The Park County Economy – Restructuring and Change in a Growing Region

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This report examines important aspects of growth and change in the area economy of Park County, Wyoming, largely using available federal data on population, income, and employment. Cody is the county seat and lies near the center of Park County, Wyoming. Park County had 26,664 people as of July 1, 2005. Cody itself has 9,100 residents, over a third of the county total. The county’s other major city is Powell and it has 5,288 residents.

Park County is 6,969 square miles in size and almost 80 percent of this land is some type of federal public lands, including lands in Yellowstone National Park, national forest lands, and some BLM lands. The other 20 percent not in public lands is primarily managed and used for agricultural purposes – mainly as pasture and grazing land for cattle.

Much of the Interior West region that is centered on the various ranges and sub-ranges of the Rocky Mountains has become relatively fast-growing. More and more people are moving to the region, including to many smaller cities and towns and some more isolated rural areas. This growth is seeping into Park County and surrounding areas and is very likely to continue, if not expand. With growth comes change and communities must position themselves for this change in order to better assure their future.
Summary of Findings

Population Trends in the Larger Greater Yellowstone Region  A 24-county area encompassing Park County, Wyoming, and Yellowstone National Park and extending in all directions (shown on page 11 of this report) was analyzed in terms of population trends. This area includes the population centers of Bozeman and Billings in Montana and Idaho Falls and Pocatello in Idaho. There were over a half million people living in the 24-county region in 1980 – 532,000 to be more precise and this grew to 555,000 people in 1990, an increase of 23,000 people or growth of about 4%. However, during the decade of the ’90s, the region’s population expanded by over 89,000, an increase of 16%, raising the population to 555,000. Since 2000 (2000-2005) the region’s population grew by another 45,000 people. The region’s increased rate of population growth can almost be entirely attributed to a complete reversal in area migration trends. In the 1980s over 43,000 more people moved from the region than to it (considering only persons changing their counties of permanent residence). In the 1990s over 42,000 more people moved to the region than away, and this net in-migration is continuing.

Recent Shifts in Net Migration Patterns and the Role of Public Lands  There was a virtual “sea change” in population migration patterns in going from the decade of the 1980s to the decade of the 1990s. Whereas much of the Interior western United States was losing more people through out-migration than in-migration during the ’80s, many more people moved to the region than the number moving away in the ’90s. Since 2000 this pattern is largely continuing, although pockets of population growth are becoming a little more focused. In other words, growth is becoming a little more selective, even as it continues. As a result of these migration shifts, the Interior West of the U.S., including the larger Rocky Mountain region, has become one of the fastest growing regions in the nation.

Much of this growth appears to be “amenity-driven,” that is, it is being spurred by more and more people moving to the region from other areas, largely seeking high quality places to live and work. Many nice communities surrounded by increasingly valued natural landscapes, including those on public lands in the West, are seeing increased growth. To further document and understand this, how growth is playing out in areas with large concentrations of federal public lands was analyzed in detail. Counties in an 11-state region of the West (Washington, Oregon, California, Arizona, New Mexico, Nevada, Colorado, Utah, Idaho, Wyoming, and Montana) were sorted and grouped by characteristics, including “urban-rural” features such as population size and the presence of a major population center, and proximity to various categories of public lands, including ones with large national parks. Areas nearby national park lands are among the fastest growing areas of the West, including many relatively isolated rural areas like Park County, Wyoming. While Park County has yet to see rapid growth associated with recent shifts in population growth, many areas exactly like Park County are seeing such growth and there is evidence that this growth is spreading throughout much of the Greater Yellowstone Region.

A focused analysis of a subset of counties with similar characteristics to those of Park County was done to further examine how much proximity to public lands, particularly national park lands and forest lands, is influencing important trends in growth in the region. Many counties very much like Park County that are likewise nearby national park lands are seeing increased rates of growth in population, income, employment, and area economic well-being.

Population Trends in the 8-County Area Surrounding Park County, WY  A subset of counties from the larger set of 24 Greater Yellowstone Region counties was examined in more detail. In addition to Park County, Wyoming, these include the neighboring counties to the north of Park County and Carbon County, Montana, and Big Horn, Washakie, Hot Springs, Fremont, and Teton Counties in Wyoming. The total population of this area actually fell in the ’80s from 118,000 to 114,000, a decline of over 3%. But in the ‘90s, the population rose by over 15,400 persons, an increase of over 13%. Of this increase, 10,680 was accounted for by net in-migration. Between 2000 and 2005 (the latest available estimate) the area’s population has risen by 1.7%. As the population of the larger Greater Yellowstone region grows, it is increasingly likely that growth will continue in this 8-county area. Future rates of population growth will largely be determined by migration patterns.

Population Trends in Park County, Wyoming  There were 830 more people who moved away from Park County in the ‘80s than the number moving to it. However, in the ‘90s, this reversed with 1,700 more persons moving to the county than away. As a result, Park County’s population, which had grown slowly from 21,800 in 1980 to 23,200 in 1990, increased to about 25,800 people in 2000. Today, the county’s population has grown to just under 27,000 people. The current rate of growth is averaging about one percent a year and at this rate the county will reach almost 31,000 people by the year 2020. However, it is highly likely that future population growth in the county will range between 1 and 2 percent a year. If population growth were to increase as a result of future migration patterns and this rate rose to 2%, the county would grow to almost 36,000 people by 2020. Adding to these
new residents will be additional part-time and seasonal residents that are not reflected in these population data and estimates.

Trends in Area Population Aging  There is a pronounced shift occurring in the age profile of the 8-county area. In short, the area’s population is becoming much older with population growth focused among persons in their 40s, 50s and 60s (classic “baby boomers”). As a result, the median age of Park County, Wyoming, increased from 29 in 1980 to 40 at the time of the 2000 Census and it is very likely that its median age will exceed 45 when the 2010 Census is conducted in another 4 years. The median age of Hot Springs County rose from 32 to 44 during this period and Carbon County, Montana, from 35 to 42.

This type of aging is occurring throughout the U.S. as the very large “baby boom” population group itself ages. However, it is more pronounced in some areas than others and it can be considered pronounced in the 8-county area. This is because much of the area experienced net “out-migration” during the ’80s, with these migrants reducing the number of young adults, while net “in-migration” during the ’90s and more recently has been primarily composed of older adults (persons in their 40s, 50s, and 60s or boomer age adults). The continued aging of the area’s population will influence many things including continued growth in area health care needs and services, housing needs with smaller households, trends in area school enrollment numbers, and area labor force participation and supply (more and more area residents are moving toward ages of retirement over the course of the next ten years).

Trends in Area Housing  The number of housing units of all types – occupied and vacant, owner-occupied and renter-occupied, seasonal and year-round, etc. – have steadily risen in Park County as the population has grown. But they have also increased in number as the population has aged. There were 2.47 persons per housing unit in the county in 1980, 2.25 per unit in 1990, and 2.12 per unit in 2004. The average number of persons per household tends to fall as a population ages and families shrink in size. At one percent annual population growth over the next fifteen years, the number of housing units in the county will rise from a current level of 12,700 to nearly 15,500 by 2020, an increase of 2,780 units.

If growth were to increase to two percent a year, the number of housing units would rise to almost 18,000 units, an increase of over 5,200 units or about 40%. Housing expansion spurred in part by area amenities can result in the degradation of those very amenities when such development is unplanned or poorly planned and located.

Personal Income Growth in Park County  The single largest source of area personal income is employment earnings or labor income, which accounted for almost 60% of all personal income in 2004. Labor earnings had actually fallen in the ’80s by $49 million, as the area went through difficult economic adjustments associated with declines in area oil and gas activity and contractions in area agriculture. However, labor earnings growth was strong in the ’90s and remained strong since 2000.

Income from transfer payments – primarily Social Security and Medicare and Medicaid payments to individuals – has steadily increased, rising from 8% of all income in 1980 to over 15% today. Income from this source will rise more rapidly in future years as more and more people in the area reach ages of retirement. Sources of investment income are also rising in the area. It is very likely that in another five or more years, labor earnings will fall to 50% or less of all area personal income, reflecting a much older population with increased dependence on retirement income sources.

Major Employment Trends  Wage and salary workers account for 72 percent of all employment in Park County and 76 percent of all labor earnings, with the remainder in both accounted for by proprietors or self-employed persons. In recent years, proprietor employment has been increasing at a faster rate than wage and salary employment. However, there has been relatively steady growth in both types of employment since the late ’80s and early ’90s.

Much of the recent employment growth has been in the private sector. Private nonfarm employment accounted for 78 percent of all employment in 2004, up from 73 percent in 1990. Workers of all types employed on area farms and ranches has fallen from 1,052 in 1980 to 825 in 1990 and to 802 in 2004 and they now account for about 4 percent of all employment. Private nonfarm workers also have been increasing their share of labor earnings, receiving 72 percent of all earnings in 2004 versus 67 percent in 1990. So, employment and labor earnings growth in the county are concentrated in the private nonfarm sector.

