

Community Builders, Inc. (CBI) is a Wyoming-based consulting firm that assists with development of businesses, organizations, and communities. Each month, *CBI Focus* newsletters provide current economic data and analytical graphics, each newsletter focused on one of Wyoming's 23 counties (plus one covering the entire state). All *CBI Focus* newsletters, source notes, and data explanations are online at www.consultCBI.com. CBI principal consultants are Bobbe Fitzhugh and Joe Coyne. Contact CBI at 873 Esterbrook Road, Douglas, WY 82633; email Joe@consultCBI.com; or call (307) 359-1640. © 2011 Community Builders, Inc.



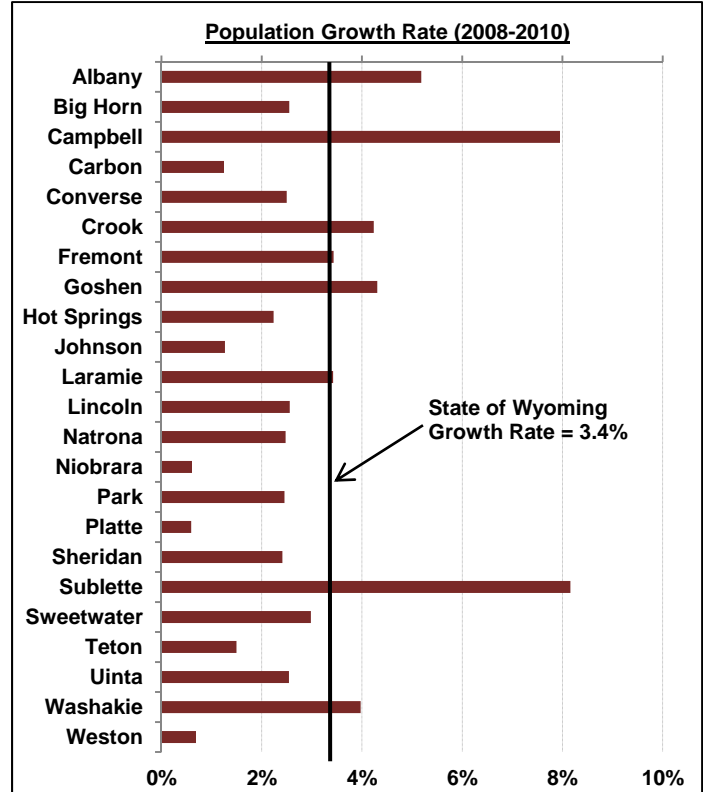
Population Estimates

Now that the 2010 Census is complete, the U.S. Census Bureau is preparing population estimates for each county in Wyoming. Since the official census is taken only once every 10 years, annual estimates are helpful to track population changes for shorter periods of time. After the 2010 census was completed, the Census Bureau reviewed and revised previous estimates for 2000 to 2009. From 2008 to 2010, every county in Wyoming grew. The fastest growing county (Sublette) grew by nearly 8.2% during that time, while the slowest growing county (Platte) grew by less than 0.6%. As a whole, the State of Wyoming grew by almost 3.4% from 2008 to 2010.

The chart on the right demonstrates the wide disparity among growth rates in Wyoming from 2008 to 2010, and compares every county's growth rate to the State of Wyoming (shown by the vertical dark black line in chart). Eight counties' growth exceeded the state average. A group of three eastern plains counties (Niobrara, Platte, and Weston) seems to have grown especially slowly, averaging just 0.6% for 2008 to 2010.

Interestingly, some of Wyoming's smallest counties have produced the highest rates of growth from 2008 to 2010. Four of the fastest growing counties (Sublette, Goshen, Crook, and Washakie Counties) are in the bottom half of the county ranking for total population. In contrast, one of the largest counties in Wyoming (Natrona) lagged behind the state growth rate.

