

Economic Indicators for Greater Cheyenne



Photos courtesy of Peter G. Arnold

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Business & Economic Analysis**
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**Volume XXVII, Number 1
March 2011**

Economic Indicators for Greater Cheyenne

Annual Trends Edition

Wyoming Center for Business and Economic Analysis

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Table of Contents

Economic Indicators Summary	1	Figure 8 - Per Capita Personal Income.....	35
Business Trends		Figure 9 - Personal Income.....	35
Cheyenne/Laramie County Profile	4	Laramie County Personal Income and	
Laramie County Retail Sales by Sub-Sectors.....	6	Earnings by Industry (BEA).....	36
Figure 1 - Sales and Use Taxes Total Tax Distributions...	6	Laramie County Total Payroll.....	38
Laramie County Sales and Use Tax Receipts.....	7	Average Annual Pay by States	39
Selected Sales and Use Tax Distributions	8	Demographic Trends	
Growth Rates.....	9	Census Detail	42
Figure 2 - Growth Rates – Population vs Employment	10	Population Estimates and Projections	43
Laramie County Gross Domestic Product.....	10	Figure 10 - Population Forecasts	44
Figure 3 - Growth Rates – Wages,		Laramie County Population Profiles.....	45
Personal Income and Real GDP.....	11	Population by Race and Ethnic Groups	46
Cheyenne Electrical Power Sales	12	Migration & Commuters.....	47
Figure 4 - Commercial Electric Power Sales	13	Figure 11 - Commuting Flows	48
Cheyenne Gas Consumption.....	14	Figure 12 - Net Residential Adjustment	48
Cheyenne Utility Hookups.....	15	Commuter Income Flows	49
Laramie County Auto Registrations (Titles).....	16	Laramie County Education Profiles.....	50
Laramie County Enplanements	17	Public and Private School Enrollment.....	51
Tourism Activity	18	Figure 13 - Public School and College Enrollment.....	52
Employment Trends		Housing Trends	
Labor Force Averages.....	20	Residentials for Sale, Sold & Price.....	54
Figure 5 - Unemployment Rate	21	Cheyenne Housing Rental Rates.....	55
Laramie County Employment (BEA).....	22	Housing Profile – Laramie County.....	56
Current Employment Statistics	23	Figure 14 - Residential Housing Profile.....	57
Laramie County Employers.....	24	Housing Profile – Cheyenne Area.....	58
Laramie County Proprietors.....	25	Building Permits	59
Figure 6 - Proprietor Income vs Annual Earnings	26	Residential Construction Activity	60
Laramie County Employment Projections.....	27	Historic Housing Occupancy.....	61
Major Employers in the Cheyenne Area	28	Vacancy Rates.....	62
Firms by Size and Industry in 2008.....	29	Development Trends	
Wage, Earnings & Income Trends		Annexation Trends	64
2009 Household Income.....	31	Commercial Construction Activity	65
Median Household Income	31	Figure 15 - Residential and Commercial	
2009 Earnings by Gender	31	Construction Valuation	66
Average Wage and Compensation Per Job	31	Commercial Property	67
Figure 7 - Average Wage and Average		Assessed Real and Personal Property Value	68
Compensation Per Job.....	32	Figure 16 - Assessed Real and Personal Property Values..	69
Laramie County Average Annual Earned Income.....	33	Major Property Tax Districts.....	70
Per Capita Personal Income	34	Figure 17 - Major Property Tax Districts.....	71

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The articles appearing in this publication represent the opinions of the authors and do not necessarily reflect the views of the various funding organizations. Duplication or quotation of material in this publication is welcomed, but it is requested that the Center be credited.

Economic Indicators

Summary

The purpose of the *Annual Trends* is to summarize and illustrate the Cheyenne/Laramie County local economy over the past 10 years or more. It presents the latest available, federal, state and local agency statistics dealing with Laramie County's economic and demographic growth patterns. Business and government planning requires a realistic assessment of past trends of the existing economy and realistic assumptions about the future. The indicators and statistics contained in this report can be used as a relative measure of future economic activity in Cheyenne and Laramie County.

2010 in Review

Slowly, better quality and revised data sets became available over 2010 which provided a clearer picture of the impacts of the Great Recession on the greater Cheyenne economy. Earlier assessments suggested the local economy fared well relative to other areas. The new and revised data continued to re-enforce this conclusion. One new and important statistic, total personal income, recently released by the U.S Bureau of Economic Analysis (BEA) showed that Laramie County's personal income rose by 0.5 percent during 2009. Rising personal income, during a recession as severe as the Great Recession, would be a rare exception and Cheyenne was the rare exception this time. By comparison, national personal income fell 1.7 percent during 2009, Colorado's personal income dropped 2.0 percent (-\$449,875,000) and the Rocky Mountain Region showed an overall decline of 1.8 percent. Wyoming's personal income fell the most, off 2.75 percent in 2009.

Another vital statistical set was added to the arsenal of positive trends for Laramie County just as this report was being completed. The Census Bureau released the 2010 Census count data for cities and counties. As expected, the new 2010 Census counts had population figures considerably higher than previous Census Bureau estimates which historically tend

to understate population growth. The county's 2010 population was pegged at 91,738 which was an increase of 3.24 percent (2,884 persons) over the Bureau's 2009 estimate of 88,854. Cheyenne's 2010 population count increased by 1,848 persons over the Bureau's 2009 estimate and was set at 59,466. The Census Bureau in coming months will smooth out their earlier estimates so that it does not appear that the County gained almost 3,000 persons in one year and the City 1,848.

Most encouraging of all, was the recent release by BEA of U.S. metropolitan (MSA) Gross Domestic Product (GDP) statistics. Cheyenne's real GDP in 2009 soared 6.44 percent over 2008's growth rate of 2.37 percent. Real GDP measures economic growth with inflation removed. This unexpected high growth rate was attributed to the widespread increase in mining and natural resource activities impacting the entire state with Cheyenne receiving indirect benefits from this activity. U.S. GDP by comparison fell 2.4 percent in 2009 after sliding 0.4 percent in 2008. Table 1.5 provides historical GDP data which showed local real GDP had increased at an annual average rate of 4.3 percent between 2001 and 2009. Nominal GDP rose 7.9 percent over the same period. Casper's GDP grew at a rate of 22.4 percent, the fastest in the nation in 2009. Both cities were in the top national growth quintile in 2009.

One critical data set, BEA's 2009 employment statistics, had not been released at the time of this report, so we had to rely upon state generated labor market data to further assess the recession's effects. The average number of persons unemployed during 2009 on a monthly basis was 2,806 versus 1,725 during 2008. This was an increase of 1,081 persons. Job growth following a recession tends to lag other economic activity as an economy pulls out of a recession and this fact held during 2010. Rather than seeing the number of unemployed decline last year as wished for, it rose. The average monthly number of unemployed workers rose to 3,206 during 2010, an increase of 400 workers (14.3%) over 2009's average and 1,481 over 2008's average.

Employment levels at firms with at least 100 workers in the Cheyenne area are presented in Table 2.6 and rose as 2010 drew to a close. Cheyenne LEADS' annual survey of local large employers reported an increase of 0.8 percent (+174) in jobs during 2010 – a remarkable occurrence given the times and clearly established that there were no massive layoffs in any sector of the local economy. F.E. Warren Air Force Base reported the largest increase in jobs, 126 during 2010. Within the large employer group, firms tied to medical and health care services were, surprisingly, the ones with the largest job losses (-121 jobs when combined). Readers are reminded that this survey is not statistically valid and firms cooperate voluntarily with the effort.

Based upon the above personal income and GDP data and other available indicators, it appears the majority of workers negatively impacted by the recession were those marginally attached to the local workforce. These would be persons with low job skills, new entrants into the workforce and those with little work experience, less than 3 years. Such persons tend to be the first laid off during an economic downturn.

Three economic sectors took the brunt of the recession locally. The construction sector lost the most jobs (-600) between 2008 and 2010. Retail Trade was second with a loss of 500 jobs and Leisure and Hospitality was third with a loss of 300. Table 2.2 provides these details.

The sector that is at times either blessed or cursed by local residents, acted as a blessing in 2009 and 2010. Preliminary government employment data showed an increase of 400 jobs between 2008 and 2010, and thus once again, the government sector added a much needed stabilizing effect to the local economy as the Great Recession ran its course.

While the primary measure of an economy's economic health, positive job creation, remained in negative territory during 2010, other local indicators clearly demonstrated that Cheyenne's economy had begun to march firmly away from the recession. Retail sales grew 2.0 percent over 2009, but still remained 2.7 percent behind 2008. All three residential utility measures (water taps, electric hookups and gas hookups) increased over 2009 levels with an overall average increase of 0.9 percent. See Table 1.8 for details. Auto registrations rose 2.2 percent.

As mentioned above, the construction sector was the hardest hit sector in 2009 and 2010 and thus deserves some closer scrutiny, especially going forward. New industrial and commercial construction within the City of Cheyenne, after having an abysmal year in 2009, saw the average monthly value of new construction rise to \$2,271,000 in 2010 as compared to

\$321,475 per month in 2009. Total dollar valuation in 2009 was \$3,857,698 versus \$27,254,322 in 2010. Given the recent announcements of new industrial firms locating to the Swan Ranch industrial rail park, the high probability of additional new firm announcements in 2011, the on-going construction of the NCAR facility, and probable start of the construction of the UW/GE coal gasification research facility in a few months, there is every reason to believe that 2011 will see a strong resurgence in new commercial and industrial construction activities which in turn should help spur job growth within the construction sector in 2011.

New residential construction began 2010 with a strong burst of activity but then faded in the last five months of the year. This inconsistent behavior places this sector in limbo for 2011. Will it post increases in 2011, remain stagnant or even decline? Within city limits, the dollar value of new single-family construction in 2010 finished with a total valuation of 37.4 million dollars as compared to 28.1 million dollars in 2009, a gain of 33 percent. However, 66 percent of this gain occurred over the first seven months of the year. Equally disconcerting was the fact that the average dollar value of a new city single-residential permit was \$161,863 in 2010 as compared to \$162,884 in 2009, a decrease of 0.6 percent. The value of a residential permit issued outside of the city limits, however, rose 26.7 percent in 2010 from an average of \$210,957 in 2009 to \$267,337 in 2010. There were 139 such permits issued last year versus 112 in 2009 which was 24 percent increase.

Table 5.2 presents total new residential construction in all of Laramie County from 1982 through 2010. Last year, a total of 312 new single-family residential units were permitted, an increase of 36 percent over 2009's total of 229. However, last year's total was still 2.3 times below the level posted in 2004. It should also be noted that there was no new multi-family units permitted in 2010.

The question remains, how will residential construction perform in 2011? Long term mortgage rates are on the rise as are commodity prices and both tend to dampen spending plus there remains a large supply of existing homes for sale. These factors would suggest there will not be much of a turn-around in new residential construction in 2011. However, the counter argument says there will definitely be new firms moving to Cheyenne in 2011 and thus new job creation. Coupled with the expected job growth resulting from the continued development of Niobrara shale oil play, these factors suggest an increasing demand for new residential construction as 2011 progresses. Between the two scenarios, we expect the latter to prevail.

Business Trends

This section contains core business sets designed to measure overall economic growth for the greater Cheyenne economy.

Table 1.4 provides 10 core growth measures such as population, jobs, personal income and GDP. With the release of the 2010 Decennial Population Census results, the county's population growth rate over the past ten years was 1.18 percent annually with the most recent 5-year rate at 1.48 percent. Expect this latter rate to prevail in 2010 and probably for the next 3 to 4 years going forward. A year ago there was an expectation that there would be a population loss due to the recession but given the unexpected growth in the economy mentioned earlier and what appears to be now small negative impacts from the recession, the probability of out-migration in 2010 and 2011 seem remote. This conclusion is further bolstered by the fact that total county-wide school enrollments increased 2.5 percent in 2010 or by 362 students and 0.3 percent in 2009. This conclusion contradicts Figure 2 that presents the traditional relationship between job growth and population growth and suggests that there should be population losses in 2009 and 2010 given negative employment growth over these last two years.

Figure 3 presents the relationship between personal income growth, wage growth and county Gross Domestic Product (GDP). As can be seen, personal income growth consistently exceeded the growth in wages until 2009 when it fell below that series, however this one year deviation does not diminish the long-term trend which said non-labor income (dividends, interest, rents, and government transfer payments) has added substantially to personal income growth over the years.

The just released Cheyenne MSA GDP data by BEA for the years 2001 through 2009 were revised sharply upwards in absolute dollars by that agency. For instance last year, it reported 2001 GDP at 2.745 billion dollars and this year's 2001 figure was reported at 3.238 billion dollars, an increase of 18 percent. The end results of these revisions was that by 2009 Laramie's County's Real Gross Domestic Product stood at 4.5 billion dollars. In unadjusted dollars, it was 5.0 billion dollars.

Table 1.1 provides yearend statistics for the local retail sector. As shown, retail sales grew in 2010 and finished the year with a 2.0 percent gain over 2009 retail sales which in turn were down 4.6 percent from 2008. The sub-sector, Miscellaneous Retail, had the largest relative gain, up 22.0 percent over 2009, followed by Home Furniture and Furnishings (14.4%). The big loser was Electronic and Appliance Stores which experienced a 28.1 drop in sales year-over-year. There is a substantial county-wide positive retail gap in this sub-sector, and it is surprising it has not been filled. Expect to see that gap eliminated in coming months.

Table 1.11 provides yearend statistics for the local tourism industry. These data failed to clearly describe how the sector fared during 2010. Critical measures such as the occupancy rate and nights occupied suggested it was a good year. However, average room rates and Old West Museum paid visitor counts suggested the opposite. The occupancy rate averaged 64 percent last year as compared to 55 percent in 2009. Nights occupied rose 16 percent from last year also. Old West Museum paid visits, on the other hand, fell 21 percent and room rates registered a marginal increase of 0.3 percent. The contradictions suggested there remained lingering effects from the Great Recession during 2010.

Anecdotal evidence for early 2011 suggest hotel and motel occupancy rates will soar as the year progresses due to the influx of oil and gas exploration workers tied to the Niobrara shale gas play.

