase it.

Selected Demographic Data:

In the year 2000, according to the U.S. Census, Sublette County was older and of a smaller family size than Wyoming as a whole. This can be seen to reflect the retirement and amenity-led population influx in the region between 1990-2000. Likewise, as a wage-earning population influx related to oil and gas activity and related employment activity continues, the average age can be expected to drop and the average family size to increase.

Age:

Age data is difficult to obtain for except by the U.S. Census Bureau; the 2000 census findings are illustrated in the chart above. The median age in 2000 was about 40, compared to a state-wide average of about 36. The largest population clusters were those aged between 40 to 49 years (18.36%), followed by those 10 to 19 (15.07%), 50 to 59 (14.21%), and 30 to 39 (13.70%). Those aged 20 to 29 comprised only about 9% of the population in 2000.

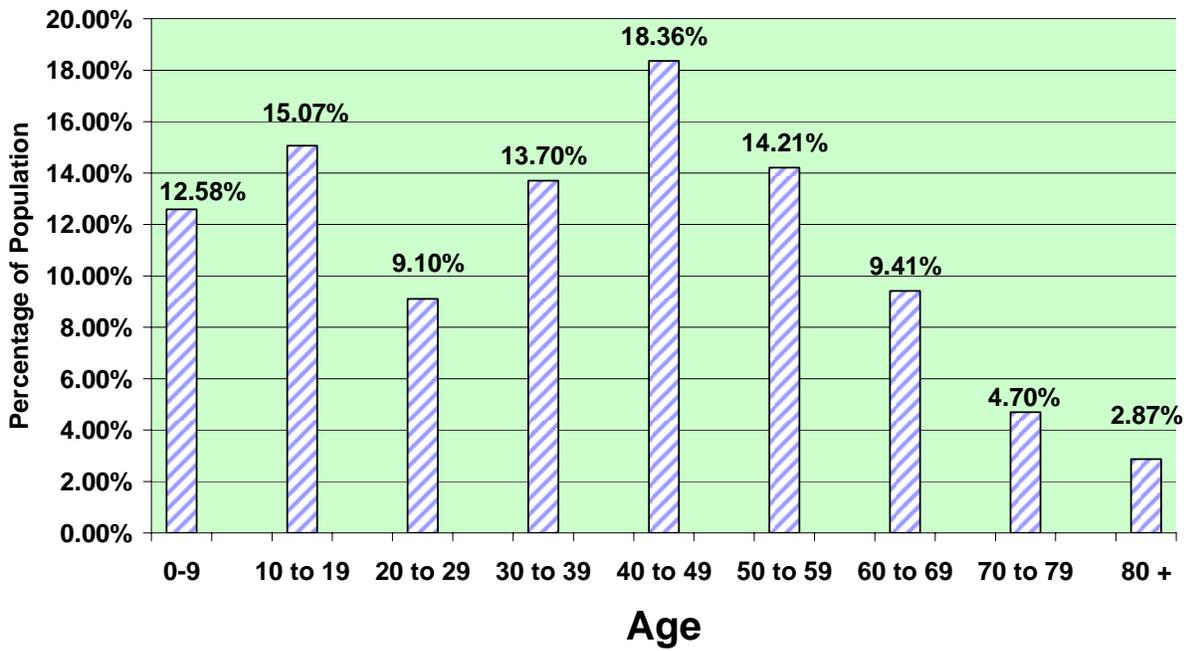
Current age statistics are unavailable and may not be recorded until the next U.S. Census effort in 2010. In general, a population influx of wage-earning workforce will be younger than a retirement or amenity-led population. In addition, much of the workforce of the natural gas industry is widely seen to be reaching retirement age, and new employees can be expected to be much younger⁸.

Family Size:

According to the 2000 Census, the average family size in Sublette County was 2.91, compared to a Wyoming state average of 3.00. According to the survey of non-residents employed in the natural gas industry who were “thinking or planning on relocating to the area” the median family size was nearly 4.00. With 75% of respondents indicating they would relocate with a spouse or significant other. About 70% of respondents said they would be bringing at least 1 child, and the median number of children of all potential relocating respondents was about 2.

