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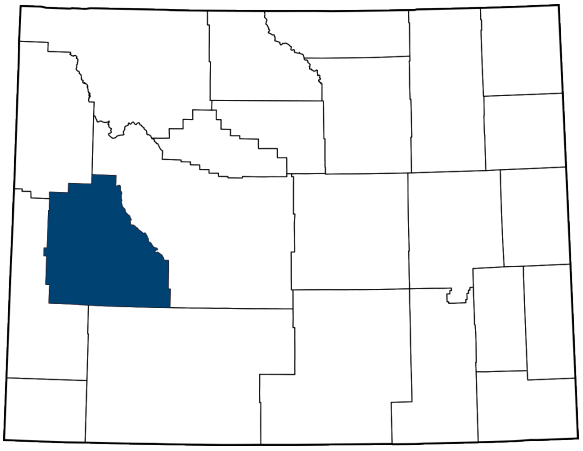
A Sublette County Profile: Socioeconomics



Sublette County Board of County Commissioners

Andy Nelson, Chair

Joel Bousman

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The goal of this document is to provide an accurate picture of Sublette County's socioeconomic attributes. Accomplishing this requires verifiable and universally accepted substantive data that is objectively incorporated into a narrative format. Those requirements provide the foundation for this document. The resulting document not only serves the county as it moves forward with its own educational and planning efforts, but also serves to inform state and federal educational and planning efforts as well.

This socioeconomic profile of Sublette County is made possible with the collobarative support of:

University of Wyoming Extension

Wyoming Department of Administration & Information

Wyoming County Commissioners Association

INTRODUCTION

In a rapidly changing world, timely and accurate information is essential to good decision making. Local officials, state governments, Federal agencies, and the general public need information on the structure and trends within a region's economy in order to more effectively conduct and participate in public policy decision making processes. Information describing regional economic conditions can aid in the public policy decision making process by providing a perspective on economic structure and changes over time. In addition, the identification of long-term trends can help residents, local official, state government, and Federal agencies plan for the future. This report has been developed to provide baseline information on the structure and trends of the Sublette County economy.

Four types of information are discussed in this report, including: 1) Demographics, 2) Land Characteristics, 3) County Government Finances, and 4) Industry Profiles. The Demographic section provides information on the characteristics of the residents of county. The Land Characteristic section provides a perspective on the physical setting of the county. The County Government Finances section considers county government's ability to meet the needs of residents in terms of public services and public infrastructure. The Industry profile section discusses the economic importance of selected industries in the county.

Each type of information is discussed separately in the report. To put Sublette County's information in perspective, the county data is compared to corresponding data for Wyoming and the United States. A variety of data sources were used to development this socio-economic profile including the Wyoming Department of Administration & Information – Economic Analysis Division's Wyoming County Profiles. The most current data available from these data sources was used in the report. All time series data involving dollars were adjusted for inflation to 2009 dollars since these deflators are latest that are currently available. This report is part of an ongoing cooperative effort between the University of Wyoming and the Wyoming County Commissioners Association to develop a socio-economic database for Wyoming Counties.

COUNTY SUMMARY

Sublette County has experienced dramatic growth since 2000 due to energy development. The county's population increased from less than 6,000 residents in 2000 to more than 10,000 residents in 2013. The county's population growth since 2000 (68 percent) was four times the growth rate for Wyoming (18 percent) and 6 times the growth rate for the U.S. (12 percent). Most of the increase in population occurred in the eight years from 2002 through 2009 when population increased at an average annual rate of 7 percent per year. Since 2009, the county's population has plateaued at around 10,000 residents reflecting a slowdown in energy development in the county.

Population growth can occur in one of two ways: 1) Natural Increase (more births than deaths) or Net Migration (more people moving in than moving out). The rapid population growth in the county from 2000 to 2013 was a combination of both natural increase and net migration. However, as is typically the case with rapid population growth, the majority of the population increase came from net migration which accounted for 81 percent of the county's overall population growth, while natural increase accounted for 19 percent.

People move to an area for a variety of reasons ranging from economic to esthetic. Data from the Wyoming Housing Database Partnership for 2000 through 2013 indicates that the most frequent primary reason given by new residents to Sublette County for moving to Wyoming were job related factors (56 percent). Job related factors included Job Transfers, New Jobs, Better Employment Opportunities, and Starting or Expanding a Business. The second most frequent reason was that friends or relatives resided in the area (19 percent). Slightly more than 7 percent of new residents surveyed indicated that a better quality of life was the primary reason for moving to the county with over 17 percent indicating some other reasons.

The age distribution of Sublette County residents is slightly older than either Wyoming or the U.S. In 2013 the largest age groups for Sublette County were adults 45 to 64 years old (29 percent) and adults 25 to 44 years old (27 percent). Combined, these two age groups represented 56 percent of the total county population. Compared to Wyoming and the U.S., the county had a larger proportion of its overall population in the adult age groups of 24 to 44 and 45 to 64, particularly the 45 to 64 age group. The county also had a larger proportion of its overall population in the younger 5 to 17 age group. Conversely, the county had a smaller proportion of its overall population in the young adult age groups of 18 to 24 and in the retirement age group 65 and over. The under 5 age group was slightly below the state percentage but similar to the U.S. percentage. Overall, the median age for the county in 2013 was slightly older at 38.9 years compared to 36.8 years for Wyoming and 37.6 years for the U.S.

White is the predominate category of race for Sublette County, accounting for 95 percent of the total population. The various other races account for the remaining 5 percent with the two largest categories being Blacks (1.4 percent) and individuals of Two or More races (1.4 percent). Compared to Wyoming and the U.S., the percentage of the county population that is white slightly exceeds the percentage for Wyoming (93 percent) and substantially exceeds the percentage for the U.S. (78 percent).

The federal government defines the term "Hispanic" as a cultural identification rather than a specific race. Thus Hispanics can be individuals of any race that self-identify themselves as "Hispanic" or "Latino" based on heritage, nationality group, lineage, or country of birth of the person or person's parents or ancestors before their arrival in the United States. In Sublette County the percentage of the population classifying themselves as Hispanic (8 percent) was only 46 percent of the U.S. percentage (17 percent) and 80 percent of the Wyoming percentage (10 percent).

Per capita income is a general measure of the economic well-being of a county's population. In 2000, per capita income in Sublette County was $35,352 in 2009 dollars. The per capita income for the county in 2000 was slightly above Wyoming's ($35,327) and 5 percent below the U.S. ($37,351). From 2000 to 2008, after adjusting for inflation, per capita income for the county increased by 82 percent to $64,194. As a result of this rapid increase, in 2008 the county's per capita income was 30 percent higher than Wyoming's ($49,418) and 56 percent higher than the U.S. ($41,188). Since 2008 the county's per capita income has fluctuated between $55,000 and $61,000 (2009 dollars).

There are three sources of per capita income: 1) net labor earnings including wages, salaries, and proprietor (self-employed) income, 2) government transfer payments such as Social Security, Medicare, Medicaid, and various income assistance program payments, and 3) investment income representing property income in the form of dividends, interest, and rents. The vast majority of the growth in county per capita income between 2000 and 2013 was the result of growth of net labor earnings (91 percent) with 1 percent coming from higher transfer payments and 8 percent coming from higher investment income. As a result of the rapid growth in labor earnings, the percentage of total per capita income coming from labor earnings increased from 54 percent in 2000 to 68 percent in 2013.

In 2013 per capita income for Sublette County was $60,572 in 2013 dollars. This level of income was 15 percent above per capita income for Wyoming ($52,827) and 35 percent above per capita income for the U.S. ($44,765). In addition to higher per capita income, the county's 2013 poverty rate (6.3 percent) was substantially below both Wyoming's (11.9 percent), and the U.S. (15.0 percent). The county's 2013 unemployment rate (3.6 percent) was also below both Wyoming's (4.6 percent) and the U.S. (7.4 percent). While the per capita income for the county was 15 percent above the state average, the Wyoming Economic Analysis Division estimates that the county's cost-of-living for the second quarter of 2013 was 10 percent above the state average. This suggests that, on average, the county's population was economically better-off than the rest of the state in 2013.

Overall, the Sublette County population was somewhat more educated in terms of a high school degree or higher (96 percent) than either Wyoming (92 percent) or the U.S. (86 percent) but somewhat less educated in terms of college or advanced degrees (23 percent vs. 25 percent vs. 29 percent). The percentage of the county population without a high school degree (4 percent) was substantially below both Wyoming (8 percent) and the U.S. (14 percent). The percentage of the county's population with a high school degree (29 percent) was slightly below Wyoming (30 percent) but slightly above the U.S. (28 percent). The percentage of the county's population with some college or and associate degree (12 percent) was above both Wyoming (10 percent) and the U.S. (8 percent). However, the percentage of

the county's population with either a bachelors (16 percent) or graduate/professional degree (7 percent) was below both Wyoming (17 percent and 8 percent) and the U.S. (18 percent and 11 percent).

Employment in Sublette County more than doubled between 2000 and 2011 increasing from 3,902 jobs in 2000 to 8,506 jobs with 94 percent of this increase occurring from 2000 through 2008. After plateauing at around 8,000 jobs from 2009 through 2012, county employment declined by 11 percent from 8,506 to 7,576 from 2012 to 2013. Compared to Wyoming and the U.S., county employment increased by 94 percent from 2000 through 2013, while Wyoming's employment increased by 23 percent and the U.S. employment increased by 10 percent. While county employment increased by 111 percent between 2000 and 2008, the county population only increased by 59 percent suggesting that much of this job growth was filled by nonresidents during this time period.

In 2013 Mining was largest employer in the Sublette County economy accounting for 21 percent of total employment. Following Mining was Construction and Local Government, both with more than 10 percent of total county employment. Local government includes school districts which are often one of the largest employers in many rural communities. Following Construction and Local Government were Retail Trade, Agriculture, Accommodations and Food Service, and Real Estate, all of whom had more than 5 percent of total county employment and Transportation & Warehousing and Professional Services, both with nearly 5 percent of total county employment. Combined, these nine sectors represent 78 percent of the total employment in the county. The three largest employment sectors in the county's economy, Mining, Construction, and Local Government represent 45 percent of the total employment in the county. This compares to 28 percent for Wyoming's top three employment sectors and 14 percent for the U.S. top three employment sectors and illustrates the high concentration of employment in a few sectors of the county's economy. County employment locational quotients indicate that the county's economy is specialized in the following sectors: Mining, Agriculture, Construction, Transportation & Warehousing, Local Government, and Real Estate relative to the U.S. economy.

Employment in Sublette County more than doubled from 2001 through the peak in 2011. Much of this increase was driven by the rapid growth in mining employment which increased by nearly 5 times from 434 jobs in 2001 to 2,153 jobs in 2011. Despite its rapid growth, mining only accounted for 40 percent of the total growth in county employment between 2001 and 2011 with other sectors accounting for the remaining 60 percent. Out of the 23 sectors listed for the county economy, only the Information sector experienced a decline in employment during the time period. Sectors such as Construction (+13 percent), Local Government (+8 percent), Transportation & Warehousing (+8 percent), and Real Estate (+6 percent) also accounted for significant portions of the growth in county employment. Combined with Mining, these sectors represented 74 percent of the total growth in employment between 2001 and 2011. In terms of individual sector growth, the fastest growing sectors were Mining and Transportation & Warehousing where employment for both increased by nearly 5 times. Employment in Management Services, Real Estate, Wholesale Trade, Educational Services, Construction, and Finance & Insurance also more than doubled between 2001 and 2011.

After peaking in 2011, employment in Sublette County declined by 11 percent from over 8,500 jobs in 2011 to slightly under 7,600 jobs in 2013. Again Mining was the major contributor to the change in employment representing 63 percent of the decline. Out of the 23 sectors listed for the county economy, only the Arts, Entertainment, & Recreation; Federal –Civilian; and Real Estate sectors did not experience a decline in employment during the time period. Sectors such as Accommodations & Food Service (-7 percent), Retail Trade (-6 percent), Transportation & Warehousing (-5 percent), and Management Services (-4 percent) also accounted for significant declines in total employment. Combined with Mining, these sectors accounted for 85 percent in the total decline in employment during the time period. In terms of individual sector declines, in addition to Mining (-27 percent), Manufacturing, Information, Management Services, Accommodations & Food Services, Wholesale Trade, Utilities, Transportation & Warehousing, and Retail Trade all experienced more than a 10 percent decline in employment.

In addition to the number of jobs, the labor earnings associated with these jobs is an important consideration. Overall average earnings per job are a general measure of the economic well-being of the local workforce. In 2000, the average earnings per job in Sublette County were $30,107 in 2009 dollars. The average earnings per job for the county in 2000 were 19 percent below Wyoming's ($37,046) and 38 percent less than the U.S. ($48,819). From 2000 to 2008, after adjusting for inflation, average earnings per job nearly doubled to $58,665. As a result of this rapid increase, in 2008 the average earnings per job for the county were 24 percent above Wyoming's ($47,257) and 15 percent higher than the U.S ($51,065). Since 2008 average earnings per job for the county has fluctuated around $60,000. In 2013 the county's average earnings per job ($58,696) were 19 percent above Wyoming's ($49,188) and 12 percent above the U.S. ($52,330). While the average earnings per job for the county were 19 percent above the state average, the Wyoming Economic Analysis Division estimates that the county's cost-of-living for the second quarter of 2013 was 10 percent above the state average. This suggests that, on average, the county's workforce was economically better-off than the rest of the state in 2013.

Average earnings per job (AEPJ) can vary substantially by sector. In 2013 AEPJ in Sublette County ranged from over $100,000 for Utilities and Mining to less than $10,000 for Arts, Entertainment, and Recreation. Following Utilities and Mining, Federal – Civilian, State Government, Transportation & Warehousing, Construction, and Local Government all had AEPJ above the county average ($62,552). If the Information sector is included with the sectors above the county average, seven of the sectors in the county's economy had an AEPJ that was greater than the Wyoming ($52,420) or U.S. average ($55,768) in 2013.

The combination of the number of jobs and average earnings per job (AEPJ) determines the relative importance of individual sectors in the Sublette County economy to total labor earnings. Overall, employment in the county generated $474 million of labor earnings in 2013. Mining represents more than one-third of this total (38 percent). Following Mining were Construction (15 percent) and Local Government (12 percent). These three sectors represent 65 percent of the total labor earnings in the county. This compares to 40 percent for Wyoming's top three labor earnings sectors and 30 percent for

the U.S. top three labor earnings sectors and illustrates the high concentration of labor earnings in a few sectors of the county's economy.

Sublette County is the sixth largest county in Wyoming containing 3.2 million acres. Nearly 80 percent of this land (2.4 million acres) is managed by the Federal Government. Of this amount, the BLM controls 1.3 million acres, with the Forest Service controlling 1.2 million acres and the Bureau of Reclamation controlling 4,480 acres. State lands account for 4 percent of the county's land area (123,779 acres). More than 114,000 acres of the state land area is state trust land with the other 9,425 acres held by the Game and Fish Department. Finally, local government and others each account for 0.1 percent of the land in the county (4,954 acres combined). As a result of the large government presence in the county, less than 20 percent of the county's land area is privately owned (589,174 acres). Information from the Wyoming Department of Revenue on acres taxed as agricultural land indicates that agriculture is the dominant private land use in the county representing 92 percent of the total private land in the county (544,710 acres). Of this total 75 percent is range land (410,940 acres).