Industry or Sector Trends in Employment and Labor Earnings  The single largest sector of the economy in terms of employment in 2000 was services, which included about 5,000 full and part-time jobs. Within services are such subsectors as health care services, business services like accountants and computer specialists, engineering and management services, legal services, recreation services, hotels and motels, and social services. The second largest sector is retail trade with over 3,000 jobs in 2004. Services and retail trade together account for over 45 percent of all
jobs and during the ‘90s these two sectors added another 2,200 new jobs. The finance, insurance and real estate (FIRE) sector added over 540 jobs during this period, while construction added 490. Job losses in the ‘90s were concentrated in mining (oil and gas).

Prior to 1987 the single largest sector in terms of labor earnings was mining. It reached a high in 1981 at $78 million. It’s labor earnings in 2000 totaled $34 million. Growth in labor earnings was concentrated in services — up $39 million from $60 to $99 million. Construction labor earnings grew by $16 million in the ‘90s, by $14 million in the FIRE sector, and by $13 million in local government (city and county governments and local public schools). There was a reversal in the slide in manufacturing labor earnings that occurred in the ‘80s, with a gain of almost $9 million in the ‘90s.

Since 2000 federal data on sector employment and labor earnings are being compiled using a new industry classification system — the NAICS or North American Industry Classification System. The increasingly large services sector under the old codes has been divided into 9 separate major sectors. FIRE also was split into two sectors — finance and insurance, and real estate. Park County’s largest sectors in 2004 are retail trade with 2,500 jobs, accommodations and food service with 2,240 jobs, and local government with 2,200 jobs. Its largest sectors as measured by labor earnings in 2004 are local government at $72 million, construction at $56 million and federal civilian government at $52 million.

The sectors adding the most new jobs between 2001 and 2004 are health care — up 232, retail trade — up 189, real estate — up 142, and construction — up 90. The sectors adding the most labor earnings during this period are real estate — up $8.6 million, local government — up $8.3 million, construction — up $7.9 million, and health care — up $6 million. These four sectors alone accounted for 83 percent of all labor income gains in the county during this recent period. Labor earnings declined in manufacturing — down $7.5 million, mining — down $4 million, and transportation — down $4 million.

**Shifts in Park County’s Economic Base** The economic base of an area is composed of sectors and activities that result in bringing dollars from outside the area to the county as income for individuals and families. The “income multiplier” for basic income in Park County has ranged from 2.3 to 2.5 over the last twenty years. A 2.5 multiplier indicates that for every additional dollar that comes to the area from outside and becomes income, another $1.5 in additional income for the area is generated as this new income is spent and re-spent.

The single largest source of outside income dollars for Park County residents is transfer payment income. This primarily comes to the area in the form of Social Security checks and payments for Medicare and Medicaid benefits. Transfer payments also include veterans benefits, family assistance dollars, federal dollars for education and training, and other program payments. Using averages for 2001, 2002, and 2003 (or 2002 benchmark data), transfer payment income totaled $109 million and accounted for 33 percent of Park County’s entire economic base. In 1987 transfer payments also were the largest source of outside income at $60 million, but at that time accounted for 27 percent of the base. Investment income received from sources outside of the local area, estimated at 30 percent of all investment income, is the second largest source of basic income at $62 million in 2002. These two sources — transfer payments and externally generated investment income — accounted for over half of all outside income flowing to Park County residents.

All of the remaining external income sources are employment sectors. Labor earnings by local residents employed by the federal civilian government is the largest among these at $50 million (15% of total basic income), followed by mining at $38 million (11.5% of the total). The largest increases in basic income for Park County between 1987 and 2002 came from increases in transfer payments — up $48 million, investment income — up $23 million, and the export component of trade and service activity — up $18 million. More and more external dollars come to the area economy as a result of more people living in Park combined with the steady aging of residents, raising levels of transfer payment and investment incomes. And more money from outside being spent on locally provided retail and services trade is generating income.

**Trends in the Area’s Farm and Ranch Sector** Over 80 percent of all land in Park County that is outside of federal ownership is used for farming and ranching and over 80 percent of this farm and ranch land is contained within less than 50 farms and ranches. The county’s farm sector went through a very difficult contraction during the decade of the ‘80s, forced upon it by declining profitability as measured in annual net farm earnings. However, the sector stabilized in the ‘90s. Livestock marketing receipts have been ranging from $34 to $36 million annually in recent years. Crop marketing receipts have been averaging about $27 to $28 million and farmers and ranchers have been spending about $60 million each year on production costs — principal among these are costs for capital and land including interest on loans and machinery costs.
In the mid-'70s gross agricultural receipts from the marketing of livestock and crops brought more than $7 million to Park County producers each year for every $20 million in area total personal income. This reflected the area’s fairly narrow economic dependency on area agriculture. However, in most of the years since, total personal income has grown while farm receipts have fallen. And, in 2004 gross ag marketing receipts totaled $1.7 million for every $20 million in area total personal income. Park County’s economy is becoming increasingly less narrowly dependent on agriculture.

**Area Dependency on Oil and Gas Activity**  Oil and gas exploration and drilling in the area reached a peak in the early '80s and at that time, local labor earnings by those employed in this industry came to $3 million for every $20 million in total personal income. Today this ratio is less than $1 million per $20 million in income. However, this calculation does not include contributions to area personal income linked to oil and gas production and royalty payments to area residents.

**Trends in Area Construction Activity**  Labor earnings received by those employed in some aspect of construction in an 8-county area surrounding Park County increased from $141 million in 1990 to nearly $300 million in 2002 before falling back more recently. In Park County alone these earnings rose from $31 million in 1990 to $56 million in 2004. This relatively strong and steady growth in construction industry labor earnings is evidence that more people are moving to the area, stimulating housing and other construction.

**Trends in Area Economic Well-being**  There is no single measure of how well residents in an area are doing economically. But several measures are used as indicators of area economic well-being. One of these is per capita income, which is simply total area personal income divided by the total population. The per capita income of Park County residents in 2004 was over $28,900, measured in 2000 inflation-adjusted dollars. This compares with $27,000 in 2000 and $21,000 ten-years earlier in 1990. Per capita income in 1990 was actually lower than what it was in 1980 ($22,400). So, losses in per capita income incurred by area residents during the '80s have been more than offset by gains since 1990 and these gains are relatively strong when compared with many other similar areas.

Median family income, or the income of families in the county with an equal number higher and lower than them, in 1989 had fallen from what it had been in 1979 – from $44,560 to $40,100. However, by 1999 the county’s median family income had risen to $42,460. The direction of the poverty rate in Park County is troubling. It rose from 8.4 percent of all individuals in 1979 to 9.5 percent in 1989, but continued to rise after that, reaching 12.7 percent in 1999. This poverty level can be considered moderately high, but calculations used in determining area poverty do not make distinctions between variations in local area costs of living. So, for most rural areas where costs of living are lower than in most urban areas, poverty rates are over-stated. However, rising poverty rates can become a drag on area economic activity and its important for poverty rates to decline in the future.

**Likely Future Trends and Implications for Area Decision-makers**  It is very likely that population growth will continue in Park County and much of its surrounding area and it is extremely possible that the pace of such growth may accelerate. Areas with attractive communities and attractive landscapes protected from undue development by federal land managers are attracting a seemingly growing number of people who can choose where they want to live. Many areas nearby national parks and national forest lands, including many somewhat isolated, rural areas began to experienced increased population growth in the early 1990s and this trend seems to be continuing. Growth is occurring in many areas of a 24-county Greater Yellowstone region. Most of its small cities are growing, some more rapidly than others, and this growth is spreading into many of their fringe areas. Growth also is spreading into the more isolated rural areas of the region.

The spreading of this growth to Park County has been limited so far, but it has started and is very likely to continue. This growth will bring changes to the area that will overlay and add to many changes already occurring in the area’s population and economy. The population is increasingly older. It is very likely that the fastest growth in population in the future will be by persons in their 50s and 60s. More people will be leaving the work force as they age and their numbers will need to be replenished. This is one of the area and region’s growing challenges – how to retain and attract more people to the area in their 20s and 30s – young adults joining the work force, forming families, and having children that will replenish dwindling school enrollments. Both Wyoming and Montana are projected to be two of the five “oldest” populations among states in future years because of their current age profiles.

So, area decision makers must cope with growth, if not manage it better. They also must think about how to make their communities better places to live for young adults looking for opportunity and older adults looking for what they need as they retire. Attractive areas with growing populations where virtually anything goes with respect to development can easily lose qualities that make them attractive places to live and work. Plain and simply, places that know how to grow “well” will be more likely to have and maintain
prosperous businesses and families. It is important for old and new area leaders to understand and come to terms with the direction and meaning of change and to find ways to accommodate growth and change that help sustain economic vitality without unnecessarily degrading the very qualities that make Park County and its communities attractive places to live.

Area decision makers cannot re-make their economy. They cannot refashion the underlying age demographics of their population. What they can do is better position area workers, businesses, schools, organizations, and families for anticipated future change through better and more informed decision making, including decision making about community infrastructure, business assistance, workforce training, and education more generally. Successful communities, just like successful businesses and individuals, are ones that figure out ways to adjust and adapt to change. Doing so requires sustained learning by area leaders, including both elected officials and private sector leadership. Economic and community development is never finally achieved. It is only pursued, always a work-in-progress.