Sublette County Age Breakdown - Year 2000 -

Source: U.S. Census Bureau 2000 Census



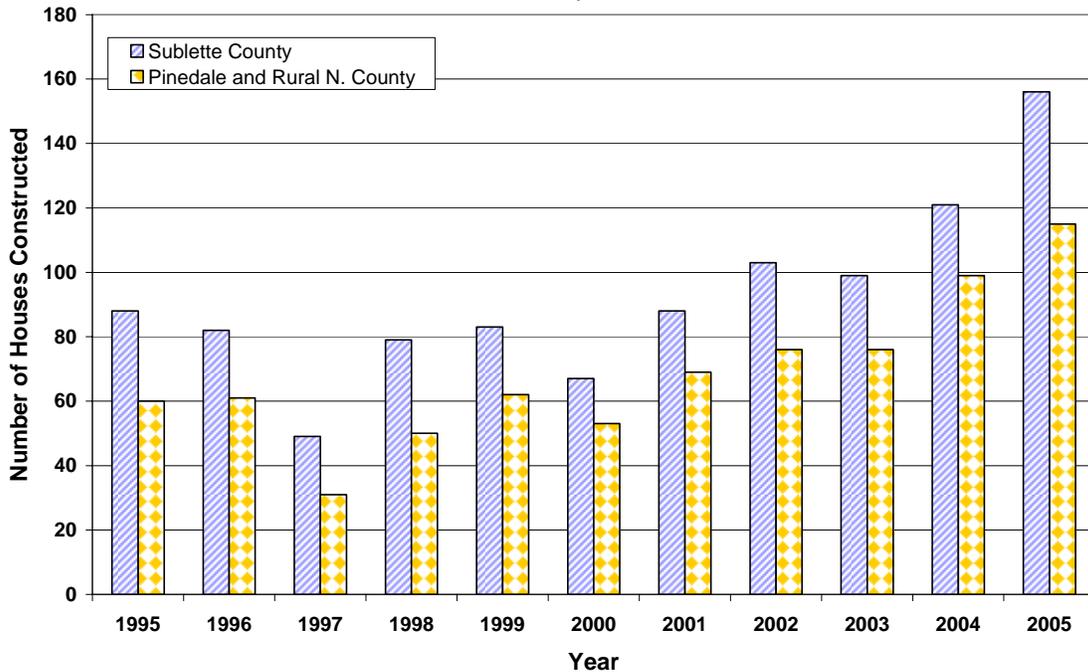
Housing & Real Estate Trends:

Housing Construction:

According to the Sublette County Assessor’s Office, 637 single family homes were constructed in Sublette County between 2000 and 2005. 488 of these houses (about 77%) were constructed in the rural northern Sublette County region (along the Wind River Range) or in Pinedale. 156 of these homes in the county were built in 2005 (*see graph below*).

Single Family Homes Constructed in Sublette County By Year 1995-2005

Includes Manufactured, Modular, and Stick-Built
 Source: Sublette County Assessor's Office



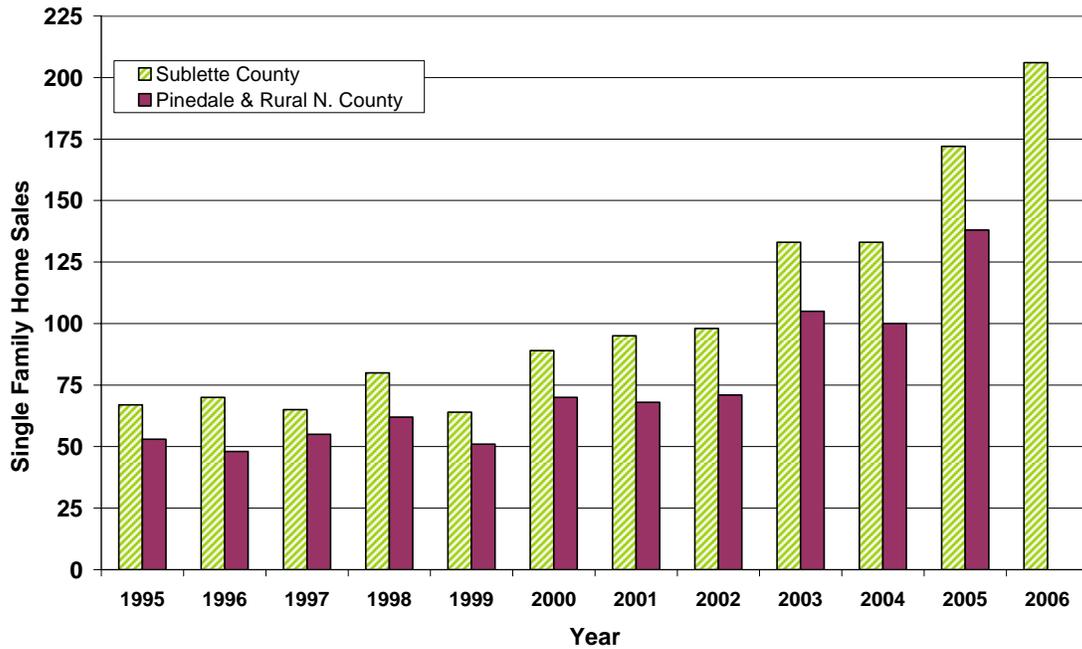
Housing Sales:

According to the Sublette County Assessor’s Office, there were 720 single family home sales between 2000 and 2005. As with new housing construction, the majority of these sales (about 77%) were for homes located in either Pinedale or in northern rural Sublette County (mostly along the Wind River Range). 172 of these sales in the County took place in 2005 (*see graph below*).