Federal lands are managed for different purposes under differing statutory authority. Three categories of designation summarizing these statutory authorities are presented by county in Economic Profile System – Human Dimension Toolkit: Protected, 2) Restricted, and 3) General Use. In Sublette County 20 percent of federal lands are designated as protected (477,699 acres). This amount includes 430,457 acres of Forest Service land that is designated as national wilderness (37 percent of total Forest Service land in the county). In addition, 18 percent of federal lands in the county are designated as restricted (448,091 acres) with the remaining 62 percent designated for general use (1.5 million acres).

Wyoming Department of Audit information indicates that the total revenue for Sublette County Government was $54.9 million in FY2014. Of this total, the largest source was Taxes which included property taxes and optional sales tax revenue (65 percent). Following Taxes was State Aid which included the county's share of the 4 percent sales and use tax revenue (28 percent). Combined these two sources represented 93 percent of the total county government revenue in FY2014. This compares to 76 percent for all Wyoming counties' top two revenue sources and illustrates the high concentration of county revenue from a few sources. Other sources of revenue included Miscellaneous Revenue, Direct Federal Aid (including PILT payments), Charges for Services, and Other Local Government Revenue. Combined these smaller revenue sources represented 7 percent of the total county government revenue in FY2014. Compared to all counties in Wyoming, Sublette County had a higher proportion of revenue from Taxes (65 percent vs. 50 percent). The county's proportion from State Aid was comparable to other counties in the state (28 percent vs. 27 percent) and the proportion from all other sources was lower than other counties in the state (7 percent vs. 24 percent).

The total assessed valuation for Sublette County in FY2014 was $3.4 billion. Nearly 90 percent of the total valuation was from Mineral Production. Following minerals was Industrial Property (8 percent). Combined these two sources represented 96 percent of the county's assessed valuation. This compares to 78 percent for Wyoming's top two sources of assessed valuation and illustrates the high concentration of county assessed valuation in a few sectors of the local economy. Other sources of

assessed valuation included Residential Property, Commercial Property, Agricultural Land, and Utilities. Combined these sources represented 4 percent of the county's assessed valuation.

Compared to Wyoming, the county had a higher proportion of assessed valuation from Mineral Production (88 percent vs. 60 percent). The county's proportion of assessed valuation from Industrial Property was comparable to Wyoming's (8 percent vs. 9 percent). The county's proportion of assessed valuation from Residential Property was substantially lower than Wyoming's (3 percent vs. 18 percent). The county's assessed valuation for Commercial, Agricultural, and Utilities was also below Wyoming's (1 percent vs. 12 percent). In terms of Mineral Production, natural gas represented 83 percent of total county mineral assessed valuation, crude oil represented 17 percent of total county mineral assessed valuation, and sand & gravel represented less than 1 percent of total county mineral assessed valuation. In terms of Industrial Property, oil and gas extraction represented more than 99 percent of total county industrial property assessed valuation. Overall, oil and gas production and facilities represents 96 percent of the county's total assessed valuation. This leaves county government finances vulnerable to fluctuations in oil and gas prices.

In FY2014 Sublette County's sales and use tax rate was 4 percent which generated $43.8 million in sales and use tax revenue. Of this total 69 percent ($30.2 million) was retained by state government and 31 percent ($13.6 million) was returned to local government in Sublette County. In FY2014 Sublette County government's share of the returned sales and use tax revenue was approximately $9.4 million (69 percent) with the remaining $4.2 million (31 percent) going to municipal governments in the county.

Over one-half of the county's sales and use tax revenue came from Mining (54 percent). Following Mining was Retail (11 percent), Public Administration (8 percent), Wholesale (6 percent), Other Services (6 percent), and Financial (6 percent). Combined these six sectors contributed 90 percent of the county's total sales and use tax revenue. Public Administration represents sales and use tax revenue on motor vehicle purchases which are collected at the time of registration. Manufacturing, Utilities, Leisure & Hospitality, and Others represented a combined 10 percent of county sales and use tax revenue.

Compared to Wyoming, the county had a higher proportion of sales and use tax revenue from Mining (54 percent vs. 21 percent). On the other hand, the county's proportion of sales and use tax revenue from Retail Trade was much lower than Wyoming's (11 percent vs. 29 percent). The proportion of sales and use tax revenue from most of the other sectors was comparable between the county and Wyoming with the exception of Leisure & Hospitality (2 percent vs. 9 percent).

The Economic Profile System-Human Dimensions Toolkit indicates that federal land payments to local governments in Sublette County totaled $1.4 million in FY2013. The largest source of federal land payments to the county was Payment in Lieu of Taxes (PILT) representing 63 percent of the total amount. The second largest source of federal payments to the county was Forest Service payments representing 26 percent of the total amount. The third largest source of federal payments to the county was BLM Payments representing 11 percent of the total amount. Of the $1.4 million in Federal land payments to the county in FY2013, 77 percent went to county government, 11 percent went to local

school districts, 10 percent went to grazing districts, and 2 percent went to Resource Advisory Councils. In FY2013 Federal Land Payments to the county represented $0.58 per acre of Federal land.

The total cost of maintaining county government for Sublette County in FY2014 was $50.7 million. This represents a per capita cost of $5,046. The largest cost category was Construction representing 36 percent of the total. Following Construction was law enforcement (County Sheriff, Jail, County Attorney, and County Courts) representing 14 percent of the total, County Administration (11 percent), and Road and Bridge (9 percent). Combined these four cost categories represented 70 percent of the total county costs in FY2014.

Mining, including oil and gas production, is the major industry in Sublette County. In 2013, the 5,614 producing wells in the county produced 6.3 million barrels of crude oil and 1.0 billion mcf of natural gas. This represented about 10 percent of total crude oil and 50 percent of total natural gas production in the state. The other major type of mineral production in the county was sand and gravel which produced 352,749 tons in 2013. This represented 4 percent of the total sand and gravel production in the state.

The mining industry in the county, including the associated industrial property, had an assessed valuation of $3.3 billion dollars in 2014 (2014 assessed valuation for minerals is based on 2013 production). This valuation represented 96 percent of the total assessed valuation for the county. Based on a county levy of 59.1 mills the mineral industry generated $193.3 million in property tax revenue in 2014. Of this total 75 percent went to K-12 schools ($145.7 million), 20 percent went to local county government ($39.2 million), and 4 percent went to county special districts ($8.4 million). Special districts in the county included: Weed and Pest, Cemetery, Improvement & Service, and Rural Health Care.

In 2013 the mining industry in the county supported 1,571 jobs with labor earnings of $179.0 million. This represented 21 percent of total employment and 38 percent of total labor earnings in the county. The percent of total employment in mining for the county was 24 times the national percentage (0.9%). The average earnings per job for mining in the county were $113,949 which was 1.8 times the county average ($62,552). The mining industry ranked 1st out of 23 sectors in the county's economy in terms of total employment and 1st out of 23 sectors in terms of total labor earnings.

Agriculture is also an important industry in the county. In 2012 there were 398 agricultural operations in Sublette County. These operations managed 777,516 acres in the county. Included in this acreage is 92 percent of the private land in the county. Of the total land in agriculture, 82 percent is classified as grazing land, 16 percent as cropland, 2 percent as woodlands, and 1 percent as farmsteads and buildings. The average size of an agricultural operation in the county was 1,954 acres. The total cattle inventory in the county was 69,588 head. In 2013, the county ranked 13th out of 23 counties in Wyoming in terms of cattle and calves inventory and 14th out of 23 counties in terms of sheep and lambs inventory. It also ranked 11th in barley production, 22nd in alfalfa hay, and 3rd in other hay. In terms of investment by agricultural operators, the estimated total market value of lands, buildings, and

equipment for agriculture in the county was $1.1 billion. This total included $1.0 billion in land and buildings and $41.5 million for equipment and machinery. The average investment per agricultural operation was $2.7 million.

The gross revenue for the agricultural industry in the county in 2013 was $54.3 million. Of this total 80 percent was from cash receipts for livestock, 11 percent was from cash receipts for crops, 7 percent was from miscellaneous sources, and 2 percent was from government payments. Total employment for agriculture in 2013 was 443 jobs with labor earnings of $12.1 million. This represented 6 percent of the jobs in the county and 3 percent of the labor earnings. The percent of total employment in agriculture for the county was 4 times the national percentage (1.4%). The average earnings per job for agriculture in the county were $27,300 which was 44 percent the county average ($62,552) and 56 percent of the non-mining county average ($49,106). Average earnings per job in agriculture tend to be low because most employment in agriculture is self-employment and includes a large number of small part-time and lifestyle operations that generate limited labor earnings. The agriculture industry ranked 5th out of 23 sectors in the county's economy in terms of total employment and 9th out of 23 sectors in terms of total labor earnings.

In addition to jobs and income, agriculture also provides important natural resource amenities such as open space. Open space offers landscapes, lifestyles, and wildlife habitat that can have value to both residents and visitors. Open space is particularly important because it determines the character of the landscapes surrounding a community. Out of economic necessity, most agricultural operations in the county cover large areas of land; as a result, agriculture can contribute substantially to maintaining open spaces on private lands in a region. As noted above, 92 percent of the private land in county is in agricultural use.

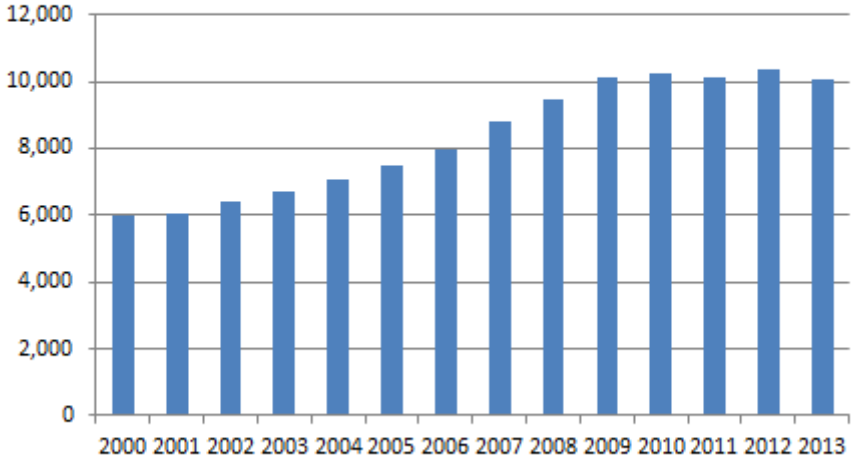
The Travel industry is also important to the county economy. In 2013 Dean Runyan Associates estimates that visitors spent $42.8 million while in Sublette County. In terms of accommodations, 34 percent of this spending was by visitors staying in hotels/motels, 23 percent by visitors staying in vacation homes, 22 percent was by visitors staying in campgrounds, 11 percent was by visitors visiting friends and relatives, and 10 percent was by visitors not staying overnight. In terms of purchases, 22 percent was for food services, 19 percent was for retail items, 18 percent was for local transportation & gas, 17 percent was for art/entertainment/recreation, and 9 percent went to food stores.

It is estimated that the travel industry generated 430 jobs in the county in 2013. This represents 6 percent of total employment in the county. Nearly 47 percent of these jobs were in the accommodations and food service sector, 35 percent were in the arts/entertainment/recreation sector, and 17 percent were in the retail trade sector. The labor earnings associated with this employment was estimated to be $12.4 million. This represents 3 percent of the total labor earnings for the county. Average earnings per job for the travel industry in the county for 2013 were $28,837. Average earnings per job for the travel industry were 46 percent the county average ($62,552) and 59 percent of the non-mining county average ($49,106). The tax revenue associated with the county's travel industry is

estimated to be $1.5 million with $0.5 million (33 percent) going to local government and $1.0 million (67 percent) going to state government.

DEMOGRAPHICS

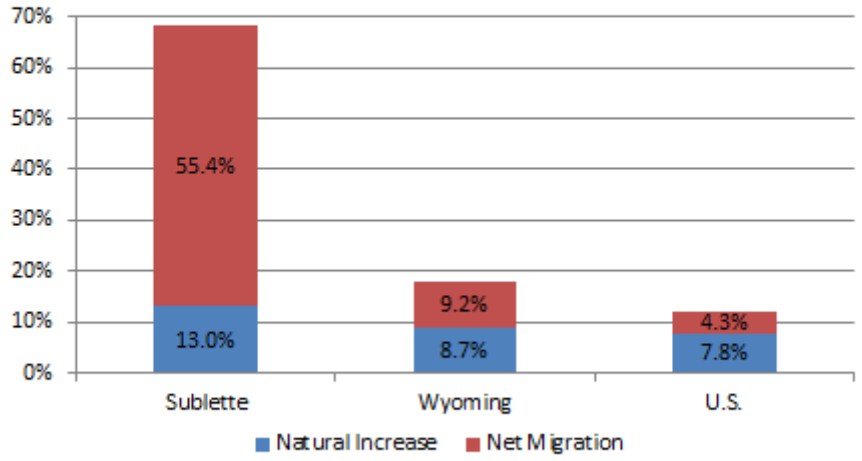
Figure 1.
Sublette County Population: 2000-2013



Sublette County experienced very rapid population growth between 2000 and 2013 (Figure 1). The county's population increased from less than 6,000 residents in 2000 to more than 10,000 residents in 2013 representing a 68 percent increase over the time period (Figure 1). The county's population growth from 2000 to 2013 was four times the percentage growth for Wyoming (18 percent) and 6 times the percentage growth for the U.S. (12 percent). During this time period, the vast majority of the county's population growth occurred between 2002 and 2009 when population increased at an average annual rate of 7 percent per year. This high growth rate was primarily due to the rapid energy development that was occurring in the county during this time period. Since 2009, the county's population has plateaued at slightly more than 10,000 residents probably reflecting a slowdown in energy development in the county since 2009.

Data Sources: Wyoming Department of Administration and Information. 2014. Economic Analysis Division, Table 1. Intercensal Estimates of the Resident Population for Counties of Wyoming: April 1, 2000 to July 1, 2010 and Table 1. Annual Estimates of the Resident Population for Counties of Wyoming: April 1, 2010 to July 1, 2014.

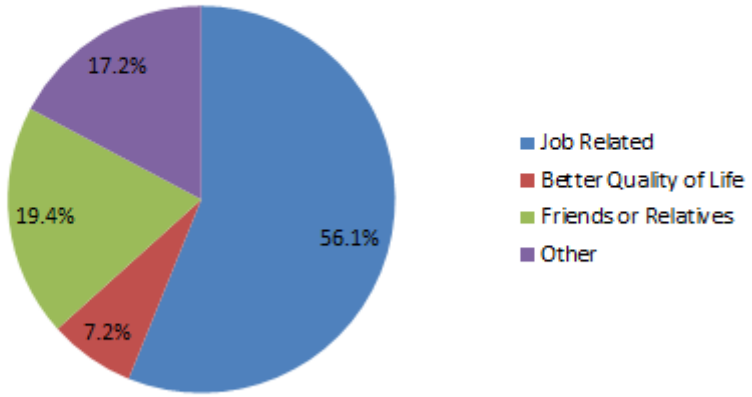
Figure 2.
Comparison of Source of Population Change:
2000-2013



Population increases can occur in one of two ways: 1) Natural Increase (more births than deaths) or Net Migration (more people moving in than moving out). As shown in Figure 2, Sublette County's growth rate in both categories substantially exceeds the growth rates for either Wyoming or the U.S. between 2000 and 2013. In terms of natural increase, the county's growth rate was 1.5 times the state growth rate and 1.7 times the national growth rate. In terms of net migration the county's growth rate was 6 times the state growth rate and 13 times the national growth rate. The rapid population growth in the county from 2000 to 2013 was a combination of both natural increase and net migration. However, as is typically the case with rapid population growth, the majority of the population increase came from net migration which accounted for 81 percent of the county's overall population growth, while natural increase accounted for 19 percent. For Wyoming, net migration accounted for 52 percent of the population growth and for the U.S. net migration represented 35 percent of the growth. Of course in-migration is much more restricted at the national level. However, the comparison is still important in explaining the differences in population growth rates.