For Park County area communities, an important consideration in how they choose to approach the future relates to the growing importance of area natural and environmental amenities and resources in shaping future growth trends and patterns. These amenities have clearly become one of the area’s most important “economic assets”. As such, increased care and attention will have to be given to how these assets are managed and protected in ways to sustain Park County communities, businesses, and families well into the future.
Recent Population Growth among States

Areas of population growth or decline tend to shift from place to place and region to region over long periods of time. Since 1990 population growth in the U.S. has tended to be greater in the West than in the East. For example, 18 states had population growth greater than the national average during the 1990 to 2005 period and 11 of these fast-growing states are in the West. And the top five states in terms of growth are all in the West, including Nevada, Arizona, Utah, Idaho, and Colorado.

Three of these top five fastest growing states are in the five-state Rocky Mountain West, which has become one of the nation’s fastest growing regions. The other two – Montana and Wyoming – had population growth below the national average, even though there are sub-areas within both of these states that have become relatively fast-growing.

States are listed in the chart by rates of population growth during this recent 15-year period and western states are shown in colors by major region. The five Rocky Mountain West states are shown in pink. The two Southwest states – Arizona and New Mexico - are shown in orange. California and Nevada are shown in light blue. And the two Pacific Northwest states – Washington and Oregon – are shown in light green.

Patterns of population growth in the U.S. continue to favor growth in many areas of the West.
Regional patterns of population growth tend to shift from place to place from one time period to the next. The upper left map shows areas of fast growth (dark red) and moderately fast growth (medium red) during the decade of the '80s. Declining areas are shown in black and gray. Areas with little change in population are shown in white. The lower left map shows population growth and decline in the '90s and the map below shows growth and decline for the more recent 2000 to 2005 time period. Growth shifted into the Interior West in the '90s, but this has slowed in some areas more recently. Decline, centered in the greater Plains region in the '80s, de-intensified in the '90s, but has accelerated more recently.
Federal Government Lands in the U.S.

The largest landowner in the United States is the American people through their national government and various federal agencies. In the 48 contiguous states, there are around 810,000 square miles of land under some form of federal government management and control. About 92 percent of these lands, or nearly 741,000 square miles, are in the 22-state West. These include 280,000 square miles of National Forest Service lands, over 270,000 square miles of Bureau of Land Management lands, 97,000 square miles of Bureau of Indian Affairs lands, over 34,000 square miles of National Park Service lands, and 32,000 square miles of lands under the control of either the Department of Defense or Department of Energy.

These 741,000 square miles of federal lands account for over one-third of all land in the 22-state West. The largest concentrations are found in states west of the Plains regions; including states in the Rocky Mountain West, Southwest, Pacific Northwest, and California/ Nevada region. Among the eleven states in these regions, Nevada has the largest amount of federal lands; nearly 98,000 square miles accounting for 88 percent of the entire state, while Washington has the smallest amount; over 26,000 square miles accounting for 37 percent of the state. Nearly 70 percent of the entire areas of the states of Utah, Idaho, and Arizona are federal lands.

The management and use of these lands have heavily shaped the history of settlement and economic development in the West. These lands also will play a significant role in the West’s economic future. However, the varying economic roles they play from place to place are changing as the larger economy restructures and the pattern and make-up of economic activity shift and change.

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Regional Ecomonies Assessment Database (READ)

The University of Montana, 2003

Source: U.S. Geological Survey, 1:2,000,000 - Scale Digital Line Graph Data, National Atlas of the U.S.
Public Lands and Population Growth in the West

An examination of U.S. population trends shows that growth is greater in much of the western U.S. than in much of the eastern U.S., as well as greater in much of the southern U.S. than northern U.S. Within the West itself, growth from one area to the next is highly variable. Area growth patterns are different in urban areas than rural areas. And growth also seems to be differentiating itself when it comes to area “amenities” – area features that make some areas more desirable places to live than others. Proximity to large concentrations of federal public lands, like national park lands and national forests, also is influencing patterns of population growth.

Counties in an 11-state region of the West have been sorted and classified based upon urban/rural features, such as population size and the presence of large and small regional population centers. And they have then been sorted and grouped based upon proximity to various categories of federal public lands. Large concentrations of federal lands have been mapped and counties lying in and nearby these lands identified. Three categories of federal public land concentrations are used: 1) large concentrations of federal lands centered around major national parks, 2) large concentrations centered around national forests and national forest wilderness areas, and 3) concentrations of largely Bureau of Land Management (BLM) lands with no national park or national forest lands. Patterns of growth for counties nearby these three categories of public lands are compared with similar counties that are not nearby any federal public lands.

Pop. Change by Period for Small Reg. Centers, & Isolated Rural Areas of the West

Across the full range of areas and county types, growth in the ‘90s was considerably greater than growth in the ‘80s. And for most county types, growth since the 2000 Census is continuing. However, growth is particularly great in counties with regional centers nearby public lands that include large national parks. Growth also is high in regional centers and their fringe areas and in isolated rural areas nearby public lands with large concentrations of national forest lands. However, some of the differences in the chart simply reflect differences in the number of counties in each grouping. There are 13 regional center counties nearby national parks, 13 nearby national forests, but only 4 nearby BLM lands (excluding Yuma), and only 3 that are not nearby any of these public lands. And there are only 17 city fringe counties nearby parks, while there are 53 nearby national forests, but only 5 nearby BLM lands and 14 nearby the 3 regional centers without public lands.
Differences in Relative Population Growth Between Periods

The next chart shows change for these periods in relative terms or in terms of percentage growth. Regional center counties nearby national parks grew by about 19% in the ‘80s and nearly 25% in the ‘90s and this growth is continuing (about 11% growth between 2000 and 2005). Included among these counties are Gallatin (Bozeman) in Montana – up 34% in the ‘90s and 15% since 2000 - and Bonneville (Idaho Falls) in Idaho – up 14% in the ‘90s and by 11% since 2000. Growth in regional centers nearby large concentrations of national forest lands (without national park land) went from 6% in the ‘80s to 18% in the ‘90s. Population centers among these include Pocatello and Bannack County – up 14% in the ‘90s and 3% since 2000. Growth for regional centers nearby BLM lands only went from about 1% to 12%, and these centers include Casper (Natrona County went from a 15% loss in the ‘80s to a 9% gain in the ‘90s) and Rock Springs (Sweetwater County has been consistently losing population). Growth for regional centers not nearby public lands went from about 2% in the ‘80s to 11% in the ‘90s. Included among the three regional centers in this category is Billings (Yellowstone County has a 5% gain in the ‘80s and 14% increase in the ‘90s).

Park County, Wyoming, is included with “isolated rural counties” nearby major national parks. This group also includes Teton County, Wyoming. There are only 14 counties in this group and their growth went from less than 10% in the ‘80s to 19% in the ‘90s. Park County grew by 7% in the ‘80s, 11% in the ‘90s, and by 3% since 2000. Teton grew by 63% in the ‘90s, up from 19% growth in the ‘80s.

Growth by isolated rural counties nearby national parks is similar to growth by isolated rural counties nearby national forest lands, without any national park lands. There are 58 counties in this category, including Big Horn, Sublette, Fremont, Lincoln, and Sheridan in Wyoming and as a group their growth went from 5% in the ‘80s to 19% in the ‘90s. Big Horn lost 12% of its population in the ‘80s, but grew by 9% in the ‘90s. Sublette grew by 22% in the ‘90s, up from 6% growth in the ‘80s. Fremont grew by 6% in the ‘90s after losing 14% of its population in the ‘80s. Lincoln grew by 15% in the ‘90s, up from 4% growth in the ‘80s. And Sheridan grew by 13% in the ‘90s after losing 6% of its population in the ‘80s. Lemhi County, Idaho, where Salmon is located – also in this group, grew by 13% in the ‘90s after falling in population by 8% in the ‘80s.
Shifting Migration Patterns and Their Influence on Population Trends

An area’s population changes through births and deaths – referred to as “natural change” – and through net migration, which is simply the product of people moving to and from an area and only considers movers actually changing their county of permanent residence. This excludes part-time residents who may have a home in the area, but maintain their permanent residence elsewhere.

There was a major shift in migration patterns from the ‘80s to the ‘90s, with many more people moving to most areas of the West in the latter decade. This is a major factor in increasing rates of growth in most fast-growing areas. The top chart shows net population migration by period for the various area types and the bottom chart shows how much in percentage terms net migration alone changed total populations. Net migration for each county is calculated using two sets of U.S. Census Bureau data – counts and estimates of the total population by county and estimates of cumulative births and deaths by county for these same time periods. Births minus deaths equates to “natural change” and subtracting natural change from total population change yields population change by net migration. For every single area type, net migration was taking away from area population growth in the ‘80s. But in the ‘90s this greatly changed.

Population change due to net migration only clearly differentiates with respect to proximity to public lands with its influence increasingly positive in going from areas without any of these lands to ones with some national park lands. Many areas nearby national parks and national forests are seeing major inflows of new residents.
Patterns of Personal Income Growth in the West

Personal income is most areas is growing, almost irrespective of trends in area population growth. The upper chart shows changes in total personal income, adjusted for inflation, in the various area types based upon urban/rural character and proximity to federal lands. Just as with population, personal income grew at a faster pace in the ’90s and more recently than in the ’80s across the West. And income growth is particularly strong in areas nearby both national parks and national forest lands.