Single Family Home Sales in Sublette County 1995-2006

Includes Manufactured, Modular, and Stick-Built

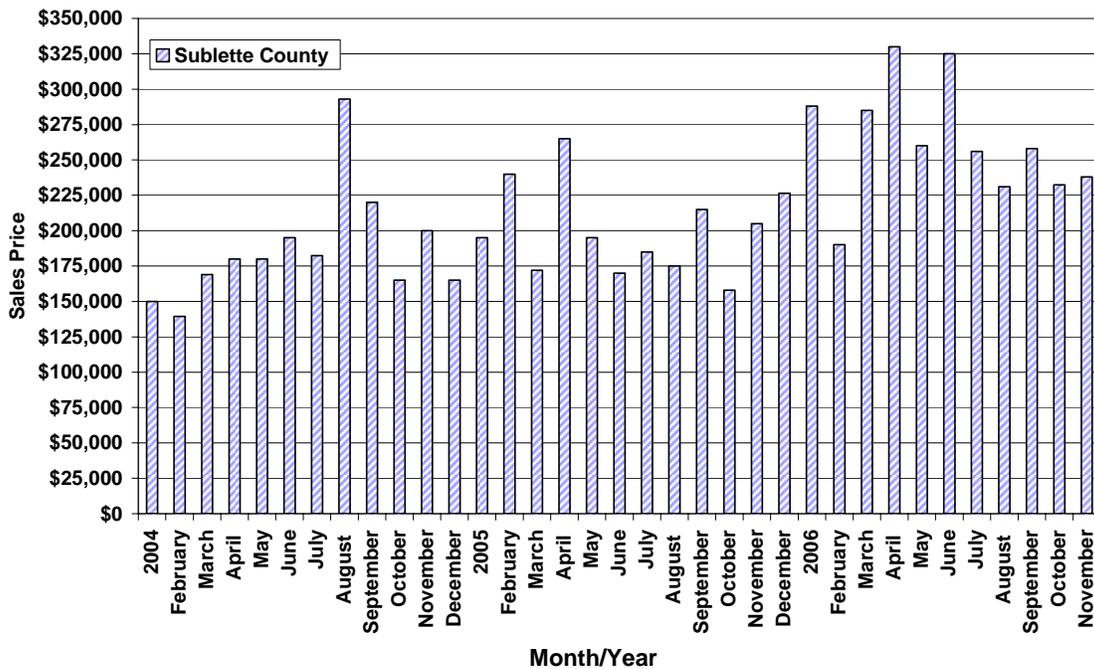
Source: Sublette County Assessor's Office