Even though it seems relatively high, the growth rate in Sublette County has actually slowed down in the last three years. Oil and gas development has driven phenomenal growth there since 2001-2002, when it began booming. Sublette County growth peaked in 2006-2007 (10.6% growth that year), and the county led growth statewide by increasing its population by an astounding 71.8% from 2000 to 2010.



County	2010 Size Rank	2008-10 Growth	Growth Rank
Albany	6	5.2%	3
Big Horn	15	2.5%	11
Campbell	3	7.9%	2
Carbon	12	1.2%	20
Converse	13	2.5%	13
Crook	21	4.2%	5
Fremont	5	3.4%	7
Goshen	14	4.3%	4
Hot Springs	22	2.2%	17
Johnson	18	1.3%	19
Laramie	1	3.4%	8
Lincoln	11	2.6%	10
Natrona	2	2.5%	14
Niobrara	23	0.6%	22
Park	8	2.5%	15
Platte	17	0.6%	23
Sheridan	7	2.4%	16
Sublette	16	8.2%	1
Sweetwater	4	3.0%	9
Teton	9	1.5%	18
Uinta	10	2.5%	12
Washakie	19	4.0%	6
Weston	20	0.7%	21
Wyoming	NA	3.4%	NA

The table to the left shows how each county in Wyoming currently stacks up against the others. Each county is first ranked according to its relative population size as of 2010. The other two columns identify each county's growth rate from 2008 to 2010, and then indicate how that growth rate compares to other counties (Growth Rank).

