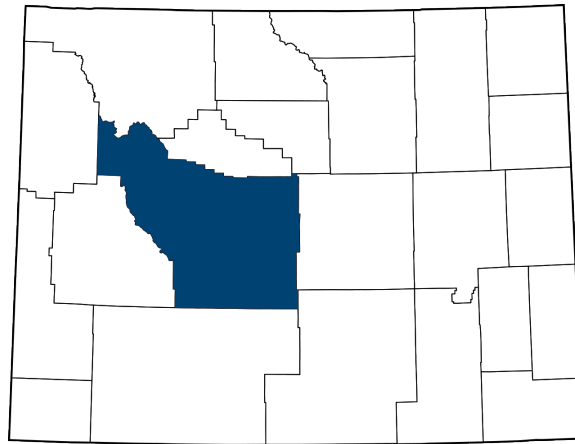


A Fremont County Profile: Socioeconomics



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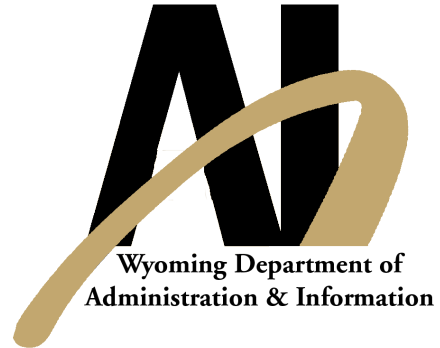
The goal of this document is to provide an accurate picture of Fremont County's socioeconomic attributes. Accomplishing this requires verifiable and universally accepted substantive data that is objectively incorporated into a narrative format.

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 Fremont County is made possible
with the collaborative support of:*



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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 Fremont County economy.

Four types of information are discussed in this report, including: 1) Demographics, 2) Land Characteristics, 3) County Government Finances, and 4) Natural Resource Based 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 natural resource based industries in the county.

Each type of information is discussed separately in the report. To put Fremont 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

Demographics

Fremont County experienced modest population growth between 2000 and 2013 that was proportionately somewhat higher than the U.S. but lower than for Wyoming. The county's population increased from 35,840 residents in 2000 to 40,998 residents in 2013 representing a 14 percent increase over the time period. The county's population growth from 2000 to 2013 was 20 percent lower than the growth rate for Wyoming (18 percent) but 20 percent higher than the growth for the U.S. (12 percent) over the time period. Prior to 2007 the county's population growth had lagged behind the U.S.; however since 2007 it has exceeded the U.S. The county's population growth has lagged behind Wyoming throughout the time period. In 2013 the county's population leveled off at about 41,000 residents while Wyoming and the U.S. experienced continued population growth.

Population increases can occur in one of two ways: 1) Natural Increase (more births than deaths) or 2) Net In-Migration (more people moving in than moving out). Between 2000 and 2013 Fremont County experienced both types of population growth. While the county, state, and nation all experienced somewhat similar rates of natural increase from 2000 through 2013 (7.5 percent for Fremont County, 8.6 percent for Wyoming, and 7.8 percent for the U.S.), the major difference in the overall population growth rates between the regions was the higher rate of net migration for Wyoming and Fremont County (9.3 percent for Wyoming and 6.9 percent for Fremont County vs. 4.3 percent for the U.S.). As a result, while 52 percent of Fremont County's and 48 percent of the Wyoming's population increase between 2000 and 2013 was due to natural increase, 65 percent of the U.S. population increase was from natural increase.

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 Fremont County for moving to Wyoming were job related factors (42 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 already resided in the area (28 percent). Nearly 9 percent of new residents surveyed indicated that a better quality of life was the primary reason for moving to the county with 21 percent indicating some other reasons.

The population distribution for Fremont County was over represented at both ends of the age spectrum. In 2013 the largest age groups for Fremont County were adults 45 to 64 years old (27 percent) and adults 25 to 44 years old (23 percent). Combined, these two age groups represented 51 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 (16 percent), adults 18 to 24 years old (8 percent), and youth under 5 years of age (7 percent). Compared to Wyoming and the U.S., Fremont County had a higher proportion of its overall population in the younger age groups of Under 5 and 5 to 17. The county also had a higher proportion of its overall population in the older age groups of 45 to 65 and 65 and over, especially the 65 and over age category. Conversely, the county had a smaller proportion of its overall population in the young and middle-aged adult age groups of 18 to 24 and 25 to 44. Overall,

the median age for Fremont County in 2012 was slightly older at 38.4 years compared to 36.8 years for Wyoming and 37.6 years for the U.S. Given the relatively high proportion of the county's residents in the 45 to 64 age group, the county's population is likely to continue to age over time.

White is the predominate category of race in Fremont County, accounting for 75 percent of the total population. Due to the presence of the Wind River Indian Reservation in the county, the second largest category of race is Native American (21 percent). The combination of these two categories represented 96 percent of the total population in the county. The other categories of race accounted for the remaining 4 percent of the population with Two or More races being the most common (3 percent). The percentage of the county's population that was Native American was 8 times the Wyoming percentage (3 percent) and 17 times the U.S. percentage (1 percent). Also, as a result of the large Native American population in the county, the percentage of the population that was White was comparable to the U.S. percentage (78 percent) but was substantially less than the Wyoming percentage (93 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 Fremont County the percentage of the population classifying themselves as Hispanic (6 percent) was only 38 percent of the U.S. percentage (17 percent) and 67 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 Fremont County was \$28,724 in 2009 dollars. The per capita income for the county in 2000 was 19 percent below Wyoming's (\$35,327) and 23 percent below the U.S. (\$37,351). From 2000 to 2013, after adjusting for inflation, per capita income for the county increased by 43 percent to \$41,081. Despite this increase, in 2013 the county's per capita income (\$41,081) was still 17 percent lower than Wyoming's (\$49,569) but has increased to only 2 percent lower than the U.S. (\$42,005).

In 2013 per capita income for Fremont County was \$43,780 in 2013 dollars. This level of income was 17 percent below per capita income for Wyoming (\$52,827) and 2 percent below per capita income for the U.S. (\$44,765). Most of the difference in per capita income between the county, Wyoming and the U.S. can be attributed to lower per capita labor earnings (\$22,658 vs. \$31,288 vs. \$28,679). This difference is slightly offset by higher per capita transfer payments for the county compared to Wyoming and the U.S. (\$8,164 vs. \$6,484 vs. \$7,638). The county's per capita investment income (\$12,958) was 14 below Wyoming's (\$15,055) but 1.5 times the U.S. (\$8,448). While the per capita income for the county was 17 percent below the state average, the Wyoming Economic Analysis Division estimates that the county's cost-of-living for the second quarter of 2013 was 2 percent below the state average. This suggests that, on average, the county's population was economically somewhat worse-off than the rest of the state in 2013.

Overall, the Fremont County population educational attainment in terms of a high school degree or higher (91 percent) was comparable to Wyoming (92 percent) and higher than the U.S. (86 percent). However, the county's population was somewhat less educated in terms of college or advanced degrees

(21 percent vs. 25 percent vs. 29 percent). The percentage of the county population without a high school degree (9 percent) was similar to Wyoming's (8 percent) and substantially lower than the U.S. (14 percent). The percentage of the county's population with a high school degree (30 percent) was similar to Wyoming's (30 percent) but slightly above the U.S. (28 percent). The percentage of the county's population with some college (29 percent) or an associate degree (11 percent) was above both Wyoming (28 percent and 10 percent) and the U.S. (21 percent and 8 percent). However, the percentage of the county's population with either a bachelors (14 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).

Fremont County experienced significant employment growth between 2000 and 2013. Employment in the county increased by 19 percent from 2000 through 2013 growing from 20,773 jobs in 2000 to 24,688 jobs in 2013. This employment growth primarily occurred between 2000 and 2008 with county's employment plateauing at around 25,000 jobs since 2008. During this time period Wyoming employment increased by 23 percent and the U.S. employment increased by 10 percent. Employment in all three regions was probably negatively affected by 2008-2009 recession, although the county's economy appears to have been less impacted than Wyoming or the U.S. While county employment increased by 19 percent between 2000 and 2013, county population increased by 14 percent suggesting that at least some the job growth in the county was filled by nonresidents during this time period.

From 2000 to 2013, employment in Fremont County increased by 19 percent. This increase was 17 percent less than the employment increase for Wyoming (23 percent) and 1.8 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 greater growth in wage and salary jobs for the county and Wyoming. While the increase in county wage and salary employment (11 percent) was 23 percent less than for Wyoming (15 percent), it was four times the anemic growth rate for the U.S (3 percent). In comparison, the increase in county self-employed employment (7 percent) was similar to that for Wyoming's (8 percent) or the U.S. (7 percent).

Due to its large size and the wide geographic distribution of its population, Local Government was the largest employer in Fremont County in 2013 accounting for 19 percent of total county employment. Local Government includes all the employment associated with the county, the numerous cities and towns in the county, and its eight school districts. Following Local Government was Retail Trade and Health Care & Social Assistance, both with about 10 percent of total county employment. Following Retail Trade and Health Care & Social Services was Accommodations & Food Services, Agriculture, Construction, and Mining, all of whom represented about 6 percent of total county employment and Other Services which represented 5 percent of total county employment. Combined, these eight sectors accounted for 68 percent of the total employment in the county. The three largest employment sectors in the county's economy, Local Government, Retail Trade, and Health Care & Social Assistance represent 38 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 indicates that the county's employment is somewhat more concentrated in a few sectors than Wyoming or the U.S.

County employment locational quotients indicate that the county's economy is specialized in the following sectors: Mining, Agriculture, Local Government, Forestry, Fishing, & Ag Support, State Government, and Civilian Federal Government.

Employment in Fremont County increased by 16 percent from 2001 through 2013. The largest increases were in Local Government which accounted for 37 percent of the growth in total county employment and Mining which accounted for 27 percent of the growth in total county employment. Combined these two sectors represented 65 percent of the total increase in county employment. In terms of other sectors, employment increases in Real Estate and Health Care & Social Services each accounted for more than 9 percent of the growth in total county employment. Also employment increases in Agriculture, Educational Services, and Finance & Insurance each accounted for more than 7 percent of the growth in total county employment. On the other hand, six sectors experienced losses in employment between 2001 and 2013 including: Construction (-491), Manufacturing (-182), Retail Trade (-124), Information (-89), Utilities (-32), and State Government (-5).

In terms of individual sector employment growth, the fastest growing sector was Mining which increased by nearly 3 times between 2001 and 2013. Following Mining, was Educational Services which almost doubled in employment during the time period. Real Estate and Finance and Insurance also experienced substantial growth in employment growing by more than 1.5 times. On the other hand, Utilities, Manufacturing, Information, and Construction all experienced employment declines of more than 25 percent.

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. The Fremont County economy has a continuing problem with relatively low paying jobs. In 2000, the average earnings per job in Fremont County were \$30,559 in 2009 dollars. The average earnings per job for the county in 2000 were 17 percent below Wyoming's (\$37,046) and 37 percent less than the U.S. (\$48,819). From 2000 to 2013, after adjusting for inflation, average earnings per job increased by 28 percent to \$39,074. Despite this increase, in 2013 the average earnings per job for the county were still 21 percent below Wyoming's (\$49,188) and 25 percent below the U.S. (\$52,330). While the average earnings per job for the county were 21 percent below the state average, the Wyoming Economic Analysis Division estimates that the county's cost-of-living for the second quarter of 2013 was 98 percent above the state average. This suggests that, on average, the county's workforce was economically worse-off than the rest of the state in 2013.

Average earnings per job (AEPJ) can vary substantially by sector. In 2013 AEPJ in Fremont County ranged from over \$100,000 for Utilities and to slightly more than \$7,500 for Arts, Entertainment, and Recreation. After Utilities, Federal – Civilian and Mining both had AEPJ of more than \$80,000. State Government, Transportation & Warehousing, Local Government and Wholesale Trade all had AEPJ above \$50,000. Six of the 23 sectors in the county's economy had an AEPJ that was greater than the average for Wyoming (\$52,420) and four of these sectors had an AEPJ that was greater than the U.S. average (\$55,768) in 2013. The six sectors with AEPJ above the Wyoming average represents only 33

percent of the total jobs in the county while the four sectors with AEPJ above the U.S. average represent only 12 percent of the total jobs in the county. This explains the lower overall AEPJ for the county relative to Wyoming and the U.S.

The combination of the number of jobs and average earnings per job (AEPJ) determines the relative importance of individual sectors in the Fremont County economy in terms of total labor earnings. Labor earnings are important because they represent the major source of personal income for county residents. Overall, employment in the county generated \$1.0 billion of labor earnings in 2013. Local Government, due to its large number of jobs and above average AEPJ, represents 24 percent of this total. Following Local Government were Mining (11 percent) and Health Care & Social Assistance (10 percent). Retail Trade represented 7 percent of total county employment, Construction 7 percent and State Government 5 percent. These six sectors account for 65 percent of the total labor earnings in the county. Total government labor earnings (Local Government, State Government, Federal – Civilian, and Military) represents 34 percent of total labor earnings in the county.

Land Characteristics

Fremont County is the second largest county in Wyoming containing 5.9 million acres. Most of this land area is under government or tribal ownership. More than 54 percent of the county's land area (3.2 million acres) is owned by the federal government. Of this amount, the BLM controls nearly two-thirds, with the Forest Service controlling more than 30 percent and the Bureau of Reclamation controlling nearly 4 percent. Tribal lands represent nearly 26 percent of the county's land area (1.6 million acres). State lands account for more than 5 percent of the county's land area (more than 317,000 acres). Nearly 85 percent of the state land area is state trust land with the other 15 percent held by the Game and Fish Department and the Recreation Commission. Finally, local government owns 0.1 percent of the land in the county (slightly more than 5,500 acres). As a result of the large government and tribal presence in the county, less than 14 percent of the county's land area is privately owned (slightly more than 820,000 acres). Information from the Wyoming Department of Revenue on acres taxed as agricultural land indicates that nearly 90 percent of the private land in the county is in agricultural use (more than 729,000 acres). Of this amount nearly 84 percent is range land (more than 610,000 acres).

Federal lands are managed for different purposes under differing statutory authority. Three categories of designation are presented for counties in the Economic Profile System – Human Dimension Toolkit: 1) Protected, 2) Restricted., and 3) General Use. In Fremont County nearly 22 percent of federal lands are designated as protected (nearly 672,000 acres). This amount includes more than 530,000 acres of Forest Service land that is designated as national wilderness (54 percent of total Forest Service land in the county). Also, more than eight percent of federal lands are designated as restricted (nearly 250,000 acres) with 70 percent designated for general use (more than 3 million acres).

County Government Finances

Wyoming Department of Audit information indicates that the total revenue for Fremont County Government was \$39.8 million in FY2014. Of this total, the largest source was Taxes which included property taxes and optional sales tax revenue (41 percent). Following Taxes was State Aid which included the county's share of the 4 percent sales and use tax revenue (31 percent) and Charges for Services (16 percent). Combined these three sources represented 88 percent of the total county government revenue in FY2014. Other sources of county government revenue included Direct Federal Aid (including PILT payments), Miscellaneous Revenue, and Other Local Government Revenue. Combined these smaller revenue sources represented 12 percent of the total county government revenue in FY2014. Compared to all counties in Wyoming, the County had a lower proportion of revenue from Taxes (41 percent vs. 50 percent). The county's proportion from State Aid was higher relative to all counties in the state (31 percent vs. 26 percent) and the proportion from Charges for Services was substantially higher relative to all counties in the state (16 percent vs. 7 percent). Other sources of revenue were comparable to all other counties in the state in terms of Direct Federal Aid (6 percent vs. 6 percent) and Miscellaneous Revenue (5 percent vs. 6 percent, except for Other Local Government (1 percent vs. 5 percent). Overall, the county's per capita revenue (\$972) was 25 percent below the average for all counties in Wyoming (\$1,288).