Sublette County Single Family Home Median Sales Price by Month 2004-2006

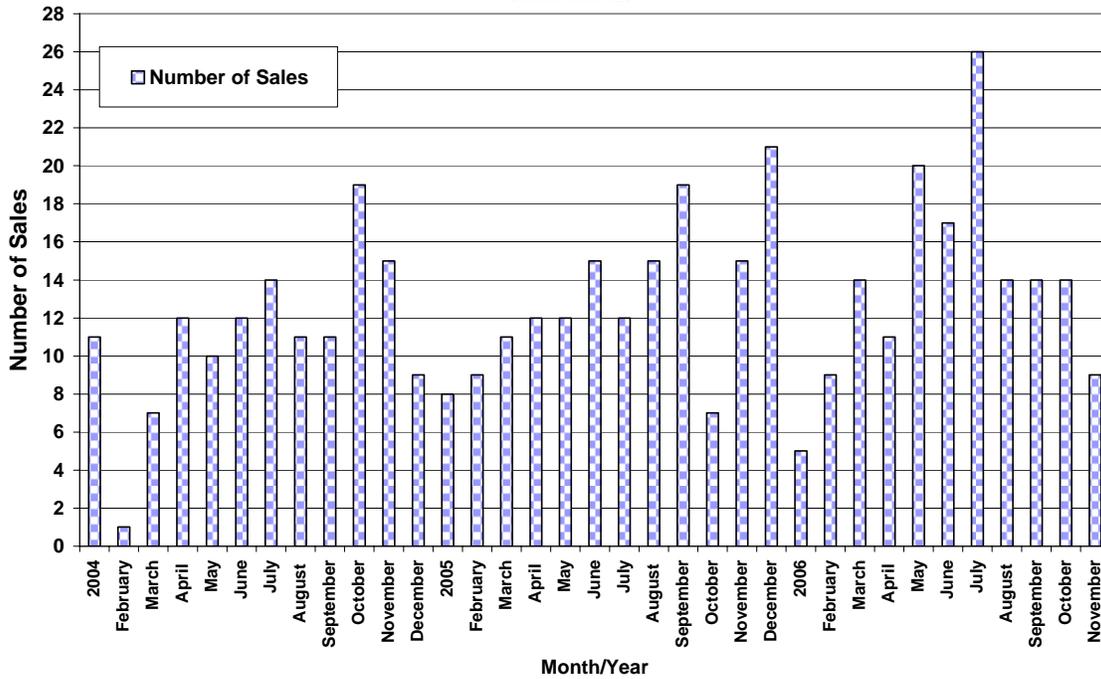
Includes all Single-Family Units

Source: Teton MLS



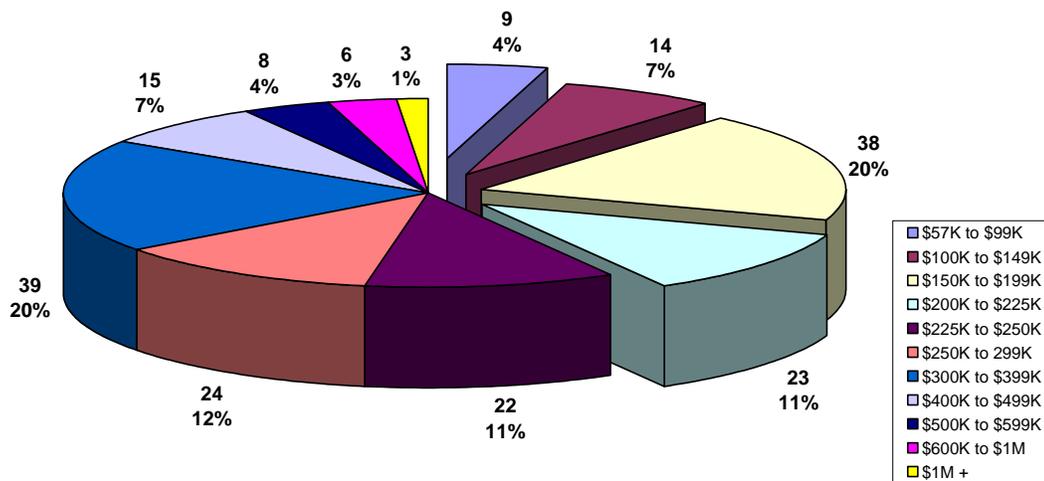
Sublette County Home Sales by Month 2004-2006

Includes All Single-Family Units
Source: Teton MLS



2006 Home Sales In Sublette County by Price Range (through Dec. 18th)

"Cut Out" Pieces represent affordability of bottom 50% of Sublette County Families
Source: Sublette County Assessor's Office



When the number of home sales are broken down by price range (see above pie graph), about 40% of the home sales fell at or below the \$225,000 mark. However, these figures include sales of small cabins, RVs, and seasonal-only residences which appear as low cost housing but are not a realistic option for primary housing. Based on the current list of residential homes listed for sale by the Teton MLS, these secondary-residences probably comprise about 5% of all homes sold.

If sales prices were to match up to median income and affordability estimates, than about 50% of the sales should be below \$225,000. These sales numbers seem to reflect the shortages in housing as expressed below by the local realtors.

Realtor Perceptions:

Several Realtors were contacted in order to gauge what types of demand they are seeing in the Real Estate Market⁹. Almost all agents broke down the housing demand they are seeing in general terms as follows:

20-30% -- Less than \$200,000
30-40% -- \$200,000 to \$300,000
20-30% -- \$300,000 to \$500,000
Remainder - \$500,000 and up

Most realtors felt that there was adequate supply for houses in the \$200,000 to \$250,000 range, and that it was around the \$150,000 or less range where supply lagged. When asked how many \$150,000 homes could be sold if they were an unlimited supply available, an average response from the agents was about 50 homes per year, with some realtors responding 25 per year and others responding as many as 75. All agents said that “stick-built” homes would garner a higher absorption rate, and that perhaps more houses could be sold per year in future years. Most realtors seemed to agree that the less-expensive the houses were, the more that could be sold, provided that they were of high-quality construction.

Most realtors that were contacted felt that a large subdivision proposal of as many as 500 units would be “reasonable” for the market demand, but only if the houses could be sold for around \$200,000 or less and it were phased in over a number of years. One realtor thought that 500 units were far too many, unless the houses could be sold for around \$100,000.

Affordability

Shortages and Rising Prices

However, the 20% growth seen between 2000 and 2005 has occurred despite severe housing shortages and climbing housing prices. The available housing stock (as estimated by the U.S. Census Bureau) has only grown by 11% since 2000, again with population gains of at least 17% during the same period (see *chart next page*).

According to the Sublette County Assessor's Office, the average single family home sales price nearly doubled between 2000 and 2005, increasing from about \$126,000 to \$249,000 (when not adjusted for inflation). According to the State of Wyoming Department of Administration and Information Economic Analysis Division (EADIV), rental prices for a single family home have more than doubled since 2000, climbing from \$566 per month in the 4th quarter of 2000 to \$1,195 per month in the 1st quarter of 2006. According to the same EADIV figures, the single family home rental price has jumped 35% in the last year alone.

Due to severe workforce shortages in the region, the need for additional new residents to enter the workforce is implied. In fact, several thousand people currently work in Sublette County but live elsewhere due partly to the shortages in both houses for sale and rental opportunities (see *temporary resident discussion on pages 6- 8*). It is likely that if more housing were made available at prices these workers considered affordable, the county would be experiencing a much higher growth rate than the current rate of about 20% every 5 years.

It is also worthwhile to note that the overall cost of living (which includes housing, food, transportation, and other costs) is likely a factor when these workers consider permanent relocation. According to the Missouri Economic Research and Information Center, Wyoming ranks 26th in the U.S. in cost of living and ranks significantly higher than any bordering state except Colorado. According to the EADIV, Sublette County's overall cost of living is about 16% higher than the state average.