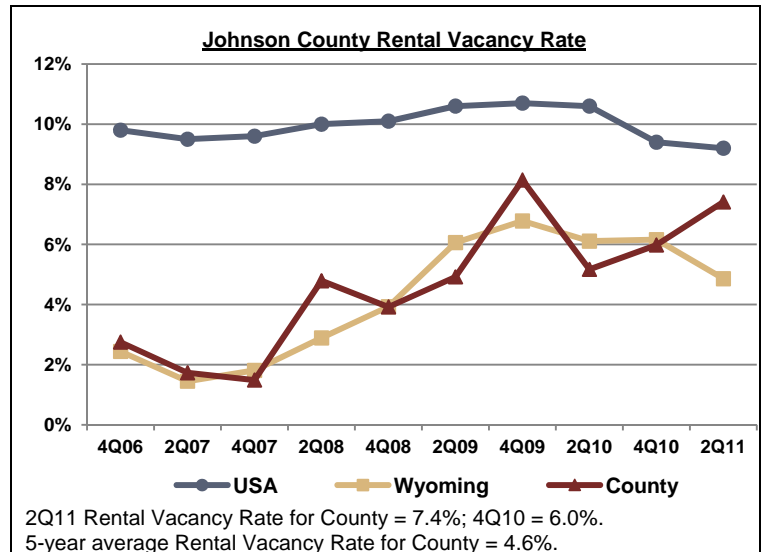
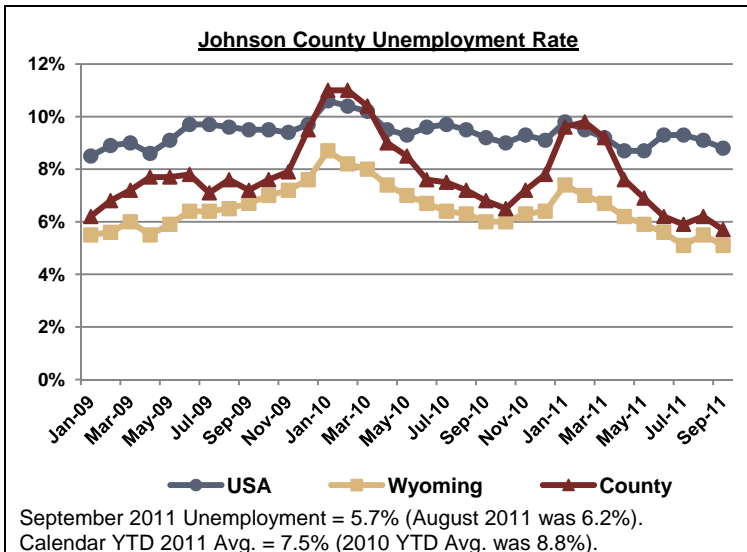
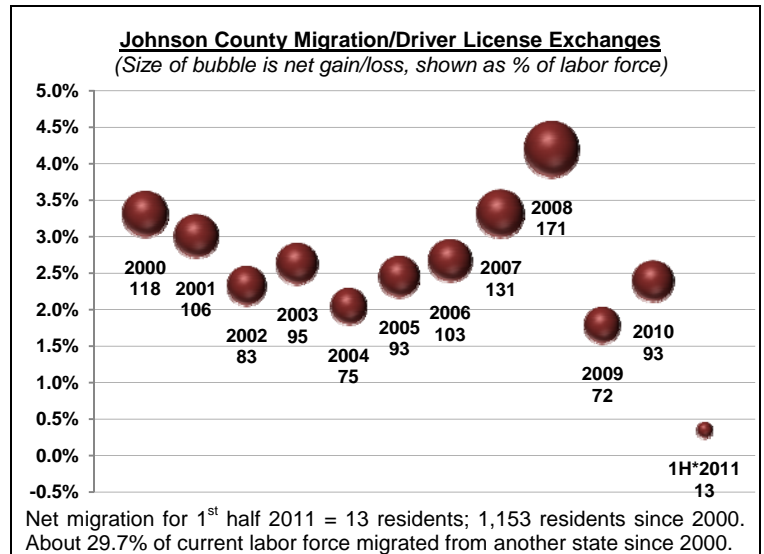
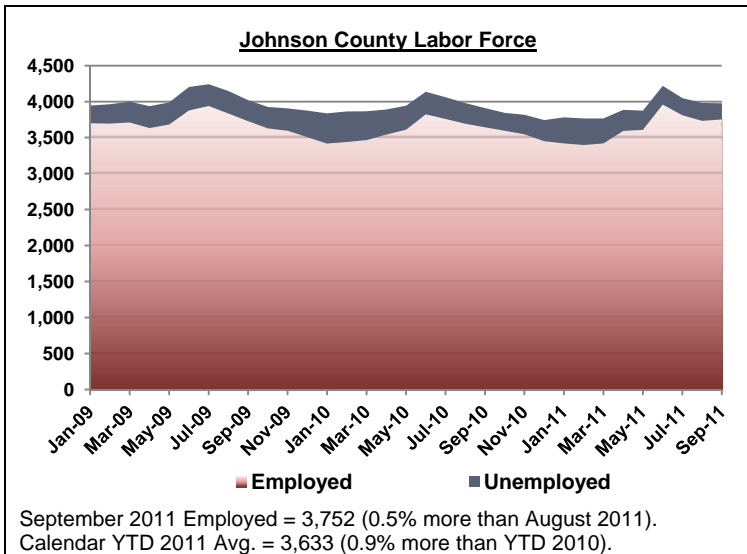
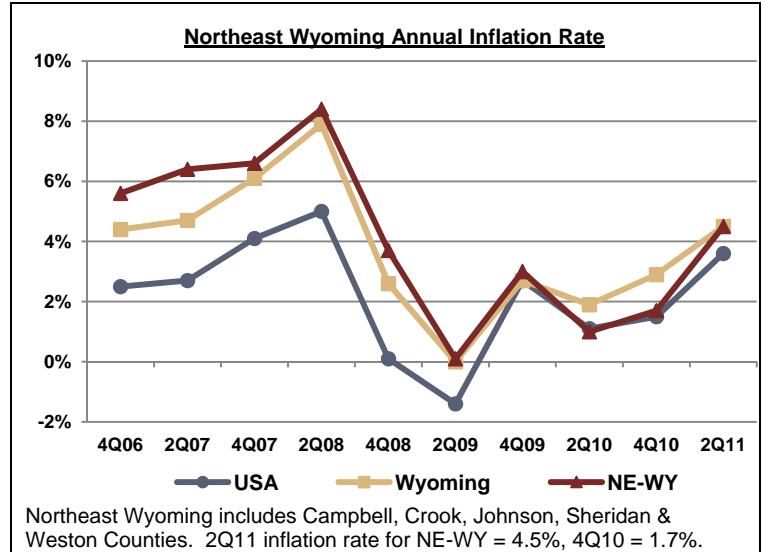
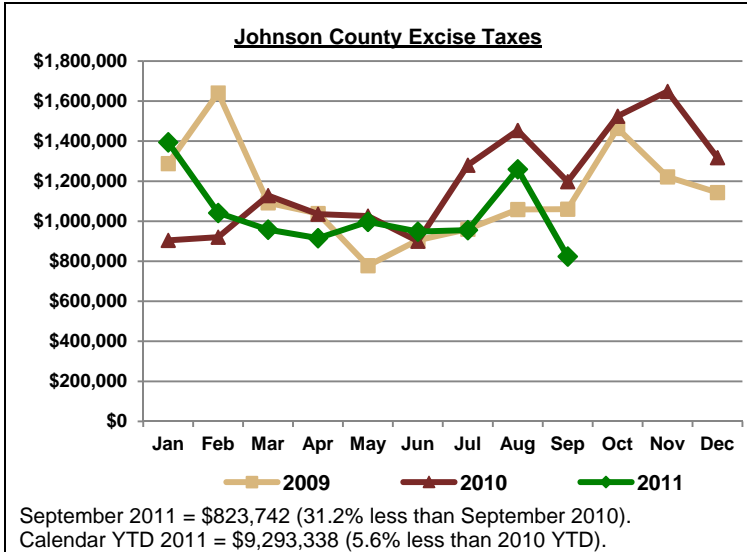
In spite of the nation's continuing economic woes, many economists expect Wyoming to see further growth, particularly in areas of the state that benefit from mineral extraction industries Wyoming, where new oil and gas discoveries are fueling rapid development.