The total assessed valuation for Fremont County in FY2014 was \$917.6 million. More than 50 percent of the total valuation was from Mineral Production. Following minerals was Residential Property (25 percent) and Industrial Property (11 percent). Combined these three sources represented 89 percent of the county's total assessed valuation. Other sources of assessed valuation included Commercial Property (7 percent), Utilities (3 percent) and Agricultural Lands (2 percent). Combined these sources represented 11 percent of the county's assessed valuation.

Compared to Wyoming, the county had a lower proportion of assessed valuation from Mineral Production (53 percent vs. 60 percent). The county's proportion of assessed valuation from Residential Property was higher than Wyoming's (25 percent vs. 18 percent). The county's proportion of assessed valuation from Industrial Property was slightly higher than Wyoming's (11 percent vs. 9 percent). The county's assessed valuation for Commercial, Utilities, and Agricultural was comparable to Wyoming's (11 percent vs. 12 percent). In terms of Mineral Production, crude oil represented 61 percent of total county mineral assessed valuation, natural gas represented 39 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 facilities represented more than 93 percent of total county industrial property assessed valuation. Overall, oil and gas production and the associated facilities represent 63 percent of the county's total assessed valuation. This concentration makes county government finances vulnerable to fluctuations in oil and gas prices and activity in the county.

In FY2014 Fremont County's sales and use tax generated \$40.1 million in sales and use tax revenue. Of this total, 55 percent (\$22.1 million) was retained by state government and 45 percent (\$18.1 million) was returned to local governments in Fremont County. In FY2014 County government's share of the

returned sales and use tax revenue was approximately \$9.0 million (50 percent) with the remaining \$9.0 million (50 percent) going to municipal governments in the county.

About forty percent of the county's sales and use tax revenue came from Retail Trade. Following Retail Trade was Mining (17 percent), Public Administration (12 percent), and Leisure & Hospitality (9 percent). Combined these four sectors contributed 77 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 in Wyoming. Wholesale, Utilities, Construction, Other Services, Financial and Other represented a combined 23 percent of county sales and use tax revenue with Utilities, Construction, Other Services, and Financial each accounting for more than 3 percent of total county sales and use tax revenue.

Compared to total sales and use tax revenue for Wyoming, the county had a substantially higher proportion of sales and use tax revenue from Retail Trade (40 percent vs. 29 percent). The county's proportion of sales and use tax revenue from Mining was somewhat lower than Wyoming's (17 percent vs. 21 percent). The proportion of county sales and use tax revenue from Public Administration was somewhat higher than Wyoming's (12 percent vs. 9 percent) and the proportion from Leisure & Hospitality was comparable to Wyoming's (9 percent vs. 9 percent).

The Economic Profile System-Human Dimensions Toolkit indicates that federal land payments to local governments in Fremont County totaled \$3.3 million in FY2013. The largest source of federal land payments to the county was Payment in Lieu of Taxes (PILT) representing 72 percent of the total amount (\$2.4 million). The second largest source of federal payments to the county was Forest Service payments representing 21 percent of the total amount (\$712,028). The third largest source of federal payments to the county was BLM Payments representing 6 percent of the total amount (\$218,130). Of the \$3.3 million in Federal land payments to the county in FY2013, 83 percent went to county government (\$2.8 million), 9 percent went to local school districts (\$302,612), 6 percent went to grazing districts (\$213,053), and 2 percent went to Resource Advisory Councils (\$56,962). In FY2013 Federal Land Payments to the county represented \$1.04 per acre of Federal land.

The total cost of maintaining county government for Fremont County in FY2014 was \$33.3 million. This represents a per capita cost of \$811.63 which was 25 percent below the average for all Wyoming counties. The largest cost categories were Jail (14 percent) and County Sheriff (14 percent). If the costs of all law enforcement (County Sheriff, Jail, County Attorney, County Courts and Juvenile Probation) are considered it represents 36 percent of the total county budget. The other major cost categories were Road and Bridge (11 percent) and Health (10 percent). The combination of combined law enforcement, Road and Bridge, and Health represent 57 percent of the total county budget.

Natural Resourced Based Industry Profiles

In 2013, the 1,274 producing oil and gas wells in Fremont County produced 4.1 million barrels of crude oil and 134.5 million mcf of natural gas. This represented about 7 percent of total crude oil and 7 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 545,350 tons in 2013. This represented 4 percent of the total sand and gravel production in the state. There was also a small amount of bentonite production in the county during 2013.

The mining industry in the county, including the associated industrial property, had an assessed valuation of \$582.6 million dollars in 2014 (2014 assessed valuation for mineral production is based on 2013 production). This valuation represented 63 percent of the total assessed valuation for the county. Based on a county levy of 72.6 mills the mineral industry generated \$42.3 million in property tax revenue in 2014. Of this total, 62 percent went to K-12 schools (\$26.4 million), 16 percent went to local county government (\$7.0 million), 12 percent went to county special districts (\$5.2 million), and 9 percent went to the Community College (\$3.8 million). Special districts in the county included: Cemetery, Water and Sewer, Solid Waste Disposal, and Conservation.

In 2013 the mining industry in the county supported 1,430 jobs with labor earnings of \$115.0 million. This represented 6 percent of total employment and 11 percent of total labor earnings in the county. The percent of total employment in mining for the county was 6 times the national percentage (0.9%). The average earnings per job for mining in the county were \$80,395 which was 1.9 times the county average (\$41,641). The mining industry ranked 7th out of 23 sectors in the county's economy in terms of total employment and 2nd out of 23 sectors in terms of total labor earnings.

In 2012 there were 1,363 agricultural operations in Fremont County. These operations managed 1.7 million acres in the county. Included in this acreage is 89 percent of the private land in the county. Of the total land in agriculture, 88 percent is classified as grazing land, 10 percent as cropland, less than 1 percent as woodlands, and 2 percent as farmsteads and buildings. The average size of an agricultural operation in the county was 1,255 acres. The total cattle and sheep inventory in the county was 97,391 head including 81,288 head of cattle and calves and 16,103 head of sheep and lambs. In 2013, the county ranked 2nd out of 23 counties in Wyoming in terms of cattle and calves inventory and 8th out of 23 counties in terms of sheep and lambs inventory. It also ranked 5th in barley production, 5th in dry bean production, 6th in sugar beet production, 7th in corn for grain, 1st in alfalfa hay production, and 6th 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 \$1.6 billion. This total included \$1.5 billion in land and buildings and \$141.1 million for equipment and machinery. The average investment per agricultural operation was \$1.2 million. In 2012 agricultural operations in the county paid \$4.8 million in property taxes.

The gross revenue for the agricultural industry in the county in 2013 was \$151.6 million. Of this total 55 percent was from cash receipts for livestock, 31 percent was from cash receipts for crops, 13 percent was from miscellaneous sources, and less than 1 percent was from government payments. Total employment for agriculture in 2013 was 1,485 jobs with labor earnings of \$28.8 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 4.2 times the national percentage (1.4 percent). The average earnings per job for agriculture in the county were \$19,378 which was 47 percent the county

average (\$41,641). 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 12th 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, 89 percent of the private land in county is in agricultural use.

Dean Runyan Associates estimates that visitors spent \$136.4 million while in Fremont County in 2013. In terms of accommodations, 34 percent of this spending was by visitors staying in hotels/motels, 24 percent by visitors staying in campgrounds, 20 percent was by visitors staying in private homes, 5 percent was by visitors staying in vacation homes, and 16 percent was by visitors not staying overnight. In terms of purchases, 30 percent was for local transportation & gas, 20 percent was for food services, 15 percent was for arts/entertainment/recreation, 14 percent was for retail sales, 13 percent for accommodations, 7 percent went to food stores and less than 1 percent for air transportation.

Dean Runyan estimated that the travel industry generated 1,530 jobs in the county in 2013. This represents 6 percent of total employment in the county. Nearly 60 percent of these jobs were in the accommodations and food service sector, 25 percent were in the arts/entertainment/recreation sector, and 13 percent were in the retail trade sector. The labor earnings associated with this employment was estimated to be \$43.5 million. This represents 4 percent of the total labor earnings for the county. Average earnings per job for the travel industry in the county for 2013 were \$28,431. Average earnings per job for the travel industry were 68 percent the county average (\$41,641).

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.

American Indian Residents

The Wind River Indian Reservation occupies 1.6 million acres in Fremont County representing 26 percent of the total land base in the county. Due to the presence of the reservation, Native Americans represent the second largest category of race in the county accounting for 21 percent of the total population (see page 7). In many respects the social and economic characteristics of the American Indian population in the county are somewhat different than the rest of the county's population. In terms of household type, American Indian residents were less likely to be in a married couple family (40 percent vs. 51 percent) or a nonfamily household (15 percent vs. 32 percent). Nonfamily households represent mostly

people living alone, but also a household where no one is related to the householder. Conversely, American Indian residents were more likely to live in a male householder family with no wife present (12 percent vs. 6 percent) and in a female householder family with no husband present (32 percent vs. 10 percent).

In terms of educational attainment, American Indian residents were more likely to not have a high school degree (14 percent vs. 11 percent), be only a high school graduate (34 percent vs. 28 percent), or have attended some college (36 percent vs. 28 percent). Conversely, they were slightly less likely to have an associate degree (9 percent vs. 10 percent), less likely to have a bachelor's degree (5 percent vs. 14 percent), and less likely to have a graduate or professional degree (2 percent vs. 8 percent). Overall, the percentage of the American Indian residents with a high school degree or higher was comparable to the county residents (86 percent vs. 89 percent); however the percentage of American Indian residents with a bachelor's degree or higher was significantly lower than for county residents (7 percent vs. 23 percent).

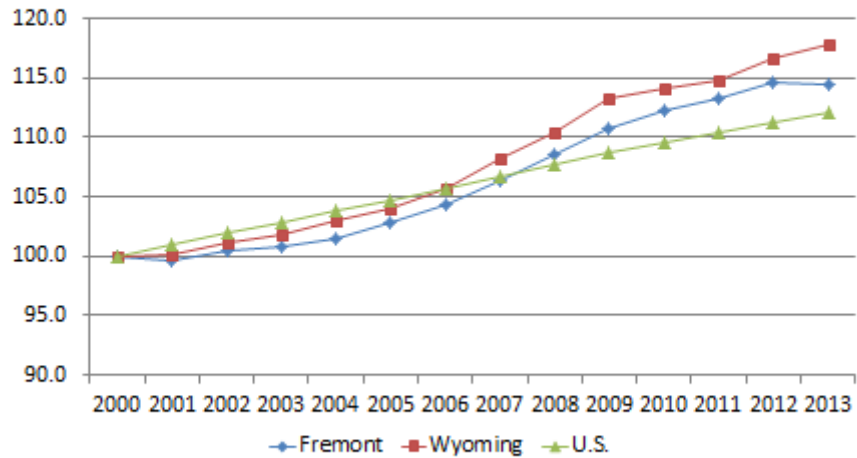
Unemployment is a continuing problem for American Indian residents in Fremont County. For the period 2006 through 2010, the Census Bureau estimates that the unemployment rate for American Indians in Fremont County was 16 percent. This was more than twice the unemployment rate for Fremont County as a whole (7%). Due to the difficulties of collecting census data on the reservation, the actual unemployment rate for American Indians in the county may be substantially higher than that reported by the Census Bureau.

For those American Indian residents that are employed, the type of employment is also different than that for Fremont County as whole. Only 46 percent of the American Indian workers in the county are employed in the private sector compared to 64 percent for all workers. Conversely, 51 percent of the American Indian workers are employed in the government sector versus 26 percent for all workers in the county. The percentage of workers that are self-employed is also less for American Indian workers (3 percent vs. 9 percent). The percent of workers that are unpaid family labor is higher for American Indian workers than for all workers in the county (.04 percent versus .02 percent).

Due to the high unemployment rate among American Indian residents in the county, these residents also have a high poverty level. For the 2006-2010 time period, the Census Bureau estimates that 24 percent of the American Indian residents in the county were living below the poverty level. This was nearly twice the poverty rate for the county as a whole. Due to the difficulties in collecting census data on the reservation, the actual poverty rate may be substantially higher than that reported by the Census Bureau. The poverty rate was particularly high for American Indian families with a female householder, no husband present, with related children under 5 years old at 66 percent. On a per capita income basis, American Indian residents were 40 percent below the average for the county (\$14,809 versus \$24,173). American Indian residents were also more likely to receive cash public assistance income (15 percent vs. 4 percent) and to have food stamp/SNAP benefits (26 percent vs. 9 percent).

DEMOGRAPHICS

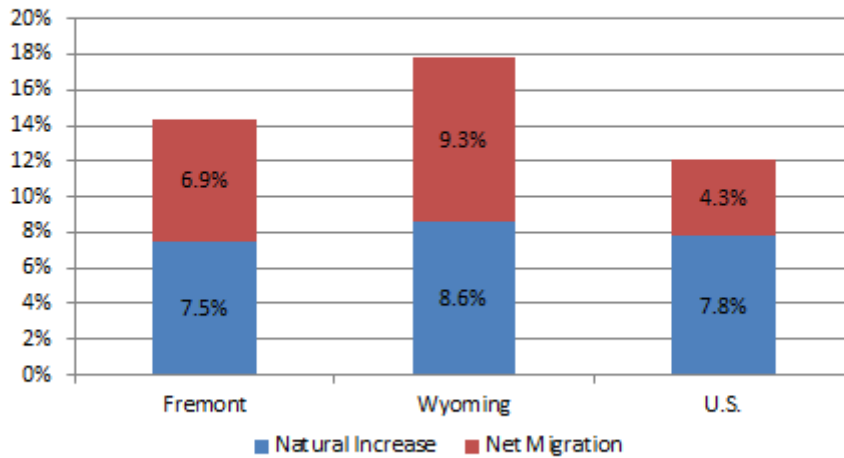
Figure 1.
Population Growth Index: 2000-2013



Fremont County experienced modest population growth between 2000 and 2013 that was proportionately somewhat higher than the U.S. but lower than for Wyoming (Figure 1). The county's population increased from 35,840 residents in 2000 to 40,998 residents in 2013 representing a 14 percent increase over the time period. The county's population growth from 2000 to 2013 was 20 percent lower than the growth rate for Wyoming (18 percent) but 20 percent higher than the growth for the U.S. (12 percent) over the time period. Prior to 2007 the county's population growth had lagged behind the U.S.; however since 2007 it has exceeded the U.S. The county's population growth has lagged behind Wyoming throughout the time period. In 2013 the county's population leveled off at about 41,000 residents while Wyoming and the U.S. experienced continued population growth.

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.