Data Source: Wyoming Department of Administration and Information. 2014. Economic Analysis Division, Annual Births, Deaths, and Net Migration by County of Residence: 1971-2013,

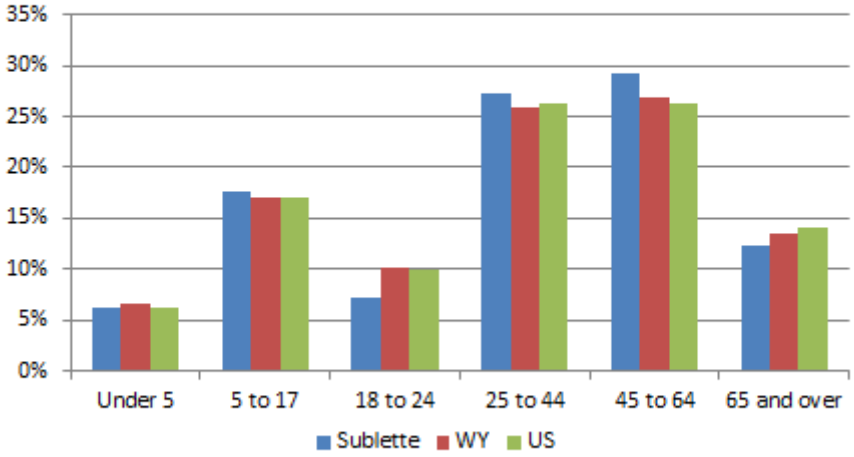
Figure 3.
Primary Reason for Moving to Sublette County:
2000-2013



People move to an area for a variety of reasons ranging from economic to esthetic. Data from the Wyoming Housing Database Partnership for 2000 through 2013 (Figure 3) indicates that the most frequent primary reason given by new residents to Sublette County for moving to Wyoming were job related factors (56 percent). Job related factors included Job Transfers, New Jobs, Better Employment Opportunities, and Starting or Expanding a Business. The second most frequent reason was that friends or relatives resided in the area (19 percent). Slightly more than 7 percent of new residents surveyed indicated that a better quality of life was the primary reason for moving to the county with over 17 percent indicating some other reasons. This data is from the Housing Needs Assessment Survey conducted by the Wyoming Housing Database Partnership in cooperation with the Wyoming Department of Transportation. The survey results are based on a random sample of new residents who were exchanging their previous state's driver's licenses for Wyoming licenses.

Data Source: Wyoming Community Development Authority. 2014. Wyoming Housing Database Partnership, Wyoming Profile of Demographics, Economics, and Housing; Volume II: Technical Appendix, Semiannual Report, Appendix G: Housing Needs Assessment Survey Data, 2000-2013.

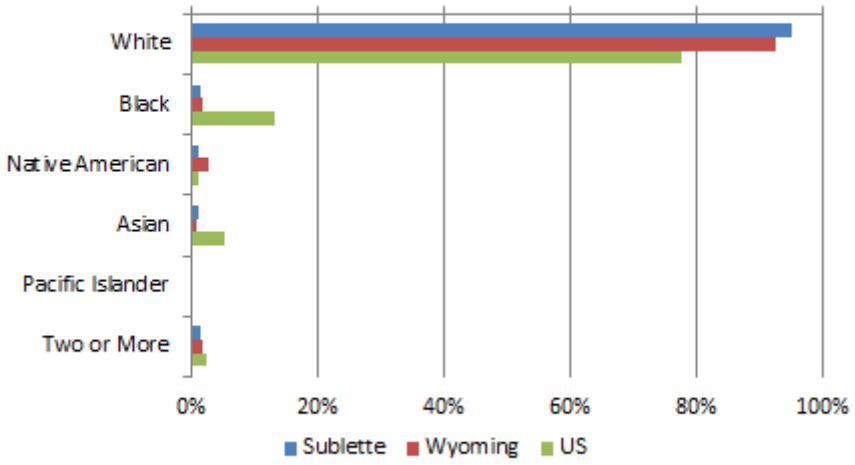
Figure 4.
Comparison of Population Age Distribution, 2013



In 2013 the largest age groups for Sublette County were adults 45 to 64 years old (29 percent) and adults 25 to 44 years old (27 percent). Combined, these two age groups represented 56 percent of the total county population (Figure 4). The next largest age group was youth 5 to 17 years old (18 percent), followed by retirement aged adults 65 and over (12 percent), adults 18 to 24 years old (7 percent), and youth under 5 years of age (6 percent). Compared to Wyoming and the U.S., the county had a larger proportion of its overall population in the adult age groups of 24 to 44 and 45 to 64, particularly the 45 to 64 age group. The county also had a larger proportion of its overall population in the younger 5 to 17 age group. Conversely, the county had a smaller proportion of its overall population in the young adult age groups of 18 to 24 and in the retirement age group 65 and over. The under 5 age group was slightly below the state percentage but similar to the U.S. percentage. Overall, the median age for the county in 2013 was slightly older at 38.9 years compared to 36.8 years for Wyoming and 37.6 years for the U.S.

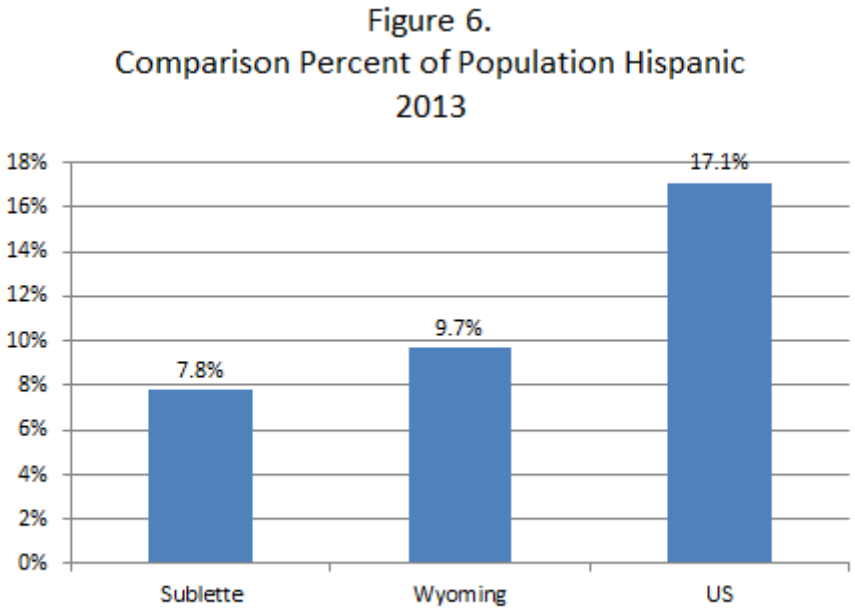
Data Source: Wyoming Department of Administration and Information. 2014. Economic Analysis Division, Annual Estimation of the Resident Population for Selected Age Groups by Sex for Wyoming: April 1, 2010 to July 1, 2014.

Figure 5.
Comparison of Population by Race, 2013



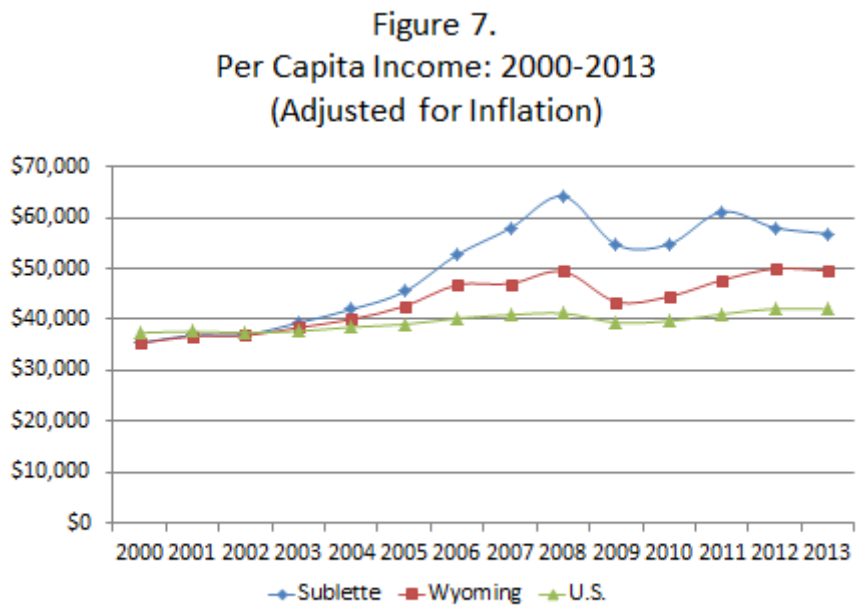
White is the predominate category of race for Sublette County, accounting for 95 percent of the total population (Figure 5). The various other races account for the remaining 5 percent with the two largest categories being Blacks (1.4 percent) and individuals of Two or More races (1.4 percent). Compared to Wyoming and the U.S., the percentage of the county population that is white slightly exceeds the percentage for Wyoming (93 percent) and substantially exceeds the percentage for the U.S. (78 percent). Compared to the U.S., the percentage of the county population that is Black (1.4 percent vs. 13 percent) or Asian (1.1 percent vs. 5 percent) is substantially smaller. Compared to Wyoming, the percentage of the county's population that is Native American is less than one-half but only slightly less than the percentage for the U.S (1.1 percent vs. 2.6 percent vs. 1.2 percent). The percentage of the county population that is individuals of Two or More races is smaller (1.4 percent) than either Wyoming (1.9 percent) or the U.S. (2.4 percent).

Data Source: Wyoming Department of Administration and Information. 2014. Economic Analysis Division, Table 6. Annual Estimate of the Resident Population by Race for the United States, Wyoming, and Counties: July 1, 2013.



The federal government defines the term "Hispanic" as a cultural identification rather than a specific race. Thus Hispanics can be individuals of any race that self-identify themselves as "Hispanic" or "Latino" based on heritage, nationality group, lineage, or country of birth of the person or person's parents or ancestors before their arrival in the United States. In Sublette County, as shown in Figure 6, the percentage of the population classifying themselves as Hispanic (8 percent) was only 46 percent of the U.S. percentage (17 percent) and 80 percent of the Wyoming percentage (10 percent).

Data Source: Wyoming Department of Administration and Information. 2014. Economic Analysis Division, Table 6. Annual Estimates of the Resident Population by Race and Hispanic Origin for the United States, Wyoming, and Counties: July 1, 2013.

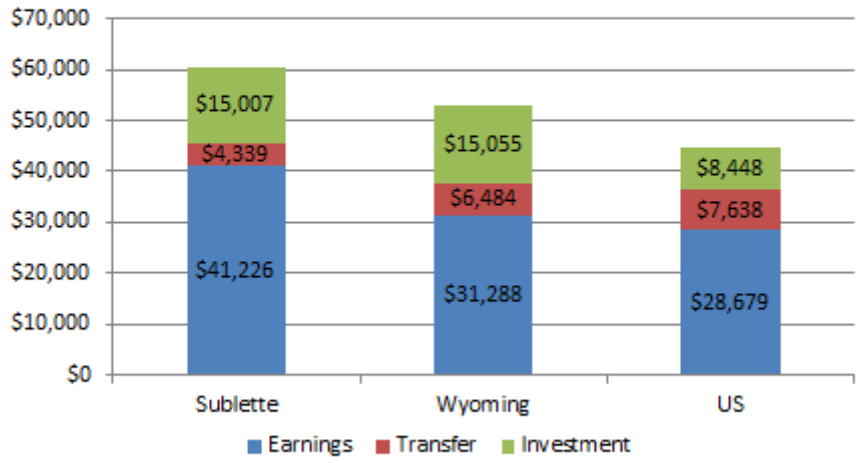


Per capita income is a general measure of the economic well-being of a county's population. In 2000, per capita income in Sublette County was $35,352 in 2009 dollars (Figure 7). The per capita income for the county in 2000 was slightly above Wyoming's ($35,327) and 5 percent below the U.S. ($37,351). From 2000 to 2008, after adjusting for inflation, per capita income for the county increased by 82 percent to $64,194. As a result of this rapid increase, in 2008 the county's per capita income was 30 percent higher than Wyoming's ($49,418) and 56 percent higher than the U.S. ($41,188). Since 2008 the county's per capita income has fluctuated between $55,000 and $61,000 (2009 dollars).

There are three sources of per capita income: 1) net labor earnings including wages, salaries, and proprietor (self-employed) income, 2) government transfer payments such as Social Security, Medicare, Medicaid, and various income assistance program payments, and 3) investment income representing property income in the form of dividends, interest, and rents. The vast majority of the growth in county per capita income between 2000 and 2013 was the result of growth of net labor earnings (91 percent) with 1 percent coming from higher transfer payments and 8 percent coming from higher investment income. As a result of the rapid growth in labor earnings, the percentage of total per capita income coming from labor earnings increased from 54 percent in 2000 to 68 percent in 2013.

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA30.

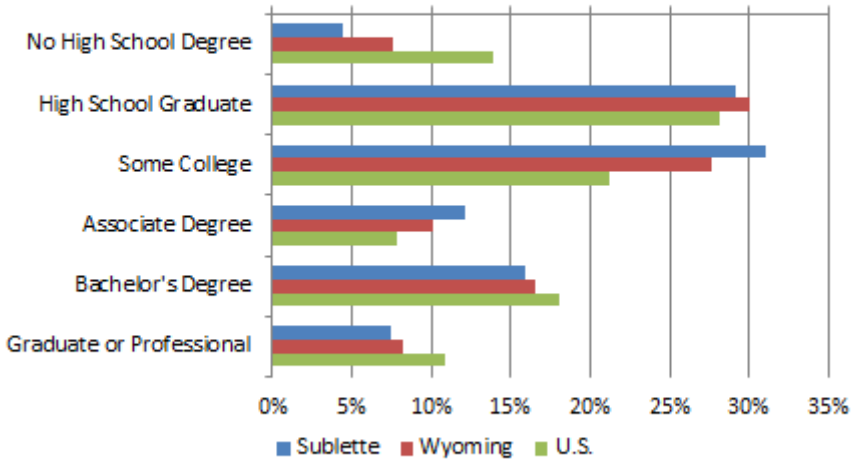
Figure 8.
Comparison of Per Capita Income by Source 2013



In 2013 per capita income for Sublette County was $60,572 in 2013 dollars (Figure 8). This level of income was 15 percent above per capita income for Wyoming ($52,827) and 35 percent above per capita income for the U.S. ($44,765). Most of the difference in per capita income between the county and Wyoming and the U.S. can be attributed to higher per capita labor earnings ($41,226 vs. $31,288 vs. $28,679). This difference is slightly offset by lower per capita transfer payments for the county ($4,339 vs. $6,484 vs. $7,638). The county's per capita investment income ($15,007) was comparable to Wyoming's ($15,055) but 1.8 times the U.S. ($8,448). In addition to higher per capita income, the county's 2013 poverty rate (6.3 percent) was substantially below both Wyoming's (10.9 percent), and the U.S. (14.5 percent). The county's 2013 unemployment rate (3.6 percent) was also below both Wyoming's (4.6 percent) and the U.S. (7.4 percent). While the per capita income for the county was 15 percent above the state average, the Wyoming Economic Analysis Division estimates that the county's cost-of-living for the second quarter of 2013 was 10 percent above the state average. This suggests that, on average, the county's population was economically somewhat better-off than the rest of the state in 2013.