Personal income of regional center counties nearby parks grew by 41% in the ’90s. This compares with 33% growth for regional centers with no nearby public lands. For isolated rural counties nearby parks, incomes grew by 41%, as compared to 23% for similar counties not nearby public lands. Personal income in fringe areas to these regional centers grew by 43% in counties nearby parks, but by only 15% in areas not nearby public lands. Isolated rural counties nearby national forest lands had income gains in the ’90s of 41% versus about 14% in the ’80s. These same counties in areas without public lands had gains of 23% in the ’90s versus 10% in the ’80s. The 45% gain in isolated counties nearby forest lands resulted because these counties include places like Aspen and Vail, Colorado, where personal income more than doubled.

The lower chart shows change in total employment by period. Employment growth is particularly strong for all types of areas nearby both national park lands and national forests.

Source: Swanson, 2006 (using BEA, U.S. Commerce data adjusted for inflation)

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Growth Trends among Counties in the West Like Park County, Wyoming

A subset of counties was selected from those included in the previous analysis of growth trends nearby public lands that have characteristics similar to Park County. Park is classified as an “isolated rural county” in that it has no major regional population center or city and also is not nearby a regional center county. So the first step in selecting Park County peers was to exclude all regional center counties. Next counties were screened in terms of their total populations and populations of their largest cities. Other criteria such as the percent of the population that is Native American also were used, arriving upon 43 peer counties (shown in a list at the back of this report).

This group of 43 counties included 5 fringe and 5 isolated rural counties nearby national parks (including Park County itself), 13 fringe and 7 isolated rural counties nearby national forest lands and without park lands, 2 fringe and 5 isolated rural counties nearby BLM lands without park and forest lands, and 2 fringe and 4 isolated rural counties without any nearby public lands. The upper chart shows percentage population change for these counties, as well as the norm for the 43 counties as a whole and change for Park County itself at the far right. The lower chart shows personal income change for these same counties.

Growth in both population and total personal income is greatest in fringe and isolated rural counties nearby national parks and fringe counties nearby forest lands. Population growth in Park County in the ‘90s (7%) is significantly lower than that of other isolated rural counties nearby parks (19%). However, income growth is comparable.
Trends in Employment and Construction Growth among Park County Peers

This group of 43 peer counties for Park County are further evaluated in terms of recent trends in total employment growth and construction activity, as measured by change in labor earnings by those employed in area construction.

The upper chart shows percentage change in employment for the peers by sub-category. As with population and income growth, employment growth is highest in peer counties nearby national park lands with employment growth in the ‘90s of 46 percent in fringe counties and 33 percent in isolated rural counties. Park County total employment growth in the ‘90s was 28 percent, slightly less than its peer counties in other isolated rural counties nearby park lands. Employment growth in fringe counties nearby national forest lands also was high in the ‘90s at 41 percent. Employment growth was much lower in areas without public lands.

The lower chart shows percentage change in construction labor earnings among the Park County peers. The greatest growth in the ‘90s was in fringe counties nearby national forest lands – even higher than fringe counties nearby park lands. Construction growth in isolated rural counties nearby park lands in the ‘90s totaled 95 percent, considerably higher than growth in Park County of 50 percent.

Park County saw increased growth in population, income, employment, and construction in the ‘90s over what it experienced in the ‘80s, but its growth in these areas is lagging behind what occurred in most of the other counties most like Park.
Improvements in Area Well-being Among Park Peers – Rising Per Capita Income Levels

Perhaps most significantly, recent growth among Park County peers that are nearby national park lands and national forest lands is also producing gains in per capita income. Per capita income is simply area total personal income divided by the total number of area residents. It does not consider the distribution of income.

The upper chart shows gains in per capita income levels by Park County peers since 1990. The biggest increase was by isolated rural counties nearby national park lands where per capita income rose by $18,048 in 2000 inflation-adjusted dollars, increasing from $22,745 in 1990 to $40,790 in 2004. This represented a 79 percent increase, as shown in the lower chart.

Per capita income gains were greatest for peer counties nearby park and forest lands, rising by $12,450 in fringe counties nearby parks (up 63%) and by $12,255 in fringe counties nearby forest lands (up 64%).

Per capita income rose by $7,357 in Park County during this period – a 34 percent increase. This is less than the gain by all 43 peer counties together and even further behind gains by park and forest land peers. However, it is considerably higher than gains by peer counties nearby BLM lands and counties without any public lands.

Source: Swanson, 2006 (using BEA, U.S. Dept. of Commerce data, inflation-adjusted 2000 dollars)
The Larger 24-County
Greater Yellowstone Region

Centered in the map at the right is Park County, Wyoming. The larger surrounding region shown extends from Yellowstone National Park in all directions, reaching to and including the region’s largest cities. Included in these are Billings (incorporated area population of over 100,000) to the northeast, Bozeman to the northwest (greater area population of over 60,000), and Idaho Falls and Pocatello to the southwest (both with immediate area populations exceeding 60,000). Each of these cities can be considered relatively small cities by national standards, but they are all regional centers.

The red dots shown on the map are population mapped at the Census "block" level, with each dot representing 30 persons. These dots only include "permanent residents" of the area. Part-time residents who have homes in the area but have not made it their permanent residence are not included. A prominent feature of the region is the presence of many types of federal public lands. These include Yellowstone National Park in the center and national forest and national forest wilderness areas shown in green and light green. BLM lands are shown in a yellow-green color.

At the time of the 2000 Census there were over 644,000 people living in a 24-county area that largely encompasses the region. This had grown from 555,000 in 1990 and from 532,000 in 1980. The population of the region today stands at nearly 690,000 residents and will likely exceed 730,000 people when the next census is conducted in 2010. Population growth is not occurring at the same pace everywhere in the region, but growth is all around and has sharply increased in the last decade and a half.

Like many areas in the Interior West, the Greater Yellowstone Region is largely growing because more and more people want to live in attractive areas with big natural landscapes, large wildlife populations, plentiful recreation opportunities, and attractive and welcoming communities. If the area did not have these types of amenities it would not be seeing the type of population growth that it now is. Many people have wanted to live in areas like this for a long time but couldn’t very easily do so. Today, more and more can and are, largely because they are older and more independent, because their jobs and work routines allow them to do so.
Population Trends in the 24-County Area

The upper chart at the right shows population change for each of the 24 counties in the region by time period – the decade of the ‘80s, decade of the ‘90s, and five years since the 2000 Census, or 2000 to 2005 (which are the latest available population estimates by the U.S. Census Bureau). In the ‘90s, only one of the 24 counties experienced some population loss – Washakie County. In the previous decade, eight of the counties had some loss in total population with the biggest loss by Fremont County, Wyoming.

In the ‘90s, there were sharp population increases in many of the counties. Teton County, Wyoming, grew by over 7,000 in the ‘90s while growing by only 1,800 in the ‘80s. Park County, Wyoming, grew more modestly – up 2,600 people in the ‘90s after growing by only 1,500 in the ‘80s. Most of the counties with regional population centers saw large increases in population. Bonneville County (Idaho Falls) grew by 10,300 people in the ‘90s after growth of 6,000 in the ‘80s. Gallatin County (Bozeman) grew by over 17,000 after growth of only 7,600 in the ‘80s. Yellowstone County (Billings) grew by 16,000 people after growth of only 5,400. And Bannock County (Pocatello) grew by 9,500 after growth in the previous decade of only 600. None of these cities is seeing much reduction in this growth since 2000 and growth is spreading into surrounding counties, although this spreading of population growth remains spotty.

The lower chart translates this growth by period into percentage terms. It is very obvious that area growth rates in the ‘90s were significantly higher than the previous decade. Teton County, Idaho, had the single highest growth among the counties with growth of nearly 75% in the ‘90s.
Shift in Net Population Migration in the Region

The region’s recent increase in population growth can be almost entirely attributed to a reversal in area net migration. During the 1980s, more people moved from the region than the number moving to it – about 43,400 more people left than came. But during the 1990s, 42,000 more people moved to the region than away and this in-migration is largely continuing since 2000 with net migration of over 19,000 people.

Natural population growth in the region – or the net effect of births and deaths – is actually declining over time from over 66,000 in the ‘80s to 47,000 in the ‘90s. This is due to the aging of the area population that is resulting in gradually falling area birth numbers and gradually increasing area death counts.

The lower chart shows how area shifts in net migration are distributed among individual counties. The county in the region with the single highest level of net in-migration is Gallatin County where population growth due to net migration went from less than 3,000 in the ‘80s to over 13,000 in the ‘90s. Net migration for Gallatin County since 2000 exceeds 7,500. Yellowstone County had a complete reversal in net migration, going from minus 5,200 in the ‘80s to nearly 9,000 in the ‘90s. Teton County, Wyoming, went from net migration of about 340 in the ‘80s to over 5,800 in the ‘90s. Net migration in Park County, Wyoming, went from minus 830 in the ‘80s to over 1,700 in the ‘90s.

It is very likely that population trends of the last five years will largely continue into the next five to ten years. However, there have been some recent increases in area births and this is because of increases in the population of young adults.
Population Change in the 8-County Surrounding Area

The charts at the right focus on population trends in the 8 counties surrounding Park County, Wyoming. None of the region’s larger population centers are included. Population growth in the ‘90s in all but one of these counties (Park County, Montana) was greater than growth in the ‘80s. Growth is greatest in Teton County, Wyoming, followed by Park County, Wyoming, and Fremont County.