SECTION 1 BUSINESS TRENDS

Table

- 1.0 Cheyenne/Laramie County Profile
- 1.1 Laramie County Retail Sales By Sub Sectors (2006-2010)
Figure 1 - Laramie County Sales & Use Taxes
- 1.2 Laramie County Sales and Use Tax Receipts (1990-2010)
- 1.3 Selected Laramie County Sales and Use Tax Distribution (1983-2010)
- 1.4 Growth Rates (1994-2010)
Figure 2 - Growth Rate Population vs. Employment
- 1.5 Laramie County GDP (2001-2009)
Figure 3 - Growth Rates – Wages, Personal Income & Real GDP
- 1.6 Electrical Power Sales (1986-2010)
Figure 4 - Commercial Electric Power Sales
- 1.7 Gas Consumption (1991-2010)
- 1.8 Utility Hookups (1990-2010)
- 1.9 Auto Registrations (1995-2010)
- 1.10 Enplanements (1993-2010)
- 1.11 Tourism Activity (2002-2010)

Table 1.0

Cheyenne/Laramie County Profile					
ITEMS	MOST RECENT PERIOD		PREVIOUS PERIOD		% CHANGE IN VALUE
	YEAR	VALUE	YEAR	VALUE	
Demography					
Total Population - Cheyenne ¹	2010	59,466	2009	57,478	3.46%
Total Population - Laramie County	2010	91,738	2009	88,854	3.25%
Total Male Population	2009	44,625	2008	43,990	1.44%
Total Female Population	2009	44,229	2008	43,552	1.55%
% of Population - Under 20 Years Old	2009	26.6%	2008	28.8%	-7.61%
% of Population - 65 Years & Older	2009	12.7%	2008	12.0%	5.83%
Median Age	2009	36.6	2008	35.8	2.23%
% of Population - White Alone (Non-Hispanic)	2009	86.1%	2008	85.7%	0.47%
% of Population - Native American Alone	2009	1.4%	2008	1.8%	-22.22%
% of Population - Hispanic or Latino	2009	11.4%	2008	11.7%	-2.56%
Households - County	2009	34,945	2008	33,025	5.81%
Average Household Size - County	2009	2.5	2008	2.6	-3.85%
Households - City	2007	22,929	2000	23,782	-3.59%
% of Households (HH) Headed by Married Couples	2009	51.6%	2008	47.8%	7.95%
% of HH Headed by Single Female (w/own children <18 yrs.)	2009	5.6%	2008	7.4%	-24.32%
Weather & Geography					
Total Area (sq. miles) ¹	2000	2,688	—	—	
Total Area (sq. miles) ¹¹ - Cheyenne	2010	25.2	2009	24.9	1.13%
Water Area (sq. miles)	2000	1.6	—	—	
Mean Elevation (ft.)	2000	6,100	—	—	
Normal Mean Temperature (F) - Cheyenne ²	1949 - 06	45.9	1971-00	44.9	2.23%
Average Annual Precipitation (inches) - Cheyenne ²	1949 - 06	14.6	1971-00	15.5	-5.50%
Average Wind Speed (mph)	1996 - 06	12.4	1992-02	12.6	-1.59%
Crime & Law Enforcement					
Crimes ³	2009	3,064	2008	3,327	-7.91%
Crimes per 100,000 Persons	2009	2,722.5	2008	2,912.5	-6.52%
Homicides per 100,000 Persons	2009	3.6	2008	2.6	37.08%
Rapes per 100,000 Persons	2009	35.5	2008	25.4	39.83%
Robberies per 100,000 Persons	2009	26.7	2008	26.3	1.67%
Aggravated Assaults per 100,000 Persons	2009	94.2	2008	107.7	-12.52%
Burglaries per 100,000 Persons	2009	296.8	2008	360.7	-17.71%
Larcenies & Thefts per 100,000 Persons	2009	2,136.1	2008	2,263.8	-5.64%
Motor Vehicle Thefts per 100,000 Persons	2009	129.7	2008	126.1	2.89%
Education					
% of Pop. (25 yrs. & older) with High School Diploma ¹	2009	90.5%	2008	91.0%	-0.55%
% of Pop. (25 yrs. & older) with Bachelor's Degree	2009	22.2%	2008	24.1%	-7.88%
Pupil -Teacher Ratio in LCSD #1 ⁴	2006-07	10.38	2005-06	10.36	0.19%
Pupil -Teacher Ratio in LCSD #2	2006-07	7.47	2005-06	6.53	14.40%
Expenditures Per Pupil in LCSD #1 (\$)	2008-09	\$13,813	2007-08	\$12,904	7.05%
Expenditures Per Pupil in LCSD #2 (\$)	2008-09	\$20,353	2007-08	\$18,869	7.86%
LCSD #1 Enrollment Fall Semester	2010	13,173	2009	13,205	-0.24%
LCSD #2 Enrollment Fall Semester	2010	925	2009	872	6.08%
Total School Enrollments Laramie County Fall Semester	2010	14,776	2009	14,395	2.65%
% of Students in Private Schools	2010	2.7%	2009	3.3%	-17.93%
% of Students Home-Schooled	2010	2.2%	2009	2.8%	-21.99%
ACT Average Composite Score (range 1-36) LCSD #1	2009-10	19.1	2008-09	20.6	-7.28%

ITEMS	MOST RECENT PERIOD		PREVIOUS PERIOD		% CHANGE IN VALUE
	YEAR	VALUE	YEAR	VALUE	
ACT Average Composite Score (range 1-36) LCSD #2	2009-10	19.6	2008-09	20.1	-2.49%
LCSD #1 Graduation Rate ⁵	2007-08	73.5%	2006-07	74.3%	-1.10%
LCSD #2 Graduation Rate	2007-08	82.9%	2006-07	82.8%	0.11%
Average Student Age at LCCC (Fall Semester)	2010	27	2009	27	0.00%
3 -Year Graduation Rate at LCCC	2010	17.6%	2009	25.3%	-30.55%
3 - Year Rate of Transfer from LCCC	2010	28.4%	2009	24.9%	14.18%
Fall Semester Full-time Equivalent (FTE) Enrollment at Laramie County Community College ⁷	2010	3,190	2009	3,021	5.59%
Housing					
Average Rent for 2-3 Bedroom House (\$) ⁸	2Q10	\$936	2Q09	\$892	4.93%
Average Rent for 2 Bedroom Apartment (\$)	2Q10	\$621	2Q09	\$587	5.79%
Average Rent for 2-3 Bedroom Mobile Home (\$)	2Q10	\$630	2Q09	\$576	9.38%
Average Sales Price - Cheyenne	2010	\$182,630	2009	\$168,237	8.6%
Average Sales Price - Close-in Rural	2010	\$262,112	2009	\$252,674	3.7%
Laramie County's Economy					
Median Household Income ¹	2009	\$49,744	2008	\$56,821	-12.45%
Mean Household Income	2009	\$60,781	2008	\$73,894	-17.75%
Per Capita Personal Income (\$) ⁹	2008	\$44,613	2007	\$43,175	3.33%
Average Wage per Job	2009	\$40,345	2008	\$39,481	2.19%
Average Annual Pay (\$) ¹⁰	2009	\$38,376	2008	\$37,453	2.46%
Employment & Labor					
Employment ¹²	2010	39,907	2009	40,066	-0.40%
Unemployment Rate ¹³	2010	7.4%	2009	6.5%	13.85%
Total Non-farm Jobs ⁹	2008	62,558	2007	60,687	3.08%
% of Jobs in Farming	2008	1.45%	2007	1.49%	-2.22%
% of Jobs in Mining	2008	N/A	2007	N/A	—
% of Jobs in Government	2008	27.08%	2007	27.23%	-0.55%
% of Jobs in Construction	2008	6.90%	2007	6.77%	1.83%
% of Jobs in Manufacturing	2008	2.89%	2007	2.90%	-0.08%
% of Jobs in Trans. & Ware.	2008	5.80%	2007	5.93%	-2.16%
% of Jobs in FIRE	2008	8.44%	2007	8.70%	-2.96%
% of Jobs in Services	2008	30.17%	2007	30.28%	-0.36%
% of Jobs in Retail Trade	2008	11.61%	2007	12.13%	-4.36%
% of Jobs in Wholesale	2008	1.69%	2007	1.64%	3.18%
Employed Workforce Demographics¹					
% of Workforce Age 16-19 ¹	2009	5.3%	2008	5.3%	-1.78%
% of Workforce Age 20-44	2009	54.3%	2008	53.9%	0.73%
% of Workforce Age 45+	2009	40.4%	2008	40.7%	-0.74%
% of Workforce Male	2009	54.6%	2008	55.7%	-1.99%
% of Workforce Female	2009	45.4%	2008	44.3%	2.49%
CPI					
U.S. CPI	2010	218.1	2009	214.5	1.64%
Annual Inflation Rate - Cheyenne	2Q10	2.6%	2Q09	0.2%	—

Sources:

- 1 U.S. Census Bureau
- 2 Western Regional Climate Center
- 3 Wyoming Division of Criminal Investigation
- 4 Laramie County School Districts #1 & #2
- 5 Wyoming Department of Education
- 6 Office of Institutional Analysis, University of Wyoming
- 7 Laramie County Community College
- 8 State of Wyoming, Dept. of Admin. & Info., Economic Analysis Division
- 9 U.S. Commerce Department, Bureau of Economic Analysis
- 10 U.S. Department of Labor, Bureau of Labor Statistics
- 11 City of Cheyenne
- 12 Wyoming Department of Employment, CES Data
- 13 Wyoming Department of Employment, LAUS Data

Table 1.1

Laramie County Retail Sales by Sub Sectors 2006 - 2010

INDUSTRY (NAICS)	* 2006	2007	2008	2009	2010
Auto Dealers and Parts	26,834,941	52,136,013	51,570,200	50,152,900	52,837,200
Gasoline Stations	16,556,380	33,395,237	38,197,300	39,567,600	43,260,400
Home Furniture and Furnishings	12,719,153	30,594,185	31,371,400	27,572,600	31,543,800
Electronic and Appliance Stores	32,486,615	72,127,254	66,252,400	54,716,600	39,320,500
Building Material & Garden	58,258,480	101,503,553	106,827,600	101,813,600	107,094,100
Grocery and Food Stores	17,267,370	19,449,698	21,897,300	20,178,100	20,325,000
Liquor Stores	7,793,348	15,708,780	16,322,500	15,086,000	15,026,600
Clothing and Shoe Stores	18,148,851	37,571,554	40,194,500	41,084,800	41,381,500
Department Stores	31,389,496	69,019,778	58,895,300	55,514,100	53,570,900
General Merchandise Stores	63,520,511	118,318,762	112,139,900	121,387,400	117,054,300
Miscellaneous Retail	29,381,233	60,403,420	63,200,700	58,896,900	71,878,600
Lodging Services	21,534,903	37,805,315	37,066,900	34,652,800	38,775,900
Eating and Drinking Places	68,952,643	134,939,799	144,445,500	142,509,500	146,935,100
Automobile Sales	102,300,313	192,290,835	188,725,700	168,978,700	171,949,500
TOTAL	507,144,237	975,264,183	977,107,200	932,111,600	950,953,400

*Note 2006 figures represent the months of July thru December only.

Source: Wyoming Department of Revenue

FIGURE 1

Laramie County Sales and Use Taxes Total Tax Distributions 1990 - 2010

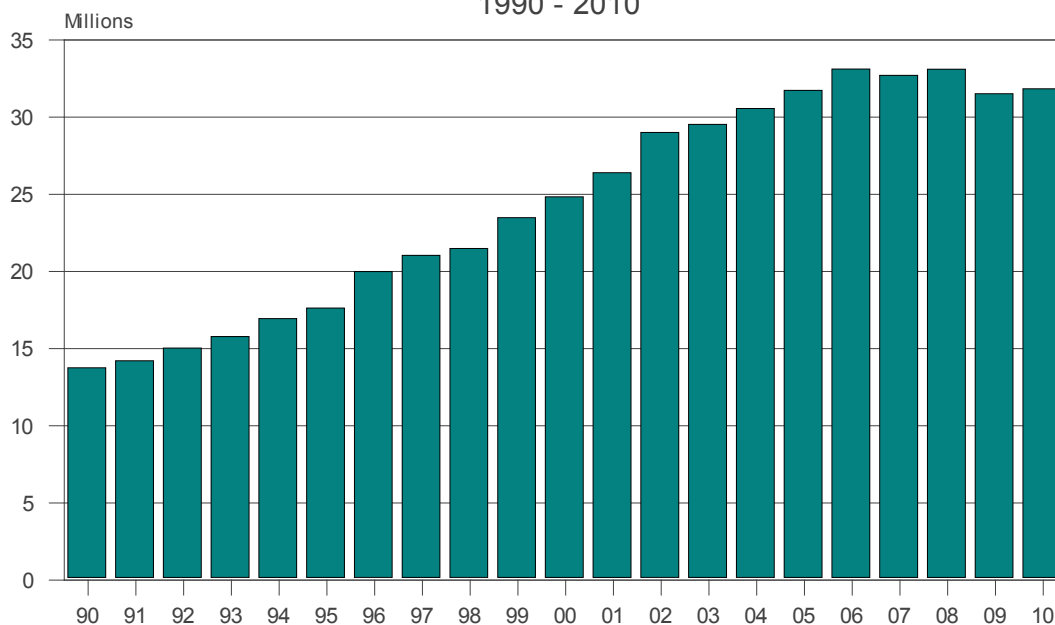


Table 1.2

Laramie County Sales and Use Tax Receipts
Annual Total
1990 - 2010
(Dollars)

YEAR	TOTAL SALES TAX DISTRIBUTIONS 4% STATE & 1% OPTIONAL (a)	4% STATE SALES AND USE TAX DISTRIBUTIONS (B)	LOCAL OPTIONAL 1% SALES AND USE TAX DISTRIBUTIONS
1990	13,754,944	7,403,129	6,351,815
1991	14,214,108	7,743,249	6,470,859
1992	15,030,132	8,260,537	6,769,595
1993	15,783,892	8,675,088	7,108,804
1994	16,945,691	9,260,700	7,684,991
1995	17,634,051	9,673,791	7,960,260
1996	19,999,036	11,223,626	8,775,410
1997	21,048,071	11,177,653	9,870,418
1998	21,494,660	11,541,365	9,953,295
1999	23,492,966	12,426,483	11,066,483
2000	24,833,339	13,115,173	11,718,167
2001	26,406,542	13,800,674	12,605,568
2002	29,011,725	15,428,989	13,582,736
2003	29,528,829	15,855,502	13,673,327
2004	30,559,319	16,501,718	14,057,601
2005	31,733,902	17,213,493	14,520,409
2006	33,118,921*	17,894,618	15,224,303
2007	32,702,985*	17,636,107	15,066,606
2008	33,114,106*	17,827,988	15,286,119
2009	31,517,315*	16,979,116	14,529,199
2010	31,846,764*	17,051,836	14,794,927

Notes: (a) This total includes the 4% Sales and Use Tax, the 1 % Sales and Use Tax, and the Out of State Sales and Use Tax.