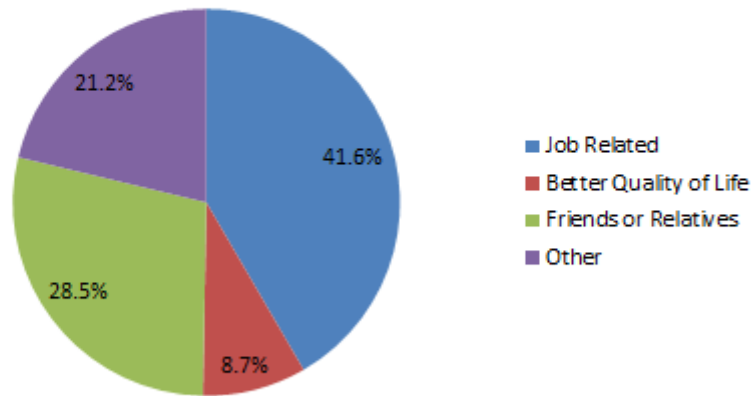
Figure 2.
Comparison of Source of Population Change:
2000-2013



Population increases can occur in one of two ways: 1) Natural Increase (more births than deaths) or 2) Net In-Migration (more people moving in than moving out). Between 2000 and 2013 Fremont County experienced both types of population growth (Figure 2). While the county, state, and nation all experienced somewhat similar rates of natural increase from 2000 through 2013 (7.5 percent for Fremont County, 8.6 percent for Wyoming, and 7.8 percent for the U.S.), the major difference in the overall population growth rates between the regions was the higher rate of net migration for Wyoming and Fremont County (9.3 percent for Wyoming and 6.9 percent for Fremont County vs. 4.3 percent for the U.S.). As a result, while 52 percent of Fremont County's and 48 percent of the Wyoming's population increase between 2000 and 2013 was due to natural increase 65 percent of the U.S. population increase was from natural increase. Conversely, while 48 percent of Fremont's and 52 percent of Wyoming's population increase was from net migration, only 35 percent of the U.S. population increase was from net migration. Of course immigration is much more restricted at the national level than at state level. However, the comparison is still important in explaining differences in population growth rates with the county and Wyoming experienced more balanced population growth than the U.S.

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

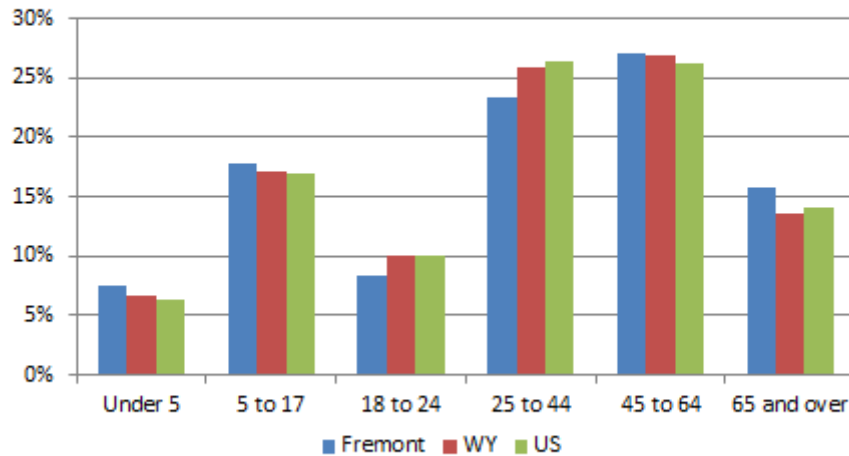
Figure 3.
Primary Reason for Moving to Fremont County:
2000-2013



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 Fremont County for moving to Wyoming were job related factors (42 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 already resided in the area (28 percent). Nearly 9 percent of new residents surveyed indicated that a better quality of life was the primary reason for moving to the county with 21 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.

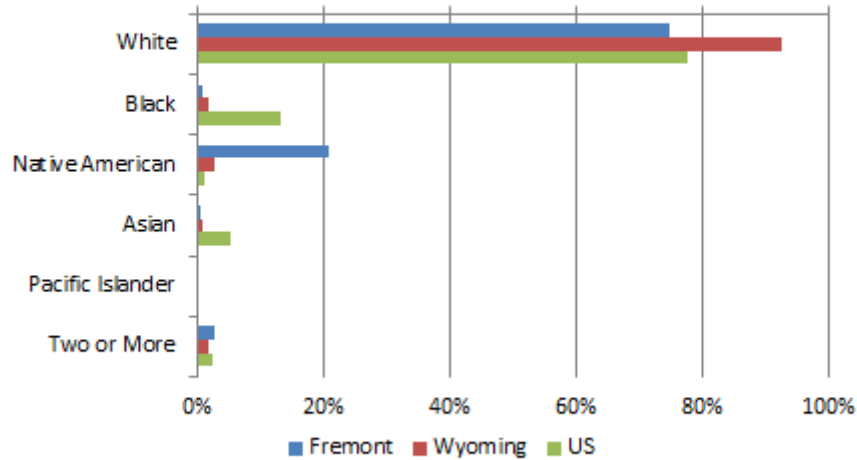
Figure 4.
Comparison of Population Age Distribution, 2013



In 2013 the largest age groups for Fremont County were adults 45 to 64 years old (27 percent) and adults 25 to 44 years old (23 percent). Combined, these two age groups represented 51 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 (16 percent), adults 18 to 24 years old (8 percent), and youth under 5 years of age (7 percent). The population distribution for Fremont County was over represented at both ends of the age spectrum. Compared to Wyoming and the U.S., Fremont County had a higher proportion of its overall population in the younger age groups of Under 5 and 5 to 17. The county also had a higher proportion of its overall population in the older age groups of 45 to 65 and 65 and over, especially the 65 and over age category. Conversely, the county had a smaller proportion of its overall population in the young and middle-aged adult age groups of 18 to 24 and 25 to 44. Overall, the median age for Fremont County in 2012 was slightly older at 38.4 years compared to 36.8 years for Wyoming and 37.6 years for the U.S. Given the relatively high proportion of the county’s residents in the 45 to 64 age group, the county’s population is likely to continue to age over time.

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.

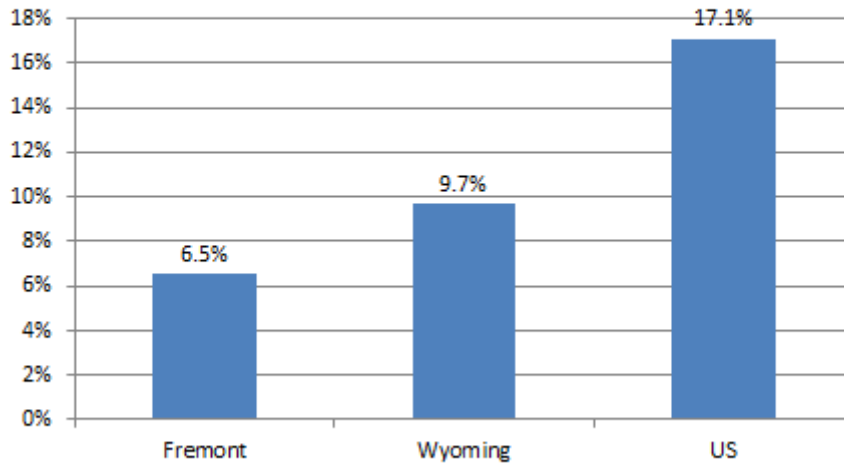
Figure 5.
Comparison of Population by Race, 2013



White is the predominate category of race in Fremont County, accounting for 75 percent of the total population (Figure 5). Due to the presence of the Wind River Indian Reservation in the county, the second largest category of race is Native American (21 percent). The combination of these two categories represented 96 percent of the total population in the county. The other categories of race accounted for the remaining 4 percent of the population with Two or More races being the most common (3 percent). The percentage of the county’s population that was Native American was 8 times the Wyoming percentage (3 percent) and 17 times the U.S. percentage (1 percent). Also, as a result of the large Native American population in the county, the percentage of the population that was White was comparable to the U.S. percentage (78 percent) but was substantially less than the Wyoming percentage (93 percent). The percentage of the county population that was Black, Asian, or Pacific Islander was less than the percentage for either Wyoming or the U.S. The percentage of the population that was Two or More races was slightly higher than Wyoming or the U.S. (3 percent vs. 2 percent and 2 percent respectively).

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.

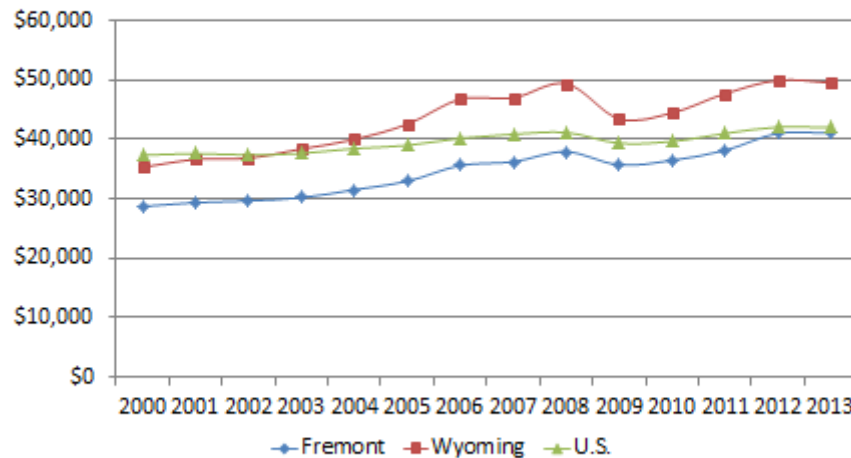
Figure 6.
Comparison Percent of Population Hispanic
2013



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 Fremont County, as shown in Figure 6, the percentage of the population classifying themselves as Hispanic (6 percent) was only 38 percent of the U.S. percentage (17 percent) and 67 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.

Figure 7.
Per Capita Income: 2000-2013
(Adjusted for Inflation)

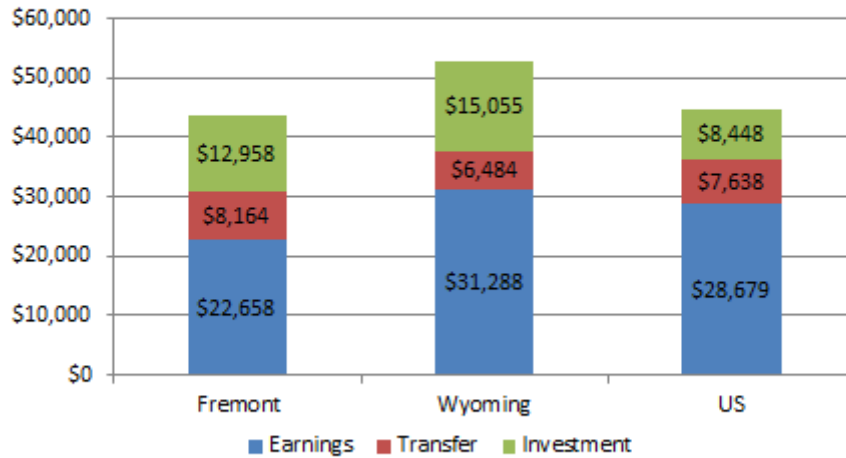


Per capita income is a general measure of the economic well-being of a county’s population. In 2000, per capita income in Fremont County was \$28,724 in 2009 dollars (Figure 7). The per capita income for the county in 2000 was 19 percent below Wyoming’s (\$35,327) and 23 percent below the U.S. (\$37,351). From 2000 to 2013, after adjusting for inflation, per capita income for the county increased by 43 percent to \$41,081. Despite this increase, in 2013 the county’s per capita income (\$41,081) was still 17 percent lower than Wyoming’s (\$49,569) but has increased to only 2 percent lower than the U.S. (\$42,005). 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 majority of the growth in county per capita income between 2000 and 2013 was the result of growth of net labor earnings (42 percent) and higher investment income (42 percent) with 17 percent coming from higher transfer payments. Over one-half of the growth in county per capita investment income occurred between 2011 and 2013 as per capita investment income increased by 30 percent in the three-year period. In 2000, net labor earnings represented 56 percent of total per capita income, with investment income representing 25 percent, and transfer payments representing 19 percent. In 2013, net labor income represented 52 percent of total per capita income, with investment income representing 30 percent, and transfer payments representing 18 percent.

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

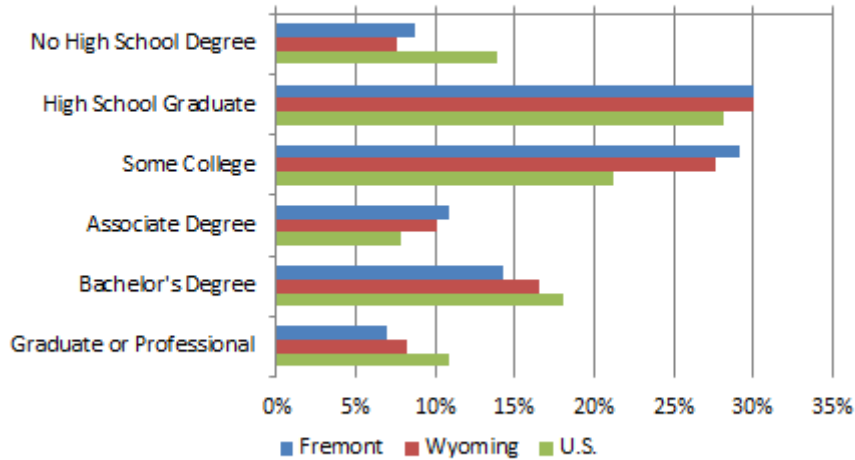
Figure 8.
Comparison of Per Capita Income by Source 2013



In 2013 per capita income for Fremont County was \$43,780 in 2013 dollars (Figure 8). This level of income was 17 percent below per capita income for Wyoming (\$52,827) and 2 percent below per capita income for the U.S. (\$44,765). Most of the difference in per capita income between the county, Wyoming and the U.S. can be attributed to lower per capita labor earnings (\$22,658 vs. \$31,288 vs. \$28,679). This difference is slightly offset by higher per capita transfer payments for the county compared to Wyoming and the U.S. (\$8,164 vs. \$6,484 vs. \$7,638). The county's per capita investment income (\$12,958) was 14 below Wyoming's (\$15,055) but 1.5 times the U.S. (\$8,448). In addition to lower per capita income, the county's 2013 poverty rate (15.3 percent) was substantially higher than Wyoming's (10.9 percent), and somewhat higher than the U.S. (14.5 percent). The county's 2013 unemployment rate (6.1 percent) was also above Wyoming's (4.7 percent) but below the U.S. (7.4 percent). While the per capita income for the county was 17 percent below the state average, the Wyoming Economic Analysis Division estimates that the county's cost-of-living for the second quarter of 2013 was 2 percent below the state average. This suggests that, on average, the county's population was economically somewhat worse-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.