Income & Affordability:

A rough guideline typically used by realtors, lenders, and State and Federal housing officials considers a housing payment affordable if it equals 1/3rd of the family income or less. For example, a family that makes \$3,000 per month and has few debts, they can afford to pay about \$1,000 per month in rent or mortgage payments

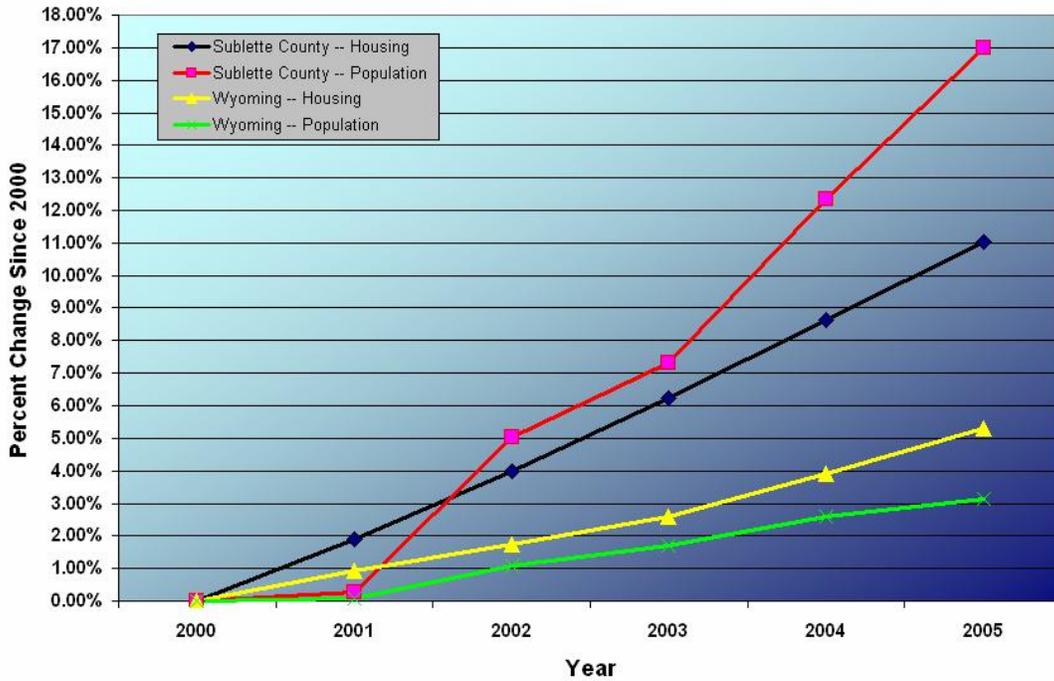
Median Family Income:

The U.S. Department of Housing and Urban Development has estimated Sublette County's median family income in 2006 to be about \$59,400/yr, a

figure that has grown by \$19,000 in the past 5 years, or a 40% increase¹⁰. Half of the families in the county would earn more than this figure and the other half would earn less.