Prior to 1989, the percentage of sales and use tax collections distributed to counties was 33%,

From July 1, 1989 to June 30, 1992, it was 36.67%.

From July 1, 1992 to June 30, 1993, the allocation was 35%.

From July 1, 1993, it was changed to 28%.

As of July 1, 2002, the percentage distribution was changed to 29.5%.

As of June 30, 2004, the percentage distribution was changed to 31%.

(b) State Sales and Use Taxes were increased from 3% to 4% on July 1, 1993

* Totals do not include state reimbursements for lost sales taxes previously levied on food sales

Source: Wyoming Department of Revenue & Taxation

Table 1.3

Selected Laramie County Sales and Use Tax Distributions
Annual Totals
1983 - 2010
(Dollars)

YEAR	LODGING TAX RECEIPTS (A)	% CHANGE	ESTIMATED TOTAL TAXABLE SALES (B)	% CHANGE
1983	N/A		N/A	
1984	N/A		N/A	
1985	N/A		559,666,300	
1986	N/A		573,654,700	2.5%
1987	N/A		560,841,236	-2.2%
1988	202,981		570,305,413	1.7%
1989	222,653	9.7%	585,918,593	2.7%
1990	228,378	2.6%	635,181,509	8.4%
1991	246,751	8.0%	647,085,861	1.9%
1992	262,981	6.6%	676,959,513	4.6%
1993	283,746	7.9%	710,880,409	5.0%
1994	302,640	6.7%	768,499,065	8.1%
1995	316,596	4.6%	796,025,960	3.6%
1996	326,421	3.1%	877,541,038	10.2%
1997	321,721	-1.4%	987,041,761	12.5%
1998	344,509	7.1%	995,329,539	0.8%
1999	362,725	5.3%	1,106,648,302	11.2%
2000	399,193	10.1%	1,171,816,600	5.9%
2001	400,237	0.3%	1,260,556,700	7.6%
2002	453,917	13.4%	1,358,273,578	7.8%
2003	582,681	28.4%	1,367,333,000	0.7%
2004	646,724	11.0%	1,405,760,086	2.8%
2005	691,081	6.9%	1,452,040,902	3.3%
2006	845,936	22.4%	1,557,499,671*	7.3%
2007	1,128,773	33.4%	1,577,713,775*	1.3%
2008	1,156,118	2.4%	1,636,290,275*	3.7%
2009	1,058,485	-8.4%	1,632,019,917*	-0.3%
2010	1,244,406	17.6%	1,569,042,742*	-3.9%

Notes: (A) Lodging Tax Receipts: 7/1/87 - 3/31/03 - 2%; 4/1/03 - 3/31/07 - 3%; effective 4/1/07 - 4%
(B) Estimated Total Taxable Sales: amounts were added to reflect loss in sales taxes levied on food
*2006- \$350,694
*2007 - \$710,532
*2008 - \$1,076,784
*2009 - \$1,791,000
*2010 - \$895,500

Source: Wyoming Department of Revenue & Taxation

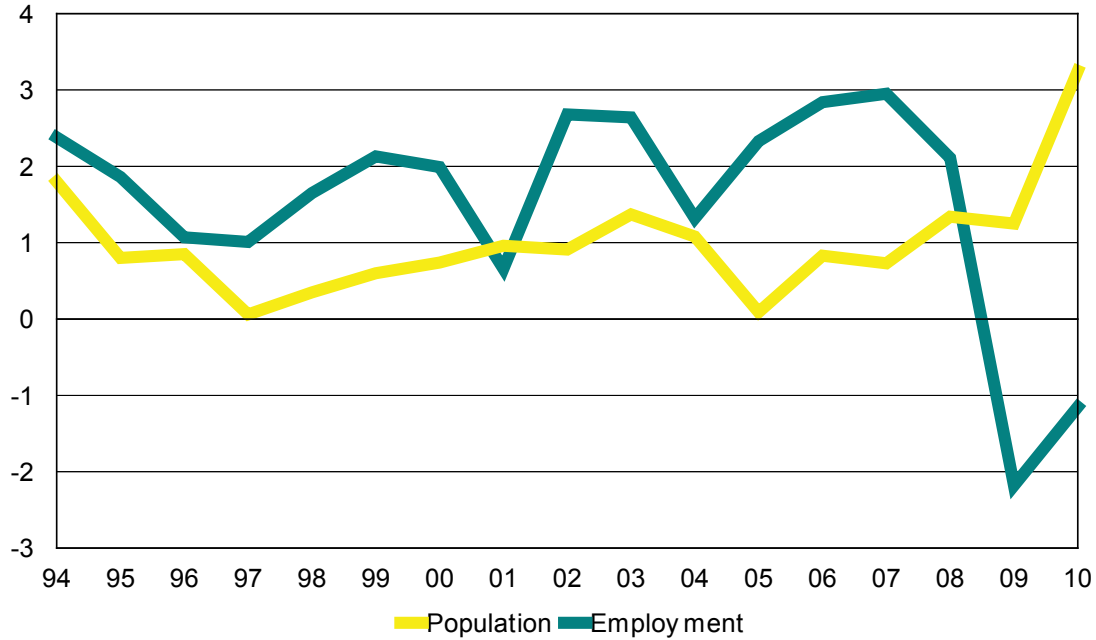
Tables 1.4

Growth Rates Laramie County 1994 - 2010

YEAR	LARAMIE COUNTY		CITY OF CHEYENNE		DOE EMPLOYMENT (CES)		BEA EMPLOYMENT		ANNUAL AVG EARNINGS/JOB	
	POPULATION	% CHANGE	POPULATION	% CHANGE	# JOBS	% CHANGE	# JOBS	% CHANGE	\$	% CHANGE
1994	78,885	1.80%	53,329	1.33%	34,450	2.38%	49,275	2.92%	23,359	2.77%
1995	79,513	0.80%	53,472	0.27%	35,092	1.86%	49,692	0.85%	23,426	0.29%
1996	80,186	0.85%	53,692	0.41%	35,467	1.07%	50,127	0.88%	23,595	0.72%
1997	80,238	0.06%	53,626	-0.12%	35,825	1.01%	50,635	1.01%	24,504	3.85%
1998	80,522	0.35%	53,780	0.29%	36,417	1.65%	51,659	2.02%	25,819	5.37%
1999	81,009	0.60%	53,925	0.27%	37,192	2.13%	52,383	1.40%	26,890	4.15%
2000	81,607	0.74%	53,399	-0.98%	37,933	1.99%	53,997	3.08%	27,466	2.14%
2001	82,392	0.96%	53,717	0.60%	38,183	0.66%	53,220	-1.44%	29,199	6.31%
2002	83,144	0.91%	54,103	0.72%	39,208	2.68%	54,802	2.97%	30,799	5.48%
2003	84,287	1.37%	54,709	1.12%	40,242	2.64%	55,998	2.18%	31,705	2.94%
2004	85,195	1.08%	55,461	1.37%	40,775	1.32%	57,213	2.17%	33,077	4.33%
2005	85,270	0.09%	55,533	0.13%	41,725	2.33%	58,438	2.14%	34,361	3.88%
2006	85,974	0.83%	55,885	0.63%	42,908	2.84%	59,637	2.05%	37,391	8.82%
2007	86,601	0.73%	56,313	0.77%	44,175	2.95%	61,602	3.29%	38,232	2.25%
2008	87,759	1.34%	57,048	1.31%	45,108	2.11%	63,480	3.05%	39,481	3.27%
2009	88,854	1.25%	57,618	1.00%	44,125	-2.18%	N/A	—	40,345	2.19%
2010	91,738	3.25%	N/A	—	43,617	-1.15%	N/A	—	N/A	—
10 Year Avg.		1.18%		0.67%		1.42%		2.09%		4.16%
5 Year Avg.		1.48%		0.77%		0.91%		2.54%		4.08%
Source: Census Bureau			Source: Census Bureau		Source: Wyo. Dept. of Employment		Source: U.S. Dept. of Commerce		Source: Wyo. Dept. of Employment	

YEAR	PERSONAL INCOME		PER CAPITA INCOME		REAL PER CAPITA INCOME		REAL COUNTY GDP		RESIDENTIAL ELECTRIC	
	\$	% CHANGE	\$	% CHANGE	\$	% CHANGE	(\$000,000)	% CHANGE	# HOOKUPS	% CHANGE
1994	1,637,207	—	20,754	3.10%	14,004	0.01%	N/A	—	28,476	1.82%
1995	1,710,435	4.47%	21,511	3.65%	14,115	0.79%	N/A	—	28,851	1.32%
1996	1,782,412	4.21%	22,228	3.33%	14,167	0.37%	N/A	—	29,295	1.54%
1997	1,882,460	5.61%	23,435	5.43%	14,601	3.06%	N/A	—	29,794	1.70%
1998	2,031,156	7.90%	25,225	7.64%	15,475	5.99%	N/A	—	30,319	1.76%
1999	2,150,636	5.88%	26,957	6.87%	16,181	4.56%	N/A	—	30,421	0.34%
2000	2,292,534	6.60%	28,601	6.10%	16,638	2.82%	N/A	—	30,806	1.27%
2001	2,489,246	8.58%	30,212	5.63%	17,059	2.53%	3,238	—	30,946	0.45%
2002	2,669,447	7.24%	32,106	6.27%	17,847	4.62%	3,360	3.77%	31,330	1.24%
2003	2,837,070	6.28%	33,660	4.84%	18,293	2.50%	3,505	4.32%	31,776	1.42%
2004	3,028,303	6.74%	35,546	5.60%	18,817	2.86%	3,636	3.74%	32,340	1.77%
2005	3,208,013	5.93%	37,622	5.84%	19,264	2.38%	3,695	1.62%	35,065	8.43%
2006	3,549,671	10.65%	41,288	9.74%	20,480	6.31%	3,947	6.82%	35,121	0.16%
2007	3,739,019	5.33%	43,175	4.57%	20,827	1.69%	4,140	4.89%	35,057	-0.18%
2008	3,915,224	4.71%	44,613	3.33%	20,721	-0.51%	4,238	2.37%	35,136	0.23%
2009	3,933,828	0.48%	44,273	-0.76%	20,640	-0.39%	4,511	6.44%	35,318	0.52%
2010	N/A	—	N/A	—	N/A	—	N/A	—	35,478	0.45%
10 Year Avg.		6.25%		5.12%		2.48%	8 Year Avg.	4.25%	10 Year Avg.	1.45%
5 Year Avg.		5.42%		4.54%		1.90%		4.43%		0.23%
Source: U.S. Dept. of Commerce			Source: U.S. Dept. of Commerce		Source: WCBEA		Source: U.S. Dept. of Commerce		Source: CLF&P	

FIGURE 2
Growth Rates
Population vs Employment
 1994 - 2010



Tables 1.5

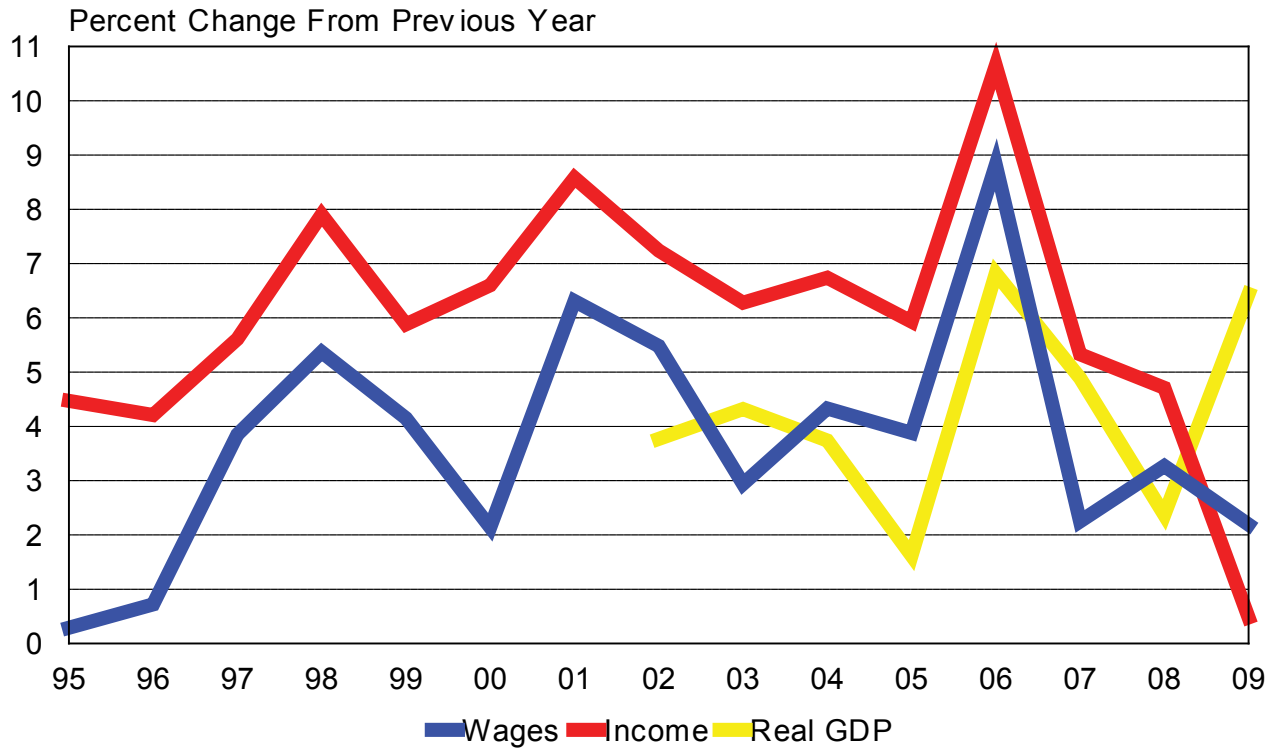
Laramie County Gross Domestic Product
 2001 - 2009