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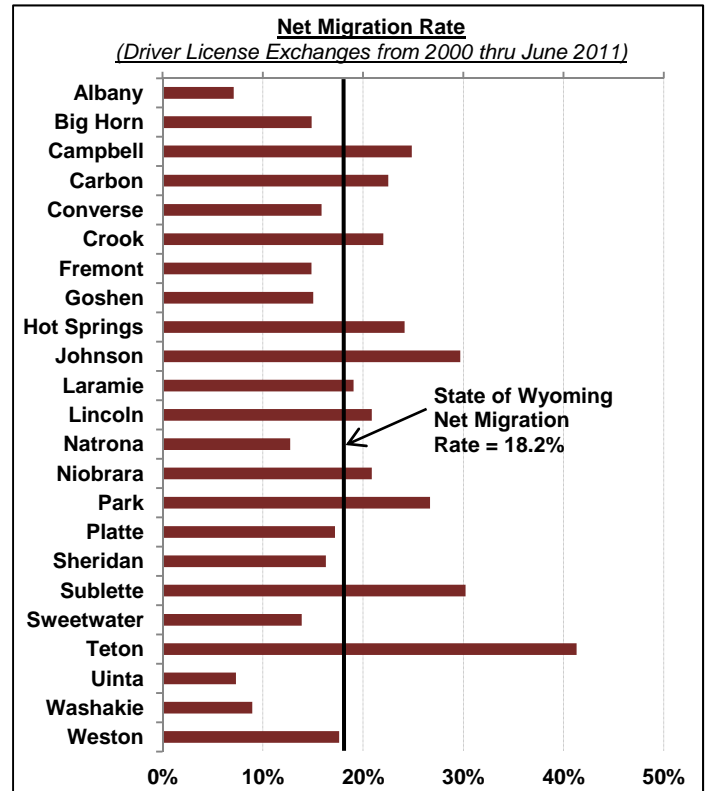
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Net Migration/Driver License Exchanges