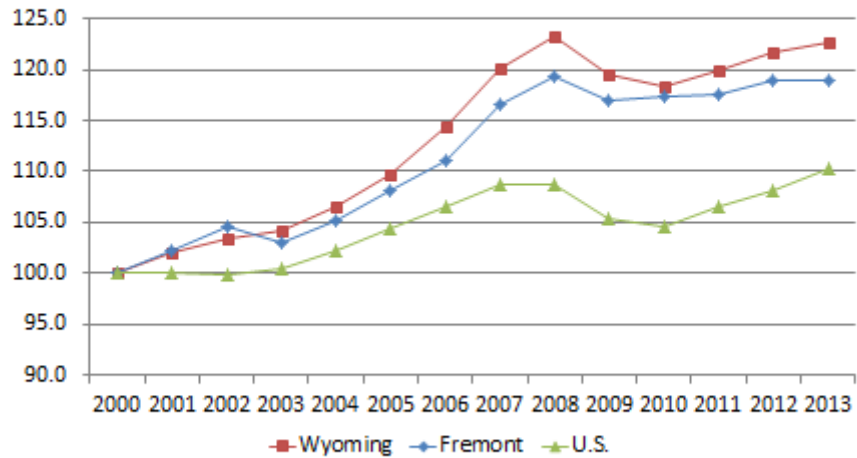
Figure 9.
Level of Educational Attainment, 2009-2013
(Population 25 Years or Older)



Overall, the Fremont County population educational attainment in terms of a high school degree or higher (91 percent) was comparable to Wyoming (92 percent) and higher than the U.S. (86 percent). However, the county’s population was somewhat less educated in terms of college or advanced degrees (21 percent vs. 25 percent vs. 29 percent). The percentage of the county population without a high school degree (9 percent) was similar to Wyoming’s (8 percent) and substantially lower than the U.S. (14 percent). The percentage of the county’s population with a high school degree (30 percent) was similar to Wyoming’s (30 percent) but slightly above the U.S. (28 percent). The percentage of the county’s population with some college (29 percent) or an associate degree (11 percent) was above both Wyoming (28 percent and 10 percent) and the U.S. (21 percent and 8 percent). However, the percentage of the county’s population with either a bachelors (14 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, Fremont County has eight public school districts with a total of 31 schools and a 2012 fall enrollment of 6,656. The graduation rate for the public school system was 67 percent compared to a state average of 78 percent. The public school system had 582 certified teachers, 131 certified staff, 81 administrators, and 583 classified staff. Total general fund expenditures for the county’s public school system was \$125.4 million in 2012 with an operating cost of \$21,163 per average daily membership. This compares with an average operating cost of \$17,156 per average daily membership for the state. Central Wyoming Community College is located in the county with its main campus in Riverton and off-campus facilities in Lander, Dubois, and the Wind River Indian Reservation.

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.
Employment Growth Index: 2000-2013



Fremont County experienced significant employment growth between 2000 and 2013. Employment in the county increased by 19 percent from 2000 through 2013 growing from 20,773 jobs in 2000 to 24,688 jobs in 2013 (Figure 10). This employment growth primarily occurred between 2000 and 2008 with county’s employment plateauing at around 25,000 jobs since 2008. During this time period Wyoming employment increased by 23 percent and the U.S. employment increased by 10 percent. Employment in all three regions was probably negatively affected by 2008-2009 recession, although the county’s economy appears to have been less impacted than Wyoming or the U.S. While county employment increased by 19 percent between 2000 and 2013, county population increased by 14 percent suggesting that at least some the job growth in the county 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



Source: Bureau of Economic Analysis

From 2000 to 2013, employment in Fremont County increased by 19 percent (Figure 11). This increase was 17 percent less than the employment increase for Wyoming (23 percent) and 1.8 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 greater growth in wage and salary jobs for the county and Wyoming. While the increase in county wage and salary employment (11 percent) was 23 percent less than for Wyoming (15 percent), it was four times the anemic growth rate for the U.S (3 percent). In comparison, the increase in county self-employed employment (7 percent) was similar to that for 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.
Fremont County Employment by Sector: 2013

Sector	Jobs	Percent	LQ
Local Government	4,584	18.6%	2.41
Retail Trade	2,479	10.0%	0.98
Health Care & Social Assistance	2,404	9.7%	0.88
Accommodations & Food Service	1,686	6.8%	0.95
Agriculture	1,485	6.0%	4.16
Construction	1,456	5.9%	1.30
Mining	1,430	5.8%	6.95
Other Services	1,307	5.3%	0.90
Real Estate	989	4.0%	0.89
State Government	904	3.7%	1.30
Professional Services	890	3.6%	0.57
Finance & Insurance	725	2.9%	0.53
Management Services	615	2.5%	0.37
Transportation & Warehousing	610	2.5%	0.70
Educational Services	520	2.1%	0.90
Federal - Civilian	479	1.9%	1.22
Arts, Entertainment, & Recreation	472	1.9%	0.78
Wholesale Trade	446	1.8%	0.55
Manufacturing	429	1.7%	0.24
Forestry, Fishing, & Ag Support	251	1.0%	1.65
Information	235	1.0%	0.55
Military	218	0.9%	0.79
Utilities	74	0.3%	0.92
Total	24,688	100.0%	

Due to its large size and the wide geographic distribution of its population, Local Government was the largest employer in Fremont County in 2013 accounting for 19 percent of total county employment (Figure 12). Local Government includes all the employment associated with the county, the numerous cities and towns in the county, and its eight school districts. Following Local Government was Retail Trade and Health Care & Social Assistance, both with about 10 percent of total county employment. Following Retail Trade and Health Care & Social Services was Accommodations & Food Services, Agriculture, Construction, and Mining, all of whom represented about 6 percent of total county employment and Other Services which represented 5 percent of total county employment. Combined, these eight sectors accounted for 68 percent of the total employment in the county. The three largest employment sectors in the county's economy, Local Government, Retail Trade, and Health Care & Social Assistance represent 38 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 indicates that the county's employment is somewhat more concentrated in a few sectors than Wyoming or the U.S.

The location quotients (LQ) in the fourth column of Figure 12 were used to identify Defining Industries in the 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 that account for at least 0.2 percent of total employment in the region. On this basis Fremont County has six Defining Industries: Mining (6.57), Agriculture (4.17), Local Government (2.43), Forestry, Fishing, & Ag Support (2.05), State Government (1.27), and Civilian Federal Government (1.25).

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

Figure 13.**Change in Fremont County Employment by Sector: 2001-2013**

Sector	2001	2013	Change 2001-2013	Percent of Change	Percent Change
Local Government	3,302	4,584	1,282	37.2%	38.8%
Mining	482	1,430	948	27.5%	196.7%
Real Estate	632	989	357	10.4%	56.5%
Health Care & Social Assistance	2,089	2,404	315	9.1%	15.1%
Agriculture	1,228	1,485	257	7.5%	20.9%
Educational Services	268	520	252	7.3%	94.0%
Finance & Insurance	480	725	245	7.1%	51.0%
Other Services	1,123	1,307	184	5.3%	16.4%
Professional Services	757	890	133	3.9%	17.6%
Arts, Entertainment, & Recreation	341	472	131	3.8%	38.4%
Forestry, Fishing, & Ag Support	183	251	68	2.0%	37.2%
Management Services	557	615	58	1.7%	10.4%
Accommodations & Food Service	1,633	1,686	53	1.5%	3.2%
Federal - Civilian	452	479	27	0.8%	6.0%
Wholesale Trade	420	446	26	0.8%	6.2%
Transportation & Warehousing	593	610	17	0.5%	2.9%
Military	203	218	15	0.4%	7.4%
State Government	909	904	-5	-0.1%	-0.6%
Utilities	106	74	-32	-0.9%	-30.2%
Information	324	235	-89	-2.6%	-27.5%
Retail Trade	2,603	2,479	-124	-3.6%	-4.8%
Manufacturing	611	429	-182	-5.3%	-29.8%
Construction	1,947	1,456	-491	-14.3%	-25.2%
Total	21,243	24,688	3,445	100.0%	16.2%

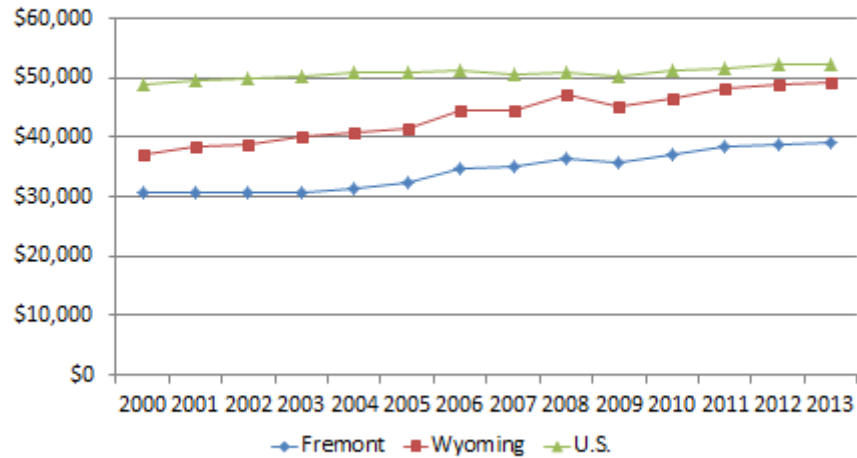
Employment in Fremont County increased by 16 percent from 2001 through 2013 (Figure 13). The largest increases were in Local Government which accounted for 37 percent of the growth in total county employment and Mining which accounted for 27 percent of the growth in total county employment. Combined these two sectors represented 65 percent of the total increase in county employment. In terms of other sectors, employment increases in Real Estate and Health Care & Social Services each accounted for more than 9 percent of the growth in total county employment. Also employment increases in Agriculture, Educational Services, and Finance & Insurance each accounted for more than 7 percent of the growth in total county employment. On the other hand, six sectors experienced losses in employment between 2001 and 2013 including: Construction (-491), Manufacturing (-182), Retail Trade (-124), Information (-89), Utilities (-32), and State Government (-5).

In terms of individual sector employment growth, the fastest growing sector was Mining which increased by nearly 3 times between 2001 and 2013. Following Mining, was Educational Services which

almost doubled in employment during the time period. Real Estate and Finance and Insurance also experienced substantial growth in employment growing by more than 1.5 times. On the other hand, Utilities, Manufacturing, Information, and Construction all experienced employment declines of more than 25 percent. The year 2001 was used to compare employment growth with 2013 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 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. Figure 14 illustrates the continuing problem that the Fremont County economy has with relatively low paying jobs. In 2000, the average earnings per job in Fremont County were \$30,559 in 2009 dollars. The average earnings per job for the county in 2000 were 17 percent below Wyoming’s (\$37,046) and 37 percent less than the U.S. (\$48,819). From 2000 to 2013, after adjusting for inflation, average earnings per job increased by 28 percent to \$39,074. Despite this increase, in 2013 the average earnings per job for the county were still 21 percent below Wyoming’s (\$49,188) and 25 percent below the U.S. (\$52,330). While the average earnings per job for the county were 21 percent below the state average, the Wyoming Economic Analysis Division estimates that the county’s cost-of-living for the second quarter of 2013 was 98 percent above the state average. This suggests that, on average, the county’s workforce was economically worse-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 Fremont County: 2013**

Sector	Jobs	Earnings	
		(\$1,000)	AEPJ
Utilities	74	\$7,766	\$104,946
Federal - Civilian	479	\$41,456	\$86,547
Mining	1,430	\$114,965	\$80,395
State Government	904	\$56,466	\$62,462
Transportation & Warehousing	610	\$33,775	\$55,369
Local Government	4,584	\$243,225	\$53,060
Wholesale Trade	446	\$23,247	\$52,123
Construction	1,456	\$68,749	\$47,218
Professional Services	890	\$41,193	\$46,284
Information	235	\$10,599	\$45,102
Health Care & Social Assistance	2,404	\$107,364	\$44,660
Military	218	\$6,968	\$31,963
Retail Trade	2,479	\$74,775	\$30,163
Finance & Insurance	725	\$21,334	\$29,426
Manufacturing	429	\$12,398	\$28,900
Other Services	1,307	\$37,640	\$28,799
Real Estate	989	\$28,008	\$28,320
Management Services	615	\$16,772	\$27,272
Educational Services	520	\$11,402	\$21,928
Accommodations & Food Service	1,686	\$32,790	\$19,448
Agriculture	1,485	\$28,776	\$19,378
Forestry, Fishing, & Ag Support	251	\$4,813	\$19,175
Arts, Entertainment, & Recreation	472	\$3,543	\$7,506
Total	24,688	\$1,028,024	\$41,641

Average earnings per job (AEPJ) can vary substantially by sector (Figure 15). In 2013 AEPJ in Fremont County ranged from over \$100,000 for Utilities and to slightly more than \$7,500 for Arts, Entertainment, and Recreation. After Utilities, Federal – Civilian and Mining both had AEPJ of more than \$80,000. State Government, Transportation & Warehousing, Local Government and Wholesale Trade all had AEPJ above \$50,000. Six of the 23 sectors in the county’s economy had an AEPJ that was greater than the average for Wyoming (\$52,420) and four of these sectors had an AEPJ that was greater than the U.S. average (\$55,768) in 2013. The six sectors with AEPJ above the Wyoming average represents only 33 percent of the total jobs in the county while the four sectors with AEPJ above the U.S. average represent only 12 percent of the total jobs in the county. This explains the lower 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 Fremont County: 2013

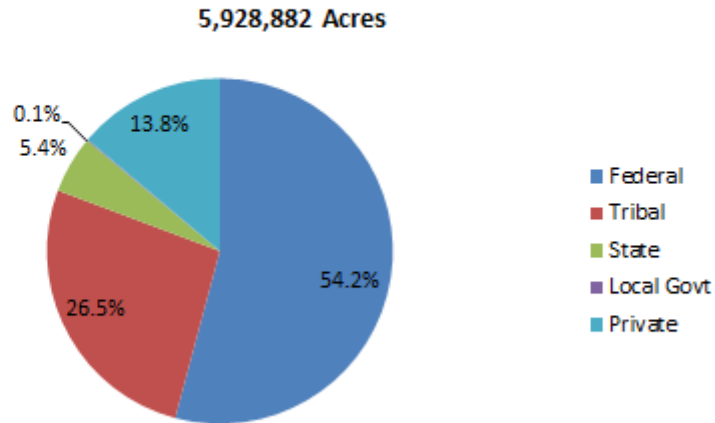
Sector	Jobs	AEPJ	Earnings (\$1,000)	Percent
Local Government	4,584	\$53,060	\$243,225	23.7%
Mining	1,430	\$80,395	\$114,965	11.2%
Health Care & Social Assistance	2,404	\$44,660	\$107,364	10.4%
Retail Trade	2,479	\$30,163	\$74,775	7.3%
Construction	1,456	\$47,218	\$68,749	6.7%
State Government	904	\$62,462	\$56,466	5.5%
Federal - Civilian	479	\$86,547	\$41,456	4.0%
Professional Services	890	\$46,284	\$41,193	4.0%
Other Services	1,307	\$28,799	\$37,640	3.7%
Transportation & Warehousing	610	\$55,369	\$33,775	3.3%
Accommodations & Food Service	1,686	\$19,448	\$32,790	3.2%
Agriculture	1,485	\$19,378	\$28,776	2.8%
Real Estate	989	\$28,320	\$28,008	2.7%
Wholesale Trade	446	\$52,123	\$23,247	2.3%
Finance & Insurance	725	\$29,426	\$21,334	2.1%
Management Services	615	\$27,272	\$16,772	1.6%
Manufacturing	429	\$28,900	\$12,398	1.2%
Educational Services	520	\$21,928	\$11,402	1.1%
Information	235	\$45,102	\$10,599	1.0%
Utilities	74	\$104,946	\$7,766	0.8%
Military	218	\$31,963	\$6,968	0.7%
Forestry, Fishing, & Ag Support	251	\$19,175	\$4,813	0.5%
Arts, Entertainment, & Recreation	472	\$7,506	\$3,543	0.3%
Total	24,688	\$41,641	\$1,028,024	100.0%

The combination of the number of jobs and average earnings per job (AEPJ) determines the relative importance of individual sectors in the Fremont County economy in terms of total labor earnings (Figure 16). Labor earnings are important because they represent the major source of personal income for county residents. Overall, employment in the county generated \$1.0 billion of labor earnings in 2013. Local Government, due to its large number of jobs and above average AEPJ, represents 24 percent of this total. Following Local Government were Mining (11 percent) and Health Care & Social Assistance (10 percent). Retail Trade represented 7 percent of total county employment, Construction 7 percent and State Government 5 percent. These six sectors account for 65 percent of the total labor earnings in the county. Total government labor earnings (Local Government, State Government, Federal – Civilian, and Military) represents 34 percent of total labor earnings in the county.