YEAR	REAL GDP	% CHG.	NOMINAL GDP	NOMINAL GROWTH	REAL PER CAPITA GDP	% CHG.
2001	3,238		2,737		39,301	
2002	3,360	3.77%	2,908	6.25%	40,415	2.83%
2003	3,505	4.32%	3,159	8.63%	41,586	2.90%
2004	3,636	3.74%	3,404	7.76%	42,681	2.63%
2005	3,695	1.62%	3,695	8.55%	43,330	1.52%
2006	3,947	6.82%	4,158	12.53%	45,915	5.97%
2007	4,140	4.89%	4,583	10.22%	47,806	4.12%
2008	4,238	2.37%	4,837	5.54%	48,288	1.01%
2009	4,511	6.44%	5,012	3.62%	50,768	5.14%
AVERAGE		4.25%		7.89%		3.26%

Source: BEA

FIGURE 3

Growth Rates Wages, Personal Income and Real GDP 1995 - 2009



Cheyenne Electrical Power Sales
Monthly Average
1986 - 2010

YEAR	INDUSTRIAL	COMMERCIAL	RESIDENTIAL
1986	16,359,393	15,088,952	N/A
1987	16,915,723	15,402,928	N/A
1988	18,101,455	16,122,944	N/A
1989	19,279,580	16,630,256	N/A
1990	19,708,183	17,242,640	N/A
1991	20,206,789	17,804,254	10,853,997
1992	22,678,954	18,213,299	15,461,257
1993	25,888,948	19,363,148	16,100,752
1994	26,660,488	20,470,098	16,153,544
1995	29,646,805	20,722,672	16,378,051
1996	29,274,837	21,981,947	16,909,734
1997	30,333,102	22,289,679	17,007,344
1998	29,496,366	23,627,902	17,198,608
1999	30,008,744	24,583,751	17,489,479
2000	29,558,994	26,688,059	18,315,332
2001	29,422,453	26,817,975	17,687,186
2002	30,183,684	27,929,167	18,096,770
2003	31,074,855	28,776,711	18,475,063
*2004	26,128,505	27,358,136	30,991,326
*2005	13,580,000	41,602,707	42,421,787
*2006	10,787,692	44,657,625	20,757,341
2007	11,868,049	45,400,412	21,165,873
2008	12,014,921	48,779,417	21,278,735
2009	14,566,015	48,560,547	21,260,937
2010	13,379,674	49,638,083	21,561,223

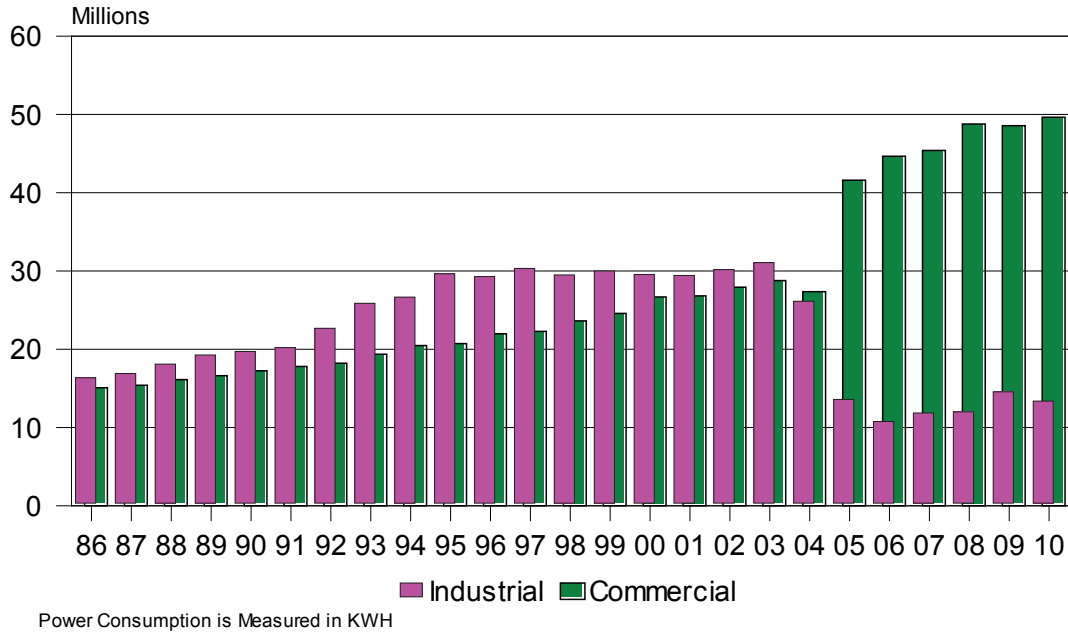
Note: Power Consumption is measured in KWH.

* The variance in the average use per month for industrial and commercial customers between 2004-2006 and prior years is the result of customer classifications differences between the two accounting systems utilized by CLFP's corporate owners. The total of industrial and commercial customers remains consistent for the two years and prior years.

Source: Cheyenne Light Fuel & Power

FIGURE 4

**Commercial Electric Power Sales
Monthly Average
Cheyenne 1986 - 2010**



Cheyenne Gas Consumption
Monthly Average
(Measured in MCF)
1991 - 2010

YEAR	INDUSTRIAL	COMMERCIAL	RESIDENTIAL
1991	62,300	140,943	224,265
1992	64,192	131,956	215,981
1993	63,294	152,432	243,881
1994	54,535	140,474	227,168
1995	62,276	142,419	232,901
1996	59,469	143,344	247,028
1997	55,996	140,290	247,759
1998	58,969	124,638	211,119
1999	60,765	120,926	206,842
2000	61,456	123,062	204,375
2001	58,687	131,003	201,329
2002	56,454	124,940	210,776
2003	56,620	120,830	201,057
2004	N/A	179,150	211,275
2005	N/A	120,787	198,367
2006	N/A	112,464	193,828
2007	N/A	105,777	198,413
2008	N/A	124,734	215,187
2009	N/A	124,949	209,717
2010	N/A	122,462	207,426

Source: Cheyenne Light Fuel & Power

Cheyenne Utility Hookups
1990 - 2010

YEAR	AVERAGE METERED WATER TAPS	AVERAGE RESIDENTIAL ELECTRIC HOOKUPS	AVERAGE RESIDENTIAL GAS HOOKUPS
1990	17,349	N/A	N/A
1991	17,417	27,467	22,861
1992	17,537	27,743	23,183
1993	17,721	27,966	23,452
1994	17,926	28,476	23,900
1995	18,154	28,851	24,299
1996	18,444	29,295	24,696
1997	18,691	29,794	25,490
1998	18,890	30,319	25,864
1999	19,100	30,421	25,994
2000	19,193	30,806	26,415
2001	19,355	30,946	26,643
2002	19,532	31,330	27,122
2003	19,832	31,776	27,668
2004	20,246	32,340	28,357
2005	20,721	35,065	29,175
2006	21,225	35,121	29,859
2007	21,600	35,057	30,185
2008	21,678	35,136	30,400
2009	21,929	35,318	30,672
2010	22,048	35,478	31,205

Source: Cheyenne Board of Public Utilities
Cheyenne Light, Fuel and Power

Laramie County Auto Registrations (Titles)
Annual Total
1995 - 2010

1995	30,390
1996	31,540
1997	31,181
1998	31,022
1999	32,625
2000	33,381
2001	35,092
2002	36,808
2003	36,353
2004	35,724
2005	36,737
2006	36,021
2007	36,242
2008	35,229
2009	32,445
2010	33,146

Source: Laramie County Clerk

Laramie County Enplanements
Annual Total
1993 - 2010

1993	42,830
1994	34,634
1995	23,581
1996	21,002
1997	21,839
1998	19,035
1999	19,500
2000	22,646
2001	24,426
2002	21,391
2003	17,182
2004	16,167
2005	14,372
2006	14,681
2007	16,888
2008	15,314
2009	11,155
2010	17,426

Note: The declines in 1994 and 1995 reflect the loss of a regional airline serving the Cheyenne market.

Source: Cheyenne Airport

Tourism Activity
Monthly Averages
2002 - 2010

	2002	2003	2004	2005	2006	2007	2008	2009	2010
*Available Rooms	25,880	27,775	28,637	66,126	66,156	68,411	66,142	69,263	69,788
*Nights Occupied	18,290	17,306	17,851	42,643	43,509	46,272	39,232	38,248	44,490
*Occupancy Rate	69.1%	63.4%	62.3%	64.5%	65.7%	67.6%	59.3%	55.1%	63.7%
*Average Room Rate (\$)	\$57.19	\$57.97	\$57.88	\$64.45	\$62.75	\$67.58	\$72.40	\$69.86	\$70.10
CACVB Visitor Walk-in Count	1,298	1,203	2,317	2,653	4,132	4,015	3,934	4,495	4,189
Trolley Ridership	606	912	947	1,027	1,284	1,023	1,041	1,231	1,019
Pine Bluffs Info. Center	15,461	14,466	13,935	13,085	12,589	12,924	10,353	11,297	11,836
I-25 State Visitor Center	5,475	5,770	5,102	5,379	7,391	6,837	6,401	6,174	6,650
Old West Museum Paid Visitor	3,527	3,491	3,019	3,017	3,277	2,921	2,591	2,644	2,082
State Museum	1,413	2,274	1,862	1,745	2,003	1,734	1,824	1,865	2,262

* Note: Visit Cheyenne changed reporting agencies for hotels, beginning with 2005 data

Note: Numbers reported are a monthly average for each year.

Source: Visit Cheyenne

Employment Trends

This section presents a comprehensive overview of past and current employment statistics and trends.

Table 2.1 presents job totals (full & part-time) by industrial sector which permits the user to see which sectors have been growing or shrinking over time. The source of these numbers is the Bureau of Economic Analysis (BEA) which is an arm of the U.S. Department of Commerce and is considered the best source of jobs data, but BEA data lags by two years and thus does not show 2009 or 2010 trends and thus diminishes the data's effectiveness in evaluating current economic activity.

When measured in absolute numbers, most new jobs in 2008 were generated by the Finance and Insurance sector (+304). Second was the Real Estate sector with 282 new jobs and third was Health Care with 229 jobs. Retail Trade was the largest job loser, down 167 positions in 2008.

Table 2.2 contains current estimates of jobs by sector from the Wyoming Department of Employment. The results within were mentioned earlier this report.

Table 2.3 contains statistics on the number of employers in Laramie County. The county saw a fractional loss employers (-6) in 2009 and ended the year with 3,208 firms.

Table 2.4 presents BEA derived data on the number of non-farm and farm proprietors plus average incomes for both groups through 2008. The number of non-farm proprietors increased at a rate of 7.3 percent in 2008 as compared to 5.8 percent in 2007, up 837. Non-farm proprietor income, on the other hand, declined 6.2 percent in 2008. Non-farm proprietor income has consistently contributed an average of 7.7 percent to total personal income in Laramie County.

The problem, however, is that non-farm proprietors are not making any headway in adding to the economic diversity of the county's economy plus they have seen their average income fall over the past two years, down 4.8 percent in 2008 and 9.5 percent in 2007. It appeared that the constant growth in the number of proprietors over recent years served to only dilute their annual earnings.

Figure 6 presents the relationship between average annual earnings in Laramie County to average non-farm proprietor income. The gap between the two averages remained fairly consistent between 2001 and 2004, but then began to widen thereafter. That is, employed worker earnings increased much faster than proprietor incomes and by 2008, the gap had widened to \$17,955 as compared to \$15,414 in 2007 and \$8,775 in 2004.

BEA sharply revised its data for the number of farm proprietors this year. Overall, the revision increased the number of such firms and also changed the long-term declining trend to one where there were random sharp and sporadic increases in some years. For instance between 2006 (608) and 2007 (721), the number of farm proprietors increased by 113, an 18 percent increase. By the end of 2008, there were 718 such firms in the county, the third highest level ever recorded by BEA. The highest figure was 749 and was reached in 2002.

Average farm income, a highly volatile item, rose 227.0 percent on a year-to-year basis in 2008. It stood at \$29,362 that year and exceeded, for the first time ever, average non-farm proprietor income (\$21,287) by 38 percent. See Table 2.4 for historical data.

Table 2.5 contains job projections (full and part-time) through year 2013. Losses are projected for 2009 and 2010 with a resumption of job growth in 2011. Projected losses for 2009 are 595 jobs with 2010 seeing another loss of 357 jobs. In Table 1.4, job losses as reported by the Wyoming Department of Employment were 983 for 2009 and 508 for 2010.

Table 2.7 presents the number of firms in Laramie County by employment size with the data from County Business Patterns. As of 2008, there were 2,651 firms compared to 2,616 firms in 2007, an increase of 1.3 percent year-over-year. Overwhelmingly, most local firms had 4 or less employees (55%). Only 1 company had more than 1,000 employees and 4 employed between 500 and 999 employees.

SECTION 2 EMPLOYMENT TRENDS

Table

- 2.0 Labor Force Averages (1997-2010)
Figure 5 - Unemployment Rates
- 2.1 BEA Employment (1997-2008)
- 2.2 Current Employment Statistics (1992-2010)
- 2.3 Employers By NAICS (1999-2009)
- 2.4 BEA Proprietors (1984-2008)
Figure 6 - Proprietor Income vs. Annual Earnings
- 2.5 Employment Projections (2008-2013)
- 2.6 Major Employers (2007-2011)
- 2.7 Firms by Size and Industry (2008)

Table 2.0

Labor Force Averages For Wyoming, Laramie County & Cheyenne 1997 - 2010

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010 ^(a)
LABOR FORCE														
Wyoming	256,263	260,570	264,676	266,883	269,985	269,654	271,607	273,091	278,183	284,987	290,490	293,854	293,926	292,266
Laramie County	39,277	39,690	40,327	40,237	40,120	40,839	41,550	41,324	41,611	41,984	42,418	42,622	42,871	43,113
Cheyenne	27,582	27,872	28,320	26,802	26,730	27,212	27,692	27,540	27,726	27,970	28,253	28,397	28,334	N/A
EMPLOYED^(b)														
Wyoming	243,944	247,748	251,828	256,685	259,508	258,462	259,489	262,358	267,927	275,758	282,102	284,535	275,217	272,249
Laramie County (LAUS)	37,842	38,224	38,913	38,732	38,464	39,342	40,182	40,381	40,756	40,324	40,874	40,796	40,066	39,907
Laramie County (CES)	35,825	36,417	37,192	37,933	38,183	39,208	40,242	40,833	41,575	42,908	44,175	45,108	44,125	43,617
Cheyenne *	26,588	26,857	27,341	25,737	25,559	25,982	26,336	26,208	26,480	26,798	27,161	27,176	26,633	N/A
UNEMPLOYED														
Wyoming	12,319	12,822	12,848	10,197	10,477	11,192	12,118	10,733	10,256	9,229	8,388	9,099	18,710	20,100
Laramie County	1,435	1,466	1,414	1,505	1,656	1,744	1,923	1,903	1,747	1,636	1,544	1,725	2,806	3,206
Cheyenne *	994	1,015	979	1,065	1,171	1,230	1,356	1,332	1,246	1,171	1,093	1,220	1,701	N/A
UNEMPLOYMENT RATE (%)														
Wyoming	4.8%	4.9%	4.9%	3.8%	3.9%	4.2%	4.5%	3.9%	3.7%	3.3%	2.9%	3.2%	6.4%	6.9%
Laramie County	3.7%	3.7%	3.5%	3.7%	4.1%	4.3%	4.6%	4.6%	4.2%	3.9%	3.6%	4.0%	6.5%	7.4%
Cheyenne *	3.6%	3.6%	3.5%	4.0%	4.4%	4.5%	4.9%	4.8%	4.5%	4.2%	3.9%	4.3%	6.0%	N/A

N/A - Data is not available.