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA30.

Figure 9.
Level of Educational Attainment, 2009-2013
(Population 25 Years or Older)

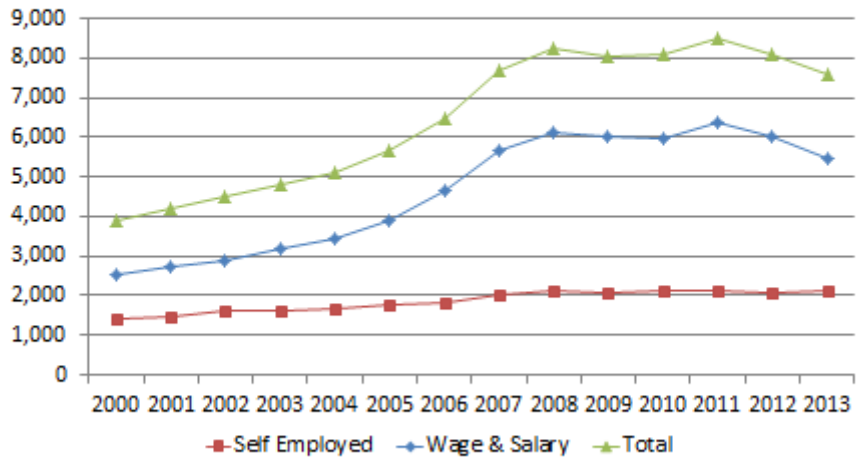


Overall, the Sublette County population was somewhat more educated in terms of a high school degree or higher (96 percent) than either Wyoming (92 percent) or the U.S. (86 percent) but somewhat less educated in terms of college or advanced degrees (23 percent vs. 25 percent vs. 29 percent). The percentage of the county population without a high school degree (4 percent) was substantially below both Wyoming (8 percent) and the U.S. (14 percent). The percentage of the county's population with a high school degree (29 percent) was slightly below Wyoming (30 percent) but slightly above the U.S. (28 percent). The percentage of the county's population with some college or and associate degree (12 percent) was above both Wyoming (10 percent) and the U.S. (8 percent). However, the percentage of the county's population with either a bachelors (16 percent) or graduate/professional degree (7 percent) was below both Wyoming (17 percent and 8 percent) and the U.S. (18 percent and 11 percent).

In terms of access to educational resources, Sublette County has two public school districts with a total of eight schools and a 2012 fall enrollment of 1,645. The graduation rate for the public school system was 88 percent compared to a state average of 78 percent. The public school system had 140 certified teachers, 25 certified staff, 24 administrators, and 121 classified staff. Total general fund expenditures for the county's public school system was $28.5 million in 2012 with an operating cost of $22,571 per average daily membership. This compares with an average operating cost of $17,156 per average daily membership for the state. There is no community or four-year college in the county.

Data Source: Wyoming Department of Administration and Information. 2014. Economic Analysis Division, Social, Economic, and Housing Characteristics; American Community Survey Profiles, 5-Year Data Profiles for Wyoming and Counties: 2009-2013.

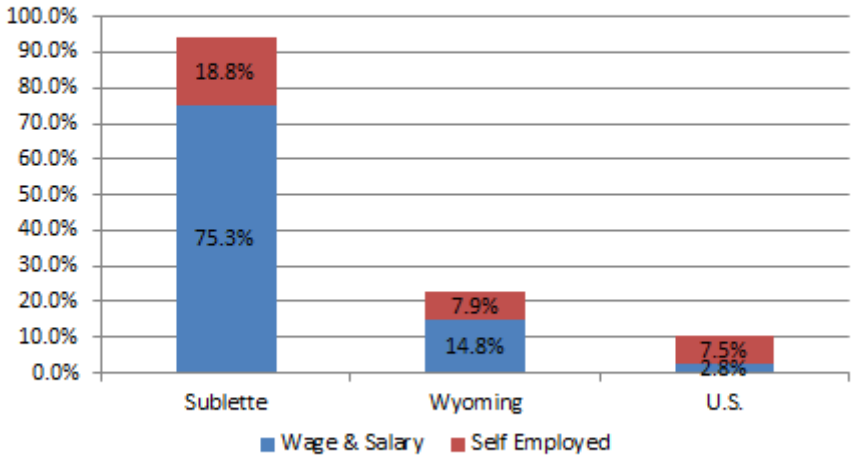
Figure 10.
Sublette County Employment: 2000-2013



Employment in Sublette County more than doubled between 2000 and 2011 increasing from 3,902 jobs in 2000 to 8,506 jobs with 94 percent of this increase occurring from 2000 through 2008 (Figure 10). After plateauing at around 8,000 jobs from 2009 through 2012, county employment declined by 11 percent from 8,090 jobs to 7,576 jobs from 2012 to 2013. Compared to Wyoming and the U.S., county employment increased by 94 percent from 2000 through 2013, while Wyoming's employment increased by 23 percent and the U.S. employment increased by 10 percent. Due to the small size of the local economy more than one-third of the total jobs in the county were held by self-employed individuals in 2000. This compared to 22 percent for Wyoming and 17 percent for the U.S. in 2000. Growth in wage and salary jobs accounted for 80 percent of the growth in total jobs in the county while growth in self-employed jobs accounted for the other 20 percent. As a result the percentage of total jobs in the county held by self-employed individuals decreased to 28 percent in 2013. While county employment increased by 111 percent between 2000 and 2008, the county population only increased by 59 percent suggesting that much of this job growth was filled by nonresidents during this time period.

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA25.

Figure 11.
Comparison of Employment Growth: 2000-2013



From 2000 to 2013, employment in Sublette County increased by 94 percent (Figure 11). This increase was roughly four times the employment increase for Wyoming (23 percent) and more than nine times the employment increase for the U.S. (10 percent) during the same time period. The main reason for the difference in overall employment growth was the rapid growth rate for wage and salary jobs in the county. The increase in county wage and salary employment (75 percent) was five times the increase for Wyoming (15 percent) and nearly 27 times the anemic growth rate for the U.S (3 percent). Although substantially lower than the increase in wage and salary employment, the increase in county self-employed employment (19 percent) was also significantly higher than Wyoming's (8 percent) or the U.S. (7 percent).

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA25.

Figure 12.
Sublett County Employment by Sector: 2013

Sector	Jobs	Percent	LQ
Mining	1,571	20.7%	23.52
Construction	988	13.0%	2.57
Local Government	846	11.2%	1.46
Retail Trade	509	6.7%	0.67
Agriculture	443	5.8%	4.05
Accommodations & Food Service	432	5.7%	0.79
Real Estate	405	5.3%	1.22
Transportation & Warehousing	366	4.8%	1.47
Professional Services	*354*	4.7%	0.68
Other Services	285	3.8%	0.65
Management Services	*265*	3.5%	0.47
Health Care & Social Assistance	*225*	3.0%	0.26
Finance & Insurance	165	2.2%	0.40
Arts, Entertainment, & Recreation	128	1.7%	0.75
Federal - Civilian	127	1.7%	1.08
Forestry, Fishing, & Ag Support	118	1.6%	3.14
State Government	88	1.2%	0.40
Manufacturing	64	0.8%	0.12
Military	51	0.7%	0.60
Wholesale Trade	51	0.7%	0.19
Information	37	0.5%	0.27
Educational Services	*30*	0.4%	0.17
Utilities	28	0.4%	1.17
Total	7,576	100.0%	

In 2013 Mining was largest employer in the Sublette County economy accounting for 21 percent of total employment (Figure 12). Following Mining was Construction and Local Government, both with more than 10 percent of total county employment. Local government includes school districts which are often one of the largest employers in many rural communities. Following Construction and Local Government were Retail Trade, Agriculture, Accommodations and Food Service, and Real Estate, all of whom had more than 5 percent of total county employment and Transportation & Warehousing and Professional Services, both with nearly 5 percent of total county employment. Combined, these nine sectors represent 78 percent of the total employment in the county. The three largest employment sectors in the county's economy, Mining, Construction, and Local Government represent 45 percent of the total employment in the county. This compares to 30 percent for Wyoming's top three employment sectors and 29 percent for the U.S. top three employment sectors and illustrates the high concentration of employment in a few sectors of the county's economy.

The location quotients (LQ) in the fourth column of Figure 12 were used to identify Defining Industries in Sublette County. A location quotient is the ratio of an industry's share of total employment in the region relative to the industry's share of total employment at the national level. A large location quotient is an indication of specialization within the county's economy. Defining Industries are important because they play a significant role in a region's growth over time. The Federal Reserve Bank of Kansas City considers Defining Industries as those with a locational quotient of at least 1.25 and those that account for at least 0.2 percent of total employment in the region. On this basis Sublette County has five Defining Industries: Mining (23.52), Agriculture (4.05), Forestry, Fishing, & Ag Support (3.14), Construction (2.57), Transportation & Warehousing (1.47), and Local Government (1.46). Real Estate was also close to the definition of a Defining Industry (1.22).

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA25.

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Figure 13.
Change in Sublette County Employment by Sector: 2001-2011

Sector	2001	2011	Change 2001-2011	Percent of Change	Percent Change
Mining	434	2,153	1,719	40.1%	396.1%
Construction	472	1,011	539	12.6%	114.2%
Local Government	*487*	850	363	8.5%	74.5%
Transportation & Warehousing	83	410	327	7.6%	394.0%
Real Estate	162	400	238	5.6%	146.9%
Management Services	*119*	*307*	188	4.4%	158.0%
Professional Services	231	*375*	144	3.4%	62.3%
Retail Trade	433	568	135	3.1%	31.2%
Accommodations & Food Service	383	500	117	2.7%	30.5%
Other Services	205	308	103	2.4%	50.2%
Finance & Insurance	81	171	90	2.1%	111.1%
Health Care & Social Assistance	*151*	*240*	89	2.1%	58.9%
Arts, Entertainment, & Recreation	85	128	43	1.0%	50.6%
Forestry, Fishing, & Ag Support	80	121	41	1.0%	51.3%
Agriculture	409	446	37	0.9%	9.0%
Wholesale Trade	*24*	59	35	0.8%	145.8%
State Government	*70*	92	22	0.5%	31.4%
Federal - Civilian	105	127	22	0.5%	21.0%
Educational Services	*14*	*32*	18	0.4%	128.6%
Military	40	55	15	0.3%	37.5%
Utilities	*25*	32	7	0.2%	28.0%
Manufacturing	*76*	77	1	0.0%	1.3%
Information	50	44	-6	-0.1%	-12.0%
Total	4,219	8,506	4,287	100.0%	101.6%

Employment in Sublette County more than doubled from 2001 through the peak in 2011 (Figure 13). Much of this increase was driven by the rapid growth in mining employment which increased by nearly 5 times from 434 jobs in 2001 to 2,153 jobs in 2011. Despite its rapid growth, mining only accounted for 40 percent of the total growth in county employment between 2001 and 2011 with other sectors accounting for the remaining 60 percent. Out of the 23 sectors listed for the county economy, only the Information sector experienced a decline in employment during the time period. Sectors such as Construction (+13 percent), Local Government (+8 percent), Transportation & Warehousing (+8 percent), and Real Estate (6 percent) also accounted for significant portions of the growth in county employment. Combined with Mining, these sectors represented 74 percent of the total growth in employment between 2001 and 2011.

In terms of individual sector growth, the fastest growing sectors were Mining and Transportation & Warehousing where employment for both increased by nearly 5 times. Employment in Management

Services, Real Estate, Wholesale Trade, Educational Services, Construction, and Finance & Insurance also more than doubled between 2001 and 2011. The year 2001 was used to compare employment growth with 2011 rather than 2000 because the federal classifications for sectors changed in 2000 and as a result 2000 sector definitions are not consistent with 2013 sector definitions.

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA25.

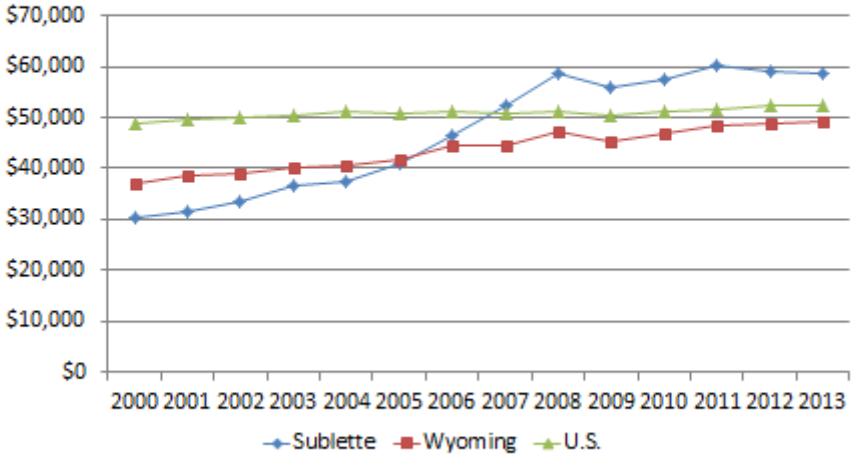
Figure 13a.
Change in Sublette County Employment by Sector: 2011-2013

Sector	2011	2013	Change 2011-2013	Percent of Change	Percent Change
Mining	2,153	1,571	-582	-62.6%	-27.0%
Accommodations & Food Service	500	432	-68	-7.3%	-13.6%
Retail Trade	568	509	-59	-6.3%	-10.4%
Transportation & Warehousing	410	366	-44	-4.7%	-10.7%
Management Services	*307*	*265*	-42	-4.5%	-13.7%
Construction	1,011	988	-23	-2.5%	-2.3%
Other Services	308	285	-23	-2.5%	-7.5%
Professional Services	*375*	*354*	-21	-2.3%	-5.6%
Health Care & Social Assistance	*240*	*225*	-15	-1.6%	-6.3%
Manufacturing	77	64	-13	-1.4%	-16.9%
Wholesale Trade	59	51	-8	-0.9%	-13.6%
Information	44	37	-7	-0.8%	-15.9%
Finance & Insurance	171	165	-6	-0.6%	-3.5%
Utilities	32	28	-4	-0.4%	-12.5%
Military	55	51	-4	-0.4%	-7.3%
State Government	92	88	-4	-0.4%	-4.3%
Local Government	850	846	-4	-0.4%	-0.5%
Agriculture	446	443	-3	-0.3%	-0.7%
Forestry, Fishing, & Ag Support	121	118	-3	-0.3%	-2.5%
Educational Services	*32*	*30*	-2	-0.2%	-6.3%
Arts, Entertainment, & Recreation	128	128	0	0.0%	0.0%
Federal - Civilian	127	127	0	0.0%	0.0%
Real Estate	400	405	5	0.5%	1.3%
Total	8,506	7,576	-930	-100.0%	-10.9%

After peaking in 2011, employment in Sublette County declined by 11 percent from 8,506 jobs in 2011 to 7,576 jobs in 2013 (Figure 13a). Again Mining was the major contributor to the change in employment representing 63 percent of the decline. Out of the 23 sectors listed for the county economy, only the Arts, Entertainment, & Recreation; Federal –Civilian, and Real Estate sectors did not experience a decline in employment during the time period. Sectors such as Accommodations & Food Service (-7 percent), Retail Trade (-6 percent), Transportation & Warehousing (-5 percent), and Management Services (-4 percent) also accounted for significant declines in total employment. Combined with Mining, these sectors accounted for 85 percent in the total decline in employment during the time period. In terms of individual sector declines, in addition to Mining (-27 percent), Manufacturing, Information, Management Services, Accommodations & Food Services, Wholesale Trade, Utilities, Transportation & Warehousing, and Retail Trade all experienced more than a 10 percent decline in employment.