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

LAND CHARACTERISTICS

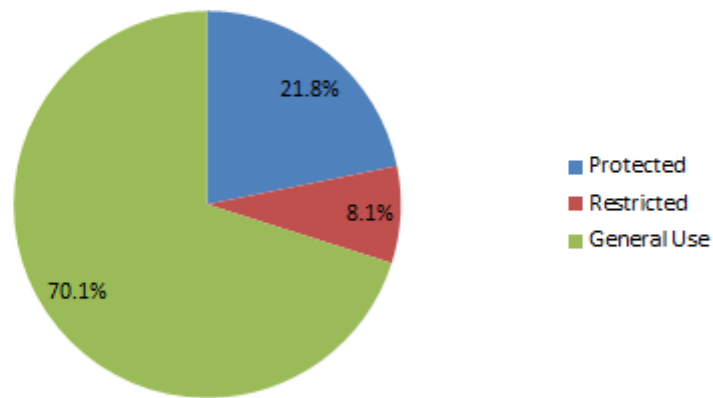
Figure 17.
Land Ownership in Fremont County



Fremont County is the second largest county in Wyoming containing 5.9 million acres (Figure 17). Most of this land area is under government or tribal ownership. More than 54 percent of the county’s land area (3.2 million acres) is owned by the federal government. Of this amount, the BLM controls nearly two-thirds, with the Forest Service controlling more than 30 percent and the Bureau of Reclamation controlling nearly 4 percent. Tribal lands represent nearly 26 percent of the county’s land area (1.6 million acres). State lands account for more than 5 percent of the county’s land area (more than 317,000 acres). Nearly 85 percent of the state land area is state trust land with the other 15 percent held by the Game and Fish Department and the Recreation Commission. Finally, local government owns 0.1 percent of the land in the county (slightly more than 5,500 acres). As a result of the large government and tribal presence in the county, less than 14 percent of the county’s land area is privately owned (slightly more than 820,000 acres). Information from the Wyoming Department of Revenue on acres taxed as agricultural land indicates that nearly 90 percent of the private land in the county is in agricultural use (more than 729,000 acres). Of this amount nearly 84 percent is range land (more than 610,000 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 Fremont County



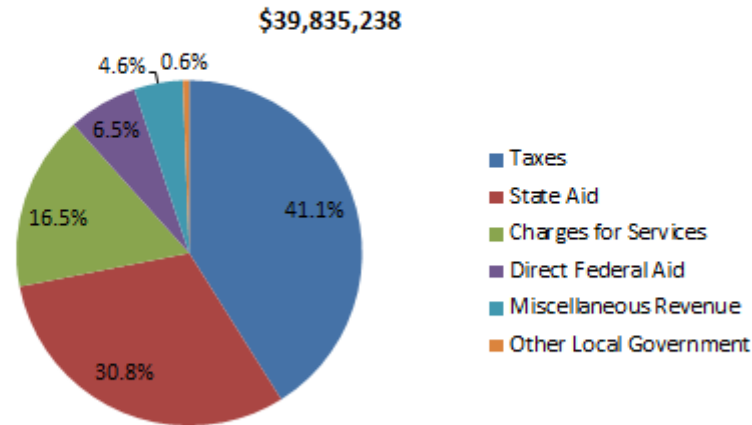
Federal lands are managed for different purposes under differing statutory authority. Three categories of designation are presented in Figure 18: 1) Protected, 2) Restricted., and 3) General Use. Protected areas include National Parks and Preserves (NPS), Wilderness (NPS, FWS, FS, BLM), National Conservation 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 Inventoried 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 Fremont County nearly 22 percent of federal lands are designated as protected (nearly 672,000 acres). This amount includes more than 530,000 acres of Forest Service land that is designated as national wilderness (54 percent of total Forest Service land in the county). Also, more than eight percent of federal lands are designated as restricted (nearly 250,000 acres) with 70 percent designated for general use (more than 3 million acres).

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

County Government Finances

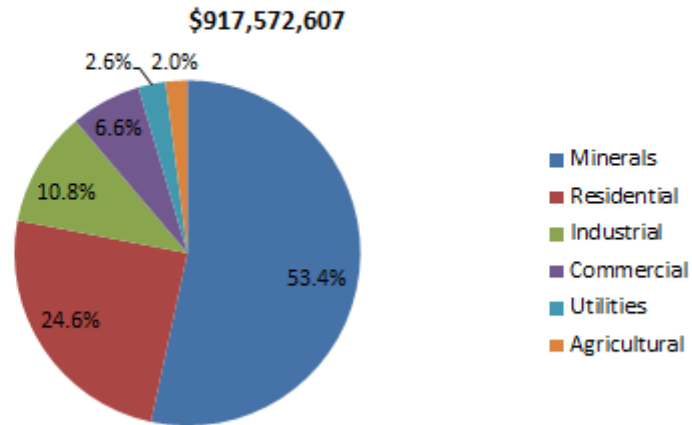
Figure 19.
Fremont County Government Revenue: FY2014



Wyoming Department of Audit information indicates that the total revenue for Fremont County Government was \$39.8 million in FY2014 (Figure 19). Of this total, the largest source was Taxes which included property taxes and optional sales tax revenue (41 percent). Following Taxes was State Aid which included the county’s share of the 4 percent sales and use tax revenue (31 percent) and Charges for Services (16 percent). Combined these three sources represented 88 percent of the total county government revenue in FY2014. Other sources of county government revenue included Direct Federal Aid (including PILT payments), Miscellaneous Revenue, and Other Local Government Revenue. Combined these smaller revenue sources represented 12 percent of the total county government revenue in FY2014. Compared to all counties in Wyoming, the County had a lower proportion of revenue from Taxes (41 percent vs. 50 percent). The county’s proportion from State Aid was higher relative to all counties in the state (31 percent vs. 26 percent) and the proportion from Charges for Services was substantially higher relative to all counties in the state (16 percent vs. 7 percent). Other sources of revenue were comparable to all other counties in the state in terms of Direct Federal Aid (6 percent vs. 6 percent) and Miscellaneous Revenue (5 percent vs. 6 percent, except for Other Local Government (1 percent vs. 5 percent). Overall, the county’s per capita revenue (\$972) was 25 percent below the average for all counties in Wyoming (\$1,288).

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.
Fremont County Assessed Valuation: FY2014

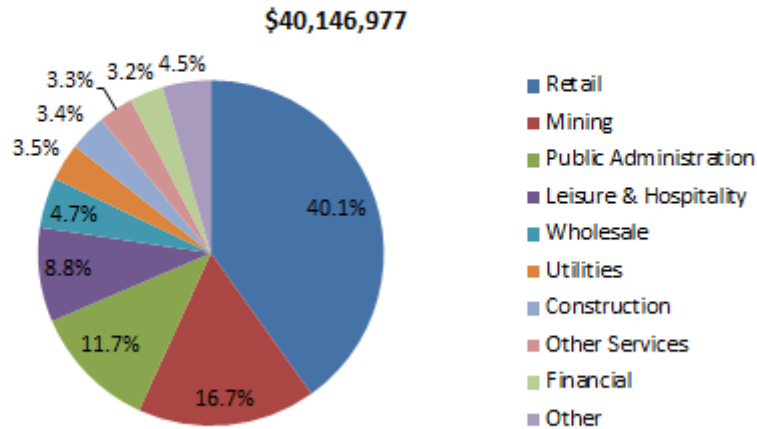


The total assessed valuation for Fremont County in FY2014 was \$917.6 million (Figure 20). More than 50 percent of the total valuation was from Mineral Production. Following minerals was Residential Property (25 percent) and Industrial Property (11 percent). Combined these three sources represented 89 percent of the county's total assessed valuation. Other sources of assessed valuation included Commercial Property (7 percent), Utilities (3 percent) and Agricultural Lands (2 percent). Combined these sources represented 11 percent of the county's assessed valuation.

Compared to Wyoming, the county had a lower proportion of assessed valuation from Mineral Production (53 percent vs. 60 percent). The county's proportion of assessed valuation from Residential Property was higher than Wyoming's (25 percent vs. 18 percent). The county's proportion of assessed valuation from Industrial Property was slightly higher than Wyoming's (11 percent vs. 9 percent). The county's assessed valuation for Commercial, Utilities, and Agricultural was comparable to Wyoming's (11 percent vs. 12 percent). In terms of Mineral Production, crude oil represented 61 percent of total county mineral assessed valuation, natural gas represented 39 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 facilities represented more than 93 percent of total county industrial property assessed valuation. Overall, oil and gas production and the associated facilities represent 63 percent of the county's total assessed valuation. This concentration makes county government finances vulnerable to fluctuations in oil and gas prices and activity in the county.

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.
Fremont County Sales & Use Tax Revenue: FY2014

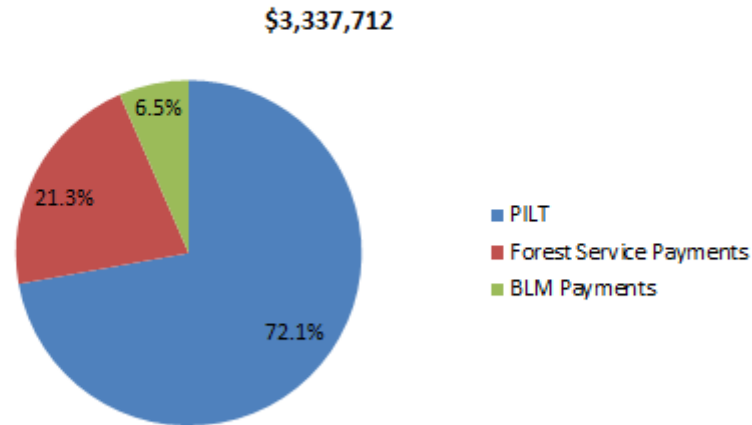


In FY2014 Fremont County’s sales and use tax generated \$40.1 million in sales and use tax revenue (Figure 21). Of this total, 55 percent (\$22.1 million) was retained by state government and 45 percent (\$18.1 million) was returned to local governments in Fremont County. In FY2014 County government’s share of the returned sales and use tax revenue was approximately \$9.0 million (50 percent) with the remaining \$9.0 million (50 percent) going to municipal governments in the county. About forty percent of the county’s sales and use tax revenue came from Retail Trade. Following Retail Trade was Mining (17 percent), Public Administration (12 percent), and Leisure & Hospitality (9 percent). Combined these four sectors contributed 77 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 in Wyoming. Wholesale, Utilities, Construction, Other Services, Financial and Other represented a combined 23 percent of county sales and use tax revenue with Utilities, Construction, Other Services, and Financial each accounting for more than 3 percent of total county sales and use tax revenue.

Compared to total sales and use tax revenue for Wyoming, the county had a substantially higher proportion of sales and use tax revenue from Retail Trade (40 percent vs. 29 percent). The county’s proportion of sales and use tax revenue from Mining was somewhat lower than Wyoming’s (17 percent vs. 21 percent). The proportion of county sales and use tax revenue from Public Administration was somewhat higher than Wyoming’s (12 percent vs. 9 percent) and the proportion from Leisure & Hospitality was comparable to Wyoming’s (9 percent vs. 9 percent).

Data Sources: Wyoming Department of Administration and Information, Economic Analysis Division. 2014. Wyoming Sales, Use, and Lodging Tax Revenue Report, 39th Edition.

Figure 22.
Fremont County Federal Land Payment: FY2013



The Economic Profile System-Human Dimensions Toolkit indicates that federal land payments to local governments in Fremont County totaled \$3.3 million in FY2013 (Figure 22). The largest source of federal land payments to the county was Payment in Lieu of Taxes (PILT) representing 72 percent of the total amount (\$2.4 million). 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 21 percent of the total amount (\$712,028). 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 6 percent of the total amount (\$218,130). BLM payments represent revenue sharing funds including grazing fees through the Taylor Grazing Act. Of the \$3.3 million in Federal land payments to the county in FY2013, 83 percent went to county government (\$2.8 million), 9 percent went to local school districts (\$302,612), 6 percent went to grazing districts (\$213,053), and 2 percent went to Resource Advisory Councils (\$56,962). In FY2013 Federal Land Payments to the county represented \$1.04 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.**Fremont County Government Costs, FY2014**

Costs	Amount	Percent	Per Capita
Jail	\$4,688,253	14.1%	\$114.35
County Sheriff	\$4,657,711	14.0%	\$113.61
Road and Bridge	\$3,535,887	10.6%	\$86.25
Health (Not Hospital)	\$3,437,663	10.3%	\$83.85
Boards	\$3,119,064	9.4%	\$76.08
Construction	\$1,784,014	5.4%	\$43.51
County Attorney	\$1,450,403	4.4%	\$35.38
Capital	\$1,447,550	4.4%	\$35.31
Social Services	\$1,002,696	3.0%	\$24.46
County Assessor	\$875,600	2.6%	\$21.36
County Clerk	\$862,952	2.6%	\$21.05
Justice or Circuit Court	\$783,131	2.4%	\$19.10
Administration	\$717,850	2.2%	\$17.51
Courthouse	\$709,752	2.1%	\$17.31
County Treasurer	\$681,816	2.0%	\$16.63
Parks & Recreation	\$669,626	2.0%	\$16.33
Distict Court	\$608,369	1.8%	\$14.84
County Commissioners	\$520,880	1.6%	\$12.71
Juvenile Probation	\$394,227	1.2%	\$9.62
County Coroner	\$350,800	1.1%	\$8.56
County Planner	\$289,396	0.9%	\$7.06
Other	\$271,284	0.8%	\$6.62
Agriculture Department	\$247,813	0.7%	\$6.04
Civil Defense	\$139,858	0.4%	\$3.41
Fire Protection	\$28,791	0.1%	\$0.70
Total	\$33,275,386	100.0%	\$811.63

The total cost of maintaining county government for Fremont County in FY2014 was \$33.3 million (Figure 23). This represents a per capita cost of \$811.63 which was 25 percent below the average for all Wyoming counties. The largest cost categories were Jail (14 percent) and County Sheriff (14 percent). If the costs of all law enforcement (County Sheriff, Jail, County Attorney, County Courts and Juvenile Probation) are considered it represents 36 percent of the total county budget. The other major cost categories were Road and Bridge (11 percent) and Health (10 percent). The combination of combined law enforcement, Road and Bridge, and Health represent 57 percent of the total county budget.