Notes: (a) Figures are not benchmarked.

(b) Labor statistics are compiled from two major sources: Current Population Survey (CPS) and Current Employment Statistics (CES). Local Area Unemployment Statistics (LAUS) are estimated based on CPS data which is collected through household surveys where individuals are reported as employed, unemployed or not in the labor force. This data includes employment for both agriculture and nonagricultural industries. CES data is based on establishment records compiled through monthly surveys of nonfarm employers. Individuals who worked in more than one establishment, full or part-time, are counted each time their names appear on payrolls.

Figures for 1995 - 2007 are benchmarked data.

* Cheyenne Employment is based on Census Bureau population estimates.

Source: Wyoming Department of Employment

FIGURE 5

Unemployment Rate 1997 - 2010

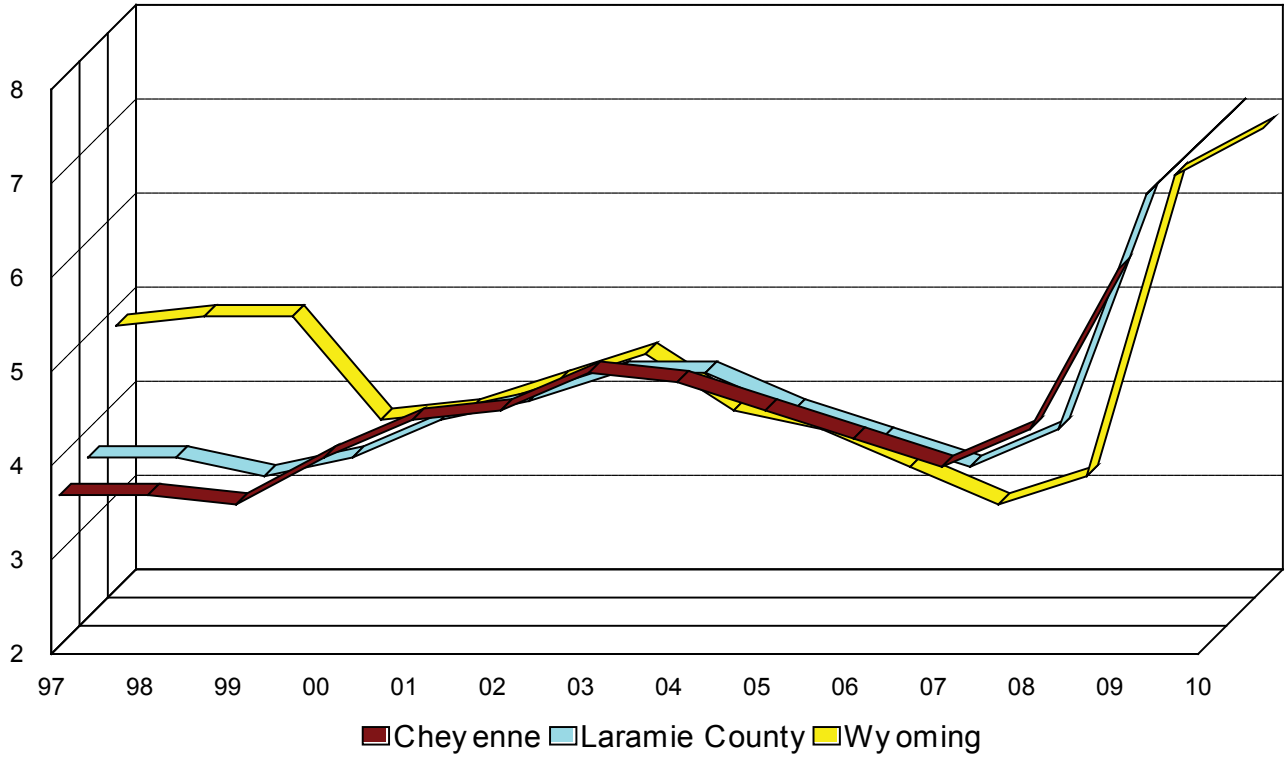


Table 2.1

**Laramie County Employment (BEA)
Full & Part Time Employment By Industry
1997 - 2008**

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total Employment	50,635	51,659	52,383	53,997	53,220	54,802	55,998	57,213	58,438	59,637	61,602	63,480
By Type												
Wage and Salary	41,444	42,095	43,068	44,289	43,654	45,012	46,088	46,679	47,364	48,222	49,452	50,496
Proprietors	9,191	9,564	9,315	9,708	9,566	9,790	9,910	10,534	11,074	11,415	12,150	12,984
Farm	584	593	590	591	679	749	678	652	636	608	721	718
Nonfarm (a)	8,607	8,971	8,725	9,117	8,887	9,041	9,232	9,882	10,438	10,807	11,429	12,266
By Industry												
Farm	855	928	901	952	950	1,009	917	886	854	820	915	922
Nonfarm	49,780	50,731	51,482	53,045	52,270	53,793	55,081	56,327	57,584	58,817	60,687	62,558
Private	34,808	35,740	36,427	37,315	36,582	37,984	38,902	39,982	40,964	42,352	43,915	45,369
Ag. Serv., For., Fish., & Other	539	571	701	727	(D)	(D)	(D)	(D)	(D)	(D)	(D)	(D)
Mining	194	197	216	189	172	194	214	199	217	258	(D)	(D)
Utilities			N/A	N/A	112	115	117	117	130	132	149	152
Construction	2,956	3,062	3,191	3,139	3,202	3,386	3,514	3,616	3,852	4,334	4,173	4,379
Manufacturing	1,810	1,906	1,868	1,930	1,683	1,650	1,641	1,706	1,741	1,781	1,784	1,837
Wholesale Trade	960	1,057	1,061	1,087	921	869	896	918	970	1,009	1,011	1,075
Retail Trade	9,545	9,581	9,621	9,936	6,937	7,166	7,163	7,118	7,314	7,274	7,475	7,367
Transportation & Warehousing	2,819	3,104	3,465	3,581	2,385	2,407	2,604	2,899	3,021	3,215	3,655	3,685
Information	N/A	N/A	N/A	N/A	(D)	(D)	(D)	(D)	(D)	(D)	1,194	1,230
Finance and insurance	4,385	4,604	3,925	4,095	2,197	2,356	2,458	2,423	2,483	2,455	2,533	2,837
Real estate and rental and leasing					1,847	1,714	1,779	2,149	2,445	2,603	2,827	3,109
Services	11,600	11,658	12,379	12,631	15,781	16,847	17,171	17,494	17,484	17,970	18,652	19,152
Professional & technical services			N/A	N/A	2,236	2,324	2,425	2,587	2,649	2,674	2,740	2,907
Management of companies and enterprises			N/A	N/A	395	326	192	192	223	257	189	176
Administrative and waste services			N/A	N/A	2,467	2,705	2,685	2,434	2,210	2,351	2,550	2,574
Educational services			N/A	N/A	315	348	349	403	456	537	519	519
Health care and social assistance			N/A	N/A	3,159	3,426	3,776	3,971	4,067	4,210	4,586	4,815
Arts,entertainment,and recreation			N/A	N/A	805	729	704	684	708	738	790	818
Accommodation and food services			N/A	N/A	3,793	4,236	4,301	4,435	4,420	4,396	4,462	4,542
Other services			N/A	N/A	2,611	2,753	2,739	2,788	2,751	2,807	2,816	2,801
Government & Government Enterprises	14,972	14,991	15,055	15,730	15,688	15,809	16,179	16,345	16,620	16,465	16,772	17,189
Federal, Civilian	2,409	2,419	2,392	2,547	2,393	2,405	2,609	2,627	2,573	2,488	2,514	2,584
Military	3,971	3,888	3,856	3,813	3,753	3,716	3,794	3,826	3,718	3,547	3,426	3,432
State government					3,710	3,870	3,938	3,960	3,994	4,001	4,118	4,212
Local government					5,832	5,818	5,838	5,932	6,335	6,429	6,714	6,961

N/A - Data is not available

Note: (D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals.

Source: U.S. Commerce Department - Bureau of Economic Analysis

Table 2.2

Current Employment Statistics
Laramie County Nonagricultural Wage and Salary Employment
Employment In Thousands
1992 - 2010

	1992 ^(fb)	1993 ^(fb)	1994 ^(fb)	1995 ^(fb)	1996 ^(fb)	1997 ^(fb)	1998 ^(fb)	1999 ^(fb)	2000 ^(fb)	2001 ^(fb)	2002 ^(fb)	2003 ^(fb)	2004 ^(fb)	2005 ^(fb)	2006 ^(fb)	2007 ^(fb)	2008 ^(fb)	2009 ^(pb)	2010 ^(p)
Total Nonag. Wage & Salary Employment	32.8	33.7	34.5	35.1	35.5	35.8	36.4	37.2	37.9	38.2	39.2	40.2	40.8	41.7	42.9	44.2	45.1	44.1	43.6
Total Private	21.6	22.4	23.1	23.8	24.1	24.5	24.9	25.7	26.2	26.3	27.1	28.0	28.4	29.0	30.1	30.9	31.5	N/A	N/A
Total Goods Producing	2.7	2.9	3.2	3.3	3.5	3.7	3.8	4.0	3.9	3.9	4.0	4.1	4.2	4.4	4.9	4.8	5.0	4.5	4.1
Natural Resources, Mining, & Construction	1.6	1.8	1.9	2.0	2.1	2.2	2.2	2.4	2.3	2.3	2.5	2.6	2.7	2.9	3.3	3.1	3.3	3.0	2.7
Manufacturing	1.1	1.2	1.3	1.3	1.4	1.5	1.5	1.5	1.7	1.5	1.5	1.5	1.6	1.6	1.6	1.6	1.7	1.5	1.4
Total Service Providing	30.1	30.7	31.3	31.8	32.0	32.1	32.6	33.2	34.0	34.3	35.2	36.1	36.5	37.3	38.0	39.4	40.1	39.6	39.5
Trade, Transportation, & Utilities	7.0	7.1	7.0	7.1	7.3	7.2	7.6	7.6	8.1	8.1	8.2	8.5	8.6	9.0	9.2	9.8	9.8	9.1	9.1
Wholesale Trade	0.5	0.5	0.6	0.6	0.6	0.6	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.9	0.8	0.8
Retail Trade	4.4	4.5	4.5	4.7	4.8	4.9	5.1	5.0	5.3	5.3	5.4	5.5	5.5	5.6	5.6	5.7	5.7	5.3	5.2
Trans, Warehouse, & Utilities	2.1	2.1	1.9	1.8	1.8	1.7	1.8	1.9	2.1	2.1	2.1	2.3	2.4	2.6	2.8	3.3	3.2	3.0	3.0
Information	1.0	0.9	0.8	0.7	0.8	0.9	0.9	1.1	1.2	1.1	1.0	1.1	1.0	1.0	1.0	1.0	1.1	1.1	1.1
Financial Activities	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.9	2.0	2.0	2.0	2.0	2.0	2.2	2.2	2.2
Professional & Business Services	2.5	2.4	2.6	2.9	3.0	3.1	3.1	3.3	3.3	3.4	3.5	3.4	3.3	3.2	3.3	3.4	3.4	3.2	3.2
Educational & Health Services	1.7	1.8	1.9	2.0	2.0	2.1	2.2	2.2	2.3	2.3	2.7	3.0	3.2	3.3	3.5	3.8	3.9	4.0	4.1
Leisure & Hospitality	3.7	4.0	4.3	4.6	4.4	4.3	4.2	4.2	4.2	4.2	4.3	4.3	4.4	4.4	4.4	4.5	4.6	7.9	4.3
Other Services	1.3	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.5	1.5	1.6	1.6	1.7	1.7	1.7	1.7	1.7	1.6	1.6
Government	11.1	11.3	11.4	11.3	11.3	11.4	11.5	11.5	11.7	11.9	12.1	12.3	12.4	12.8	12.8	13.2	13.6	13.9	14.0
Federal Government	2.6	2.6	2.6	2.5	2.5	2.4	2.4	2.4	2.5	2.5	2.5	2.6	2.6	2.6	2.5	2.5	2.6	N/A	N/A
State Government	3.4	3.4	3.4	3.3	3.3	3.4	3.4	3.4	3.4	3.6	3.8	3.9	3.8	3.9	3.9	4.0	4.1	N/A	N/A
Local Government	5.2	5.3	5.5	5.4	5.5	5.6	5.7	5.7	5.8	5.9	5.8	5.8	5.9	6.3	6.5	6.7	6.9	N/A	N/A
Local Education	2.5	2.5	2.7	2.7	2.6	2.7	2.6	2.7	2.8	2.9	3.1	3.0	3.1	3.2	3.3	3.4	3.5	N/A	N/A

(fb) Final Benchmark, (pb) Preliminary Benchmark, (p) Preliminary Data

Source: Wyoming Department of Employment

Table 2.3

Laramie County Employers
Covered Employment
1999 - 2009

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
PRIVATE EMPLOYMENT											
Agriculture	66	63	24	22	22	20	20	21	21	22	26
Mining	11	11	10	13	14	15	18	19	20	21	17
Construction	350	366	350	373	383	404	431	460	455	452	436
Manufacturing	52	58	62	63	64	70	74	76	80	83	78
Transportation & Warehousing	151	153	105	103	103	117	110	120	126	136	130
Wholesale Trade	147	150	128	131	146	151	153	164	176	181	170
Retail Trade	474	471	344	350	351	346	346	345	340	332	322
FIRE	227	235	286	272	274	288	296	303	306	312	315
Utilities			5	7	7	6	6	9	10	10	8
Information			48	52	51	53	53	53	59	58	58
Services	925	924	1,129	1,155	1,216	1,280	1,342	1,373	1,399	1,463	1,503
Professional & Business Services			279	296	314	336	355	376	389	420	436
Management of Companies & Enterprises			N/A	N/A	13	16	22	25	25	23	20
Administrative & Waste Services			200	201	208	226	230	234	241	255	257
Educational Services			21	24	25	27	29	32	38	39	39
Health Care & Social Assistance			188	198	215	231	244	248	258	274	289
Arts, Entertainment, & Recreation			34	33	30	31	31	31	32	32	29
Accommodation & Food Services			164	165	180	185	201	199	197	194	200
Other Services			243	238	231	228	230	228	221	229	233
Government *											
Federal Government	47	46	46	48	53	52	52	54	58	58	58
State Government	50	50	54	55	57	58	57	60	60	61	61
Local Government	27	27	26	26	25	26	26	27	27	27	27
TOTAL	2,527	2,554	2,608	2,687	2,764	2,873	2,849	3,081	3,134	3,214	3,208

N/A - Data is not available.