Births, deaths, and people moving in or out of a community (migration), are the three ways that population changes. The U.S. Census Bureau analyzes and estimates migration every ten years, but typically does not make annual estimates for Wyoming counties. For more frequent data, other agencies track migration, such as the Wyoming Community Development Authority (WCDA). The WCDA sponsors the preparation of a semi-annual report, the *Wyoming Profile of Demographics, Economics and Housing* (take a look at the WCDA Profile sometime – it is an excellent publication!). Included in the Profile are data for driver licenses exchanges in Wyoming. Wyoming law requires new residents to surrender their out-of-state driver's license for a Wyoming license. Similarly, when Wyoming residents move elsewhere they surrender their Wyoming license in their new state. Annual data on every such license exchange is aggregated and reported in the WCDA Profile, so that we know the net migration impact for every county in Wyoming.

CBI further analyzes WCDA's driver license exchange data to reach a deeper understanding of local economies. Generally speaking, licensed drivers are a part of the labor force. If we compare the number of driver license exchanges in a county to the size of that county's labor force, we can get a glimpse of how important migration has been for that county's labor force. For example, since 2000, Laramie County has gained more residents through migration than any other county. However, as a percent of its total labor force, the rate of net migration is about the same as the statewide average (18.2%). As of June 2011, about 19.1% of Laramie County's labor force is represented by workers who moved here from another state.



Teton County has the highest percentage of its labor force coming from net migration (41.3%). At the other extreme is Albany County, where just 7.1% of the labor force includes new residents from another state [Note: Albany County, because of its large student “temporary” population attending the University, may actually be more impacted by net migration than the data suggests].

County	# Net New Residents	# Ranking	% Labor Force	% Ranking
Albany	1,369	12	7.1%	23
Big Horn	734	18	14.9%	17
Campbell	6,761	2	24.9%	5
Carbon	1,693	10	22.5%	7
Converse	1,168	13	15.9%	15
Crook	754	17	22.0%	8
Fremont	2,818	7	14.8%	18
Goshen	937	15	15.0%	16
Hot Springs	604	20	24.1%	6
Johnson	1,153	14	29.7%	3
Laramie	8,199	1	19.1%	11
Lincoln	1,681	11	20.9%	9
Natrona	5,165	4	12.7%	20
Niobrara	256	23	20.9%	10
Park	3,830	5	26.7%	4
Platte	703	19	17.2%	13
Sheridan	2,588	8	16.3%	14
Sublette	2,167	9	30.2%	2
Sweetwater	3,328	6	13.9%	19
Teton	5,341	3	41.3%	1
Uinta	818	16	7.3%	22
Washakie	379	22	8.9%	21
Weston	566	21	17.6%	12
Wyoming	53,012	NA	18.2%	NA

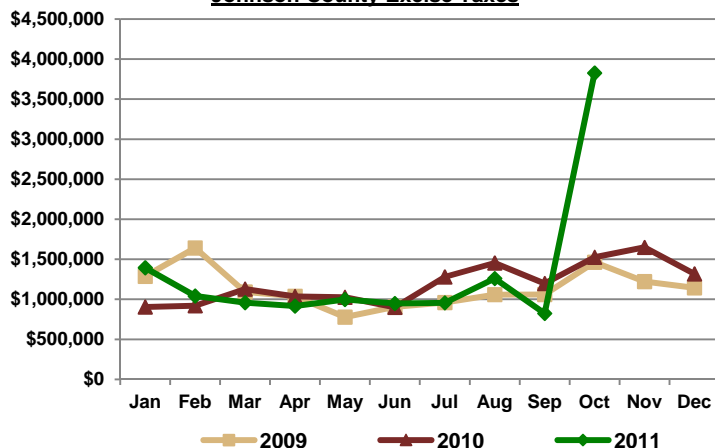
The table to the left shows how each county in Wyoming is impacted by migration. Each county's net migration is first ranked according the number of net new residents (from migration), and then by the percentage that net migration represents in that county's labor force (Remember, births and deaths also have an impact on the total resident population. We are focusing on net migration only because it has a bigger impact on the labor force.)