These population figures in the top chart are translated into percentage figures in the lower chart. Park County, Wyoming, growth went from 7% in the ‘80s to over 11% in the ‘90s. So, the degree to which growth in the larger region has spread to Park County is limited, but it is occurring. And as you look across all of the counties in the area the differences in growth between the ‘80s and ‘90s is very apparent and pronounced. What’s more, growth is largely continuing, although the pattern is not straightforward in all cases.
Patterns in Population Change in the 8-County Area

The upper chart shows population change by component for the entire 8-county area. The area's population fell by over 3,700 people in the '80s. Growth through natural change of over 11,000 was completely offset by decline through net out-migration of nearly 14,800. With a turnaround in net migration, the area's total population increased by 15,400 in the '90s with 10,500 of this increase accounted for by net migration. It can be seen that natural population growth is falling and this is resulting from falling area birth rates. And, since 2000, area net migration has been modest, at least so far.

The lower chart examines year-to-year population change in the 8-county area since the mid-'70s. The biggest increase in one year occurred between 1978 and 1979 with an area-wide increase of nearly 4,700 people. Population growth steadily increased from the mid- to late '70s and this growth coincides with fairly high production levels in area agriculture during the period and the region's temporary "boom" in oil and gas exploration and drilling activity of that period.

A collapse in oil prices in the early '80s led to a “bust” in oil and gas drilling and acutely stressful financial conditions in agriculture developed in the early and mid-'80s. Both of these coincide with a plummeting in area population growth with the single greatest year of decline occurring between 1986 and 1987 when the area lost over 3,800 people. This decline was short-lived and population growth re-emerged in the early '90s, with this growth coinciding with the broader shifts in net migration.
Trends in Population Growth in Park County, Wyoming

Year-to-year population change in Park County alone is shown at the right. Growth was strong in the mid- to late-'70s and early 80s, with the single year of greatest growth between 1981 and 1982 at 948 persons. Growth fell after that and moved into actual population decline in 1985 and decline of 740 people in 1987. Decline continued in '88, '89, and '90 before growth returned in 1991. Growth rose as high as 656 persons in 1994 before falling back and moving once again into decline in 1999. Since then, there has been growth each year but it is somewhat sporadic.

The lower chart translates this annual population change in Park County into annual percentage change. Annual population growth rose as high as 4% in 1982 and fell to as low as minus 3% in 1987. Annual growth in the early '90s was in the two to two and a half percent range in most years. And more recently annual growth is about one percent.

Total population change between 1990 and 2000 in the county was an increase of 2,608 with 1,737 of this increase (two-thirds) accounted for by net migration. Population growth in Park County between 2000 and 2005 is 878 with 737 of this (84%) accounted for by net migration. Population growth in the county over the next ten years or more will be largely dictated by future migration patterns, although it is very likely that area birth rates may begin to stabilize because of an increasing number of young adults – persons at ages of family formation and child-rearing.
Past & Projected Population Growth in Park County

The upper chart shows past population levels in Park County and what may be expected in the future at a current growth rate of about 1% a year over the next fifteen years. The county’s total population rose from 23,000 in 1990 to 25,800 in 2000 and to 26,664 in July of 2005. At an annual growth rate of 1%, the county’s population will reach almost 31,000 people by 2020. This can be considered a modest increase over present levels, but the one percent a year rate of growth may be conservative. It is well within the realm of possibility if not probability that area population growth will increase as higher growth in the larger area continues to spread.

If this were to happen and growth were to rise as high as 2% a year, population in the area would rise to as high as 36,000 by 2020. One percent population growth per year for most counties is considered manageable. Two percent annual growth for many counties is less manageable, depending upon how county government and planners have prepared for such growth and are equipped to manage it.

One of the first areas of impact from rising population is the construction of more housing. The U.S. Census Bureau periodically estimates the number of housing units in each county. Housing units include all houses, apartments, mobile homes, and similar separate living quarters for families and individuals living alone. Occupied as well as vacant housing units are counted and seasonally-occupied homes are included. The lower chart shows the number of housing units in Park County for recent years in relation to the area’s total population. The number of housing units has risen from 8,774 in 1980 to 12,474.
Past & Projected Housing Units in Park County

The upper chart shows the ratio of population-to-housing units in Park County for recent years. There were 2.47 persons (counting only permanent residents of the county) for every housing unit in 1980. This decreased to 2.25 persons per housing unit in 1990 and to 2.17 in 2000. The very latest estimate places this at 2.12. This decline in the number of persons per housing unit is common throughout the U.S., but is more pronounced in areas with aging populations.

As the number of people in the population in their late 40s, 50s, and 60s rises faster than the population as a whole, the size of households falls and this is reflected in this declining ratio in Park County.

Using the previous population projections for the county and assuming that this ratio of people to housing units will stabilize at about 2.0, the number of housing units in the county will rise from the current level of 12,700 to about 15,500 in 2020 at population growth of 1% a year. At a 2% a year growth rate, the number of housing units in the county would rise to almost 18,000 by 2020. This would be an increase of over 5,200 units or an increase of over 40% above the current number.

Source: Swanson, 2006 (using Census Bureau data)
Gradual Aging of the Area’s Population

While Park County’s population is growing relatively slowly, certain age groups within the population are growing much more rapidly than others. The populations of some age groupings also are declining. These types of shifts in the age composition of the population are common throughout the United States, but they are more pronounced in some areas than others. In many areas of both Wyoming and Montana, these age shifts are pronounced and such is the case in Park County.

The upper chart shows numbers of people living in Park County over time by five-year age groupings. The blue bars show counts of each group at the time of the 1990 Census. The yellow bars show counts fourteen years later as estimated in 2004. The bottom chart shows change only in the number of people residing in the county for each age grouping in 2004 versus 1990.

In 1990 the single largest 5-year grouping of the population was persons 35 to 39 at slightly over 2,000 persons. More recently that group has sunk in size to about 1,400 persons and the largest group is those 45 to 49 followed by those 50 to 54. Persons at these ages are referred to as “baby boomers,” or persons born in the decade and a half after W.W. II. The next two largest groupings are persons 15 to 19 and 20 to 24. These are the children of baby boomers, or what are sometimes referred to as “boomer echoes.”

As the large number of people living in the county between the ages of 45 and 65 continues to age, the population of the county as a whole will age. And as young adults move from their teens and early 20s, a key question is how many of these persons will stay. The very youngest segments of the population – those under 14 – have been shrinking in size and this shrinkage is associated with fewer adults at ages of family formation and child-rearing.
Area-wide Trend in Population Aging

The median age of the population of Park County has risen from 29 at the time of the 1980 Census to 40 at the time of the 2000 Census. When the 2010 Census is compiled in less than five years, it’s very likely that the median age of the county will exceed 45. But Park County is not alone in this aging of the population. It is something happening through the country, the larger Rocky Mountain West region (in spite of its growth), and among all counties in the surrounding area.

The chart at the right shows the median age of each county in an 8-county area surrounding Park County. Hot Springs County has the area’s oldest population with a median age of 44. Twenty years earlier its median age was 32. Next oldest is Carbon County, MT, with a median age of 42 – up from 35 twenty years earlier. Park County, MT, has a median age of 41, just slightly older than Park County, WY. The other four counties all have slightly lower median ages, but all are experiencing very similar aging processes.

As this aging process continues to play out, area residents can expect the population of persons 65 and older to roughly double over the next twenty years. And as persons in the 50s and early 60s increasingly reach ages where they leave the work force and enter retirement, they will leave increasingly large holes in the area work force. And there will be far fewer existing residents at ages five and ten years younger than these retiring seniors to fill this hole, while behind the current group of teens and twenty-year olds, there will be smaller numbers following them.

One of the most important things for area leaders and decision makers to comprehend and stay attuned to are changing area age demographics. These shifts are built in to future population change and have significant implications for the future.

An increasingly older population will mean shifts in housing needs and opportunities. Health care – already a fast-growing area of the economy – will continue to expand. School-age populations will “flex” in size, with once growing high school enrollments beginning to shrink reflecting the contraction in the pipeline of students from elementary grades. However, depending upon possible growth in the population of young adults, birth rates could begin to rise pushing early grade populations in the same direction. Will area communities have the opportunities necessary to keep and attract young adults? Will area communities be places where young adults want to live and to raise their children? Will area communities by places where an increasingly large number of older adults want to stay when they retire? Will area communities attract new residents and in what numbers at what ages? These are all fundamental questions facing communities in Park County and surrounding counties in the area and region.
Personal Income Trends in Park County

Personal income is all income actually received in a given period of time by all individuals and families in an area. Personal income comes from three major sources: 1) labor income or earnings from employment; 2) investment income or receipts for rent, interest on savings, dividend payments on stock, and capital gains; and 3) transfer payment income or income primarily in the form of Social Security, Medicare/Medicaid, Veterans benefits, and similar payments through the government.

The upper chart shows levels for each of these income sources for Park County, Wyoming, over time. The single largest source of income is labor income, which includes all employment earnings like wage and salary payments to individuals and self-employment or proprietor net earnings. Labor earnings accounted for almost 60% of all income in 2004, rising to $453 million dollars. Employment earnings had declined in inflation-adjusted dollars from the early to mid-’80s, but have steadily risen since 1987.