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.
Fremont County Mining Industry

	Amount
<u>Mineral Production (2013)</u>	
Crude Oil (Barrels)	4,155,914
Natural Gas (MCF)	134,467,744
Sand & Gravel (Tons)	545,350
Bentonite (Tons)	6,247
<u>Tax Revenue (2014)</u>	
Assessed Valuation	\$582,649,593
Property Tax Revenue	\$42,329,493
<u>Employment (2013)</u>	
Full & Part-time Jobs	1,430
Labor Earnings	\$114,965,000
Average Earnings Per Job	\$80,395

In 2013, the 1,274 producing oil and gas wells in Fremont County produced 4.1 million barrels of crude oil and 134.5 million mcf of natural gas (Figure 24). This represented about 7 percent of total crude oil and 7 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 545,350 tons in 2013. This represented 4 percent of the total sand and gravel production in the state. There was also a small amount of bentonite production in the county during 2013. The mining industry in the county, including the associated industrial property, had an assessed valuation of \$582.6 million dollars in 2014 (2014 assessed valuation for mineral production is based on 2013 production). This valuation represented 63 percent of the total assessed valuation for the county. Based on a county levy of 72.6 mills the mineral industry generated \$42.3 million in property tax revenue in 2014. Of this total, 62 percent went to K-12 schools (\$26.4 million), 16 percent went to local county government (\$7.0 million), 12 percent went to county special districts (\$5.2 million), and 9 percent went to the Community College (\$3.8 million). Special districts in the county included: Cemetery, Water and Sewer, Solid Waste Disposal, and Conservation. In 2013 the mining industry in the county supported 1,430 jobs with labor earnings of \$115.0 million. This represented 6 percent of total employment and 11 percent of total labor earnings in the county. The percent of total employment in mining for the county was 6 times the national percentage (0.9%). The average earnings per job for mining in the county were \$80,395 which was 1.9 times the county average (\$41,641). The mining industry ranked 7th out of 23 sectors in the county's economy in terms of total employment and 2nd 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.
Fremont County Agricultural Industry

	Amount
<u>Assets (2012)</u>	
Total Land in Agriculture (Acres)	1,710,015
Cattle Inventory (Head)	81,288
Sheep Inventory (Head)	16,103
Investment – Land, Buildings, Equipment	\$1,629,139,000
Property Taxes Paid	\$4,800,000
<u>Gross Revenue (2013)</u>	
	\$151,614,000
<u>Employment (2013)</u>	
Jobs	1,485
Labor Earnings	\$28,776,000
Average Earnings Per Job	\$19,378

In 2012 there were 1,363 agricultural operations in Fremont County. These operations managed 1.7 million acres in the county (Figure 25). Included in this acreage is 89 percent of the private land in the county. Of the total land in agriculture, 88 percent is classified as grazing land, 10 percent as cropland, less than 1 percent as woodlands, and 2 percent as farmsteads and buildings. The average size of an agricultural operation in the county was 1,255 acres. The total cattle and sheep inventory in the county was 97,391 head including 81,288 head of cattle and calves and 16,103 head of sheep and lambs. In 2013, the county ranked 2nd out of 23 counties in Wyoming in terms of cattle and calves inventory and 8th out of 23 counties in terms of sheep and lambs inventory. It also ranked 5th in barley production, 5th in dry bean production, 6th in sugar beet production, 7th in corn for grain, 1st in alfalfa hay production, and 6th 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 \$1.6 billion. This total included \$1.5 billion in land and buildings and \$141.1 million for equipment and machinery. The average investment per agricultural operation was \$1.2 million. In 2012 agricultural operations in the county paid \$4.8 million in property taxes.

The gross revenue for the agricultural industry in the county in 2013 was \$151.6 million. Of this total 55 percent was from cash receipts for livestock, 31 percent was from cash receipts for crops, 13 percent was from miscellaneous sources, and less than 1 percent was from government payments. Total employment for agriculture in 2013 was 1,485 jobs with labor earnings of \$28.8 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 4.2 times the national percentage (1.4 percent). The average earnings per job for agriculture in the county were \$19,378 which was 47 percent the county

average (\$41,641). 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 12th 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, 89 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 rangeland 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 rangeland provides important economic benefits to both residents and visitors. Magnan et al. (2005) found that the natural environment, rangelands, 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 rangelands 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 rangelands 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 rangeland 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 Fremont County, they do suggest that there may be significant amenity values associated with rangelands in the county. Also since these estimates represent indirect measures of value there is a potential for them to substantially overestimate the actual value.

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 464,000 acres of “prime” rangeland in Fremont County and estimated that 296,960 acres (64 percent) could be converted to residential development by 2020. They defined prime rangeland 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 21st among all counties in the Western U.S. in terms of prime rangeland at risk of development.

There is evidence that there has actually been some change in ownership of agricultural lands in Fremont County. Travis et al. (2003) estimated that 218,551 acres of rangeland in the county change ownership in just eleven years (1990-2001). Traditional ranchers bought less than one-half (46 percent) of these acres of rangeland (101,507 acres) with Amenity Buyers purchasing 14 percent (30,059 acres), Investors - 6 percent (12,387 acres), Developers- less than 1 percent (440 acres), Part-Time Ranchers - 8 percent (17,175 acres), Corporations - 6 percent (14,003 acres), Conservation Organizations - 6 percent (12,471 acres), Other Buyers - 13 percent (28,865 acres), and Unknown Buyers - 1 percent (1,644 acres). Although only 440 acres of rangeland 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 rangeland going to development may be understated since such conversions often involve smaller parcels. The authors note that this change in ownership may lead to instability in land tenure for rangelands 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 Rangeland 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 Rangeland in the Rocky Mountain West: Mapping the Threats to Prime Rangeland in Seven Western States, American Farmland Trust, Washington D.C. Travis, W.R., H. Gosnell, and J. H. Haggerty. 2003. Summary Report: Rangeland Dynamics in the Greater Yellowstone Ecosystem, A Report to Yellowstone Heritage, Center of the American West, University of Colorado at Boulder.

Figure 26.
Fremont County Travel Industry, 2013

	Amount
Visitor Spending	\$136.4 Million
Employment	1,530 Jobs
Labor Income	\$43.5 Million
Average Earnings Per Job	\$28,431
Local Tax Revenue	\$1.4 million

Dean Runyan Associates estimates that visitors spent \$136.4 million while in Fremont County in 2013 (Figure 26). In terms of accommodations, 34 percent of this spending was by visitors staying in hotels/motels, 24 percent by visitors staying in campgrounds, 20 percent was by visitors staying in private homes, 5 percent was by visitors staying in vacation homes, and 16 percent was by visitors not staying overnight. In terms of purchases, 30 percent was for local transportation & gas, 20 percent was for food services, 15 percent was for arts/entertainment/recreation, 14 percent was for retail sales, 13 percent for accommodations, 7 percent went to food stores and less than 1 percent for air transportation.

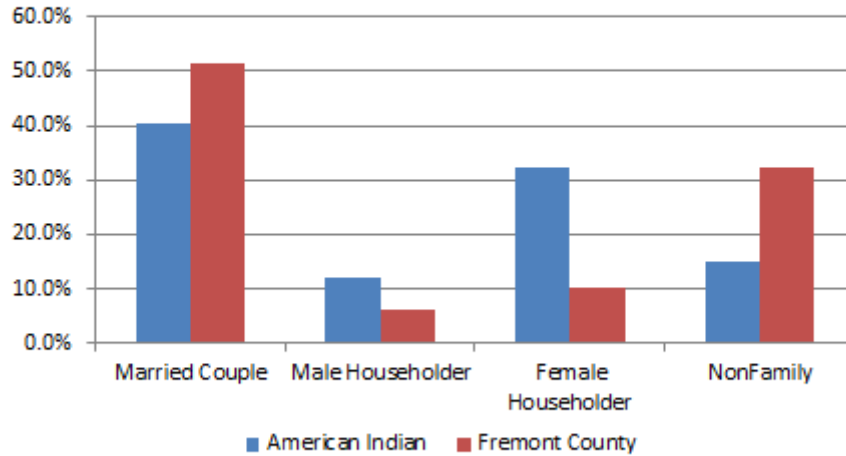
Dean Runyan estimated that the travel industry generated 1,530 jobs in the county in 2013. This represents 6 percent of total employment in the county. Nearly 60 percent of these jobs were in the accommodations and food service sector, 25 percent were in the arts/entertainment/recreation sector, and 13 percent were in the retail trade sector. The labor earnings associated with this employment was estimated to be \$43.5 million. This represents 4 percent of the total labor earnings for the county. Average earnings per job for the travel industry in the county for 2013 were \$28,431. Average earnings per job for the travel industry were 68 percent the county average (\$41,641).

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.

AMERICAN INDIAN RESIDENTS

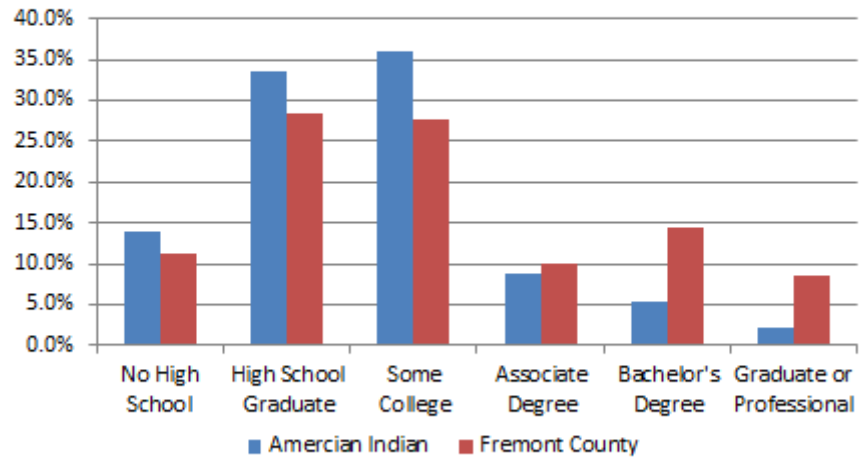
Figure 27.
Household Type, 2006-2010



The Wind River Indian Reservation occupies 1.6 million acres in Fremont County representing 26 percent of the total land base in the county (see page 22). Due to the presence of the reservation, Native Americans represent the second largest category of race in the county accounting for 21 percent of the total population (see page 7). In many respects the social and economic characteristics of the American Indian population in the county are somewhat different than the rest of the county’s population. In terms of household type, American Indian residents were less likely to be in a married couple family (40 percent vs. 51 percent) or a nonfamily household (15 percent vs. 32 percent). Nonfamily households represent mostly people living alone, but also a household where no one is related to the householder. Conversely, American Indian residents were more likely to live in a male householder family with no wife present (12 percent vs. 6 percent) and in a female householder family with no husband present (32 percent vs. 10 percent).

Data Source: U.S. Census Bureau. 2014. American Fact Finder, Selected Social Characteristics in the United States, 2006-2010 American Community Survey Selected Population Tables, DP02.

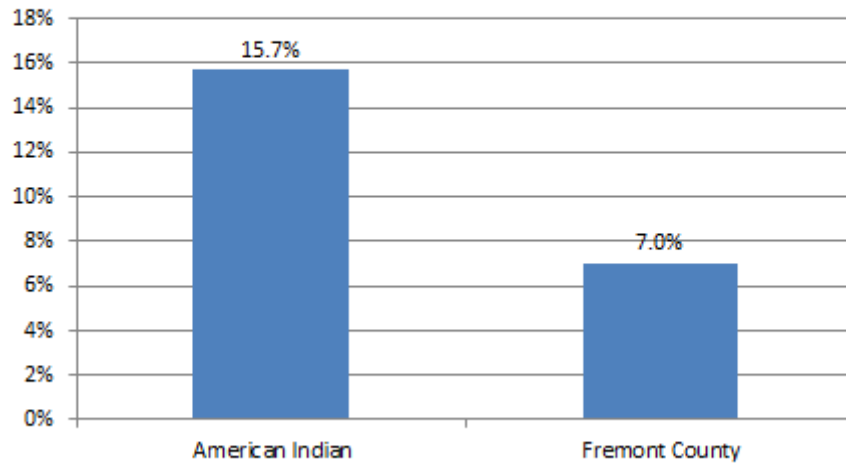
Figure 28.
Educational Attainment, 2006-2010



In terms of educational attainment, American Indian residents were more likely to not have a high school degree (14 percent vs. 11 percent), be only a high school graduate (34 percent vs. 28 percent), or have attended some college (36 percent vs. 28 percent). Conversely, they were slightly less likely to have an associate degree (9 percent vs. 10 percent), less likely to have a bachelor’s degree (5 percent vs. 14 percent), and less likely to have a graduate or professional degree (2 percent vs. 8 percent). Overall, the percentage of the American Indian residents with a high school degree or higher was comparable to the county residents (86 percent vs. 89 percent); however the percentage of American Indian residents with a bachelor’s degree or higher was significantly lower than for county residents (7 percent vs. 23 percent).

Data Source: U.S. Census Bureau. 2014. American Fact Finder, Selected Social Characteristics in the United States, 2006-2010 American Community Survey Selected Population Tables, DP02.

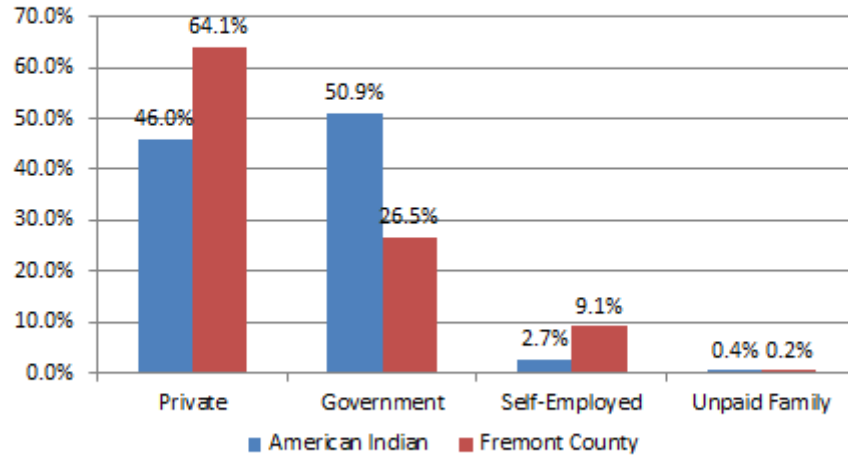
Table 29.
Percent Unemployed: 2006-2010



Unemployment is a continuing problem for American Indian residents in Fremont County. For the period 2006 through 2010, the Census Bureau estimates that the unemployment rate for American Indians in Fremont County was 16 percent. This was more than twice the unemployment rate for Fremont County as a whole (7%). Due to the difficulties of collecting census data on the reservation, the actual unemployment rate for American Indians in the county may be substantially higher than that reported by the Census Bureau.

Data Source: U.S. Census Bureau. 2014. American Fact Finder, Selected Social Characteristics in the United States, 2006-2010 American Community Survey Selected Population Tables, DP03.