Source: Wyoming Department of Employment

Table 2.4

Laramie County Proprietors
(BEA)
1984 - 2008

YEAR	NON-FARM	AVG NON-FARM PROPRIETOR INCOME	FARM	AVG FARM INCOME	TOTAL
1984	6,064		594		6,658
1985	5,822		584		6,406
1986	5,416		574		5,990
1987	6,383		547		6,930
1988	6,817		550		7,367
1989	6,578		558		7,136
1990	6,747		557		7,304
1991	7,150		563		7,713
1992	6,999		582		7,581
1993	7,285		582		7,867
1994	7,976		578		8,554
1995	7,958		582		8,540
1996	8,237		578		8,815
1997	8,607		584		9,191
1998	8,971		593		9,564
1999	8,725	\$16,699	628	\$9,586	9,353
2000	9,117	\$19,396	660	\$9,614	9,777
2001	8,887	\$24,454	679	\$15,424	9,566
2002	9,041	\$24,425	749	-\$4,210	9,790
2003	9,232	\$23,030	678	\$7,752	9,910
2004	9,882	\$24,302	652	\$6,021	10,534
2005	10,438	\$23,525	636	\$13,950	11,074
2006	10,807	\$25,087	608	\$6,467	11,415
2007	11,429	\$22,704	721	\$12,931	12,150
2008	12,266	\$21,287	718	\$29,362	12,984

Source: US Commerce Department - Bureau of Economic Analysis

FIGURE 6

**Average Proprietor Income vs Average Annual Wages
2001 - 2008**

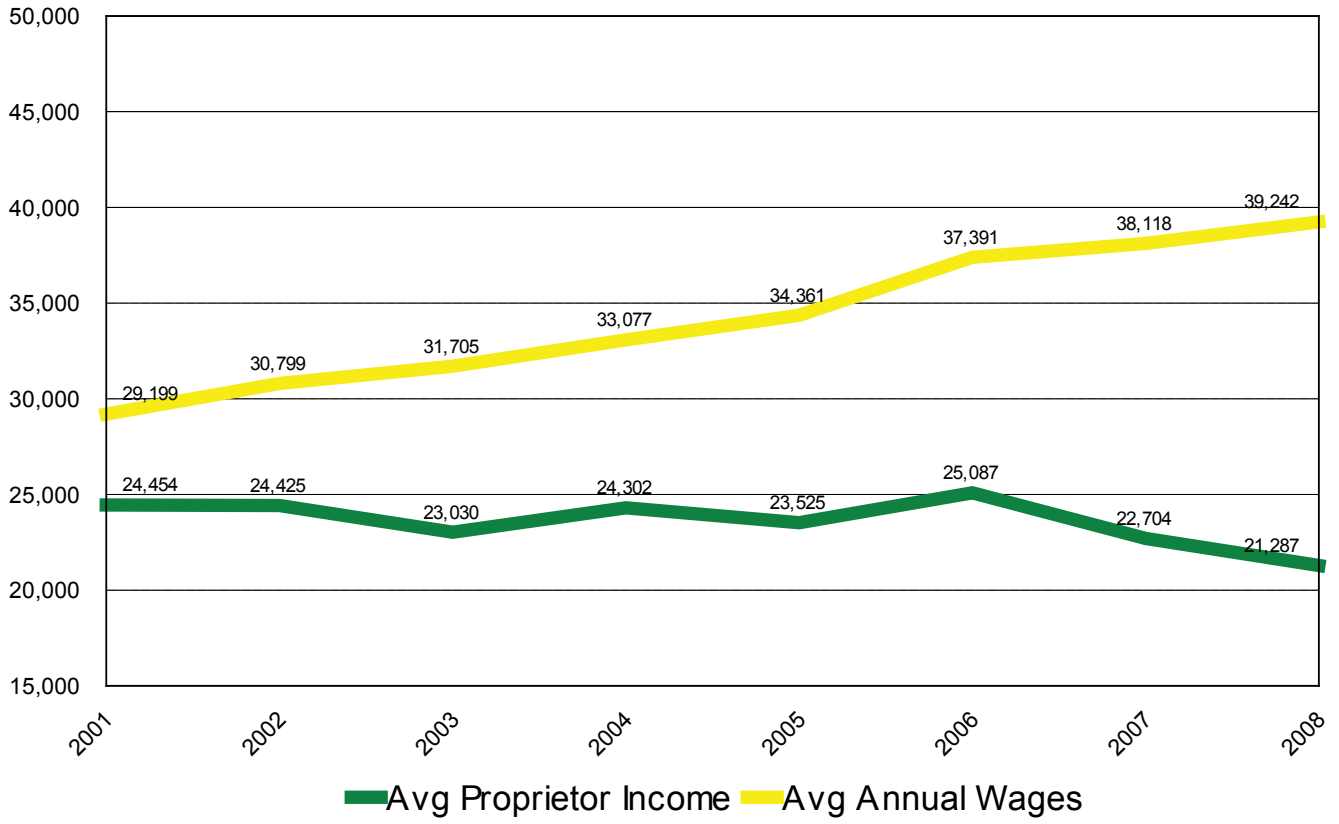


Table 2.5

Laramie County Employment Projections
Jobs by Place of Work
2008 - 2013

	ACTUAL 2008	PROJECTED 2008	PROJECTED 2009	PROJECTED 2010	PROJECTED 2011	PROJECTED 2012	PROJECTED 2013
Total Employment ⁽¹⁾	63,480	63,304	62,709	62,352	64,407	66,335	67,853

PRIVATE

Agriculture	922	901	893	888	895	914	933
Mining	N/A	223	225	430	685	1,385	1,275
Utilities	152	135	132	129	134	135	136
Construction	4,379	5,093	4,966	4,768	4,820	5,046	5,172
Manufacturing	1,837	1,920	1,747	1,695	1,720	1,932	2,044
Transportation & Warehousing	3,685	3,358	3,274	3,436	3,713	3,955	4,212
Wholesale Trade	1,075	1,158	1,129	1,084	1,089	1,114	1,140
Retail Trade	7,367	7,761	7,525	7,496	7,425	7,491	7,559
Finance, Insurance & Real Estate	2,838	5,455	5,373	5,185	5,288	5,599	5,929
Professional & Tech. Services	2,907	3,098	3,069	2,977	3,014	3,128	3,188
Administrative & Management	2,574	2,637	2,612	2,534	2,573	2,596	2,620
Information	1,230	N/A	1,248	1,274	1,301	1,328	1,357
Educational Services	519	585	580	563	568	619	675
Health Care & Social Assistance	4,815	4,750	4,773	4,801	4,902	5,172	5,440
Arts, entertainment, & recreation	818	751	745	750	762	765	768
Accommodation & Food Services	4,542	4,583	4,514	4,475	4,445	4,565	4,688
Other Services	2,801	3,136	3,106	3,011	3,061	3,077	3,108

GOVERNMENT

Federal Civilian	2,584	2,349	2,372	2,400	2,364	2,392	2,418
Military	3,432	3,514	3,466	3,363	3,379	3,420	3,460
State & Local Government	11,173	10,939	10,837	10,999	11,134	11,390	11,452

(1) Sector totals will not equal Total Employment due to non-disclosures.

Source: Wyoming Center for Business & Economic Analysis

Table 2.6

Major Employers in the Cheyenne Area (100 or more employees) 2007 - 2011

COMPANY	PRODUCT	2007	2008	2009	2010	2011
F.E. Warren A.F.B.	Military	4,156	4,410	4,325	3,694	3,820
State of Wyoming	Government Services	3,756	3,840	3,553	3,372	3,379
Laramie Co. School Dist. #1	Education K-12	2,075	1,999	1,955	2,102	2,157
Federal Government	Government Services	1,736	1,747	1,739	1,874	1,804
Cheyenne Regional Medical Center	Health Care	1,480	1,324	1,415	1,700	1,618
Wyoming National Guard	Military	693	709	756	744	744a
Sierra Trading Post	Outlet Catalogue/Retail	661	691	572	622	595
City of Cheyenne	Government Services	590	596	606	601	550
Veterans' Affairs Medical Ctr.	Health Care	486	472	496	586	586a
Union Pacific Railroad	Transportation, Rail	832	832	602	572	594
Laramie County Community College	Academic, Vocational & Community Service Education	450	465	490	506	531
Lowe's Companies	Distribution Center	900	705	518	407	450
Laramie County Government	Government Services	350	351	360	363	375
EchoStar Communications	Satellite Uplink Center	258	280	301	343	324
Frontier Oil	Oil Refinery	275	314	340	313	292
Great Lakes Aviation	Airlines	209	210	236	259	259a
United States Postal Service	Government Services	278	281	245	240	210
Allstate Call Center	Insurance		212	247	224	250
Magic City Enterprises	Rehabilitation Facility	210	285	199	221	228
Laramie Co. School Dist #2	Education K-12	207	207	214	213	214
BlueCross/Blue Shield	Health Plans	204	223	204	199	176
Life Care Cheyenne	Long-Term Care	180	180	185	190	190a
Crete Carrier Corp	Trucking		148	163	171	173
Dyno Nobel/Coastal Chem	Fertilizer & Industrial Ammonium Nitrate Mfg.	110	121	125	136	151
Mountain Towers	Long-Term Care	120	120	124	126	110
Bresnan Communications	Communications	81	103	103	125	129
APW Wyott Corporation	Manufacturing	150	160	150	125	120
Warren Federal Credit Union	Credit Union	102	100	103	125	132
Little America	Hotel & Resort	149	150	180	111	133
Mountain Regional Services, Inc.	Disability Services	130	110	130	110	124
Taco Johns Inc.	Food Service Headquarters	115	122	117	108	113
Wyoming Tribune-Eagle	News and Printing Services	115	121	114	106	111
VAE Nortrak	Mfg. Rail Switching	105	115	108	104	125
JELD-WEN	Window Manufacturing	206	175	155	104	104
Companies that requested anonymity or provided incomplete data		903	1,214	1,260	1,341	1,440
TOTALS		22,272	23,092	22,390	22,137	22,311

a Current Count not provided used previous year

Data includes locally based employees only

Note: Previous years counts may adjust as companies are added or removed from the listing

Source: Cheyenne LEADS employer interviews January 2011

Table 2.7

Firms by Size and Industry in 2008
Laramie County
Number of Establishments by Employment-size class⁽¹⁾
2008

2007	TOTAL FIRMS	EMPLOYEES	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000 OR MORE
Forestry, fishing, hunting, agriculture	4	N/A	4	0	0	0	0	0	0	0	0
Mining	18	N/A	13	2	1	1	1	0	0	0	0
Utilities	7	N/A	3	0	1	2	1	0	0	0	0
Construction	316	2,610	191	63	34	21	3	4	0	0	0
Manufacturing	61	1,653	25	10	5	12	5	3	1	0	0
Wholesale trade	108	945	60	22	13	11	2	0	0	0	0
Retail trade	358	5,631	146	102	59	27	14	8	0	2	0
Transportation & warehousing	106	2,666	62	14	14	10	2	2	0	2	0
Information	61	N/A	32	10	8	5	4	1	1	0	0
Finance & insurance	193	1,710	122	34	19	12	4	2	0	0	0
Real estate & rental & leasing	124	470	86	26	10	2	0	0	0	0	0
Professional, scientific & tech. services	323	1,530	242	45	20	13	2	1	0	0	0
Management of companies & enterprises	17	224	10	1	3	1	2	0	0	0	0
Admin, support, waste mgt, remed. Serv.	150	1,083	90	30	16	12	1	1	0	0	0
Educational services	26	379	9	5	6	5	1	0	0	0	0
Health care and social assistance	290	5,963	143	56	45	27	9	6	3	0	1
Arts, entertainment & recreation	31	220	21	2	3	5	0	0	0	0	0
Accommodation & food services	185	4,196	43	21	45	59	11	6	0	0	0
Other services (except public admin.)	265	1,416	157	65	35	8	0	0	0	0	0
Unclassified establishments.	8	11	7	1	0	0	0	0	0	0	0
TOTAL	2,651	30,707	1,466	509	337	233	62	34	5	4	1

(1) Does not include proprietors, government, household services, or railroad workers.

Source: County Business Patterns

Wage, Earnings & Income Trends

This section presents multiple series on average wages, earnings and personal income for residents of Laramie County. 2009 is the most recent year income data is available. The U.S. Census Bureau now provides various income measures using the American Community Surveys (ACS) and over recent years has attempted to refine their estimates. The ACS provides 1-year estimates, 3-year estimates and 5-year estimates and so the reader needs to be aware that income figures will vary depending upon which estimate is provided. The footnotes provided in Table 3.0 explain which estimates are being used.