Changes in Housing Vs. Population 2000-2005 -- Sublette County & Wyoming

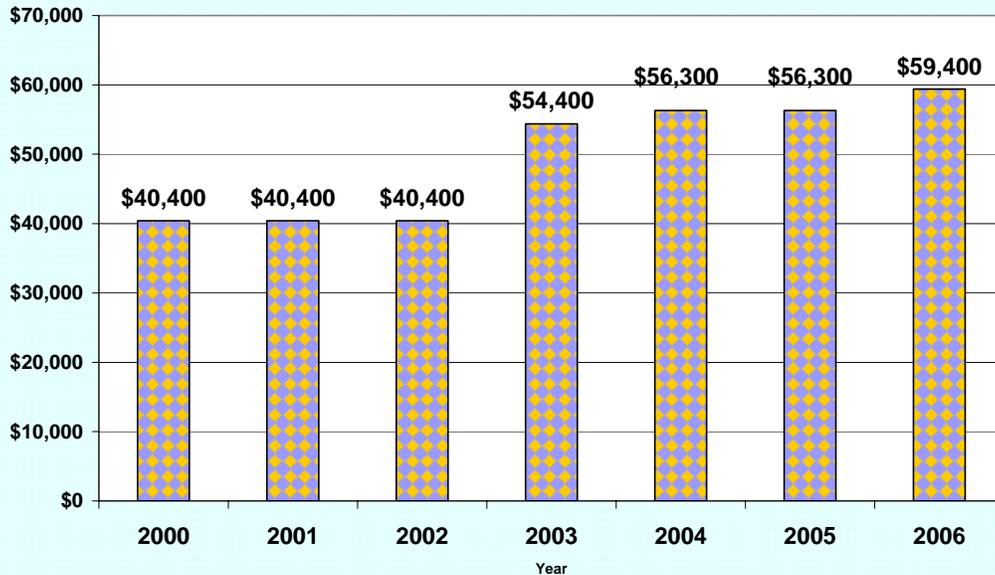
Source: U.S. Census Bureau



Sublette County Median Family Income 2000-2006

Not Adjusted For Inflation

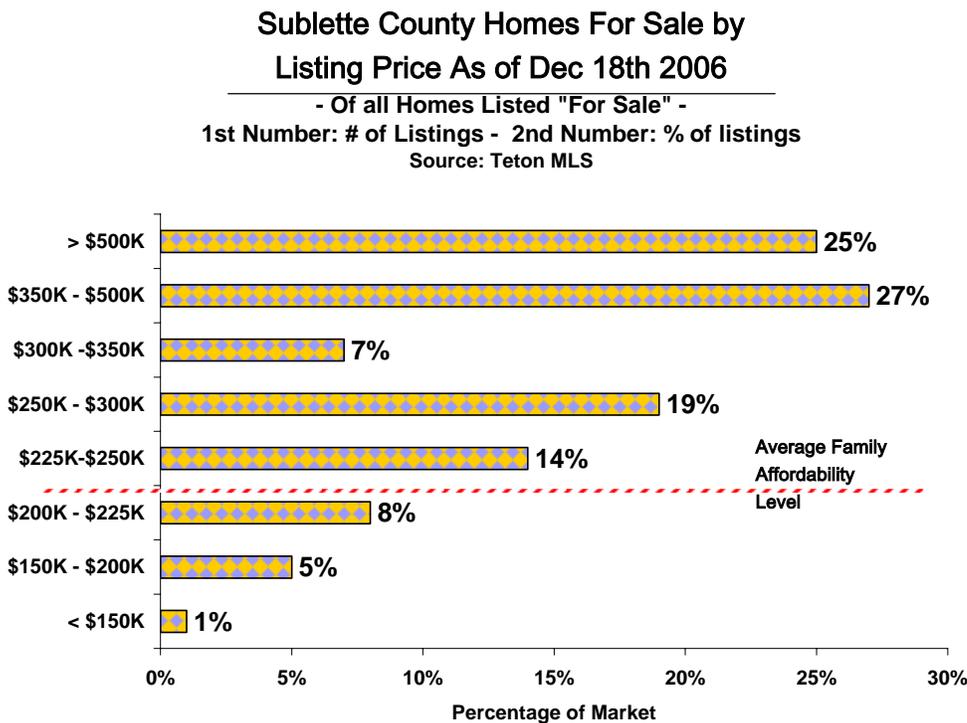
Source: U.S. Department of Housing and Urban Development



A family with good credit and few debt expenditures that earns \$59,400 a year could be expected to afford a home priced at about \$225,000 (assuming a 30-year mortgage rate of about 7%), or pay about \$1,638 per month in rent.

According to the Teton Board of Realtors Multi-listing Service, of the 107 residential properties for sale in Sublette County as of December 18th, the average listing price is \$464,000, with a median listing price of about \$335,000. 18 of the listings were at or below the \$225,000 mark. A breakdown of the properties by listing price appears in the following chart.

The price breakdown illustrates that the majority of the homes listed for sale are out of reach for the majority of families in Sublette County. Families that earn between \$60,000 and \$85,000 have considerably more options, as an additional 35% of homes are listed between \$225,000 and \$300,000. about 47% of all the homes are within the affordable price range for that income of about \$300,000



Prospective Residents working in the natural gas industry:
 Many of the workers who move to Sublette County for long-term production phase jobs in the natural gas industry can be expected to make a bit more than the county's average salary. According to a wage survey conducted this past summer of about 60 employers, workers employed during the production phase of gas field development (as pumpers, gaugers, pipeline technicians, and etc) can expect to make between \$40,000 to \$60,000 in wages, plus overtime.

These wages would equate roughly to the county's median family income level, although survey data taken last year of about 500 natural gas industry employees showed that about 75% of new workers will bring with them a spouse or "significant other". Many of these spouses can be assumed to enter the workforce. For example, a couple with a combined salary of \$80,000, good credit, and few debts could afford a house valued at about \$275,000, given a 30-year fixed mortgage at 7% APR.

Yearly Wages, Monthly Housing Payment, and Mortgage Affordability by Occupation in Sublette County