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA25.

Figure 14.
Comparison of Average Earnings Per Job: 2000-2013
(Adjusted for Inflation)



In addition to the number of jobs, the labor earnings associated with these jobs is an important consideration. Overall average earnings per job are a general measure of the economic well-being of the local workforce. In 2000, the average earnings per job in Sublette County were $30,107 in 2009 dollars (Figure 14). The average earnings per job for the county in 2000 were 19 percent below Wyoming's ($37,046) and 38 percent less than the U.S. ($48,819). From 2000 to 2008, after adjusting for inflation, average earnings per job nearly doubled to $58,665. As a result of this rapid increase, in 2008 the average earnings per job for the county were 24 percent above Wyoming's ($47,257) and 15 percent higher than the U.S ($51,065). Since 2008 average earnings per job for the county have fluctuated around $60,000. In 2013 the county's average earnings per job ($58,696) were 19 percent above Wyoming's ($49,188) and 12 percent above the U.S. ($52,330). While the average earnings per job for the county were 19 percent above the state average, the Wyoming Economic Analysis Division estimates that the county's cost-of-living for the second quarter of 2013 was 10 percent above the state average. This suggests that, on average, the county's workforce was economically better-off than the rest of the state in 2013.

Data Source: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA30.

Figure 15.
Average Earnings Per Job for Sublette County: 2013

Sector	Jobs	Earnings ($1,000)	AEPJ
Utilities	28	$3,328	$118,857
Mining	1,571	$179,014	$113,949
Federal - Civilian	127	$9,755	$76,811
State Government	88	$6,731	$76,489
Transportation & Warehousing	366	$27,124	$74,109
Construction	988	$70,779	$71,639
Local Government	846	$56,699	$67,020
Information	37	$2,202	$59,514
Wholesale Trade	51	$2,794	$54,784
Professional Services	354	$16,958	$47,903
Health Care & Social Assistance	225	$10,072	$44,764
Other Services	285	$11,576	$40,618
Manufacturing	64	$2,460	$38,438
Retail Trade	509	$18,624	$36,589
Military	51	$1,648	$32,314
Management Services	265	$8,507	$32,101
Finance & Insurance	165	$5,198	$31,503
Real Estate	405	$12,183	$30,081
Accommodations & Food Service	432	$12,449	$28,817
Agriculture	443	$12,094	$27,300
Educational Services	30	$659	$21,955
Forestry, Fishing, & Ag Support	118	$1,768	$14,983
Arts, Entertainment, & Recreation	128	$1,276	$9,969
Total	7,576	$473,897	$62,552

Average earnings per job (AEPJ) can vary substantially by sector (Figure 15). In 2013 AEPJ in Sublette County ranged from over $100,000 for Utilities and Mining to less than $10,000 for Arts, Entertainment, and Recreation. Following Utilities and Mining, Federal – Civilian, State Government, Transportation & Warehousing, Construction, and Local Government all had AEPJ above the county average ($62,552). If the Information sector is included with the sectors above the county average, seven of the sectors in the county's economy had an AEPJ that was greater than the Wyoming ($52,420) or U.S. average ($55,768) in 2013. The seven sectors with AEPJ above the Wyoming average represent 53 percent of the total jobs in the county which helps explain the higher overall AEPJ for the county relative to Wyoming and the U.S.

Data Sources: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Tables CA25 & CA5.

Figure 16.
Total Labor Earnings for Sublette County: 2013

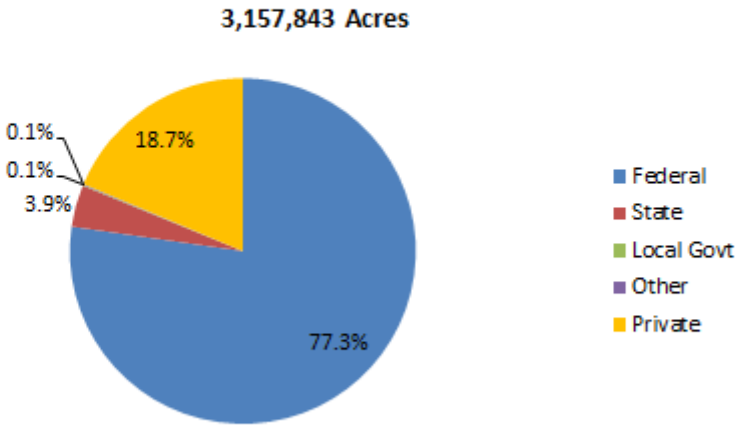
Sector	Jobs	AEPJ	Earnings ($1,000)	Percent
Mining	1,571	$113,949	$179,014	37.8%
Construction	988	$71,639	$70,779	14.9%
Local Government	846	$67,020	$56,699	12.0%
Transportation & Warehousing	366	$74,109	$27,124	5.7%
Retail Trade	509	$36,589	$18,624	3.9%
Professional Services	*354*	$47,903	$16,958	3.6%
Accommodations & Food Service	432	$28,817	$12,449	2.6%
Real Estate	405	$30,081	$12,183	2.6%
Agriculture	443	$27,300	$12,094	2.6%
Other Services	285	$40,618	$11,576	2.4%
Health Care & Social Assistance	*225*	$44,764	*$10,072*	2.1%
Federal - Civilian	127	$76,811	$9,755	2.1%
Management Services	*265*	$32,101	$8,507	1.8%
State Government	88	$76,489	$6,731	1.4%
Finance & Insurance	165	$31,503	$5,198	1.1%
Utilities	28	$118,857	$3,328	0.7%
Wholesale Trade	51	$54,784	$2,794	0.6%
Manufacturing	64	$38,438	$2,460	0.5%
Information	37	$59,514	$2,202	0.5%
Forestry, Fishing, & Ag Support	118	$14,983	$1,768	0.4%
Military	51	$32,314	$1,648	0.3%
Arts, Entertainment, & Recreation	128	$9,969	$1,276	0.3%
Educational Services	*30*	$21,955	*$659*	0.1%
Total	7,576	$62,552	$473,897	100.0%

The combination of the number of jobs and average earnings per job (AEPJ) determines the relative importance of individual sectors in the Sublette County economy to total labor earnings (Figure 16). Overall, employment in the county generated $474 million of labor earnings in 2013. Mining represents more than one-third of this total (38 percent). Following Mining were Construction (15 percent) and Local Government (12 percent). These three sectors represent 65 percent of the total labor earnings in the county. This compares to 40 percent for Wyoming's top three labor earnings sectors and 30 percent for the U.S. top three labor earnings sectors and illustrates the high concentration of labor earnings in a few sectors of the county's economy.

Data Sources: U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Tables CA25 & CA5.

LAND CHARACTERISTIC

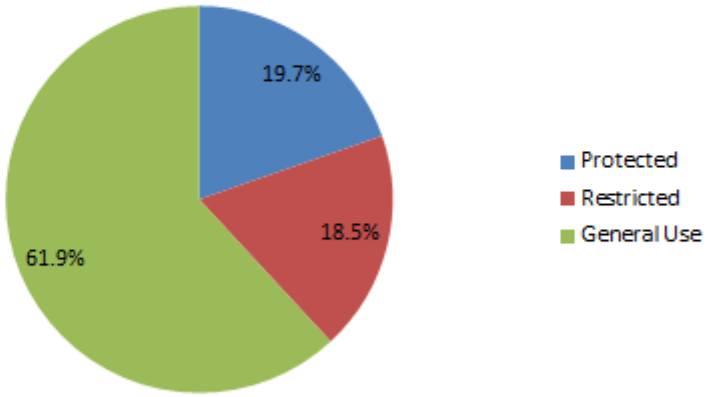
Figure 17.
Land Ownership in Sublette County



Sublette County is the sixth largest county in Wyoming containing 3.2 million acres (Figure 17). Nearly 80 percent of this land (2.4 million acres) is managed by the Federal Government. Of this amount, the BLM controls 1.3 million acres, with the Forest Service controlling 1.2 million acres with the Bureau of Reclamation controlling 4,480 acres. State lands account for 4 percent of the county's land area (123,779 acres). More than 114,000 acres of the state land area is state trust land with the other 9,425 acres held by the Game and Fish Department. Finally, local government and others land owners each account for 0.1 percent of the land in the county (4,954 acres combined). As a result of the large Federal Government presence in the county, less than 20 percent of the county's land area is privately owned (589,174 acres). Information from the Wyoming Department of Revenue on acres taxed as agricultural land indicates that agriculture is the dominant private land use in the county representing 92 percent of the total private land in the county (544,710 acres). Of this total 75 percent is range land (410,940 acres).

Data Source: Wyoming Department of Administration and Information. 2010. Economic Analysis Division, Equality State Almanac, Sublette County Landowners (page 172).

Figure 18.
Management Designation of Federal Lands in Sublette County



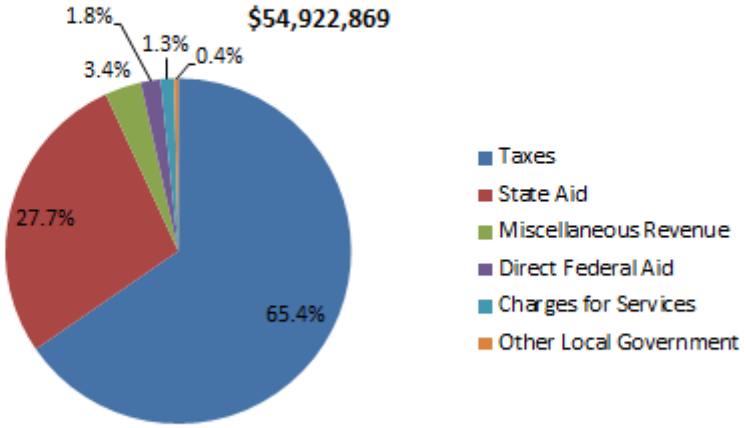
Federal lands are managed for different purposes under differing statutory authority. Three categories of designation are presented in Figure 18: 1) Protected, 2) Restricted, and 3) General Use. Protected areas include National Parks and Preserves (NPS), Wilderness (NPS, FWS, FS, BLM), National Conservation Areas (BLM), National Monuments (NPS, FS, BLM), National Recreation Areas (NPS, FS, BLM), National Wild and Scenic Rivers (NPS, FS, BLM), Water Fowl Protection Areas (FWS), Wildlife Management Areas (FWS), Research Natural Areas (FS, BLM), Areas of Critical Environmental Concern (BLM), and National Wildlife Refuges (FWS). Restricted areas include Wilderness Study Areas (NPS, FWS, FS, BLM) and Inventories Roadless Areas (FS). General Use areas include Public Domain Lands (BLM) and National Forests and Grasslands (FS). This data was obtained from the Economic Profile System – Human Dimension Toolkit (NPS = National Park Service, FWS = Fish and Wildlife, FS = Forest Service, and BLM = Bureau of Land Management).

In Sublette County 20 percent of federal lands are designated as protected (477,699 acres). This amount includes 430,457 acres of Forest Service land that is designated as national wilderness (37 percent of total Forest Service land in the county). In addition, 18 percent of federal lands in the county are designated as restricted (448,091 acres) with the remaining 62 percent designated for general use (1.5 million acres).

Data Source: Headwaters Economics. 2014. Economic Profile System-Human Dimension Toolkit, A Profile of Land Use (page 3).

County Government Finances

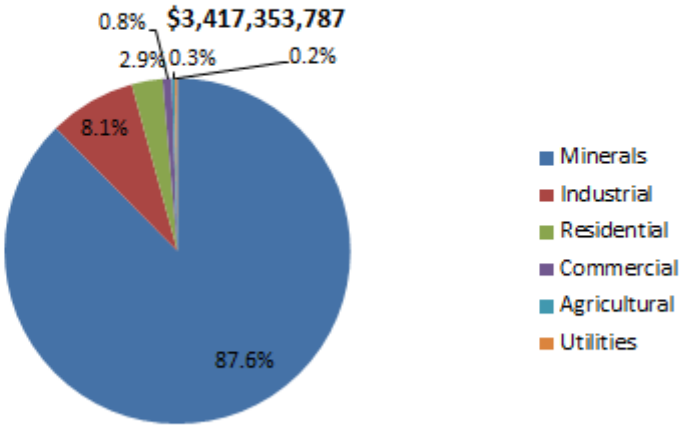
Figure 19.
Sublette County Government Revenue: FY2014



Wyoming Department of Audit information indicates that the total revenue for Sublette County Government was $54.9 million in FY2014 (Figure 19). Of this total, the largest source was Taxes which included property taxes and optional sales tax revenue (65 percent). Following Taxes was State Aid which included the county's share of the 4 percent sales and use tax revenue (28 percent). Combined these two sources represented 93 percent of the total county government revenue in FY2014. This compares to 76 percent for all Wyoming counties' top two revenue sources and illustrates the high concentration of county revenue from a few sources. Other sources of revenue included Miscellaneous Revenue, Direct Federal Aid (including PILT payments), Charges for Services, and Other Local Government Revenue. Combined these smaller revenue sources represented 7 percent of the total county government revenue in FY2014. Compared to all counties in Wyoming, Sublette County had a higher proportion of revenue from Taxes (65 percent vs. 50 percent). The county's proportion from State Aid was comparable to other counties in the state (28 percent vs. 27 percent) and the proportion from all other sources was lower than other counties in the state (7 percent vs. 24 percent).

Data Source: Wyoming Department of Audit. 2014. Cost of Maintaining County Government in Wyoming: For Fiscal Year July 1, 2013-June 30, 2014, As prepared from Reports submitted to the Department of Audit Public Funds.

Figure 20.
Sublette County Assessed Valuation: FY2014

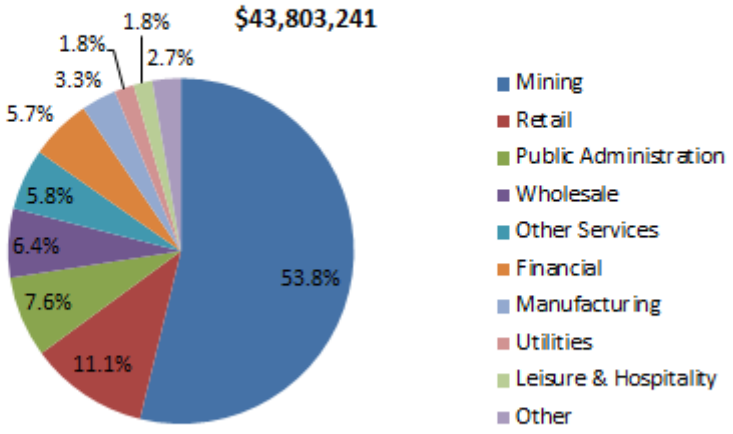


The total assessed valuation for Sublette County in FY2014 was $3.4 billion (Figure 20). Nearly 90 percent of the total valuation was from Mineral Production. Following minerals was Industrial Property (8 percent). Combined these two sources represented 96 percent of the county's total assessed valuation. This compares to 78 percent for Wyoming's top two sources of assessed valuation and illustrates the high concentration of county assessed valuation in a few sectors of the local economy. Other sources of assessed valuation included Residential Property, Commercial Property, Agricultural Land, and Utilities. Combined these sources represented 4 percent of the county's assessed valuation.