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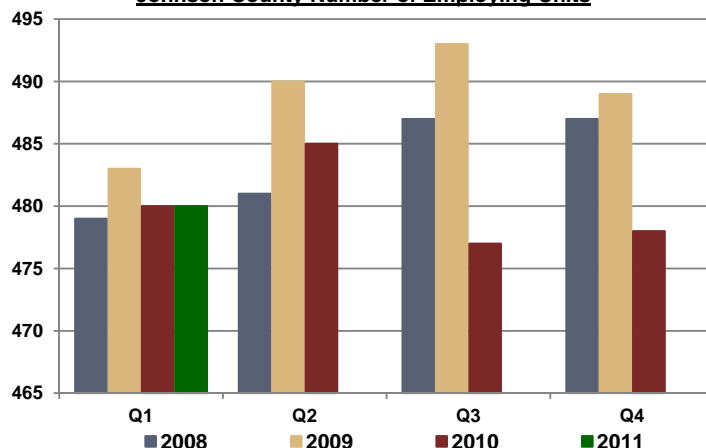


Johnson County Excise Taxes



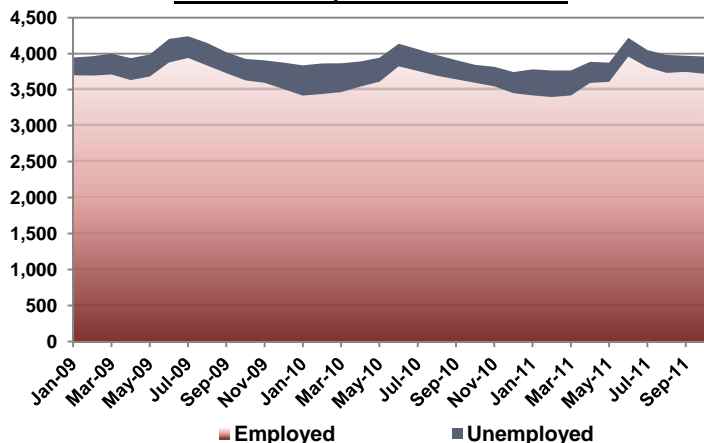
October 2011 = \$3,826,393 (150.9% more than October 2010).
 Calendar YTD 2011 = \$13,119,731 (15.4% more than 2010 YTD).

Johnson County Number of Employing Units



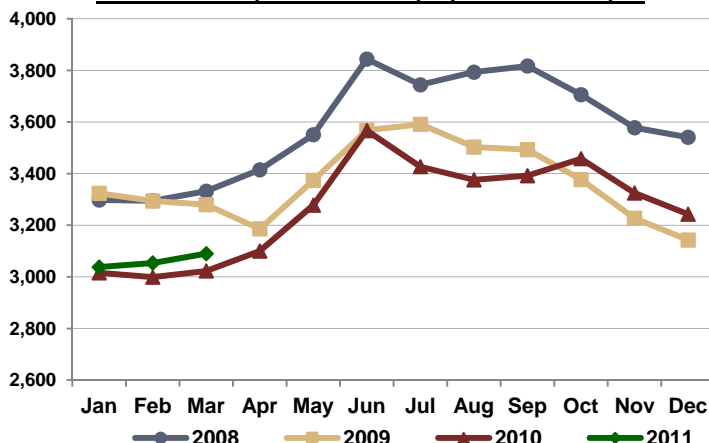
1Q11 Employing Units = 480 (same as 1Q10).
 Calendar YTD 2011 Avg. = 480 (same as 2010 YTD).