Median household income for Laramie County was estimated at \$51,465 in 2009 and mean household income was estimated at \$65,152. Both were 5-year ACS estimates. ACS 1-year estimates had 2009 median household income at \$49,744 which was a decrease of 12.5 percent (-\$7,076) from 2008's estimate of \$56,820. Generally speaking, the margin of error surrounding ACS income estimates averages 4.0 percent.

The average county-wide wage rose 2.2 percent year-over-year in 2009 and stood at \$40,345 as compared to \$39,481 in 2008. Average compensation per job which included benefits was \$52,999, up 3.5 percent from 2008 by comparison.

Figure 7 presents the relationship between the cost of employer paid benefits and total average compensation. The gap (benefits) between total compensation and average wages has risen consistently since 1998. In that year, benefits accounted for 20.3 percent of total average compensation. By 2009 this ratio had risen to 23.9 percent versus 22.9 percent in 2008.

Table 3.1 presents Wyoming Department of Employment average annual earnings by industrial sectors. Average earnings for 2009 were reported at \$38,376 as compared to \$37,453 in 2008, an increase of 2.5 percent. The former lagged BEA's 2009 average of \$40,345 by 4.9 percent. The three highest paying sectors in Laramie County in 2009 were the FIRE (Financial, Insurance & Real Estate) and Utilities, \$77,246 and \$73,294 respectively.

Laramie County's per capita income decreased marginally in 2009, off 0.8 percent from 2008, but remained well ahead of U.S. per capita income by 10.5 percent. The latter fell 2.6 percent in 2009. However, this county continued to lag behind state per capita income by 8.1 percent in 2009, but the size of the differential narrowed from 2008's gap of 11.8 percent.

Figure 9 presents U.S., Wyoming and Laramie County annual personal income totals from 1979 forward with recession years highlighted in gray. The reader will quickly see how closely changes in Laramie County's personal income mirror national income changes under most circumstances. During the 1982-83 recession, local personal income decreased more sharply than national personal income and followed it with only a slight time lag. During the 1991 recession, local personal income growth changed by almost identical rates with U.S. personal income. However, during the 2001 recession, both state and local personal income grew faster than national income and during the Great Recession, local income growth was positive (0.48%) while national and state personal income growth was negative, -1.73 percent and -2.75 percent respectively.

SECTION 3 WAGES, EARNINGS & INCOME TRENDS

Table

- 3.0 Incomes & Average Wages
Figure 7 - Average Wage and Compensation Per Job
- 3.1 Average Annual Earned Income (2003-2009)
- 3.2 Per Capita Income (1986-2009)
Figure 8 - Per Capita Personal Income
Figure 9 - Personal Income
- 3.3 Personal Income and Earnings by Industry (1998-2009)
- 3.4 Total Payroll (2001-2009)
- 3.5 Average Annual Pay by Selected States (1996-2008)

Table 3.0

2009 Household Income Laramie County

	HOUSEHOLDS
Total: *	33,871
Less than \$10,000	1,637
\$10,000 to \$14,999	1,486
\$15,000 to \$24,999	3,572
\$25,000 to \$34,999	4,010
\$35,000 to \$49,999	5,802
\$50,000 to \$74,999	7,468
\$75,000 to \$99,999	4,367
\$100,000 to \$149,999	3,989
\$150,000 to \$199,999	877
\$200,000 or more	663
Median household income	\$51,465
Mean household income	\$65,152

* 90 percent confidence level margin of error

Source: US Census Bureau,

2005 - 2009 American Community Survey, 5 year estimates

Median Household Income Laramie County

YEAR	MEDIAN HOUSEHOLD INCOME	PERCENT CHANGE
1992	N/A	N/A
1993	\$32,642	N/A
1994	N/A	N/A
1995	\$34,560	N/A
1996	N/A	N/A
1997	\$37,168	N/A
1998	\$39,671	6.73%
1999	\$39,728	0.14%
2000	\$41,075	3.39%
2001	\$41,446	0.90%
2002	\$42,485	2.51%
2003	\$44,283	4.23%
2004	\$45,684	3.16%
2005*	\$44,790	-1.96%
2006*	\$50,907	13.66%
2007*	\$52,521	3.17%
2008*	\$56,820	8.19%
2009*	\$49,744	-12.45%

Source: US Census Bureau

* American Community Survey, 1 year estimates

2009 Earnings by Gender Population 16 Years and Over (Full-time, year-round) Laramie County

	MALES	FEMALES
TOTAL	18,987	13,061
\$1 to \$9,999 or loss	551	457
\$10,000 to \$14,999	778	666
\$15,000 to \$24,999	3,152	3,017
\$25,000 to \$34,999	3,000	3,291
\$35,000 to \$49,999	4,462	3,122
\$50,000 to \$64,999	3,076	1,371
\$65,000 to \$74,999	1,367	575
\$75,000 to \$99,999	1,576	340
\$100,000 or more	1,006	222
Median earnings	\$41,774	\$31,701
Mean earnings	\$51,585	\$37,057

Source: US Census Bureau, 2005-2009 American Community Survey

Average Wage and Compensation Per Job Laramie County

YEAR	COMPEN- SATION	PERCENT CHANGE	WAGES ⁽¹⁾	PERCENT CHANGE
1991	N/A	N/A	21,253	N/A
1992	N/A	N/A	22,141	4.18%
1993	N/A	N/A	22,700	2.52%
1994	N/A	N/A	23,359	2.90%
1995	N/A	N/A	23,426	0.29%
1996	N/A	N/A	23,595	0.72%
1997	N/A	N/A	24,504	3.85%
1998	N/A	N/A	25,819	5.37%
1999	\$32,360	N/A	26,890	4.15%
2000	\$33,743	4.27%	27,466	2.14%
2001	\$36,889	9.32%	29,199	6.31%
2002	\$39,185	6.22%	30,799	5.48%
2003	\$40,621	3.66%	31,705	2.94%
2004	\$42,517	4.67%	33,077	4.33%
2005	\$44,209	3.98%	34,361	3.88%
2006	\$48,530	9.77%	37,391	8.82%
2007	\$49,446	1.89%	38,232	2.25%
2008	\$51,233	3.61%	39,481	3.27%
2009	\$52,999	3.45%	40,345	2.19%

(1) Does not include benefits

Source: US Department of Commerce - Bureau of Economic Analysis

FIGURE 7

**Average Wage and Average Compensation Per Job
Laramie County 1999 - 2009**

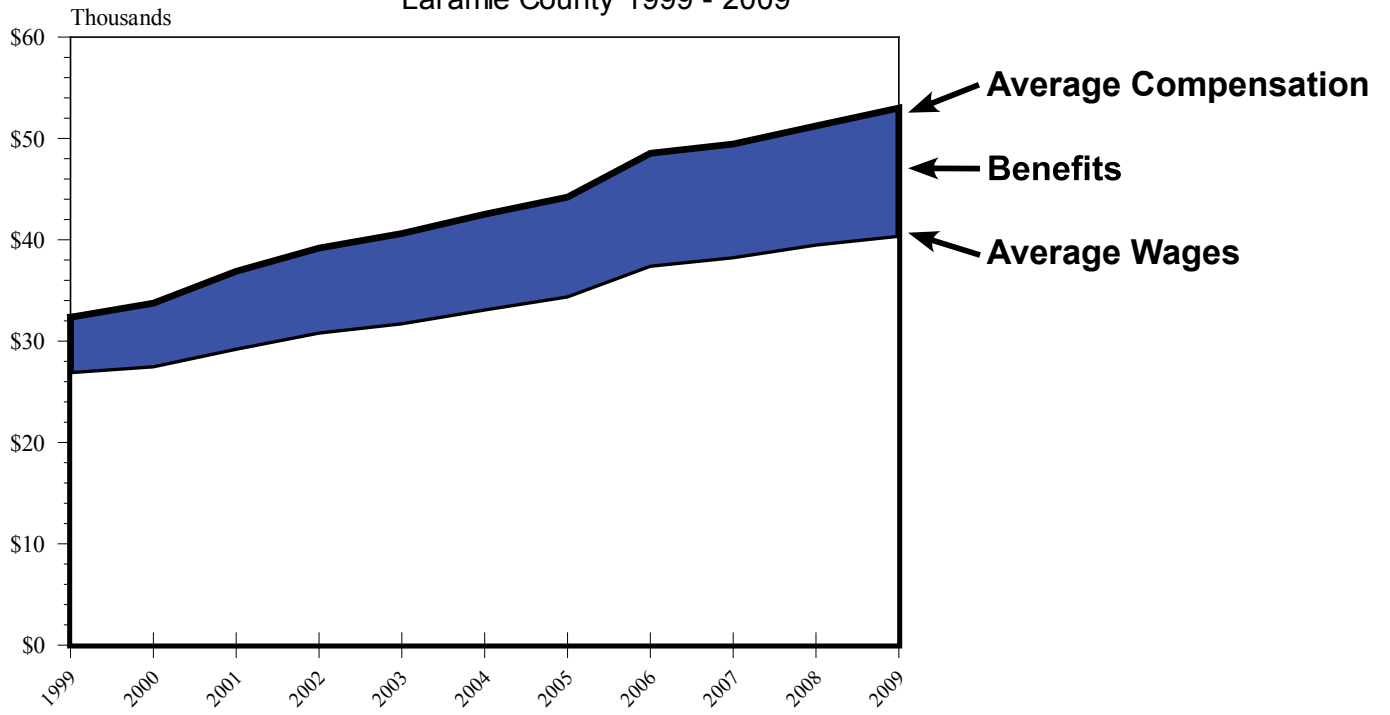


Table 3.1

Laramie County Average Annual Earned Income⁽¹⁾
(Dollars)
2003 - 2009

	2003	2004	2005	2006	2007	2008	2009
Average Annual Earned Income	29,692	30,992	32,188	35,308	35,074	37,453	38,376
PRIVATE							
Agriculture	22,451	24,882	24,505	24,284	26,611	29,016	28,093
Mining	41,613	42,705	56,680	66,183	50,856	47,333	53,586
Construction	30,108	31,447	31,162	35,802	40,430	41,782	40,313
Manufacturing	39,104	40,196	41,691	42,523	46,904	49,231	49,517
Trans & Warehousing	28,197	28,522	30,225	33,046	34,320	36,621	37,440
Wholesale Trade	38,103	39,793	40,027	42,887	45,604	46,722	47,619
Retail Trade	21,164	21,840	22,659	23,452	23,673	24,284	24,674
Fire	32,968	32,604	34,424	71,435	77,870	75,582	77,246
Utilities	56,342	59,605	58,734	59,748	62,855	71,890	73,294
Information	36,738	38,701	36,231	40,326	41,444	41,574	42,913
Services	24,255	23,510	26,657	30,038	31,111	30,903	31,159
Professional & Business Services	40,885	42,861	44,330	46,189	48,802	49,920	54,587
Management of Companies & Enterprises	38,922	N/A	45,825	52,494	61,334	56,550	51,012
Administrative & Waste Services	20,722	21,619	19,474	19,539	20,865	22,971	24,596
Educational Services	15,496	18,642	19,981	22,763	23,010	24,622	26,273
Health Care & Social Assistance	33,930	34,515	35,075	36,153	36,985	38,285	38,363
Arts, Entertainment & Recreation	10,790	12,051	12,272	12,012	12,181	12,532	12,181
Accommodation & Food Services	11,427	12,831	13,975	26,429	16,055	14,599	14,404
Other Services	22,256	22,048	22,321	24,726	29,653	27,742	27,859
TOTAL GOVERNMENT	36,868	38,558	40,378	42,783	45,591	47,723	49,179
State Government	36,689	41,028	43,095	46,215	49,361	52,455	54,691
Local Government	30,199	31,941	33,722	35,880	38,714	40,456	41,886
Federal Government	47,255	49,920	52,429	54,990	57,655	59,553	59,696

(1) Compiled using quarterly data of average weekly wages

N/A - Data is not available.

Source: Wyoming Department of Employment

Table 3.2

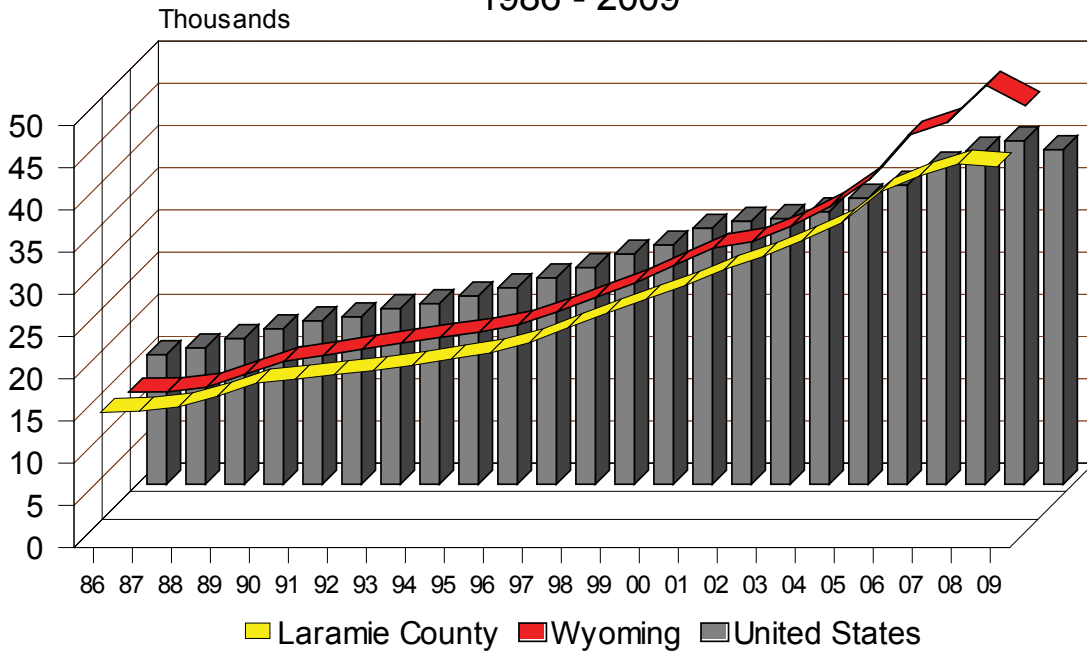
Per Capita Personal Income
Laramie County
1986 - 2009