Investment income totaled $192 million in 2004 and this is down from $220 million in 2000. This decline may be largely tied to a fall in the stock market during this period. Transfer payment income is the smallest source of area income, totaling $119 million in 2004. Transfer payments have steadily risen over the last thirty years and can be expected to rise more rapidly in future years as baby boomers move into retirement.

The lower chart shows changes in each major source of income for recent periods with values calculated using three-year averages for each source around these years: 1980, 1990, and 2000. During the ’90s, labor earnings grew by $104 million after falling by $49 million in the previous decade. And labor earnings growth has remained strong since 2000, rising by $71 million between 2000 and 2004.
Shifts in Area Income Composition Over Time

The upper chart shows what the changes in personal income by source over time have been in percentage terms. During the '80s when labor earnings were falling, transfer payment income increased by 67% while investment income grew by 23%. And even though labor earnings growth was greater than growth by both investment income and transfer payments in the '90s, in percentage terms investment income and transfer payments both grew more rapidly than labor income. Transfer payment income has continued to grow more rapidly than labor earnings since 2000 as well.

As a result of these differential rates of growth in individual income sources, the composition of area income in Park County is shifting, as shown in the lower chart. Labor earnings share of total personal income has fallen from nearly 70% in 1980 (again using a three-year average for data benchmarked around these years) to 59% in 1990. This rather marked fall in labor income’s share of all personal income largely stopped thereafter and labor earnings have maintained the same share since.

Investment income’s share of personal income rose to over 30% for the 2000 benchmark year, but has fallen back to about 25% more recently. And transfer payment income has steadily increased as a share of income, rising to 15.5% more recently. As the population of the county and larger area continues to age and more and more of the baby boom population reaches ages of retirement, transfer payment income will steadily rise and increase as a share of all income. Older individuals also will be more prone to tap into savings and investment earnings after they retire. So, it is very likely than in the not-to-distant future, over half of all personal income received by persons in Park County will come from these non-labor sources, reducing employment earnings to less than half of personal income.
Make-Up of Transfer Payments
Income in Park County

The importance of transfer payment income is increasing in Park County, Wyoming, just as it is in most other areas of the U.S. And the importance of this source of income is particularly great in areas with relative old populations, as is the case with Park County. The chart at the right shows the composition and make-up of transfer payment income received by Park County residents over the last thirty years.

The single largest source of transfer payment income is “retirement and disability insurance benefits” or, most notably, payment of Social Security benefits to retired individuals. These benefits rose from $23 million in 1980 to $37 million in 1990 – a $14 million increase – and to $49 million in 2000 – a $12 million increase in ten years. In the four years between 2000 and 2004, they have risen to $60 million – an $11 million increase. So, it can be seen that the rate of growth in this income source is rising.

The second largest source of transfer payment income is medical benefits paid through the government, including those under Medicare and Medicaid. These payments to individuals rose from around $6 million in 1980 to $15 million in 1990 and to $30 million in 2000 and reached $39 million in 2004. In other words, these benefits are increasing fairly rapidly and can be expected to continue to do so.

Income maintenance benefits are the next largest source of transfer payments income, but are much smaller than the other two primary sources. These include supplemental Social Security payments to individuals, such as for disabilities, and family assistance and food stamp benefits to low income families and individuals.

The total for all transfer payment income reached nearly $119 million in 2004, up from about $97 million in 2000.
Wage & Salary and Proprietor Employment in Park County

There are two basic categories of employment: wage and salary employment (persons who are employed by others and paid a wage or salary) and proprietor employment (self-employed persons who work for a profit or net return). The upper chart shows total employment for each of these categories of workers in Park County, Wyoming, over time. Employment data includes both full and part-time workers.

There are far more wage and salary workers in Park County than proprietors, which is the case in most places. Wage and salary employment growth was fairly stagnant from the early ’80s to early ’90s, rising from 10,453 workers to 10,706 in 1990. Since then, growth has been steady, rising to 13,746 workers in 2004. In 2004 these wage and salary workers accounted for 72% of all employment in Park County. This is down slightly from 2000 when their employment share was 74% and down from 1990 when their employment share was 77%.

This declining employment share suggests that proprietor employment or self-employment has been increasing more rapidly than wage and salary employment. Proprietors numbered 2,971 in 1980 and 3,186 in 1990, so there was only limited growth in their numbers during this period. However, proprietors totaled 5,366 in 2004, which is substantial growth. In the period between 1990 and 2004, proprietors accounted for 42% of all employment growth in the county.

The lower chart shows trends in labor earnings received by these two major categories of workers. Wage and salary earnings totaled $330 million in 2004, accounting for 76% of all labor earnings. Proprietor earnings, including those of farm proprietors, totaled $103 million – 24% of all area labor earnings.
Private versus Public Employment Growth in Park County

Total employment can be segmented into wage and salary versus proprietor employment. It can also be broken down into public and private employment. Public employment includes all types of government employment, including employment by the federal civilian government, U.S. military, state government, and local government, which includes local public education as well as city and county government.

Public employment of all types totaled 3,433 workers in 2004, up only modestly from 2,931 workers in 1990. Public workers accounted for 18% of all workers in the county in 2004 and 21% in 1990, so area employment by government has been increasing considerably slower than area private employment. Private employment of all types rose from 10,136 workers in 1990 to 14,877 in 2004. So, of the additional 5,220 workers added to area employment between 1990 and 2004, about 91% were added in some area of private nonfarm employment. Private nonfarm employment accounted for 78% of all employment in the county in 2004, up from 73% in 1990.

Workers of all types employed on area farms and ranches totaled 1,052 in 1980, 825 in 1990, and 802 in 2004, accounting for 4.2% of all employment in this most recent year.

The lower chart shows what workers in these three categories of employment actually received in labor earnings over time. Private nonfarm workers received $370 million in 2004, 72% of all labor earnings, up from 67% in 1990. Government workers received $137 million in 2004, 27% of all labor earnings, down slightly from 28% in 1990. Labor earnings of on-farm workers totaled $8.5 million in 2004, 1.7% of the total.
Employment Trends by Major Sector in Park County

Area employment also can be examined by major industry or sector. There are fourteen major sectors of the economy, as designated under the 1977-87 industry SIC codes, and employment levels by each sector in Park County are shown in the upper chart. The single largest sector is services where about 5,000 persons were employed in 2000. This also is the area of greatest employment growth during the ten years between 1990 and 2000 – a period of great economic change and restructuring throughout the region. As shown in the lower chart, services employment grew by 1,541 jobs during this ten-year period – far more than in any other sector. Services employment includes persons working in health care services, business services, legal services, engineering and management services, social services, amusement and recreation services, and other areas.

The second largest area of employment is retail trade, which employed about 3,000 persons in 2000. Services and retail trade together accounted for over 45% of all area employment in 2000 and accounted for 58% of all employment growth between 1990 and 2000. The third largest employment sector is local government, which includes those employed in city and county government and local public education. It is followed by construction and FIRE (finance, insurance, and real estate). All of the other sectors each employ fewer than 1,000 workers.

During the ‘90s employment growth in the county concentrated in services, retail trade, FIRE, construction, and local government. There also was some growth in manufacturing and ag services. Employment losses are concentrated in mining (oil and gas). Employment data after the year 2000 is being compiled using a new industry code – the NAICS system, which is examined later.
Trends in Sector Labor Earnings in Park County

The upper chart examines sector level activity in Park County over time as measured in labor earnings. Dollar figures are in inflation-adjusted 2000 dollars. As with employment the single largest sector measured in labor earnings is services, which totaled $99 million in 2000. Services grew by $39 million in the period from 1990 to 2000 (as shown in the lower chart). This is the largest area of labor earnings increase by far in the area economy.

Prior to 1987, the largest contributor to area labor earnings was mining (oil and gas drilling and exploration). Mining reached a high for the county in 1981 at $78 million. But its rapid ascent between the mid-'70s and early '80s was followed by a rapid decline, largely after 1985 that continued to a bottom point in 1996 where its labor earnings had fallen to about $30 million.

Besides services, growth in the area’s economy since 1990 have been concentrated in construction – up by $16 million between 1990 and 2000, FIRE – up by $14 million, and local government – up by $13 million. Growth also occurred in labor earnings paid to area employees of the federal civilian government and to retail trade workers. Manufacturing made a complete turnaround in going from the ‘80s to the ‘90s, rising by about $8 million in the ‘90s after falling by about $28 million in the previous decade.

Labor earnings declines occurred in both periods in the mining sector, falling by $19 million in the ‘80s and by another $12 million in the ‘90s. On-farm income, as measured by net farm earnings, also fell in the ‘90s. While some sectors grow, others decline, and the interplay of this simultaneous growth and decline is what is referred to as “economic restructuring.” Park County is seeing considerable economic restructuring.
Recent Area Employment Levels by NAICS Industries

New industry codes were recently instituted by the federal government for compiling industry income and employment data. Among other changes, these new codes divide the large services sector under the old SIC codes into 9 separate major sectors, including health care and social assistance, professional and technical services, accommodation and food services, administrative and waste services, arts-entertainment-recreation services, educational services, and management services. The FIRE sector has been divided into two sectors – finance and insurance, and real estate.