Compared to Wyoming, the county had a higher proportion of assessed valuation from Mineral Production (88 percent vs. 60 percent). The county's proportion of assessed valuation from Industrial Property was comparable to Wyoming's (8 percent vs. 9 percent). The county's proportion of assessed valuation from Residential Property was substantially lower than Wyoming's (3 percent vs. 18 percent). The county's assessed valuation for Commercial, Agricultural, and Utilities was also below Wyoming's (1 percent vs. 12 percent). In terms of Mineral Production, natural gas represented 83 percent of total county mineral assessed valuation, crude oil represented 17 percent of total county mineral assessed valuation, and sand & gravel represented less than 1 percent of total county mineral assessed valuation. In terms of Industrial Property, oil and gas extraction represented more than 99 percent of total county industrial property assessed valuation. Overall, oil and gas production and facilities represents 96 percent of the county's total assessed valuation. This leaves county government finances vulnerable to fluctuations in oil and gas prices.

Data Sources: Wyoming Department of Revenue. 2014. 2014 Annual Report, Locally Assessed Valuations for the Year 2014 (page 10) and State Assessed Valuations for the Year 2014 (page 12).

Figure 21.
Sublette County Sales & Use Tax Revenue: FY2014

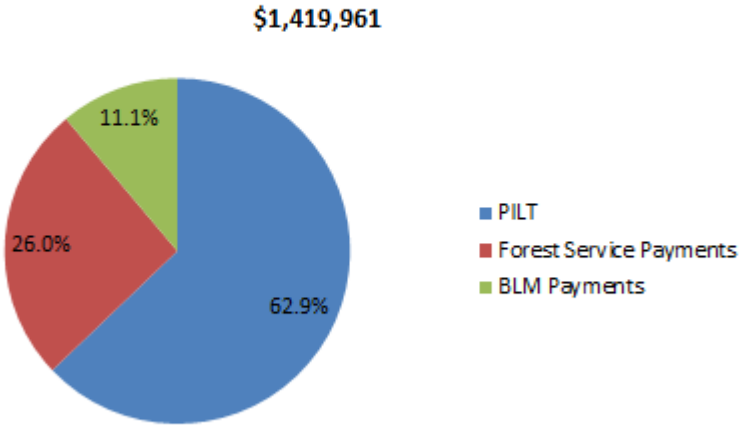


In FY2014 Sublette County's sales and use tax rate was 4 percent which generated $43.8 million in sales and use tax revenue (Figure 21). Of this total 69 percent ($30.2 million) was retained by state government and 31 percent ($13.6 million) was returned to local government in Sublette County. In FY2014 Sublette County government's share of the returned sales and use tax revenue was $9.4 million (69 percent) with the remaining $4.2 million (31 percent) going to municipal governments in the county.

Over one-half of the county's sales and use tax revenue came from Mining (54 percent). Following Mining was Retail (11 percent), Public Administration (8 percent), Wholesale (6 percent), Other Services (6 percent), and Financial (6 percent). Combined these six sectors contributed 90 percent of the county's total sales and use tax revenue. Public Administration represents sales and use tax revenue on motor vehicle purchases which are collected at the time of registration. Manufacturing, Utilities, Leisure & Hospitality, and Others represented a combined 10 percent of county sales and use tax revenue. For Retail Sales, the largest categories were Gasoline Stations (25 percent), Miscellaneous Retail (25 percent), Building Materials and Garden Supplies (18 percent), and Auto Dealers and Parts (13 percent). Combined these four sectors represented 80 percent of total sales and use tax collections for the Retail Sales sector. Compared to Wyoming, the county had a higher proportion of sales and use tax revenue from Mining (54 percent vs. 21 percent). On the other hand, the county's proportion of sales and use tax revenue from Retail Trade was much lower than Wyoming's (11 percent vs. 29 percent). The proportion of sales and use tax revenue from most of the other sectors was comparable between the county and Wyoming with the exception of Leisure & Hospitality (2 percent vs. 9 percent).

Data Sources: Wyoming Department of Administration and Information. 2014. Wyoming Sales, Use, and Lodging Tax Revenue Report, 39th Edition, Sublette County Sales Tax Collections (page 27) and Sublette County Use Tax Collections (page 60).

Figure 22.
Sublette County Federal Land Payment: FY2013



The Economic Profile System-Human Dimensions Toolkit indicates that federal land payments to local governments in Sublette County totaled $1.4 million in FY2013 (Figure 22). The largest source of federal land payments to the county was Payment in Lieu of Taxes (PILT) representing 63 percent of the total amount ($892,932). PILT payments are intended to compensate county governments for non-taxable federal lands within their borders. It is based on a maximum per-acre payment reduced by other federal revenue sharing payments and subject to a per capita population cap. The second largest source of federal payments to the county was Forest Service payments representing 26 percent of the total amount ($368,709). Forest Service payments can include 25% Revenue Sharing funds, Secure Rural School & Community Self Determination Act funds, and Bankhead-Jones Forest Grasslands funds. The third largest source of federal payments to the county was BLM Payments representing 11 percent of the total amount ($158,320). BLM payments represent revenue sharing funds including grazing fees through the Taylor Grazing Act. Of the $1.4 million in Federal land payments to the county in FY2013, 77 percent went to county government ($1,091,125), 11 percent went to local school districts ($156,702), 10 percent went to grazing districts ($142,637), and 2 percent went to Resource Advisory Councils ($29,497). In FY2013 Federal Land Payments to the county represented $0.58 per acre of Federal land.

Data Source: Headwaters Economics. 2014. Economic Profile System-Human Dimension Toolkit, A Profile of Federal Land Payments (page 1).

Figure 23.
Sublette County Government Costs, FY2014

County Costs	Amount	Percent	Per Capita
Construction	$18,150,218	35.8%	$1,807.61
County Administration	$5,574,060	11.0%	$555.13
Road and Bridge	$4,733,570	9.3%	$471.42
County Sheriff	$3,781,200	7.5%	$376.58
Courthouse	$3,017,849	6.0%	$300.55
Jail	$2,251,916	4.4%	$224.27
Boards	$2,061,363	4.1%	$205.29
Social Services	$1,927,207	3.8%	$191.93
Capital	$1,241,473	2.5%	$123.64
Fire Protection	$1,169,882	2.3%	$116.51
Other Expenses	$1,051,747	2.1%	$104.75
Landfill	$981,364	1.9%	$97.74
Parks & Recreation	$852,035	1.7%	$84.86
Natural Resources	$675,499	1.3%	$67.27
County Attorney	$651,503	1.3%	$64.88
Courty Courts	$574,686	1.1%	$57.23
County Assessor	$445,495	0.9%	$44.37
County Clerk	$338,576	0.7%	$33.72
County Treasurer	$285,308	0.6%	$28.41
Health (Not Hospital)	$262,848	0.5%	$26.18
County Planner & Surveyor	$209,643	0.4%	$20.88
Agriculture Department	$183,982	0.4%	$18.32
County Commissioners	$130,119	0.3%	$12.96
Civil Defense	$60,929	0.1%	$6.07
County Coroner	$55,489	0.1%	$5.53
Total	$50,667,961	100.0%	$5,046.11

The total cost of maintaining county government for Sublette County in FY2014 was $50.7 million (Figure 23). This represents a per capita cost of $5,046. The largest cost category was Construction representing 36 percent of the total. Following Construction was law enforcement (County Sheriff, Jail, County Attorney, and County Courts) representing 14 percent of the total, County Administration (11 percent), and Road and Bridge (9 percent). Combined these four cost categories represented 70 percent of the total county costs in FY2014.

Data Source: Wyoming Department of Audit. 2014. Cost of Maintaining County Government in Wyoming: For Fiscal Year July 1, 2013-June 30, 2014, As prepared from Reports submitted to the Department of Audit Public Funds

NATURAL RESOURCE BASED INDUSTRY PROFILES

Figure 24.
Sublette County Mining Industry

	Amount
Mineral Production (2013)	
Crude Oil (Barrels)	6,300,136
Natural Gas (MCF)	1,001,751,642
Sand & Gravel (Tons)	352,749
Tax Revenue (2014)	
Assessed Valuation	$3,271,258,526
Property Tax Revenue	$193,337,921
Employment (2013)	
Full & Part-time Jobs	1,571
Labor Earnings	$179,014,000
Average Earnings Per Job	$113,949

n 2013, the 5,614 producing oil and gas wells in Sublette County produced 6.3 million barrels of crude oil and 1.0 billion mcf of natural gas (Figure 24). This represented about 10 percent of total crude oil and 50 percent of total natural gas production in the state. The other major type of mineral production in the county was sand and gravel which produced 352,749 tons in 2013. This represented 4 percent of the total sand and gravel production in the state.

The mining industry in the county, including the associated industrial property, had an assessed valuation of $3.3 billion dollars in 2014 (2014 assessed valuation for mineral production is based on 2013 production). This valuation represented 96 percent of the total assessed valuation for the county. Based on a county levy of 59.1 mills the mineral industry generated $193.3 million in property tax revenue in 2014. Of this total, 75 percent went to K-12 schools ($145.7 million), 20 percent went to local county government ($39.2 million), and 4 percent went to county special districts ($8.4 million). Special districts in the county included: Weed and Pest, Cemetery, Improvement & Service, and Rural Health Care.

In 2013 the mining industry in the county supported 1,571 jobs with labor earnings of $179.0 million. This represented 21 percent of total employment and 38 percent of total labor earnings in the county. The percent of total employment in mining for the county was 24 times the national percentage (0.9%). The average earnings per job for mining in the county were $113,949 which was 1.8 times the county average ($62,552). The mining industry ranked 1st out of 23 sectors in the county's economy in terms of total employment and 1st out of 23 sectors in terms of total labor earnings.

Data Sources: Wyoming Oil and Gas Conservation Commission. 2014. OnLine Stats Book, 2013 County Report. Wyoming Department of Revenue. 2014. 2014 Annual Report, State Assessed Valuation:

Production Year 2013 (pages 44 & 45). U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Table CA25 & CA5.

Figure 25.
Sublette County Agricultural Industry

	Amount
Assets (2012)	
Total Land in Agriculture (Acres)	777,516
Cattle Inventory (Head)	69,588
Investment – Land, Buildings, Equipment	$1,087,026,000
Gross Revenue (2013)	$54,301,000
Employment (2013)	
Jobs	443
Labor Earnings	$12,094,000
Average Earnings Per Job	$27,300

In 2012 there were 398 agricultural operations in Sublette County. These operations managed 777,516 acres in the county (Figure 25). Included in this acreage is 92 percent of the private land in the county. Of the total land in agriculture, 82 percent is classified as grazing land, 16 percent as cropland, 2 percent as woodlands, and 1 percent as farmsteads and buildings. The average size of an agricultural operation in the county was 1,954 acres. The total cattle inventory in the county was 69,588 head. In 2013, the county ranked 13th out of 23 counties in Wyoming in terms of cattle and calves inventory and 14th out of 23 counties in terms of sheep and lambs inventory. It also ranked 11th in barley production, 22nd in alfalfa hay production, and 3rd in other hay production. In terms of investment by agricultural operators, the estimated total market value of lands, buildings, and equipment for agriculture in the county was $1.1 billion. This total included $1.0 billion in land and buildings and $41.5 million for equipment and machinery. The average investment per agricultural operation was $2.7 million.

The gross revenue for the agricultural industry in the county in 2013 was $54.3 million. Of this total 80 percent was from cash receipts for livestock, 11 percent was from cash receipts for crops, 7 percent was from miscellaneous sources, and 2 percent was from government payments. Total employment for agriculture in 2013 was 443 jobs with labor earnings of $12.1 million. This represented 6 percent of the jobs in the county and 3 percent of the labor earnings. The percent of total employment in agriculture for the county was 4 times the national percentage (1.4%). The average earnings per job for agriculture in the county were $27,300 which was 44 percent the county average ($62,552) and 56 percent of the non-mining county average ($49,106). Average earnings per job in agriculture tend to be low because most employment in agriculture is self-employment and includes a large number of small part-time and lifestyle operations that generate limited labor earnings. The agriculture industry ranked 5th out of 23 sectors in the county's economy in terms of total employment and 9th out of 23 sectors in terms of total labor earnings.

In addition to jobs and income, agriculture also provides important natural resource amenities such as open space. Open space offers landscapes, lifestyles, and wildlife habitat that can have value to both residents and visitors. Open space is particularly important because it determines the character of the landscapes surrounding a community. Out of economic necessity, most agricultural operations in the county cover large areas of land; as a result, agriculture can contribute substantially to maintaining open spaces on private lands in a region. As noted above, 92 percent of the private land in county is in agricultural use.

Due to the natural resource amenities associated with agricultural land there is public support for the retention of lands in agriculture. For example, a recent survey sponsored by the Wyoming Stock Growers Association, the Wyoming Stock Growers Land Trust, the Nature Conservancy, and the University of Wyoming found that nearly 80 percent of Wyoming residents felt that they personally benefit from the presence of farms and ranches in Wyoming. In addition, 76 percent of respondents were concerned with the loss of family farms and ranches in the State. Other issues of serious concerns to respondents included the availability of water for farming and ranching (71 percent), and natural areas and ranchland being split up by new development (66 percent).

There have been only a few efforts to quantify the values of agricultural land amenities to residents and visitors in the West. Studies in Colorado have found that ranchland provides important economic benefits to both residents and visitors. Magnan et al. (2005) found that the natural environment, ranchlands, and western historical preservation were the three most important contributors to local quality of life in Routt County. The analysis indicated that the value of ranchlands to current Routt County residents in terms of quality of life is likely to be $20-$30 million. Ellingson et al. (2006) found that the natural environment, ranch open space, western historical preservation, and recreational amenities are local assets that strongly add to the summer visitors' experience in Routt County. The analysis indicated that 50 percent of Routt County's summer tourists would reduce their expenditures and time spent in the area if existing ranchlands were converted to urban uses. This reduction would cost the county about $8 million per year in lost direct revenue. Oren and Seidl (2004) found that Gunnison's public open space and private working landscapes contribute to the quality of winter tourism in the area. Their analysis indicates that wholesale conversion of local ranchland to tourism infrastructure and second homes may reduce winter tourism by as much as 40 percent. The impact of such a change could reach $14 million dollars and 350 jobs per year. While these economic estimates are not necessarily directly transferable to Sublette County, they do suggest that there may be significant amenity values associated with ranchlands in the county.

As a result of development pressures from an expanding population base in the West, there are concerns about the retention of agricultural lands as working landscapes. The American Farmland Trust (2002) identified 658,560 acres of "prime" ranchland in Sublette County and estimated that 322,560 acres (49 percent) could be converted to residential development by 2020. They defined prime ranchland as private agricultural lands with desirable wildlife characteristics including 1) low rural development densities, 2) proximity to publicly owned lands, 3) year-round water availability, 4) mixed

grass and tree cover, and 5) a high variety of vegetation classes. The county ranked 13th among all counties in the Western U.S. in terms of prime ranchland at risk of development.