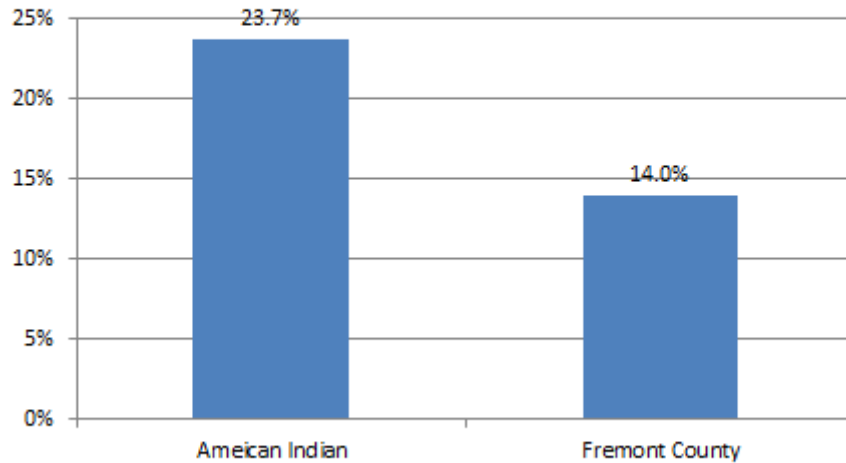
Figure 30.
Class of Worker, 2006-2010



For those American Indian residents that are employed, the type of employment is also different than that for Fremont County as whole. Only 46 percent of the American Indian workers in the county are employed in the private sector compared to 64 percent for all workers. Conversely, 51 percent of the American Indian workers are employed in the government sector versus 26 percent for all workers in the county. The percentage of workers that are self-employed is also less for American Indian workers (3 percent vs. 9 percent). The percent of workers that are unpaid family labor is higher for American Indian workers than for all workers in the county (.04 percent versus .02 percent).

Data Source: U.S. Census Bureau. 2014. American Fact Finder, Selected Social Characteristics in the United States, 2006-2010 American Community Survey Selected Population Tables, DP03.

Figure 31
Individuals Below Poverty Level, 2006-2010



Due to the high unemployment rate among American Indian residents in the county, these residents also have a high poverty level. For the 2006-2010 time period, the Census Bureau estimates that 24 percent of the American Indian residents in the county were living below the poverty level. This was nearly twice the poverty rate for the county as a whole. Due to the difficulties in collecting census data on the reservation, the actual poverty rate may be substantially higher than that reported by the Census Bureau. The poverty rate was particularly high for American Indian families with a female householder, no husband present, with related children under 5 years old at 66 percent. On a per capita income basis, American Indian residents were 40 percent below the average for the county (\$14,809 versus \$24,173). American Indian residents were also more likely to receive cash public assistance income (15 percent vs. 4 percent) and to have food stamp/SNAP benefits (26 percent vs. 9 percent).

Data Source: U.S. Census Bureau. 2014. American Fact Finder, Selected Social Characteristics in the United States, 2006-2010 American Community Survey Selected Population Tables, DP03.

TABLES

Table 1. Population, 2000-2013			
Year	Fremont	Wyoming	U.S.
2000	35,840	494,300	282,162,411
2001	35,718	494,657	284,968,955
2002	36,015	500,017	287,625,193
2003	36,130	503,453	290,107,933
2004	36,383	509,106	292,805,298
2005	36,838	514,157	295,516,599
2006	37,408	522,667	298,379,912
2007	38,132	534,876	301,231,207
2008	38,907	546,043	304,093,966
2009	39,685	559,851	306,771,529
2010	40,229	564,222	309,326,295
2011	40,585	567,329	311,582,564
2012	41,090	576,626	313,873,685
2013	40,998	582,658	316,128,839
Change	5,158	88,358	33,966,428
Percent	14.4%	17.9%	12.0%
Source	Fremont	Wyoming	U.S.
Natural Increase	2,697	42,359	21,964,712
Net Migration	2,461	45,999	12,001,716
Total Change	5,158	88,358	33,966,428
Source: WY Department of A & I - Economic Analysis Division			

Table 2. Primary Reason for Moving to Fremont County, 2000-2013		
Reason	Number	Percent
Job Related	1,670	41.6%
Better Quality of Life	348	8.7%
Friends or Relatives	1,143	28.5%
Other	852	21.2%
Total	4,013	100.0%
Source: Wyoming Community Development Authority		

Table 3. Age of Population, 2013						
				Fremont	Wyoming	U.S.
Age	Fremont	Wyoming	U.S.	Percent	Percent	Percent
Under 5	3,076	38,347	19,868,088	7.5%	6.6%	6.3%
5 to 17	7,308	99,332	53,717,784	17.8%	17.0%	17.0%
18 to 24	3,441	58,566	31,457,653	8.4%	10.1%	10.0%
25 to 44	9,585	151,055	83,297,277	23.4%	25.9%	26.3%
45 to 64	11,133	156,669	83,083,963	27.2%	26.9%	26.3%
65 and over	6,455	78,689	44,704,074	15.7%	13.5%	14.1%
Total	40,998	582,658	316,128,839	100.0%	100.0%	100.0%
Median Age	38.4	36.8	37.6			

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

Table 4. Race of Population, 2013						
				Fremont	Wyoming	U.S.
Race	Fremont	Wyoming	U.S.	Percent	Percent	Percent
White	30,731	539,936	245,499,216	75.0%	92.7%	77.7%
Black	388	10,186	41,623,897	0.9%	1.7%	13.2%
Native American	8,529	15,258	3,910,028	20.8%	2.6%	1.2%
Asian	220	5,506	16,632,553	0.5%	0.9%	5.3%
Pacific Islander	19	630	722,417	0.0%	0.1%	0.2%
Two or More	1,111	11,142	7,740,728	2.7%	1.9%	2.4%
Total	40,998	582,658	316,128,839	100.0%	100.0%	100.0%
Identity	Fremont	Wyoming	U.S.	Fremont	Wyoming	U.S.
				Percent	Percent	Percent
Hispanic	2,680	56,363	54,071,370	6.5%	9.7%	17.1%
Non-Hispanic	38,318	526,295	262,057,469	93.5%	90.3%	82.9%
Total	40,998	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						
				Fremont	Wyoming	U.S.
Type	Fremont	Wyoming	U.S.	Percent	Percent	Percent
Net Earnings	\$22,658	\$31,288	\$28,679	51.8%	59.2%	64.1%
Transfer Payments	\$8,164	\$6,484	\$7,638	18.6%	12.3%	17.1%
Investment	\$12,958	\$15,055	\$8,448	29.6%	28.5%	18.9%
Total	\$43,780	\$52,827	\$44,765	100.0%	100.0%	100.0%
	Deflated	Deflated	Deflated	Deflated	Deflated	Deflated
	Fremont	Fremont	Fremont	Fremont	Wyoming	U.S.
Year	Earnings	Tranfer	Investment	Total	Total	Total
2000	\$16,118	\$5,582	\$7,024	\$28,724	\$35,327	\$37,351
2001	\$16,713	\$5,764	\$6,893	\$29,370	\$36,653	\$37,633
2002	\$16,966	\$6,004	\$6,705	\$29,675	\$36,871	\$37,388
2003	\$16,619	\$6,283	\$7,299	\$30,201	\$38,418	\$37,666
2004	\$17,214	\$6,343	\$7,984	\$31,541	\$40,004	\$38,482
2005	\$18,152	\$6,325	\$8,504	\$32,980	\$42,594	\$39,013
2006	\$19,394	\$6,493	\$9,729	\$35,617	\$46,767	\$40,211
2007	\$20,120	\$6,678	\$9,453	\$36,251	\$47,023	\$40,894
2008	\$21,103	\$7,039	\$9,808	\$37,950	\$49,418	\$41,188
2009	\$19,744	\$7,618	\$8,356	\$35,718	\$43,488	\$39,379
2010	\$20,290	\$7,754	\$8,441	\$36,485	\$44,486	\$39,664
2011	\$21,125	\$7,619	\$9,425	\$38,169	\$47,733	\$41,020
2012	\$21,287	\$7,522	\$12,230	\$41,039	\$49,970	\$42,094
2013	\$21,261	\$7,661	\$12,159	\$41,081	\$49,569	\$42,005
Change	\$5,143	\$2,079	\$5,135	\$12,357	\$14,242	\$4,654
Percent of Total	41.6%	16.8%	41.6%	100.0%	N.A.	N.A.
Percent Change	31.9%	37.2%	73.1%	43.0%	40.3%	12.5%
Source: Bureau of Economic Analysis						

Table 6. Educational Attainment Level, 2009-2013						
	Fremont	Wyoming	U.S.	Fremont Percent	Wyoming Percent	U.S. Percent
Degree						
No High School Degree	2,325	28,616	28,773,258	8.7%	7.6%	13.9%
High School Graduate	8,070	112,959	58,167,521	30.1%	30.0%	28.2%
Some College	7,808	103,922	43,884,393	29.1%	27.6%	21.2%
Associate Degree	2,928	38,029	16,146,145	10.9%	10.1%	7.8%
Bachelor's Degree	3,829	62,127	37,260,334	14.3%	16.5%	18.0%
Graduate or Professional	1,865	30,875	22,356,200	7.0%	8.2%	10.8%
Total Population 25 Yrs or Old	26,825	376,529	206,587,852	100.0%	100.0%	100.0%
High School Degree or Higher	24,500	347,913	177,814,594	91.3%	92.4%	86.1%
Bachelor's Degree or Higher	5,694	93,003	59,616,534	21.2%	24.7%	28.9%

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

Table 7. Employment, 2000-2013

	Fremont W&S	Fremont SelfEmpl	Fremont Total	Wyoming Total	U.S. Total
Year					
2000	15,651	5,122	20,773	322,283	165,370,800
2001	15,831	5,412	21,243	328,624	165,519,200
2002	16,172	5,559	21,731	333,038	165,159,100
2003	15,839	5,562	21,401	335,584	166,026,500
2004	16,096	5,732	21,828	343,080	169,036,700
2005	16,546	5,905	22,451	353,738	172,557,400
2006	16,953	6,109	23,062	368,896	176,123,600
2007	17,497	6,703	24,200	386,981	179,885,700
2008	18,015	6,776	24,791	397,281	179,645,900
2009	17,673	6,650	24,323	385,464	174,243,700
2010	17,767	6,631	24,398	381,611	173,044,700
2011	17,958	6,518	24,476	386,385	176,286,700
2012	18,144	6,552	24,696	392,201	178,846,000
2013	18,025	6,663	24,688	395,312	182,278,200
Percent Change 2000-2012	15.2%	30.1%	18.8%	22.7%	10.2%

Source: Bureau of Economic Analysis

Table 8. Fremont County Employment by Sector, 2013

Sector	Jobs	Percent	LQ
Local Government	4,584	18.6%	2.41
Retail Trade	2,479	10.0%	0.98
Health Care & Social Assistance	2,404	9.7%	0.88
Accommodations & Food Service	1,686	6.8%	0.95
Agriculture	1,485	6.0%	4.16
Construction	1,456	5.9%	1.30
Mining	1,430	5.8%	6.95
Other Services	1,307	5.3%	0.90
Real Estate	989	4.0%	0.89
State Government	904	3.7%	1.30
Professional Services	890	3.6%	0.57
Finance & Insurance	725	2.9%	0.53
Management Services	615	2.5%	0.37
Transportation & Warehousing	610	2.5%	0.70
Educational Services	520	2.1%	0.90
Federal - Civilian	479	1.9%	1.22
Arts, Entertainment, & Recreation	472	1.9%	0.78
Wholesale Trade	446	1.8%	0.55
Manufacturing	429	1.7%	0.24
Forestry, Fishing, & Ag Support	251	1.0%	1.65
Information	235	1.0%	0.55
Military	218	0.9%	0.79
Utilities	74	0.3%	0.92
Total	24,688	100.0%	N.A.
Source: Bureau of Economic Analysis			

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

Sector	2001	2012	Change 2001-2012	Percent of Change	Percent Change
Local Government	3,302	4,584	1,282	37.2%	38.8%
Mining	482	1,430	948	27.5%	196.7%
Real Estate	632	989	357	10.4%	56.5%
Health Care & Social Assistance	2,089	2,404	315	9.1%	15.1%
Agriculture	1,228	1,485	257	7.5%	20.9%
Educational Services	268	520	252	7.3%	94.0%
Finance & Insurance	480	725	245	7.1%	51.0%
Other Services	1,123	1,307	184	5.3%	16.4%
Professional Services	757	890	133	3.9%	17.6%
Arts, Entertainment, & Recreation	341	472	131	3.8%	38.4%
Forestry, Fishing, & Ag Support	183	251	68	2.0%	37.2%
Management Services	557	615	58	1.7%	10.4%
Accommodations & Food Service	1,633	1,686	53	1.5%	3.2%
Federal - Civilian	452	479	27	0.8%	6.0%
Wholesale Trade	420	446	26	0.8%	6.2%
Transportation & Warehousing	593	610	17	0.5%	2.9%
Military	203	218	15	0.4%	7.4%
State Government	909	904	-5	-0.1%	-0.6%
Utilities	106	74	-32	-0.9%	-30.2%
Information	324	235	-89	-2.6%	-27.5%
Retail Trade	2,603	2,479	-124	-3.6%	-4.8%
Manufacturing	611	429	-182	-5.3%	-29.8%
Construction	1,947	1,456	-491	-14.3%	-25.2%
Total	21,243	24,688	3,445	100.0%	16.2%
Source: Bureau of Economic Analysis					

Table 10. Average Earnings Per Job, 2000-2013

	Deflated	Deflated	Deflated
Year	Fremont	Wyoming	U.S.
2000	\$30,559	\$37,046	\$48,819
2001	\$30,725	\$38,461	\$49,611
2002	\$30,822	\$38,938	\$49,895
2003	\$30,671	\$40,030	\$50,384
2004	\$31,395	\$40,669	\$51,079
2005	\$32,514	\$41,586	\$50,784
2006	\$34,612	\$44,465	\$51,156
2007	\$34,959	\$44,385	\$50,671
2008	\$36,374	\$47,257	\$51,065
2009	\$35,827	\$45,118	\$50,228
2010	\$37,135	\$46,691	\$51,283
2011	\$38,330	\$48,220	\$51,671
2012	\$38,765	\$48,897	\$52,461
2013	\$39,074	\$49,188	\$52,330
Percent Change	27.9%	32.8%	7.2%
Source: Bureau of Economic Analysis			

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

Sector	Jobs	Earnings (\$1,000)	AEPJ
Utilities	74	\$7,766	\$104,946
Federal - Civilian	479	\$41,456	\$86,547
Mining	1,430	\$114,965	\$80,395
State Government	904	\$56,466	\$62,462
Transportation & Warehousing	610	\$33,775	\$55,369
Local Government	4,584	\$243,225	\$53,060
Wholesale Trade	446	\$23,247	\$52,123
Construction	1,456	\$68,749	\$47,218
Professional Services	890	\$41,193	\$46,284
Information	235	\$10,599	\$45,102
Health Care & Social Assistance	2,404	\$107,364	\$44,660
Military	218	\$6,968	\$31,963
Retail Trade	2,479	\$74,775	\$30,163
Finance & Insurance	725	\$21,334	\$29,426
Manufacturing	429	\$12,398	\$28,900
Other Services	1,307	\$37,640	\$28,799
Real Estate	989	\$28,008	\$28,320
Management Services	615	\$16,772	\$27,272
Educational Services	520	\$11,402	\$21,928
Accommodations & Food Service	1,686	\$32,790	\$19,448
Agriculture	1,485	\$28,776	\$19,378
Forestry, Fishing, & Ag Support	251	\$4,813	\$19,175
Arts, Entertainment, & Recreation	472	\$3,543	\$7,506
Total	24,688	\$1,028,024	\$41,641
Source: Bureau of Economic Analysis			