The upper chart shows levels of employment in each of the major NAICS sectors in Park County in 2001 and three years later in 2004 (the latest available data). The largest employer in the county is retail trade with 2,519 workers in 2004. Next is accommodation and food services (hotels, motels, restaurants, etc.) with 2,237, followed by local government with 2,207.

The largest sector as measured by labor earning, shown in the lower chart, is local government at $71.8 million. Second largest is construction at $56 million, followed by federal civilian government at $51.7 million. Retail trade is fourth largest at $44.2 million, followed closely behind by health and social assistance.

While mining is the 14th largest sector in the county in terms of employment with 538 workers, it is the sixth largest in terms of labor earnings at $34 million. However, it is down in labor earnings between 2001 and 2004.
Recent Change in Sector Employment and Labor Earnings

Between 2001 and 2004, total employment in Park County grew by 1,127 jobs, an increase of 6.3%, and 232 of those new jobs was accounted for by health care and social assistance, 21% of all new jobs in the county during this three-year period. Retail trade had the second largest increase in jobs at 189, followed by real estate with 142 and construction with 90. These four sectors alone accounted for half of all new jobs in the county during the period.

While the total number of jobs rose by 6.3%, health care jobs rose by 18%, retail trade jobs by 8%, and real estate jobs by 24%. Construction jobs rose by 6%.

Sector growth in labor earnings during this period are shown in the lower chart. The biggest single area of increase was real estate (which includes real estate sales and development as well as rental and leasing of real estate), with an increase of $8.6 million in labor earnings – up 90% in three years and accounting for 23% of all labor income gains in the county. Labor earnings by local government workers rose by $8.3 million, up 13%. Construction labor earnings increased by $7.9 million, a 16% increase, and health care and social assistance labor earnings rose by $6 million, a 16% increase as well. Together, the top four sectors in terms of labor earnings growth for the period accounted for 83% of all labor income gains by the county.

Big declines occurred in manufacturing labor earnings – falling by $7.5 million or 28%, and in mining and transportation and warehousing, both down by over $4 million.
Park County’s Shifting Economic Base

Certain segments of an area economy have greater significance that others because of their ability to bring “outside income” to the area. For example, most area manufacturing sells products to outside markets, as do most area farmers and ranchers. External income also is received as investment income and as transfer payment income. External dollars, once received locally as income, generate additional local economic activity as they are spent and re-spent (this is referred to as the local area income “multiplier”).

The mix or make-up of an area’s economic base can change over time – another key aspect of area economic restructuring. The upper chart shows estimates for components of Park County’s economic base for several points in time. The lower chart shows changes in these components – growth or decline – for the period from 1987 to 2002. In 2002 the single largest source of area external income is transfer payment income which totaled $109 million – 33% of the area’s total economic base. Next is income from investments, estimated at 30% of total investment income for all periods. These two non-labor income sources together account for over half of Park’s current economic base. The remainder is composed of labor income sources, including mining, agriculture, and manufacturing. Labor earnings by employees of the federal civilian government, U.S. military, and state government also are included because they are externally funded. The $28 million in “trade and services” is from sectors where labor earnings by those sectors exceed what can be attributed to local demand. This estimate is made using area and sector specific “location quotients.”

In the late ‘80s 21% of Park’s economic base came from mining. In 2002 this had fallen to just under 12%. Area dependence on agriculture also has declined.
Trends in Park County’s Farm and Ranch Sector

The upper chart shows key elements determining financial conditions in area agriculture, including annual receipts by farmers and ranchers in the form of marketing receipts, farm program payments, and income from other sources (such as machine hire and custom work income, income from wood products, and some imputed income). In 1979 at the very height of activity in this sector of the economy, area farmers and ranchers received about $169 million in cash from marketings of livestock and crops at the same time that they expended also an equal amount on production costs. The lower chart showing net farm income with income from marketings only shows this as a break even point for ag producers in 1979. Positive net earnings in this year did occur, but only by adding in income received in the form of farm program payments and from other sources.

A drastic and dramatic decrease occurred in the level of annual cash marketing receipts from this peak year in 1979 through 1987 when these fell below $65 million – a plunge of over $100 million as measured in inflation-adjusted dollars. As cash marketings plummeted area producers also cut back substantially in production costs, but virtually each gain in lower costs has been equaled by a loss in marketing receipts. These declines in both receipts and expenditures leveled off in the early ‘90s and activity has been stable since then.

Area ag producers moved from profitable production to net losses from the mid-70s to early ‘80s and hit bottom in 1982, so reduced production and costs were forced by falling profitability. Positive net income returned in the area by the mid-80s and with all income included (marketings and other income), net farm earnings reached $21 million in 1992. Profitability has been more shaky in recent years, however.
Trends in Ag Production and Expenditures

The upper chart shows the value of annual cash receipts from the marketing of livestock and crops by ag producers in Park County over time. The large decline in the value of total cash marketing receipts is mostly the result of a huge fall-off in livestock marketings. These totaled more than $129 million in 1979, but this spike in receipts was short-lived, falling to $95 million in 1983 and to $45 million in 1988. More recently livestock marketing receipts have ranged from $34 to $36 million annually.

Crop marketing receipts have been averaging about $27 to $28 million annually in recent years and they, too, have fallen considerably from levels in the mid-’70s to mid-’80s. While net farm income is oftentimes small if not negative in a given year, area producers spend about $60 million a year on various production requirements. The lower chart shows how farmers and ranchers spend their money on production costs in Park County. The largest single cost category is “capital and land costs” (including interest payments on loans, machinery purchase and maintenance costs, property taxes, etc.). These totaled $27 million in 2004. The next largest cost was for livestock purchases ($11 million), followed by costs for hired labor.

Both receipts from marketing and expenditures for production costs are significantly lower today than they were twenty years earlier. Meanwhile other segments of the economy have continued to grow. This has served to reduce the Park County area’s economic dependence on area agriculture. However, changing financial conditions in area ranching and farming will continue to be important factors in the area’s overall economic vitality.
Farm/Ranch Size Distribution in Park County, Wyoming

Park County is 6,969 square miles in size with 5,500 square miles of this total land area (almost 80%) of this total land base in federal public land ownership of some type. This includes nearly 2,700 square miles of national forest lands with over half of these federally-designated wilderness areas, 1,764 square miles of national park land (Yellowstone), 755 square miles of Bureau of Land Management lands, and another 300 square miles in some other type of federal ownership.

Of the remaining 1,465 square miles of land in the county not within these public lands, 1,266 square miles (810,000 acres) were farmland included in USDA-designated farms in 2002. This farmland acreage tends to vacillate from one Ag Census to the next, however, largely reflecting changes in data collection methods. The estimate for 1997 was nearly 1,600 square miles which would have to include some public lands leased by farmers and ranchers. Suffice it to say that roughly 90% of all land in the county not in public ownership is used as farm and ranch land.

The upper chart shows the distribution of county ag land by farm size in 1997 and 2002 (both Ag Census years). Over 80% of the ag land is contained in farms and ranches exceeding 2,000 acres in size. And, as shown in the lower chart, of the county’s total number of farms (711 in 2002) 47 are larger than 2,000 acres. So, a relatively small number of farms and ranches in the county own and manage most of the county’s ag land. The remaining 20% of ag land is largely spread among farms between 200 and 1,000 acres in size.

In 2002 an estimated 126,000 acres of farmland in Park County were cropped – a little over 15% of the total – and about 20% of this cropland was actually grazed or pastured. Most ag land in the county is pasture land.
Reduced Area Dependence on Agriculture and Mining

The contraction in the size and value of gross agricultural production in Park County over the years, combined with continuing growth in other segments of the economy, have greatly reduced the area’s previous fairly narrow economic dependence on agriculture. The upper chart shows the value of total gross marketing receipts by ag producers over time for every $20 million in area total personal income. Areas that are extremely ag dependent can have gross ag receipts that are equal to if not greater than total personal income. In Park County there were $7.7 million in gross ag marketing receipts for every $20 million in area personal income in 1974 and $7.2 million in 1979 when the value of ag production peaked. However, by 1990 these have fallen to as low as $2.8 million and by 2004, which is the latest available data, stood at $1.7 million.

The lower chart shows the value of mining industry labor earnings over time for every $20 million in total personal income. This ratio hit its peak in 1981 at $3.0 million in mining labor earnings for every $20 million in area personal income. This was at the peak of the oil and gas exploration and drilling boom in the early ‘80s. However, this dependency ratio had fallen to $1.9 million in 1990 and in 2004 stood at $0.9 million. While the oil and gas industry remains important to the area’s economy in terms of employment and labor earnings as well as royalty and other income from oil and gas production, the area’s dependency on this industry is much less today than previously.

Taken together, these two traditional industries once accounted for much of the area’s outside income. But growth in other sectors combined with consolidation and decline in these two industries has greatly reduced the area’s narrow economic dependence on agriculture and mining.
Recent Growth in Construction in the 8-County Area

Population estimates by the U.S. Census Bureau only count changes in the number of area “permanent residents”. Persons moving to an area and building homes that they occupy only seasonally or part of the year and who maintain their permanent residence elsewhere aren’t counted. The most immediate effect of more of this type of part-time residents is an increase in construction activity. Trends in construction activity can be generally gauged by looking at what is occurring in the level of labor earnings over time by area construction workers.