There is evidence that there has actually been a change in ownership of agricultural lands in Sublette County. Travis et al. (2003) estimated that 143,546 acres of ranchland in the county change ownership in just eleven years (1990-2001). Traditional ranchers bought only 18 percent of these acres of ranchland (25,410 acres) with Amenity Buyers purchasing 60 percent (85,835 acres), Investors 5 percent (7,712 acres), Developers 11 percent (15,079 acres), Part-Time Ranchers 3 percent (4,072 acres), Other Buyers 2 percent (2,497 acres), and Unknown Buyers 2 percent (2,941 acres). Although only 15,079 acres of ranchland was directly purchased by developers, the long-term resiliency of the other non-tradition rancher buyers is unknown. Also, since the analysis only considered ranch sales of 400 acres or more, the amount of ranchland going to development may be understated since such conversions often involve smaller parcels. The authors note that this trend may lead to instability in land tenure for ranchlands in the region and raise concerns with the retention of land in agriculture in the county.

Data Sources: USDA. 2014. National Agricultural Statistics Service, 2012 Census of Agriculture: Wyoming State and County Data, Volume 1, Geographic Series Part 50, AC-12-A-50, Table 1. County Summary Highlights: 2012 and Table 8. Farms, Land in Farms, Value of Land and Buildings, and Land Use: 2012 and 2007. U.S. Department of Commerce. 2014. Bureau of Economic Analysis, Regional Economic Accounts, Local Area Personal Income & Employment, Tables CA45, CA25, & CA5. Freedman, K.S. and N.M. Koranta. 2014. Public Opinion on Natural Resource Conservation in Wyoming: Wyoming Open Space Initiative, Ruckelshaus Institute, A Division of the Haub School of Environment and Natural Resources, UW Extension B-1258, October 2014. Magnan, N. A. Seidl, C.J. Mucklow, and D. Alpe. 2005. The Value of Ranchland to Routt County Residents, 1998-2005. Economic Development Report, Department of Agricultural and Resource Economics, Fort Collins, CO, EDR 05-02, October 2005. Ellingson, L., A. Seidl, and C.J. Mucklow. 2006. Tourists' Value of Routt County's Working Landscape, 2005. Economic Development Report, Department of Agricultural and Resource Economics, Fort Collins, CO, EDR 06-05, May 2006. Oren, A., A. Seidl. 2004. Winter Tourism and Land Development in Gunnison, Colorado. Economic Development Report, Department of Agricultural and Resource Economics, Fort Collins, CO, EDR 04-10, August 2004. American Farmland Trust. 2002. Strategic Ranchland in the Rocky Mountain West: Mapping the Threats to Prime Ranchland in Seven Western States, American Farmland Trust, Washington D.C. Travis, W.R., H. Gosnell, and J. H. Haggerty. 2003. Summary Report: Ranchland Dynamics in the Greater Yellowstone Ecosytem, A Report to Yellowstone Heritage, Center of the American West, University of Colorado at Boulder.

Figure 26.
Sublette County Travel Industry, 2013

	Amount
Visitor Spending	$42.8 Million
Employment	430 Jobs
Labor Income	$12.4 Million
Average Earnings Per Job	$28,837
Local Tax Revenue	$0.5 million

In 2013 Dean Runyan Associates estimates that visitors spent $42.8 million while in Sublette County (Figure 26). In terms of accommodations, 34 percent of this spending was by visitors staying in hotels/motels, 23 percent by visitors staying in vacation homes, 22 percent was by visitors staying in campgrounds, 11 percent was by visitors visiting friends and relatives, and 10 percent was by visitors not staying overnight. In terms of purchases, 22 percent was for food services, 19 percent was for retail items, 18 percent was for local transportation & gas, 17 percent was for art/entertainment/recreation, 15 percent for accommodations, and 9 percent went to food stores.

Dean Runyan estimated that the travel industry generated 430 jobs in the county in 2013. This represents 6 percent of total employment in the county. Nearly 47 percent of these jobs were in the accommodations and food service sector, 35 percent were in the arts/entertainment/recreation sector, and 17 percent were in the retail trade sector. The labor earnings associated with this employment was estimated to be $12.4 million. This represents 3 percent of the total labor earnings for the county. Average earnings per job for the travel industry in the county for 2013 were $28,837. Average earnings per job for the travel industry were 46 percent the county average ($62,552) and 59 percent of the non-mining county average ($49,106).

The tax revenue associated with the county's travel industry is estimated to be $1.5 million with $0.5 million (33 percent) going to local government and $1.0 million (67 percent) going to state government.

Data Source: Dean Runyan Associates. 2014. Wyoming Travel Impacts: 2000-2013, Prepared for Wyoming Office of Tourism, Cheyenne, Wyoming.

TABLES

Table 1. Population, 2000-2013

Year	Sublette	Wyoming	U.S.
2000	5,963	494,300	282,162,411
2001	6,026	494,657	284,968,955
2002	6,389	500,017	287,625,193
2003	6,687	503,453	290,107,933
2004	7,072	509,106	292,805,298
2005	7,515	514,157	295,516,599
2006	7,957	522,667	298,379,912
2007	8,800	534,876	301,231,207
2008	9,474	546,043	304,093,966
2009	10,134	559,851	306,771,529
2010	10,231	564,222	309,326,295
2011	10,115	567,329	311,582,564
2012	10,370	576,626	313,873,685
2013	10,041	582,658	316,128,839
Change	4,078	88,358	33,966,428
Percent	68.4%	17.9%	12.0%

Source	Sublette	Wyoming	U.S.
Natural Increase	776	42,359	21,964,712
Net Migration	3,302	45,999	12,001,716
Total Change	4,078	88,358	33,966,428

Source: WY Department of A & I - Economic Analysis Division

Table 2. Primary Reason for Moving to Sublette County, 2000-2013

Reason	Number	Percent
Job Related	767	56.1%
Better Quality of Life	98	7.2%
Friends or Relatives	265	19.4%
Other	235	17.2%
Total	1,366	100.0%

Source: Wyoming Community Development Authority

Table 3. Age of Population, 2013

Age	Sublette	WY	U.S.	Sublette Percent	WY Percent	U.S. Percent
Under 5	620	38,347	19,868,088	6.2%	6.6%	6.3%
5 to 17	1,768	99,332	53,717,784	17.6%	17.0%	17.0%
18 to 24	727	58,566	31,457,653	7.2%	10.1%	10.0%
25 to 44	2,746	151,055	83,297,277	27.3%	25.9%	26.3%
45 to 64	2,944	156,669	83,083,963	29.3%	26.9%	26.3%
65 and over	1,236	78,689	44,704,074	12.3%	13.5%	14.1%
Total	10,041	582,658	316,128,839	100.0%	100.0%	100.0%
Median Age	38.9	36.8	37.6			

Source: WY Department of A & I - Economic Analysis Division

Table 4. Race of Population, 2013

Race	Sublette	Wyoming	U.S.	Sublette Percent	Wyoming Percent	U.S. Percent
White	9,543	539,936	245,499,216	95.0%	92.7%	77.7%
Black	136	10,186	41,623,897	1.4%	1.7%	13.2%
Native American	108	15,258	3,910,028	1.1%	2.6%	1.2%
Asian	110	5,506	16,632,553	1.1%	0.9%	5.3%
Pacific Islander	4	630	722,417	0.0%	0.1%	0.2%
Two or More	140	11,142	7,740,728	1.4%	1.9%	2.4%
Total	10,041	582,658	316,128,839	100.0%	100.0%	100.0%

Identity	Sublette	Wyoming	U.S.	Sublette Percent	Wyoming Percent	U.S. Percent
Hispanic	781	56,363	54,071,370	7.8%	9.7%	17.1%
Non-Hispanic	9,260	526,295	262,057,469	92.2%	90.3%	82.9%
Total	10,041	582,658	316,128,839	100.0%	100.0%	100.0%

Source: WY Department of A & I - Economic Analysis Division

Table 5. Per Capita Income, 2013						
				Sublette	Wyoming	U.S.
Type	Sublette	Wyoming	U.S.	Percent	Percent	Percent
Net Earnings	$41,226	$31,288	$28,679	68.1%	59.2%	64.1%
Transfer Payments	$4,339	$6,484	$7,638	7.2%	12.3%	17.1%
Investment	$15,007	$15,055	$8,448	24.8%	28.5%	18.9%
Total	$60,572	$52,827	$44,765	100.0%	100.0%	100.0%
	Deflated	Deflated	Deflated	Deflated	Deflated	Deflated
	Sublette	Sublette	Sublette	Sublette	Wyoming	U.S.
Year	Earnings	Tranfer	Investment	Total	Total	Total
2000	$19,136	$3,817	$12,398	$35,352	$35,327	$37,351
2001	$21,204	$3,864	$11,792	$36,861	$36,653	$37,633
2002	$22,728	$3,847	$10,440	$37,015	$36,871	$37,388
2003	$24,833	$3,972	$10,534	$39,340	$38,418	$37,666
2004	$25,303	$3,896	$12,770	$41,969	$40,004	$38,482
2005	$28,323	$3,804	$13,342	$45,469	$42,594	$39,013
2006	$33,705	$3,603	$15,423	$52,730	$46,767	$40,211
2007	$39,893	$3,477	$14,539	$57,909	$47,023	$40,894
2008	$44,489	$3,461	$16,244	$64,194	$49,418	$41,188
2009	$38,190	$3,821	$12,679	$54,690	$43,488	$39,379
2010	$39,243	$3,873	$11,667	$54,783	$44,486	$39,664
2011	$44,248	$3,974	$12,935	$61,158	$47,733	$41,020
2012	$40,378	$3,847	$13,793	$58,018	$49,970	$42,094
2013	$38,684	$4,072	$14,082	$56,838	$49,569	$42,005
Change	$19,548	$254	$1,684	$21,486	$14,242	$4,654
Percent of Total	91.0%	1.2%	7.8%	100.0%	N.A.	N.A.
Percent Change	102.2%	6.7%	13.6%	60.8%	40.3%	12.5%
Source: Bureau of Economic Analysis						

Table 6. Educational Attainment Level, 2009-2013

Degree	Sublette	Wyoming	U.S.	Sublette Percent	Wyoming Percent	U.S. Percent
No High School Degree	309	28,616	28,773,258	4.4%	7.6%	13.9%
High School Graduate	2,048	112,959	58,167,521	29.2%	30.0%	28.2%
Some College	2,174	103,922	43,884,393	31.0%	27.6%	21.2%
Associate Degree	848	38,029	16,146,145	12.1%	10.1%	7.8%
Bachelor's Degree	1,115	62,127	37,260,334	15.9%	16.5%	18.0%
Graduate or Professional	519	30,875	22,356,200	7.4%	8.2%	10.8%
Total Population 25 Yrs or Older	7,012	376,529	206,587,852	100.0%	100.0%	100.0%
High School Degree or Higher	6,703	347,913	177,814,594	95.6%	92.4%	86.1%
Bachelor's Degree or Higher	1,634	93,003	59,616,534	23.3%	24.7%	28.9%

Source: WY Department of A & I - Economic Analysis Division

Table 7. Employment, 2000-2013

Year	Sublette W&S	Sublette SE	Sublette Total	Wyoming Total	U.S. Total
2000	2,511	1,391	3,902	322,283	165,370,800
2001	2,732	1,487	4,219	328,624	165,519,200
2002	2,905	1,606	4,511	333,038	165,159,100
2003	3,196	1,599	4,795	335,584	166,026,500
2004	3,429	1,674	5,103	343,080	169,036,700
2005	3,910	1,746	5,656	353,738	172,557,400
2006	4,668	1,824	6,492	368,896	176,123,600
2007	5,657	2,016	7,673	386,981	179,885,700
2008	6,119	2,132	8,251	397,281	179,645,900
2009	5,997	2,051	8,048	385,464	174,243,700
2010	5,994	2,124	8,118	381,611	173,044,700
2011	6,385	2,121	8,506	386,385	176,286,700
2012	6,007	2,083	8,090	392,201	178,846,000
2013	5,450	2,126	7,576	395,312	182,278,200
Percent Change 2000-2012	117.0%	52.8%	94.2%	22.7%	10.2%

Source: Bureau of Economic Analysis

Table 8. Sublette County Employment by Sector, 2013			
Sector	Jobs	Percent	LQ
Mining	1,571	20.7%	23.52
Construction	988	13.0%	2.57
Local Government	846	11.2%	1.46
Retail Trade	509	6.7%	0.67
Agriculture	443	5.8%	4.05
Accommodations & Food Service	432	5.7%	0.79
Real Estate	405	5.3%	1.22
Transportation & Warehousing	366	4.8%	1.47
Professional Services	354	4.7%	0.68
Other Services	285	3.8%	0.65
Management Services	265	3.5%	0.47
Health Care & Social Assistance	225	3.0%	0.26
Finance & Insurance	165	2.2%	0.40
Arts, Entertainment, & Recreation	128	1.7%	0.75
Federal - Civilian	127	1.7%	1.08
Forestry, Fishing, & Ag Support	118	1.6%	3.14
State Government	88	1.2%	0.40
Manufacturing	64	0.8%	0.12
Military	51	0.7%	0.60
Wholesale Trade	51	0.7%	0.19
Information	37	0.5%	0.27
Educational Services	30	0.4%	0.17
Utilities	28	0.4%	1.17
Total	7,576	100.0%	
Source: Bureau of Economic Analysis			

Table 9. Change in Sublette County Employment by Sector, 2001-2011

Sector	2001	2012	Change 2001-2012	Percent of Change	Percent Change
Mining	434	2,153	1,719	40.1%	396.1%
Construction	472	1,011	539	12.6%	114.2%
Local Government	487	850	363	8.5%	74.5%
Transportation & Warehousing	83	410	327	7.6%	394.0%
Real Estate	162	400	238	5.6%	146.9%
Management Services	119	307	188	4.4%	158.0%
Professional Services	231	375	144	3.4%	62.3%
Retail Trade	433	568	135	3.1%	31.2%
Accommodations & Food Service	383	500	117	2.7%	30.5%
Other Services	205	308	103	2.4%	50.2%
Finance & Insurance	81	171	90	2.1%	111.1%
Health Care & Social Assistance	151	240	89	2.1%	58.9%
Arts, Entertainment, & Recreation	85	128	43	1.0%	50.6%
Forestry, Fishing, & Ag Support	80	121	41	1.0%	51.3%
Agriculture	409	446	37	0.9%	9.0%
Wholesale Trade	24	59	35	0.8%	145.8%
State Government	70	92	22	0.5%	31.4%
Federal - Civilian	105	127	22	0.5%	21.0%
Educational Services	14	32	18	0.4%	128.6%
Military	40	55	15	0.3%	37.5%
Utilities	25	32	7	0.2%	28.0%
Manufacturing	76	77	1	0.0%	1.3%
Information	50	44	-6	-0.1%	-12.0%
Total	4,219	8,506	4,287	100.0%	101.6%