Wage data based on Sublette County Wage Survey

Job Title	Industry	Average Overall Wage			Average Starting Wage			Average Maximum Wage		
		Yearly	Monthly	Mortgage	Yearly	Monthly	Mortgage	Yearly	Monthly	Mortgage
		Wage	Payment		Wage	Payment		Wage	Payment	
Waitress	Service	\$13,728	\$381	\$50,832	\$11,778	\$327	\$43,611	\$15,678	\$436	\$58,052
Stocking Clerk	Service	\$21,060	\$585	\$77,981	\$18,200	\$506	\$67,391	\$23,920	\$664	\$88,570
Maid	Service	\$22,360	\$621	\$82,794	\$18,720	\$520	\$69,316	\$26,000	\$722	\$96,272
Checker/Cashier	Service	\$22,793	\$633	\$84,397	\$19,760	\$549	\$73,167	\$25,827	\$717	\$95,632
Child Care Provider		\$24,093	\$669	\$89,211	\$22,907	\$636	\$84,820	\$25,280	\$702	\$93,606
Food Prep/Cook	Service	\$24,327	\$676	\$90,077	\$19,448	\$540	\$72,012	\$29,207	\$811	\$108,147
Sales Associate	Service	\$28,080	\$780	\$103,974	\$24,960	\$693	\$92,421	\$31,200	\$867	\$115,527
Preschool Teacher		\$29,253	\$813	\$108,317	\$26,667	\$741	\$98,742	\$31,840	\$884	\$117,896
Secretaries/Office Staff	Service	\$29,276	\$813	\$108,403	\$25,189	\$700	\$93,269	\$33,363	\$927	\$123,536
Secretaries/Office Staff	Gas Field	\$30,805	\$856	\$114,064	\$24,440	\$679	\$90,496	\$37,170	\$1,033	\$137,632
Secretaries/Office Staff	Non-County Gov.	\$31,605	\$878	\$117,026	\$25,949	\$721	\$96,083	\$37,260	\$1,035	\$137,966
EMT	Non-County Gov.	\$31,746	\$882	\$117,548	\$23,100	\$642	\$85,534	\$40,392	\$1,122	\$149,563
Bus Driver		\$34,752	\$965	\$128,679	\$30,805	\$856	\$114,064	\$38,698	\$1,075	\$143,290
Custodian	Service	\$35,696	\$992	\$132,174	\$30,978	\$861	\$114,705	\$40,414	\$1,123	\$149,644
Laborer	Construction	\$36,053	\$1,001	\$133,496	\$27,733	\$770	\$102,689	\$44,373	\$1,233	\$164,303
Roustabouts	Gas Field	\$36,585	\$1,016	\$135,466	\$30,490	\$847	\$112,898	\$42,680	\$1,186	\$158,035
Maintenance	Construction	\$35,256	\$979	\$130,545	\$28,912	\$803	\$107,055	\$41,600	\$1,156	\$154,036
Paramedic	Non-County Gov.	\$37,434	\$1,040	\$138,610	\$30,804	\$856	\$114,060	\$44,064	\$1,224	\$163,159
Chief	Service	\$37,749	\$1,049	\$139,776	\$31,165	\$866	\$115,397	\$44,332	\$1,231	\$164,152
Landscaping	Construction	\$38,272	\$1,063	\$141,713	\$28,704	\$797	\$106,285	\$47,840	\$1,329	\$177,141
Plumber	Service	\$38,480	\$1,069	\$142,483	\$29,120	\$809	\$107,825	\$47,840	\$1,329	\$177,141
Electrician	Service	\$38,480	\$1,069	\$142,483	\$29,120	\$809	\$107,825	\$47,840	\$1,329	\$177,141
Custodian	County Government	\$38,824	\$1,078	\$143,757	\$33,492	\$930	\$124,013	\$44,156	\$1,227	\$163,500
Mechanic	Service	\$38,865	\$1,080	\$143,908	\$32,628	\$906	\$120,814	\$45,101	\$1,253	\$166,999
Courthouse Deputies	County Government	\$40,365	\$1,121	\$149,463	\$32,426	\$901	\$120,066	\$48,303	\$1,342	\$178,855
Secretaries/Office Staff	County Government	\$40,365	\$1,121	\$149,463	\$32,426	\$901	\$120,066	\$48,303	\$1,342	\$178,855
Maintenance Manager	Service	\$41,391	\$1,150	\$153,262	\$34,213	\$950	\$126,683	\$48,568	\$1,349	\$179,837
Equipment Operator	Gas Field	\$41,747	\$1,160	\$154,580	\$33,600	\$933	\$124,413	\$49,893	\$1,386	\$184,743
Technology Tech.	Non-County Gov.	\$42,210	\$1,173	\$156,294	\$34,993	\$972	\$129,571	\$49,427	\$1,373	\$183,017
Communications	County Government	\$45,706	\$1,270	\$169,239	\$42,204	\$1,172	\$156,272	\$49,208	\$1,367	\$182,206
Waste Management	County Government	\$46,289	\$1,286	\$171,398	\$42,023	\$1,167	\$155,602	\$50,555	\$1,404	\$187,194
Road and Bridge	County Government	\$46,289	\$1,286	\$171,398	\$42,023	\$1,167	\$155,602	\$50,555	\$1,404	\$187,194
Medical Clinic Tech.	Non-County Gov.	\$46,095	\$1,280	\$170,680	\$33,481	\$930	\$123,973	\$58,709	\$1,631	\$217,386
Maintenance Supervisor	County Government	\$47,356	\$1,315	\$175,349	\$42,023	\$1,167	\$155,602	\$52,688	\$1,464	\$195,092
Scientist Tech.	Non-County Gov.	\$47,425	\$1,317	\$175,604	\$41,049	\$1,140	\$151,995	\$53,800	\$1,494	\$199,209
Manager	Service	\$48,599	\$1,350	\$179,951	\$45,490	\$1,264	\$168,439	\$51,709	\$1,436	\$191,467
Detentions	County Government	\$48,824	\$1,356	\$180,784	\$46,345	\$1,287	\$171,605	\$51,302	\$1,425	\$189,960
Pumpers	Gas Field	\$49,480	\$1,374	\$183,213	\$39,707	\$1,103	\$147,026	\$59,253	\$1,646	\$219,401
Gaugers	Gas Field	\$50,673	\$1,408	\$187,631	\$41,093	\$1,141	\$152,158	\$60,253	\$1,674	\$223,103
School Teacher	Non-County Gov.	\$51,353	\$1,426	\$190,149	\$38,169	\$1,060	\$141,331	\$64,537	\$1,793	\$238,966
Rig Hand	Gas Field	\$52,648	\$1,462	\$194,944	\$49,137	\$1,365	\$181,943	\$56,160	\$1,560	\$207,948
Patrol	County Government	\$52,852	\$1,468	\$195,699	\$48,786	\$1,355	\$180,644	\$56,917	\$1,581	\$210,751
Mechanic	Gas Field	\$54,775	\$1,522	\$202,820	\$42,000	\$1,167	\$155,517	\$67,550	\$1,876	\$250,123
Detectives	County Government	\$54,884	\$1,525	\$203,223	\$52,851	\$1,468	\$195,696	\$56,917	\$1,581	\$210,751
Engineer	Non-County Gov.	\$58,123	\$1,615	\$215,217	\$50,541	\$1,404	\$187,142	\$65,704	\$1,825	\$243,287
Scientist	Non-County Gov.	\$58,423	\$1,623	\$216,327	\$50,814	\$1,412	\$188,153	\$66,031	\$1,834	\$244,498
Electricians	Gas Field	\$60,000	\$1,667	\$222,167	\$45,000	\$1,250	\$166,625	\$75,000	\$2,083	\$277,708
Driller	Gas Field	\$60,306	\$1,675	\$223,300	\$56,826	\$1,579	\$210,414	\$63,787	\$1,772	\$236,189
Advanced Scientist	Non-County Gov.	\$61,985	\$1,722	\$229,517	\$53,919	\$1,498	\$199,650	\$70,051	\$1,946	\$259,383
Administrative	Gas Field	\$64,164	\$1,782	\$237,585	\$49,928	\$1,387	\$184,872	\$78,400	\$2,178	\$290,298
Scientist	Gas Field	\$65,000	\$1,806	\$240,681	\$50,000	\$1,389	\$185,139	\$80,000	\$2,222	\$296,222
Nurse	Non-County Gov.	\$69,142	\$1,921	\$256,017	\$53,772	\$1,494	\$199,106	\$84,513	\$2,348	\$312,933
Administrative	Non-County Gov.	\$70,568	\$1,960	\$261,298	\$58,788	\$1,633	\$217,679	\$82,347	\$2,287	\$304,913
Engineer	Gas Field	\$82,650	\$2,296	\$306,035	\$69,800	\$1,939	\$258,454	\$95,500	\$2,653	\$353,615
Field Supervisors	Gas Field	\$82,625	\$2,295	\$305,942	\$64,000	\$1,778	\$236,978	\$101,250	\$2,813	\$374,906
Tool Pusher	Gas Field	\$91,080	\$2,530	\$337,249	\$67,240	\$1,868	\$248,975	\$114,920	\$3,192	\$425,523
Drilling Foremen	Gas Field	\$157,400	\$4,372	\$582,817	\$130,000	\$3,611	\$481,361	\$184,800	\$5,133	\$684,273
Doctor	Non-County Gov.	\$186,674	\$5,185	\$691,212	\$135,590	\$3,766	\$502,060	\$237,757	\$6,604	\$880,361