Table 11. Total Labor Earnings for Fremont County, 2013				
			Earnings	
Sector	Jobs	AEPJ	(\$1,000)	Percent
Local Government	4,584	\$53,060	\$243,225	23.7%
Mining	1,430	\$80,395	\$114,965	11.2%
Health Care & Social Assistance	2,404	\$44,660	\$107,364	10.4%
Retail Trade	2,479	\$30,163	\$74,775	7.3%
Construction	1,456	\$47,218	\$68,749	6.7%
State Government	904	\$62,462	\$56,466	5.5%
Federal - Civilian	479	\$86,547	\$41,456	4.0%
Professional Services	890	\$46,284	\$41,193	4.0%
Other Services	1,307	\$28,799	\$37,640	3.7%
Transportation & Warehousing	610	\$55,369	\$33,775	3.3%
Accommodations & Food Service	1,686	\$19,448	\$32,790	3.2%
Agriculture	1,485	\$19,378	\$28,776	2.8%
Real Estate	989	\$28,320	\$28,008	2.7%
Wholesale Trade	446	\$52,123	\$23,247	2.3%
Finance & Insurance	725	\$29,426	\$21,334	2.1%
Management Services	615	\$27,272	\$16,772	1.6%
Manufacturing	429	\$28,900	\$12,398	1.2%
Educational Services	520	\$21,928	\$11,402	1.1%
Information	235	\$45,102	\$10,599	1.0%
Utilities	74	\$104,946	\$7,766	0.8%
Military	218	\$31,963	\$6,968	0.7%
Forestry, Fishing, & Ag Support	251	\$19,175	\$4,813	0.5%
Arts, Entertainment, & Recreation	472	\$7,506	\$3,543	0.3%
Total	24,688	\$41,641	\$1,028,024	100.0%
Source: Bureau of Economic Analysis				

Table 12. Land Ownership in Fremont County			
Owner	Acres	Percent of Total	Percent of Type
BLM	2,104,640	35.5%	65.5%
Forest Service	980,928	16.5%	30.5%
Bureau of Reclamation	125,632	2.1%	3.9%
Total Federal	3,211,200	54.2%	100.0%
Total Tribal Lands	1,573,940	26.5%	100.0%
State Trust Lands	268,552	4.5%	84.6%
Recreation Commission	639	0.0%	0.2%
Fish & Game	48,181	0.8%	15.2%
Total State	317,372	5.4%	100.0%
County	814	0.0%	14.7%
Cities	3,730	0.1%	67.2%
School Dist. & Colleges	1,007	0.0%	18.1%
Total Local Government	5,551	0.1%	100.0%
Total Private	820,819	13.8%	100.0%
Total Land Area	5,928,882	100.0%	
Source: Equality State Almanac			
Table 13. Acres of Taxable Agricultural Land in Fremont County			
Classification	Acres	Percent	
Irrigated Lands	118,361	16.2%	
Dry Farm Land	0	0.0%	
Range Land	610,826	83.8%	
Total Taxable Ag Land	729,187	100.0%	
Source: Wyoming Department of Revenue 2013 Annual Report			
Table 14. Management Designations of Federal Land in Fremont County			
Type	Acres	Percent	
Protected	671,803	21.8%	
Restricted	248,913	8.1%	
General Use	2,158,645	70.1%	
Total Federal Lands	3,079,361	100.0%	
Source: Economic Profile System - Human Dimensions Toolkit			

Table 15. Fremont County Government Revenue, FY2014

Source	Amount	Percent
Taxes	\$16,359,140	41.1%
State Aid	\$12,276,206	30.8%
Charges for Services	\$6,556,981	16.5%
Direct Federal Aid	\$2,589,159	6.5%
Miscellaneous Revenue	\$1,819,603	4.6%
Other Local Government	\$234,149	0.6%
Total	\$39,835,238	100.0%

Source: Wyoming Department of Audit

Table 16. Fremont County Assessed Valuation, FY2014

Property Type	Amount	Percent
Minerals	\$489,938,015	53.4%
Residential Property	\$226,026,926	24.6%
Industrial Property	\$98,953,047	10.8%
Commercial Property	\$60,591,394	6.6%
Utilities	\$23,454,831	2.6%
Agricultural Lands	\$18,608,394	2.0%
Total Valuation	\$917,572,607	100.0%
Crude Oil	\$298,492,308	60.9%
Natural Gas	\$190,281,800	38.8%
Sand & Gravel	\$1,109,442	0.2%
Total Minerals	\$489,883,550	100.0%

Source: Wyoming Department of Revenue

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

Industry	Sales Tax	Use Tax	Sales & Use	Percent
Retail	\$15,789,765	\$322,707	\$16,112,472	40.1%
Mining	\$2,766,258	\$3,933,915	\$6,700,173	16.7%
Public Administration	\$3,501,262	\$1,205,354	\$4,706,616	11.7%
Leisure & Hospitality	\$3,512,720	\$29,558	\$3,542,278	8.8%
Wholesale	\$1,854,428	\$44,891	\$1,899,319	4.7%
Utilities	\$1,395,070	\$15,349	\$1,410,419	3.5%
Construction	\$438,776	\$940,375	\$1,379,151	3.4%
Other Services	\$1,312,397	\$5,043	\$1,317,440	3.3%
Financial	\$1,208,656	\$58,046	\$1,266,702	3.2%
Information	\$1,006,993	\$42,035	\$1,049,028	2.6%
Manufacturing	\$446,675	\$10,261	\$456,936	1.1%
Business Services	\$162,214	\$22,536	\$184,750	0.5%
Transportation	\$38,046	\$25,017	\$63,063	0.2%
Education & Health	\$42,529	\$1,288	\$43,817	0.1%
Agr & Other	\$14,813	\$0	\$14,813	0.0%
Total	\$33,490,602	\$6,656,375	\$40,146,977	100.0%

Source: Wyoming Economic Analysis Division

Table 18. Fremont County Federal Land Payments, FY2013

Source	Amount	Percent
PILT	\$2,407,554	72.1%
Forest Service Payments	\$712,028	21.3%
BLM Payments	\$218,130	6.5%
Total	\$3,337,712	100.0%
Distributions	Amount	Percent
County Government	\$2,765,085	82.8%
Local School Districts	\$302,612	9.1%
Grazing Districts	\$213,053	6.4%
Resource Advisory Councils	\$56,962	1.7%
Total	\$3,337,712	100.0%

Source: Economic Profile System - Human Dimension Toolkit

County Costs	Amount	Percent	Per Capita
Jail	\$4,688,253	14.1%	\$114.35
County Sheriff	\$4,657,711	14.0%	\$113.61
Road and Bridge	\$3,535,887	10.6%	\$86.25
Health (Not Hospital)	\$3,437,663	10.3%	\$83.85
Boards	\$3,119,064	9.4%	\$76.08
Construction	\$1,784,014	5.4%	\$43.51
County Attorney	\$1,450,403	4.4%	\$35.38
Capital	\$1,447,550	4.4%	\$35.31
Social Services	\$1,002,696	3.0%	\$24.46
County Assessor	\$875,600	2.6%	\$21.36
County Clerk	\$862,952	2.6%	\$21.05
Justice or Circuit Court	\$783,131	2.4%	\$19.10
Administration	\$717,850	2.2%	\$17.51
Courthouse	\$709,752	2.1%	\$17.31
County Treasurer	\$681,816	2.0%	\$16.63
Parks & Recreation	\$669,626	2.0%	\$16.33
Distict Court	\$608,369	1.8%	\$14.84
County Commissioners	\$520,880	1.6%	\$12.71
Juvenile Probation	\$394,227	1.2%	\$9.62
County Coroner	\$350,800	1.1%	\$8.56
County Planner	\$289,396	0.9%	\$7.06
Other	\$271,284	0.8%	\$6.62
Agriculture Department	\$247,813	0.7%	\$6.04
Civil Defense	\$139,858	0.4%	\$3.41
Fire Protection	\$28,791	0.1%	\$0.70
Total	\$33,275,386	100.0%	\$811.63
Source: Wyoming Department of Audit			

Table 20. Fremont County Mining Industry

Mineral Production (2013)		
Type	Production	State Production
Oil (Barrels)	4,155,914	6.6%
Gas (MCF)	134,467,744	6.6%
Sand & Gravel (Tons)	545,350	4.2%
Bentonite (Tons)	6,247	0.2%

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

Tax Revenue (2014)							
	Assessed Valuation	Percent	County Revenue (12.0 Mills)	K-12 Revenue (45.2 Mills)	Special Districts (8.9 Mills)	Community College (6.5 Mills)	Total Revenue (72.6 Mills)
Crude Oil	\$298,492,308	51.2%	\$3,581,908	\$13,506,777	\$2,653,597	\$1,943,185	\$21,685,466
Natural Gas	\$190,281,800	32.7%	\$2,283,382	\$8,610,251	\$1,691,605	\$1,238,735	\$13,823,973
Sand & Gravel	\$1,109,442	0.2%	\$13,313	\$50,202	\$9,863	\$7,222	\$80,601
Mining Facilities	\$92,711,578	15.9%	\$1,112,539	\$4,195,199	\$824,206	\$603,552	\$6,735,496
Bentonite	\$54,465	0.0%	\$654	\$2,465	\$484	\$355	\$3,957
Total Minerals	\$582,649,593	100.0%	\$6,991,795	\$26,364,894	\$5,179,755	\$3,793,049	\$42,329,493
Percent			16.5%	62.3%	12.2%	9.0%	100.0%

Source: Wyoming Department of Revenue

Employment (2012)			
	Mining	Total	Percent Mining
Jobs	1,430	24,688	5.8%
Labor Income	\$114,965,000	\$1,028,024,000	11.2%
Average Earnings/Job	\$80,395	\$41,641	193.1%

Source: Bureau of Economic Analysis

Table 21. Fremont County Agricultural Industry				
Physical Characteristics				
Land Use	Acres	Percent	Number of Farms	Average Size (Acres)
Total Cropland	167,985	9.8%		
Total Woodland	10,922	0.6%		
Grazing Land	1,505,946	88.1%		
Farmstead	25,162	1.5%		
Total Land	1,710,015	100.0%	1,363	1,255
	Cattle & Calves	Sheep & Lambs	Total Head	
Inventory	81,288	16,103	97,391	
	Land & Buildings	Machinery & Equipment	Combined Investment	
Market Value	\$1,488,080,000	\$141,059,000	\$1,629,139,000	
Average Per Farm	\$1,091,768	\$103,492	\$1,195,260	
Source: 2012 Census of Agriculture				
Gross Revenue				
Type	Amount	Percent		
Cash Receipts - Livestock	\$83,847,000	55.3%		
Cash Receipts - Crops	\$46,595,000	30.7%		
Government Payments	\$1,259,000	0.8%		
Miscellaneous Income	\$19,913,000	13.1%		
Total Gross Revenue	\$151,614,000	100.0%		
Source: Bureau of Economic Analysis				
Employment				
	Agriculture	County Total	Percent Agriculture	
Jobs	1,485	24,688	6.0%	
Labor Income	\$28,776,000	\$1,028,024,000	2.8%	
Average Earnings/Job	\$19,378	\$41,641	46.5%	
Source: Bureau of Economic Analysis				

Table 22. Fremont County Travel Industry 2013

Visitor Spending					
	Amount				
Accommodation	(Million\$)	Percent			
Hotel, Motel	\$46.6	34.2%			
Campground	\$33.2	24.3%			
Private Home	\$28.0	20.5%			
Vacation Home	\$7.2	5.3%			
Day Travel	\$21.4	15.7%			
Total	\$136.4	100.0%			
	Amount				
Purchases	(Million\$)	Percent			
Accommodations	\$18.1	13.3%			
Food Service	\$27.1	19.9%			
Food Stores	\$9.3	6.8%			
Local Tran. & Gas	\$41.6	30.5%			
Art, Ent. & Rec	\$20.7	15.2%			
Retail Sales	\$18.6	13.6%			
Air Transportation	\$0.9	0.7%			
Total	\$136.3	100.0%			
Employment					
Sector	Jobs	Percent	Earnings (Million\$)	Percent	Ave. Earn Per Job
Accom & Food Service	920	60.1%	\$20.3	46.7%	\$22,065
Arts, Ent. & Rec.	380	24.8%	\$17.2	39.5%	\$45,263
Retail	200	13.1%	\$5.0	11.5%	\$25,000
Ground Tran	10	0.7%	\$0.3	0.7%	\$30,000
Visitor Air Tran	10	0.7%	\$0.2	0.5%	\$20,000
Other Travel	10	0.7%	\$0.5	1.1%	\$50,000
Total	1,530	100.0%	\$43.5	100.0%	\$28,431
Tax Revenue					
	Amount				
	(Million\$)	Percent			
Local Tax Revenue	\$1.4	27.5%			
State Tax Revenue	\$3.7	72.5%			
Total Revenue	\$5.1	100.0%			
Source: Dean Runyan Associates					

Table 23 Household Type, 2006-2010				
	American Indian	Fremont County	American Indian	Fremont County
Household Type	Number	Number	Percent	Percent
Married Couple Family	915	8,000	40.5%	51.5%
Male Householder, No Wife Present, Family	274	936	12.1%	6.0%
Female Householder, No Husband Present, Family	732	1,606	32.4%	10.3%
NonFamily Household	337	4,999	14.9%	32.2%
Total	2,258	15,541	100.0%	100.0%

Source: U.S. Census Bureau, American Community Survey

Table 24. Educational Attainment, 2006-2010				
	American Indian	Fremont County	American Indian	Fremont County
Level	Number	Number	Percent	Percent
No High School Degree	541	2,882	13.9%	11.2%
High School Graduate	1,305	7,305	33.6%	28.4%
Some College	1,401	7,094	36.1%	27.6%
Associate Degree	345	2,560	8.9%	10.0%
Bachelor's Degree	209	3,701	5.4%	14.4%
Graduate or Professional	82	2,173	2.1%	8.5%
Total Population 25 Yrs or Older	3,883	25,715	100.0%	100.0%
High School Degree or Higher	3,342	22,833	86.1%	88.8%
Bachelor's Degree or Higher	291	5,874	7.5%	22.8%

Source: U.S. Census Bureau, American Community Survey

Table 25. Class of Worker, 2006-2010				
	American Indian	Fremont County	American Indian	Fremont County
Class	Number	Number	Percent	Percent
Private Sector Worker	1,361	12,121	46.0%	64.1%
Government Worker	1,508	5,018	50.9%	26.5%
Self-Employed	80	1,725	2.7%	9.1%
Unpaid Family Worker	11	43	0.4%	0.2%
Total Employed Population 16 and Over	2,960	18,907	100.0%	100.0%

Source: U.S. Census Bureau, American Community Survey