Source: Bureau of Economic Analysis

Table 9a. Change in Sublette County Employment by Sector, 2011-2013

Sector	2011	2013	Change 2011-2013	Percent of Change	Percent Change
Mining	2,153	1,571	-582	-62.6%	-27.0%
Accommodations & Food Service	500	432	-68	-7.3%	-13.6%
Retail Trade	568	509	-59	-6.3%	-10.4%
Transportation & Warehousing	410	366	-44	-4.7%	-10.7%
Management Services	307	265	-42	-4.5%	-13.7%
Other Services	308	285	-23	-2.5%	-7.5%
Construction	1,011	988	-23	-2.5%	-2.3%
Professional Services	375	354	-21	-2.3%	-5.6%
Health Care & Social Assistance	240	225	-15	-1.6%	-6.3%
Manufacturing	77	64	-13	-1.4%	-16.9%
Wholesale Trade	59	51	-8	-0.9%	-13.6%
Information	44	37	-7	-0.8%	-15.9%
Finance & Insurance	171	165	-6	-0.6%	-3.5%
Utilities	32	28	-4	-0.4%	-12.5%
Military	55	51	-4	-0.4%	-7.3%
State Government	92	88	-4	-0.4%	-4.3%
Local Government	850	846	-4	-0.4%	-0.5%
Forestry, Fishing, & Ag Support	121	118	-3	-0.3%	-2.5%
Agriculture	446	443	-3	-0.3%	-0.7%
Educational Services	32	30	-2	-0.2%	-6.3%
Arts, Entertainment, & Recreation	128	128	0	0.0%	0.0%
Federal - Civilian	127	127	0	0.0%	0.0%
Real Estate	400	405	5	0.5%	1.3%
Total	8,506	7,576	-930	-100.0%	-10.9%

Source: Bureau of Economic Analysis

Table 10. Average Earnings Per Job, 2000-2013			
	Deflated	Deflated	Deflated
Year	Sublette	Wyoming	U.S.
2000	$30,107	$37,046	$48,819
2001	$31,471	$38,461	$49,611
2002	$33,569	$38,938	$49,895
2003	$36,561	$40,030	$50,384
2004	$37,485	$40,669	$51,079
2005	$40,992	$41,586	$50,784
2006	$46,349	$44,465	$51,156
2007	$52,438	$44,385	$50,671
2008	$58,665	$47,257	$51,065
2009	$55,748	$45,118	$50,228
2010	$57,342	$46,691	$51,283
2011	$60,397	$48,220	$51,671
2012	$59,054	$48,897	$52,461
2013	$58,696	$49,188	$52,330
Percent Change	95.0%	32.8%	7.2%
Source: Bureau of Economic Analysis			

Table 10a. Average Earnings Per Job for Sublette County, 2013

Sector	Jobs	Earnings ($1,000)	AEPJ
Utilities	28	$3,328	$118,857
Mining	1,571	$179,014	$113,949
Federal - Civilian	127	$9,755	$76,811
State Government	88	$6,731	$76,489
Transportation & Warehousing	366	$27,124	$74,109
Construction	988	$70,779	$71,639
Local Government	846	$56,699	$67,020
Information	37	$2,202	$59,514
Wholesale Trade	51	$2,794	$54,784
Professional Services	354	$16,958	$47,903
Health Care & Social Assistance	225	$10,072	$44,764
Other Services	285	$11,576	$40,618
Manufacturing	64	$2,460	$38,438
Retail Trade	509	$18,624	$36,589
Military	51	$1,648	$32,314
Management Services	265	$8,507	$32,101
Finance & Insurance	165	$5,198	$31,503
Real Estate	405	$12,183	$30,081
Accommodations & Food Service	432	$12,449	$28,817
Agriculture	443	$12,094	$27,300
Educational Services	30	$659	$21,955
Forestry, Fishing, & Ag Support	118	$1,768	$14,983
Arts, Entertainment, & Recreation	128	$1,276	$9,969
Total	7,576	$473,897	$62,552

Source: Bureau of Economic Analysis

Table 11. Total Labor Earnings for Sublette County, 2013

Sector	Jobs	AEPJ	Earnings ($1,000)	Percent
Mining	1,571	$113,949	$179,014	37.8%
Construction	988	$71,639	$70,779	14.9%
Local Government	846	$67,020	$56,699	12.0%
Transportation & Warehousing	366	$74,109	$27,124	5.7%
Retail Trade	509	$36,589	$18,624	3.9%
Professional Services	354	$47,903	$16,958	3.6%
Accommodations & Food Service	432	$28,817	$12,449	2.6%
Real Estate	405	$30,081	$12,183	2.6%
Agriculture	443	$27,300	$12,094	2.6%
Other Services	285	$40,618	$11,576	2.4%
Health Care & Social Assistance	225	$44,764	$10,072	2.1%
Federal - Civilian	127	$76,811	$9,755	2.1%
Management Services	265	$32,101	$8,507	1.8%
State Government	88	$76,489	$6,731	1.4%
Finance & Insurance	165	$31,503	$5,198	1.1%
Utilities	28	$118,857	$3,328	0.7%
Wholesale Trade	51	$54,784	$2,794	0.6%
Manufacturing	64	$38,438	$2,460	0.5%
Information	37	$59,514	$2,202	0.5%
Forestry, Fishing, & Ag Support	118	$14,983	$1,768	0.4%
Military	51	$32,314	$1,648	0.3%
Arts, Entertainment, & Recreation	128	$9,969	$1,276	0.3%
Educational Services	30	$21,955	$659	0.1%
Total	7,576	$62,552	$473,897	100.0%

Source: Bureau of Economic Analysis

Table 12. Land Ownership in Sublette County

Owner	Acres	Percent of Total	Percent of Type
BLM	1,266,048	40.1%	51.9%
Forest Service	1,169,408	37.0%	47.9%
Bureau of Reclamation	4,480	0.1%	0.2%
Total Federal	2,439,936	77.3%	100.0%
State Trust Lands	114,354	3.6%	92.4%
Recreation Commission	0	0.0%	0.0%
Fish & Game	9,425	0.3%	7.6%
Total State	123,779	3.9%	100.0%
County	933	0.0%	45.9%
Cities	868	0.0%	42.7%
School Dist. & Colleges	230	0.0%	11.3%
Total Local Government	2,031	0.1%	100.0%
Other Lands	2,923	0.1%	
Total Private	589,174	18.7%	
Total Land Area	3,157,843	100.0%	

Source: Equality State Almanac

Table 13. Acres of Taxable Agricultural Land in Sublette County

Classification	Acres	Percent
Irrigated Lands	133,770	24.6%
Dry Farm Land	0	0.0%
Range Land	410,940	75.4%
Total Taxable Ag Land	544,710	100.0%

Source: Wyoming Department of Revenue 2013 Annual Report

Table 14. Management Designations of Federal Land in Sublette County

Type	Acres	Percent
Protected	477,699	19.7%
Restricted	448,091	18.5%
General Use	1,502,877	61.9%
Total Federal Lands	2,428,667	100.0%

Source: Economic Profile System - Human Dimensions Toolkit

Table 15. Sublette County Government Revenue, FY2014

Source	Amount	Percent
Taxes	$35,919,149	65.4%
State Aid	$15,217,656	27.7%
Miscellaneous Revenue	$1,866,159	3.4%
Direct Federal Aid	$1,013,659	1.8%
Charges for Services	$695,314	1.3%
Other Local Government	$210,932	0.4%
Total	$54,922,869	100.0%

Source: Wyoming Department of Audit

Table 16. Sublette County Assessed Valuation, FY2014

Property Type	Amount	Percent
Minerals	$2,993,256,520	87.6%
Industrial Property	$278,383,175	8.1%
Residential Property	$98,983,734	2.9%
Comercial Property	$28,574,573	0.8%
Agricultural Lands	$10,318,157	0.3%
Utilities	$7,837,628	0.2%
Total Valuation	$3,417,353,787	100.0%
Crude Oil	$499,615,798	16.7%
Natural Gas	$2,492,574,464	83.3%
Sand & Gravel	$1,066,258	0.0%
Total Minerals	$2,993,256,520	100.0%

Source: Wyoming Department of Revenue

Table 17. Sublette County Sales & Use Tax Revenue, FY2014

Industry	Sales Tax	Use Tax	Sales & Use	Percent
Mining	$21,740,955	$1,832,901	$23,573,856	53.8%
Retail	$4,715,348	$154,242	$4,869,590	11.1%
Public Administration	$886,528	$2,436,300	$3,322,828	7.6%
Wholesale	$2,776,664	$48,626	$2,825,290	6.4%
Other Services	$2,518,055	$2,250	$2,520,305	5.8%
Financial	$2,489,965	$24,932	$2,514,897	5.7%
Manufacturing	$1,318,839	$116,412	$1,435,251	3.3%
Utilities	$784,117	$20,432	$804,549	1.8%
Leisure & Hospitality	$769,902	$1,984	$771,886	1.8%
Construction	$544,638	$61,647	$606,285	1.4%
Information	$257,452	$9,643	$267,095	0.6%
Business Services	$173,165	$3,880	$177,045	0.4%
Transportation	$106,560	$4,301	$110,861	0.3%
Agr & Other	$2,180	$0	$2,180	0.0%
Eduction & Health	$1,118	$205	$1,323	0.0%
Total	$39,085,486	$4,717,755	$43,803,241	100.0%

Source: Wyoming Economic Analysis Division

Table 18. Sublette County Federal Land Payments, FY2013

Source	Amount	Percent
PILT	$892,932	62.9%
Forest Service Payments	$368,709	26.0%
BLM Payments	$158,320	11.1%
Total	$1,419,961	100.0%

Distributions	Amount	Percent
County Government	$1,091,125	76.8%
Local School Districts	$156,702	11.0%
Grazing Districts	$142,637	10.0%
Resource Advisory Councils	$29,497	2.1%
Total	$1,419,961	100.0%

Source: Economic Profile System - Human Dimension Toolkit

Table 19. Sublette County Government Costs, FY2014			
County Costs	Amount	Percent	Per Capita
Construction	$18,150,218	35.8%	$1,807.61
County Administration	$5,574,060	11.0%	$555.13
Road and Bridge	$4,733,570	9.3%	$471.42
County Sheriff	$3,781,200	7.5%	$376.58
Courthouse	$3,017,849	6.0%	$300.55
Jail	$2,251,916	4.4%	$224.27
Boards	$2,061,363	4.1%	$205.29
Social Services	$1,927,207	3.8%	$191.93
Capital	$1,241,473	2.5%	$123.64
Fire Protection	$1,169,882	2.3%	$116.51
Other Expenses	$1,051,747	2.1%	$104.75
Landfill	$981,364	1.9%	$97.74
Parks & Recreation	$852,035	1.7%	$84.86
Natural Resources	$675,499	1.3%	$67.27
County Attorney	$651,503	1.3%	$64.88
Courty Courts	$574,686	1.1%	$57.23
County Assessor	$445,495	0.9%	$44.37
County Clerk	$338,576	0.7%	$33.72
County Treasurer	$285,308	0.6%	$28.41
Health (Not Hospital)	$262,848	0.5%	$26.18
County Planner & Surveyor	$209,643	0.4%	$20.88
Agriculture Department	$183,982	0.4%	$18.32
County Commissioners	$130,119	0.3%	$12.96
Civil Defense	$60,929	0.1%	$6.07
County Coroner	$55,489	0.1%	$5.53
Total	$50,667,961	100.0%	$5,046.11
Source: Wyoming Department of Audit			

Table 20. Sublette County Mining Industry

Mineral Production (2013)

Type	Production	Sales	State Production
Oil (Barrels)	6,300,136	6,267,431	9.9%
Gas (MCF)	1,001,751,642	909,926,273	49.0%
Sand & Gravel (Tons)	352,749	N.A.	4.1%

Source: Wyoming Oil & Gas Conservation Commission & State Inspector of Mines of Wyoming

Tax Revenue (2014)

Type	Assessed Valuation	Percent	County Revenue (12.0 Mills)	K-12 Revenue (44.5 Mills)	Special Districts (2.6 Mills)	Total Revenue (59.1 Mills)
Crude Oil	$499,615,798	15.3%	$5,995,390	$22,252,388	$1,280,515	$29,528,293
Natural Gas	$2,492,574,464	76.2%	$29,910,894	$111,016,774	$6,388,468	$147,316,136
Sand & Gravel	$1,066,258	0.0%	$12,795	$47,490	$2,733	$63,018
Oil & Gas Extraction	$278,002,006	8.5%	$3,336,024	$12,381,931	$712,519	$16,430,475
Total Minerals	$3,271,258,526	100.0%	$39,255,102	$145,698,583	$8,384,236	$193,337,921
Percent			20.3%	75.4%	4.3%	100.0%

Source: Wyoming Department of Revenue

Employment (2012)

	Mining	Total	Percent Mining
Jobs	1,571	7,576	20.7%
Labor Income	$179,014,000	$473,897,000	37.8%
Average Earnings/Job	$113,949	$62,552	182.2%

Source: Bureau of Economic Analysis

Table 21. Sublette County Agrcultural Industry

Physical Characteristics

Land Use	Acres	Percent	Number of Farms	Average Size (Acres)
Total Cropland	122,565	15.8%		
Total Woodland	12,193	1.6%		
Grazing Land	634,088	81.6%		
Farmstead	8,670	1.1%		
Total Land	777,516	100.0%	398	1,954

	Cattle & Calves	Sheep & Lambs	Total Head
Inventory	69,588	N.A.	69,588

	Land & Buildings	Machinery & Equipment	Combined Investment
Market Value	$1,045,487,000	$41,539,000	$1,087,026,000
Average Per Farm	$2,626,852	$104,369	$2,731,221

Source: 2012 Census of Agriculture

Gross Revenue

Type	Amount	Percent
Cash Receipts - Livestock	$43,520,000	80.1%
Cash Receipts - Crops	$5,992,000	11.0%
Government Payments	$902,000	1.7%
Miscellaneous Income	$3,887,000	7.2%
Total Gross Revenue	$54,301,000	100.0%

Source: Bureau of Economic Analysis

Employment

	Agriculture	County Total	Percent Agriculture
Jobs	443	7,576	5.8%
Labor Income	$12,094,000	$473,897,000	2.6%
Average Earnings/Job	$27,300	$62,552	43.6%

Source: Bureau of Economic Analysis

Table 23. Sublette County Travel Industry 2013

Visitor Spending

Accommodation	Amount (Million$)	Percent
Hotel, Motel	$14.7	34.3%
Campground	$9.3	21.7%
Private Home	$4.6	10.7%
Vacation Home	$10.0	23.4%
Day Travel	$4.2	9.8%
Total	$42.8	100.0%

Purchases	Amount (Million$)	Percent
Accommodations	$6.6	15.4%
Food Service	$9.5	22.2%
Food Stores	$3.8	8.9%
Local Tran. & Gas	$7.8	18.2%
Art, Ent. & Rec	$7.1	16.6%
Retail Sales	$8.0	18.7%
Total	$42.8	100.0%

Employment

Sector	Jobs	Percent	Earnings (Million$)	Percent	Ave. Earn Per Job
Accom & Food Service	200	46.5%	$5.8	46.8%	$29,000
Arts, Ent. & Rec.	130	30.2%	$4.3	34.7%	$33,077
Retail	100	23.3%	$2.1	16.9%	$21,000
Ground Tran	0	0.0%	$0.1	0.8%	N.A.
Other Travel	0	0.0%	$0.1	0.8%	N.A.
Total	430	100.0%	$12.4	100.0%	$28,837

Tax Revenue

	Amount (Million$)	Percent
Local Tax Revenue	$0.5	33.3%
State Tax Revenue	$1.0	66.7%
Total Revenue	$1.5	100.0%

Source: Dean Runyan Associates