The upper chart shows levels of construction labor earnings for each of the eight counties in the area over time. Figures are in millions of 2000 inflation-adjusted dollars. The lower chart shows change in the levels for three recent periods: the ’80s, the ’90s, and the period from 2000 to 2004 (the latest available data). In comparing change in the ’80s with the ’90s, all of the counties had increases and many went from negative growth to fairly strong positive growth in construction. Teton County construction activity was strong in both periods, rising by over $16 million in the ’80s and nearly $70 million in the ’90s. More recently construction labor earnings have declined a bit. In Park County construction labor earnings fell through much of the ’80s, but rose by over $13 million in the ’90s and have continued to rise.

More people with more income that come to the area and build more homes also increase demand for a variety of services, including health care, finance and insurance, real estate, and retail trade. And these effects occur with both new permanent residents and new and more part-time residents. At least some of the recent growth in construction is associated with relatively low interest rates on loans and as rates rise, this will dampen some construction.
Per Capita Income Trends in Park County

There is no single way to measure area economic well-being, but one indicator that is often used for this purpose is per capita income. Per capita income is calculated by simply dividing an area’s total personal income in a given year by the area’s total population of permanent residents, including adults of all ages as well as children.

Per capita income in the county was recently estimated at about $29,000, measured in inflation-adjusted 2000 dollars. This is a relatively high level of per capita income when compared with other areas with similar population and rural characteristics as Park County. What’s more per capita income in the county has seen regularly and steady gains since declines were incurred in the early and mid-’80s.

The upper chart shows per capita income levels over time in the county while the lower chart shows annual changes in per capita income measured in inflation-adjusted dollars. The county saw good gains in the late ’80s and early ’90s and marked gains in most years between 1996 and 2001. More recently, year-to-year change has been mixed.

Surrounding counties have experienced a similar pattern of change in per capita incomes, with the exception of Teton County, Wyoming – the Jackson Hole area. Per capita income is much higher in Teton than in other area counties.
Trends in Economic Well-being of Park and Other Area County Residents

The upper right chart shows per capita income levels for counties in the 8-county area at different points in time. The counties are ordered from left to right based upon their relative rank among counties in 2004. Teton County per capita income in 2004 exceeded $75,000, which is a very, very high level. The much lower $30,000 figure for Washakie County is relatively high as well and it must reflect area incomes are being supplemented with mineral royalties on top of labor earnings. It is common for many largely rural counties like these in other areas of the region to have per capita incomes ranging from $20,000 to $23,000. Park County, Wyoming, has the third highest per capita income among these counties.

Park County also has the third highest median family income as measured at the time of the 2000 Census at $42,458. Area poverty is periodically estimated and Park County has been experiencing a rising level of poverty. Some poverty exists almost everywhere, but poverty rates greater than 10% can be considered unacceptably high. These estimates, however, do not consider variations in local area cost of living.

Source: U.S. Census Bureau

Source: BEA, U.S. Dept. of Commerce
There's no single way to determine or gauge the size and reach of an area economy. But, it's clear, regional economies at the sub-state level are organized around major population centers and their surrounding, sometimes far-flung trade and service areas. And the articulation of regional economies around major population centers is being steadily magnified by the growing service-sector orientation of the economy as a whole. Cities are the centers of service activity and the marketplaces for most service activity are regionally defined.

A methodology was devised for identifying the dominant centers of each area of the West and then further identifying adjacent and nearby counties that are closely-linked to these centers, both economically and socially, by their proximity. A "top-down," step-by-step approach was used beginning with the very largest cities and their surrounding counties and then moving to progressively smaller centers. This process extended to areas that lie just beyond the reach of the very largest centers and to smaller centers that dominate the regional economies of increasingly less-populated areas.

A "hierarchy" of regional centers is visualized, an urban-rural continuum of region types, ranging from major metro cores and surrounding closely-linked counties to 2nd and 3rd "Tier" metro centers and further to progressively smaller, largely non-metro, large and small regional trade centers. Sparsely-populated areas at great distances from these centers are classified as "isolated rural counties."
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<th>County Name</th>
<th>ST.</th>
<th>Largest City in each county</th>
<th>Largest City’s Population</th>
<th>COUNTY 1990 POP TOTALS</th>
<th>American Indian 1990 Pop</th>
<th>READ SYSTEM</th>
<th>READ Region</th>
<th>Nat Parks</th>
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## READ Counties: Area Identifiers & Classifiers

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### The 24-County Greater Yellowstone Region

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### READ Counties: Area Identifiers & Classifiers

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Source: Dr. Larry Swanson, *Regional Economies Assessment Database* or READ System (urban-to-rural counties classification system)
A Growing Elderly Population

Another indicator of the aging U.S. population is the rising share of the population that is 65 and older. The maps show how this varies across the U.S. and what is happening over the last twenty years. Most areas had 10% or less of their populations 65 and older in 1980. By 2000 this had changed considerably and this aging process will continue for another two decades. The areas of the country with the highest shares of elderly are where population decline was greatest in past decades.

Carroll and Nancy Fields O’Connor
Center for the Rocky Mountain West
Growing Area Dependence on Non-Employment Income Sources

As the population ages and the economy changes, the composition of income shifts. Over the last couple decades, non-employment earnings have become more and more of a factor in area personal income.

Carroll and Nancy Fields O'Connor
Center for the Rocky Mountain West

Non-employment Income
Share of Total Personal Income
- 50% and more
- 45 - 50%
- 40 - 45%
- Less than 40%
Lessons to Learn in Planning for Your Economic Future

**Become “Learning Communities”**  
Success requires adaptation and adaptation requires learning at the community level. Understand the past and continuing “story” of economic change in your region and in your community. Learn what can make a difference by paying attention to key initiatives of regions and communities like yours that seem to be “prospering.” Do periodic area economic “peer reviews”.

**Look Forward**  
Catch up with change. Don’t try to grasp the future by viewing it through the rear-view mirror. Promising strategies for economic improvement must reflect where the economy is going, not where it has been.

**Think about Community and Region “Positioning”**  
A community or region cannot remake its economy. But you can find ways to better position yourself – your businesses, schools, families, work forces, governments, etc. – for future change. Anticipate future change and attempt to better position yourself for that change.

**Customize Strategies**  
Needs, opportunities, and values vary widely from place to place. Goals and strategies must likewise vary. Sub-state areas must develop leadership and intelligence in areas of economic development.

**Community Quality Matters**  
Recognize that the quality of your community matters in how you may grow and prosper. Invest in community livability. Leadership within city regions must take much of the lead in devising key strategy elements for economic improvement.

**Urban-Rural Relations Matter**  
Healthy working relationships between cities and their surrounding communities are important. Pursuing economic development town-by-town, county-by-county is often self-limiting. Influencing local economic conditions sub-region by sub-region utilizing urban-rural regional partnerships has potential.

**The Environment as a “Key Economic Asset”**  
For many areas of the West, the environment is quickly becoming their chief economic asset. Protecting this asset is not the enemy of economic improvement. Protecting key environmental assets and qualities as you grow has become an economic imperative for many western communities. “Don’t kill the goose that is laying the golden eggs.”

**Human-resource Based Economy**  
In our history, we have known how to invest in natural resources development. But in this new economy, we don't always know how to invest in human resource development. Well-designed, well-funded, adaptive systems for education and work force development (lifelong) are essential for economic prosperity.

- Dr. Larry Swanson, O'Connor Center for the Rocky Mountain West, U. of Montana, Missoula
Framework for Community Economic Success in the West

Project your community into the larger region  Understand the role your community plays in the economy of the region and fast-growing Rocky Mountain West. Develop a vision for what you want to be and pursue it in strategic and deliberate ways.

Attend to Key Foundations for Future Economic Success  To be a place of “quality” you must have:

- Quality Infrastructure: streets, water, sewer, air service, schools, parks, neighborhoods, office buildings and complexes, business centers, educational facilities, downtown, etc..

- Quality Workforce: adaptive well-stratified workforce, with access to good training and a quality education system more generally – tailored to the particular needs and opportunities of area employers.

- Quality Businesses: forward-looking, entrepreneurial with adequate and timely support (business planning, capital, workforce training, etc.)

Frame and Design Strategies and Programming around Economic “Clusters”  Workforce development and business assistance programming must be customized to fit the needs of particular kinds of businesses. Stratify current and potential employers and businesses in the area into meaningful business “clusters” and customize workforce and business assistance strategies and programming for each cluster.

Adapt to Changing Area Age Demographics  Recognize the “ebbs and flow” of population growth across differing age groups and factor these into plans for housing, health care, school enrollment, workforce development, etc.

Chart and Assess Your Progress using “Peers”  Understanding change in your own community requires understanding change in the larger region and among places and regions like yours.

Establish a “Community Development Roundtable”  Key public and private leadership in the community must be “linked up”, extending across business assistance, education, workforce development, infrastructure, and city planning, regularly meeting in order that a multi-faceted approach to development and change can be developed, inter-coordinated, and pursued.

Build Healthy Urban-Rural Partnerships for Progress in the Region  The futures of larger cities and their surrounding communities are inextricably linked. You have a common future and can best influence that future by working together.

- Dr. Larry Swanson, O’Connor Center for the Rocky Mountain West, U. of Montana, Missoula