Johnson County Resident Labor Force



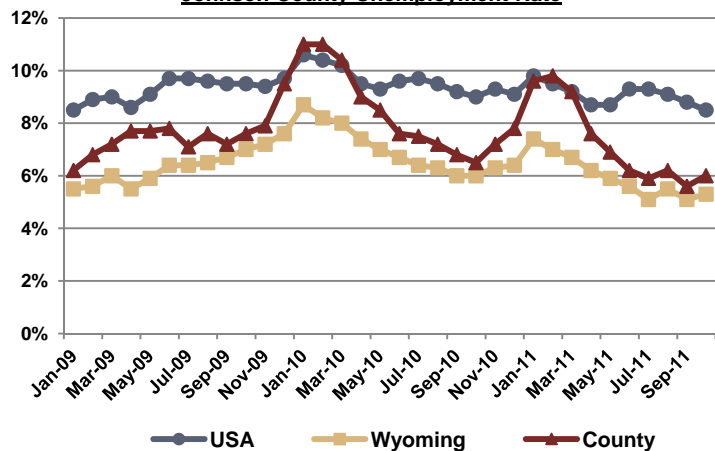
October 2011 Employed = 3,720 (0.7% less than September 2011).
 Calendar YTD 2011 Avg. = 3,641 (1.2% more than YTD 2010).

Johnson County Number of Employees Covered by UI



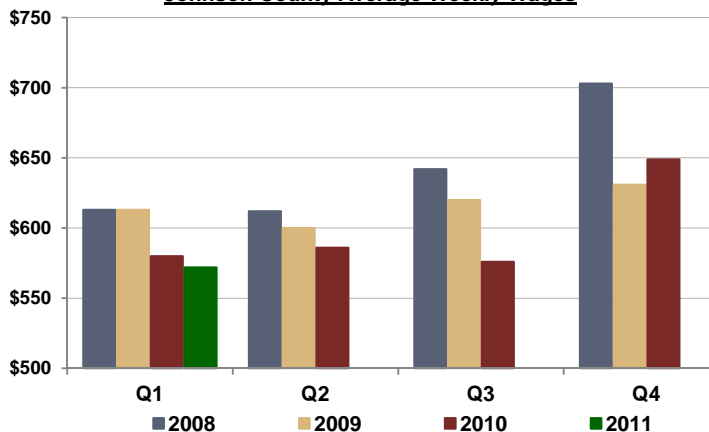
1Q11 Average Employees = 3,061 (1.6% more than 1Q10).
 Calendar YTD 2011 Avg. = 3,061 (1.6% more than YTD 2010).

Johnson County Unemployment Rate



October 2011 Unemployment = 6.0% (September 2011 was 5.6%).
 Calendar YTD 2011 Avg. = 7.3% (2010 YTD Avg. was 8.6%).