Sources Referenced:

¹ Available online at www.sublette-se.org/Population.html

² Courtesy of the Wyoming Department of Employment, Research and Information. Available online at http://doe.state.wy.us/lmi/toc_202.htm

³ (54 drilling rigs X 30 rig workers) + (25 completion crews X 40 workers per crew) = 2,620 people + several hundred roustabouts, pipeline workers, and truck drivers. For more discussion on this number, please see the essay *So, How Many Out-Of-Town workers are there in Sublette County?* by Jeffrey Jacquet. Available at www.sublette-se.org/outoftownessay.html

⁴ Man-camp figures estimated by Crown Camp Services Personnel at the Wyoming Lodge Man Camp. Motel figures estimated by Mindi Crabb, the Sublette County Tourism Director, who estimates that 75% of the county's 550 motel rooms are typically occupied with natural gas workers at a given time. She can be reached at 1-888-285-7282 or director@mountainmancountry.com

⁵ Available online at <http://eadiv.state.wy.us/>.

⁶ According to the United States Bureau of Land Management's *Jonah Infill Development Final Environmental Impact Assessment Socioeconomic Analysis Technical Support Document*. "Estimated Workforce Requirements" section, p. 110. Available online at: <http://www.wy.blm.gov/nepa/pfodocs/jonah/30TSDsocio.pdf>

⁷ Pages 27 and 28. Document available online at: <http://www.sublette-se.org/files/SonoranInstituteSubletteReport2005.pdf>.

⁸ See *The Talent Crisis in Upstream Oil and Gas*, Available online at: http://www.deloitte.com/dtt/cda/doc/content/DTT_DR_GenYOilGas_Dec05.pdf

⁹ List of Realtors Contacted:

Loni Anderson, Allen Agency, Pinedale

Jay Fear, High Mountain Real Estate, Pinedale

Cyndie Wilson, High Mountain Real Estate, Pinedale

Susie Hatch, Hatch Real Estate, Pinedale

Judy Smith, Allen Agency, Pinedale

Jon Hanlon, Sotheby's & Teton Board of Realtors (Director), Jackson

¹⁰ Information Contained in the Wyoming Community Development Authority's June 2006 edition of *A Profile of Wyoming*. Available online at: http://www.wyomingcda.com/PDFfiles/Database_12_2005/Profile06a_Vol_I_Final.pdf