Johnson County Average Weekly Wages



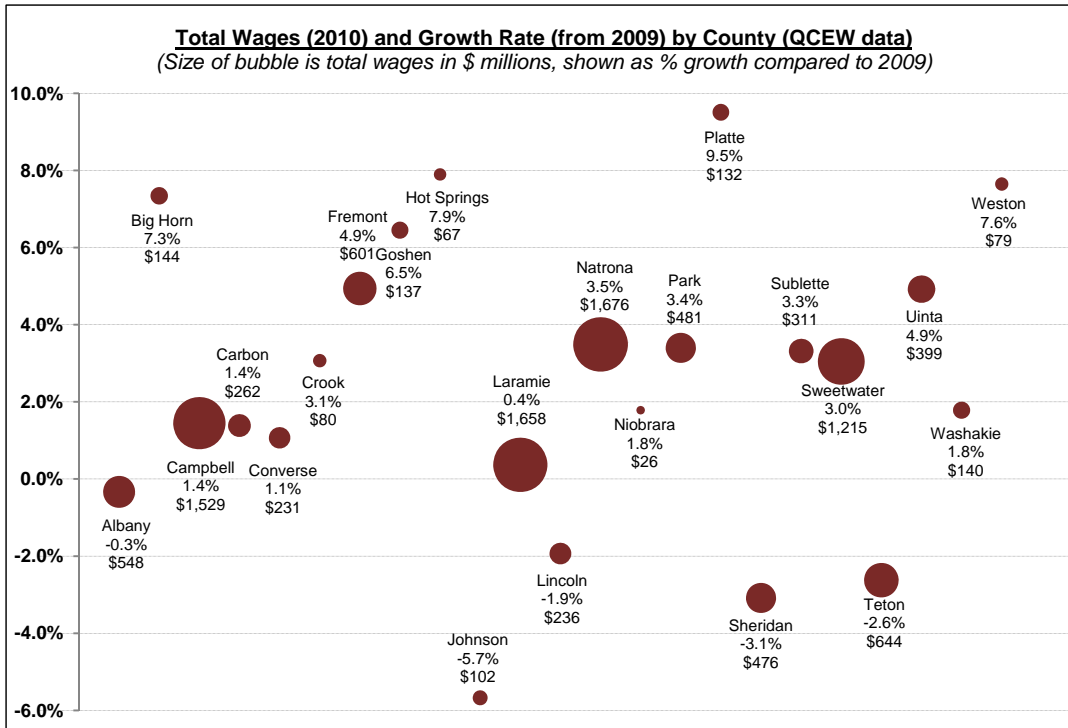
1Q11 Average Weekly Wages = \$572 (1.4% less than 1Q10).
 Calendar YTD 2011 Avg. = \$572 (1.4% less than YTD 2010).



Total Wages

CBI tracks employment using two different programs, both of which are managed by the Research & Planning Division of the Wyoming Department of Workforce Services. (Research & Planning provides many other excellent tools for analyzing employment issues and topics – visit them online at <http://doe.state.wy.us/lmi/>). The first employment measure used by CBI is

the Local Area Unemployment Statistics (LAUS) program, which creates monthly estimates of the entire labor force and unemployment rate for workers residing in a particular county, using Census counts, population estimates, and Wyoming's unemployment insurance (UI) system. The second measure, the Quarterly Census of Employment and Wages (QCEW) program, tracks jobs by place of work. QCEW is a compilation of actual UI wage records filed by employers. Although the QCEW process takes months to complete, and it only includes jobs with UI coverage, it compiles the exact number of employing units, employees, average weekly wages, and the total amount of wages paid in each county.



Total wages data is relevant to anyone wanting to know how much income has been available in the local economy. Such earnings are also major component of per capita income (which also includes income from investments, savings, employer-paid benefits, social security, and other types of income). It represents the total amount paid to all employees in a county.

There are significant differences in the amount of total wages paid in Wyoming counties, as seen by the wide range of bubble sizes in the graph above. Campbell, Laramie, Natrona, and Sweetwater Counties each had more than \$1 billion in total wages for 2010. Collectively, those four counties represent 53% of the total wages paid statewide. Several other counties (Crook, Hot Springs, Niobrara, and Weston) had less than \$100 million in total wages.

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Growth rates for total wages (from 2009 to 2010) are also widely divergent across the state, ranging from -5.7% (Johnson County) to +9.5% (Platte County). Natrona County added the most total wages (\$56 million more in 2010 compared to 2009), while Teton County lost the most (-\$17 million total wages in 2010 compared to 2009). As a whole, Wyoming added \$199 million in total wages in 2010, representing 1.8% growth over 2009, bringing the total wages statewide to \$11.4 billion dollars in 2010.

Growth in total wages is off to a great start this year. For the first quarter of 2011, total wages statewide were nearly \$2.8 billion, representing a 5.4% increase over the first quarter of 2010. Sublette County led all counties on a percentage basis (17.1% growth), and Natrona County added the most actual dollars (more than \$39 million), compared to total wages in the first quarter last year. Only two counties experienced a decrease in total wages compared to the first quarter of 2010: Uinta -2.7% (-\$2.4 million), and Sheridan -0.8% (-\$0.8 million).