YEAR	LARAMIE COUNTY (a)	WYOMING (b)	UNITED STATES (c)	PERCENT DIFFERENCE ((a-c)/c)
1986	\$15,165	\$14,244	\$15,338	-1.13%
1987	\$15,329	\$14,287	\$16,137	-5.01%
1988	\$15,829	\$14,821	\$17,244	-8.21%
1989	\$17,085	\$16,382	\$18,402	-7.16%
1990	\$18,656	\$17,910	\$19,354	-3.61%
1991	\$19,110	\$18,589	\$19,818	-3.57%
1992	\$19,648	\$19,344	\$20,799	-5.53%
1993	\$20,132	\$20,065	\$21,385	-5.86%
1994	\$20,754	\$20,741	\$22,297	-6.92%
1995	\$21,511	\$21,358	\$23,262	-7.53%
1996	\$22,228	\$22,233	\$24,442	-9.06%
1997	\$23,435	\$23,774	\$25,654	-8.65%
1998	\$25,225	\$25,496	\$27,258	-7.46%
1999	\$26,957	\$27,192	\$28,333	-4.86%
2000	\$28,601	\$29,281	\$30,318	-5.66%
2001	\$30,212	\$31,322	\$31,145	-3.00%
2002	\$32,106	\$32,079	\$31,461	2.05%
2003	\$33,660	\$33,921	\$32,271	4.30%
2004	\$35,546	\$36,261	\$33,881	4.91%
2005	\$37,622	\$39,446	\$35,424	6.20%
2006	\$41,288	\$44,676	\$37,698	9.52%
2007	\$43,175	\$46,220	\$39,458	9.42%
2008	\$44,613	\$50,588	\$40,673	9.69%
2009	\$44,273	\$48,178	\$39,626	N/A

Source: US Department of Commerce - Bureau of Economic Analysis

FIGURE 8

Per Capita Personal Income 1986 - 2009



Source: US Department of Commerce - Bureau of Economic Analysis

FIGURE 9

Personal Income Laramie County, Wyoming, and United States 1979 - 2009

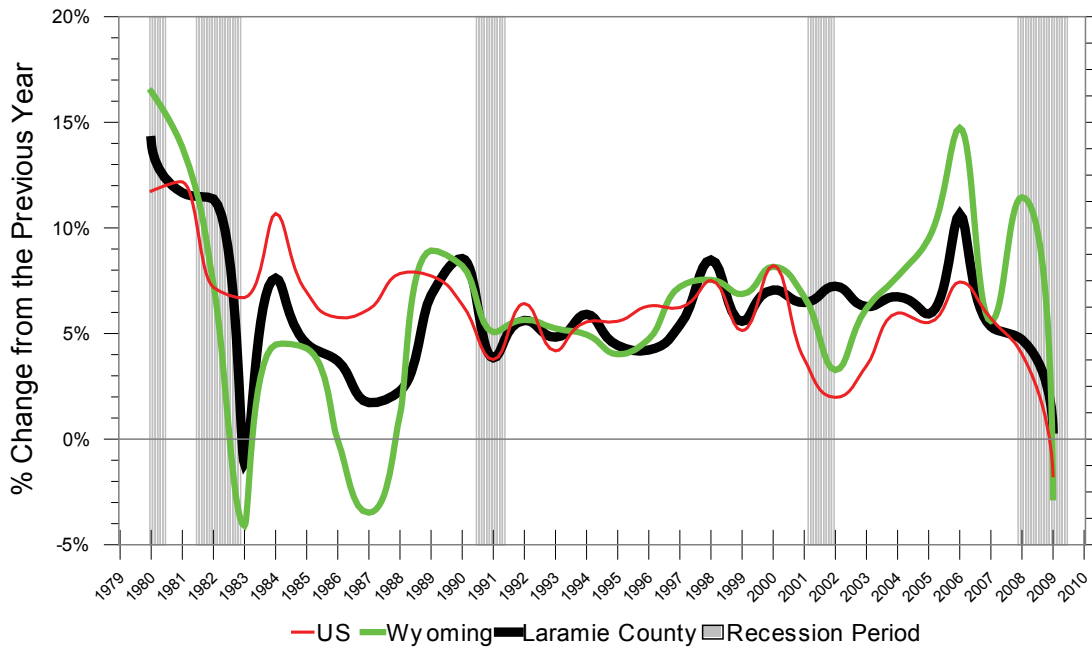


Table 3.3

Laramie County Personal Income and Earnings by Industry (BEA)
(Thousands of Dollars)
1998 - 2009

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Personal Income	2,068,328	2,183,755	2,338,017	2,489,246	2,669,447	2,837,070	3,028,303	3,208,013	3,549,671	3,739,019	3,915,224	3,933,828

Derivation of TPI

Earnings by Place of Work	1,499,023	1,590,725	1,697,748	1,838,149	1,981,478	2,090,031	2,228,713	2,348,324	2,615,255	2,712,381	2,853,577	2,902,809
Less: Personal Cont. for Social Insur. (a)	172,322	183,190	191,256	203,027	219,827	232,498	245,841	255,891	318,568	331,714	348,223	353,251
Plus: Adjustment for Residence	-9,792	-8,709	-4,640	-5,115	-9,486	-13,455	-15,004	-16,437	-22,093	-23,637	-27,744	-31,431
Equals: Net Earn. by Place of Residence	1,316,909	1,398,826	1,501,852	1,630,007	1,752,165	1,844,078	1,967,868	2,075,996	2,274,594	2,357,030	2,477,610	2,518,127
Plus: Dividends, Interest, and Rent (b)	499,688	521,875	550,075	546,825	575,121	626,450	667,297	715,211	828,116	903,848	912,232	824,566
Plus: Transfer Payments	251,731	263,054	286,090	312,414	342,161	366,542	393,138	416,806	446,961	478,141	525,382	591,135

Industry Earnings

Farm	17,454	19,077	18,145	18,117	5,496	12,817	11,963	17,913	12,763	18,107	29,498	30,343
Nonfarm	1,448,732	1,538,903	1,633,270	1,820,032	1,975,982	2,077,214	2,216,750	2,330,411	2,602,492	2,694,274	2,824,079	2,872,466
Private	862,200	928,238	986,612	1,110,590	1,189,883	1,239,082	1,320,674	1,376,270	1,592,977	1,610,983	1,673,199	1,633,637
Ag. Serv., For., Fish, and Other (c)	6,115	7,346	7,573	(D)	(D)	(D)	(D)	(D)	(D)	(D)	(D)	(D)
Mining	6,489	6,658	7,118	13,516	13,555	12,181	13,116	16,894	21,584	(D)	(D)	(D)
Construction	86,276	96,403	103,670	119,041	135,777	139,696	151,243	160,642	198,954	203,643	206,084	178,384
Manufacturing	74,760	75,941	80,678	85,287	89,988	91,255	95,289	98,384	113,051	132,568	150,759	137,199
Transportation and Warehousing	159,836	175,765	184,709	131,442	131,347	141,568	157,982	168,012	183,096	205,109	212,866	210,885
Wholesale Trade	38,953	40,174	41,130	40,742	37,243	39,915	40,957	44,016	48,686	52,539	57,670	56,042
Retail Trade	145,903	157,429	158,116	143,997	154,460	159,017	160,363	171,463	181,620	186,957	188,539	181,007
Finance and Insurance	105,581	99,350	99,759	80,344	93,445	98,905	102,735	103,549	118,422	109,704	119,007	125,868
Real estate and rental and leasing				35,628	40,572	40,349	46,805	49,851	47,663	41,221	36,877	35,783
Information	N/A	N/A	N/A	(D)	(D)	(D)	(D)	(D)	(D)	57,465	59,306	62,191
Utilities		N/A	N/A	7,801	8,765	9,125	9,665	10,488	11,246	12,857	14,862	14,154

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Services	238,287	269,172	303,859	403,701	436,068	452,382	486,079	502,588	611,926	590,424	605,477	610,693
Professional & Business services		59,876	75,439	88,270	93,380	90,009	99,939	108,411	115,180	120,668	130,353	132,123
Management of Companies & Enterprises		23,394	27,599	13,605	12,646	8,808	9,264	11,252	15,482	12,701	10,827	6,540
Administrative & Waste Services		25,753	23,880	55,880	58,177	58,475	54,320	43,795	47,394	52,967	56,611	57,928
Educational Services		2,464	2,692	3,918	4,649	5,403	6,926	7,868	10,180	10,489	10,762	11,376
Healthcare & Social Assistance		89,398	96,732	117,485	127,884	146,278	161,057	168,752	181,616	199,079	213,907	222,669
Arts, Entertainment, & Recreation		5,422	5,473	13,881	14,342	14,299	12,760	13,145	13,381	14,458	14,543	15,069
Accommodation & Food Service		16,912	17,409	55,552	61,444	65,590	75,855	81,862	154,455	97,096	88,981	85,465
Other services		38,906	41,256	55,110	63,546	63,520	65,958	67,503	74,238	82,966	79,493	79,523
Government & Government Enterprises	586,532	640,665	646,658	709,442	786,099	838,132	896,076	954,141	1,009,515	1,083,291	1,150,880	1,238,829
Federal, Civilian	138,221	140,269	149,962	153,739	167,533	182,669	199,325	205,174	211,121	222,347	236,755	256,313
Military	175,386	182,557	189,260	199,553	228,092	241,702	257,922	265,563	267,339	271,393	278,355	308,096
State government	272,925	287,839	307,436	160,567	178,133	188,876	196,630	209,560	229,871	251,924	273,106	N/A
Local government				195,583	212,341	224,885	242,199	273,844	301,184	337,627	362,664	N/A

N/A - Data is not available

Notes: (a) Personal contributions for social insurance are included in earnings by type and industry but excluded from personal income.

(b) Includes the capital consumption adjustment for rental income of persons.

(c) "Other" consists of wages and salaries of US residents employed by international organizations and foreign embassies and consulates in the United States.

(d) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals.

Source: US Commerce Department - Bureau of Economic Analysis

Table 3.4

Laramie County Total Payroll
Covered Employment by Standard Industrial Classification
 (Dollars)
 2001 - 2009

	2001	2002	2003	2004	2005	2006	2007	2008	2009
PRIVATE EMPLOYMENT									
Agriculture	4,852,263	3,832,764	3,805,187	3,993,186	4,180,865	4,975,212	5,858,146	6,917,063	7,845,101
Mining	2,712,112	3,334,352	2,455,908	3,128,128	9,736,146	5,772,466	4,386,129	4,969,916	5,180,188
Construction	66,612,068	72,825,725	77,438,089	82,032,472	89,461,929	114,832,074	122,655,250	130,697,518	116,426,319
Manufacturing	58,703,212	58,108,481	58,287,694	63,132,746	66,164,291	69,267,208	76,519,006	82,499,186	73,518,033
Transportation & Warehousing	31,979,019	31,372,737	38,656,981	45,557,647	50,309,102	61,206,000	78,702,198	84,023,272	81,026,659
Wholesale Trade	26,833,427	25,351,984	26,899,770	28,146,228	30,715,026	34,793,021	37,446,002	40,436,474	39,806,629
Retail Trade	101,690,815	114,866,318	116,887,395	118,437,493	126,654,855	131,240,773	136,485,731	137,208,929	130,458,372
Fire	56,548,108	62,729,654	69,171,513	70,514,621	74,137,871	78,223,484	82,759,298	88,117,885	91,788,491
Utilities	5,810,946	6,271,525	6,464,382	6,786,966	7,523,273	7,688,851	8,751,922	10,171,282	9,820,991
Information	36,835,044	35,624,478	38,902,675	39,906,912	36,000,249	40,775,374	43,096,401	44,546,399	46,529,919
Services	221,809,583	251,478,317	276,086,498	290,496,260	309,727,917	383,562,104	367,113,129	376,716,170	376,636,754
Professional & Business Services	47,481,291	54,226,362	54,225,008	60,989,350	67,228,599	70,776,586	74,676,113	81,258,603	82,278,379
Management of Companies & Enterprises	N/A	N/A	6,378,375	N/A	8,873,314	11,743,629	9,773,961	8,233,161	5,001,495
Administrative & Waste Services	22,783,796	37,779,036	39,313,244	36,682,742	29,297,106	30,901,987	35,107,985	38,095,141	39,122,905
Educational Services	1,387,776	1,329,421	1,501,454	2,069,270	2,806,876	4,485,436	5,045,610	5,204,090	5,502,544
Health Care & Social Assistance	72,846,787	82,366,043	97,299,953	105,511,083	111,620,055	117,796,016	131,271,554	142,131,911	146,551,102
Arts, Entertainment, & Recreation	3,332,301	3,070,583	2,941,453	3,094,922	2,993,259	3,147,717	3,657,106	3,683,910	3,531,027
Accommodation & Food Services	38,415,738	44,428,688	46,096,540	53,189,263	58,006,438	111,807,944	68,027,373	62,624,143	59,681,905
Other Services	35,561,894	28,278,184	28,330,471	28,959,630	28,902,270	32,902,789	39,553,427	35,485,211	34,967,397
GOVERNMENT									
Federal Government	102,675,745	112,090,274	122,552,000	130,284,805	134,121,740	136,304,292	144,382,915	153,343,770	160,120,805
State Government	129,113,000	143,798,375	151,591,000	154,283,173	163,991,046	176,929,458	194,156,562	211,961,307	222,447,138
Local Government	150,751,344	164,923,495	172,337,000	184,863,458	207,631,299	225,527,233	253,907,930	274,845,596	290,286,996
TOTAL PAYROLL (\$)	1,006,775,033	1,095,704,135	1,162,071,702	1,228,471,956	1,304,995,609	1,471,097,550	1,556,220,619	1,646,454,767	1,651,892,395

N/A Data was not available
 Source: Wyoming Department of Employment

Average Annual Pay by States
1996 - 2008

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	PERCENT CHANGE 95-07
United States	28,946	30,353	31,945	33,340	35,323	36,219	36,764	37,765	39,354	40,677	42,535	44,458	45,563	57.41%
Arizona	26,387	27,659	29,322	30,525	32,610	33,411	34,036	35,056	36,646	38,154	40,019	41,551	42,518	61.13%
California	31,776	33,525	35,348	37,577	41,207	41,327	41,419	42,592	44,641	46,211	48,345	50,538	51,487	62.03%
Colorado	28,520	30,066	32,248	34,191	37,168	37,952	38,005	38,942	40,276	41,601	43,506	45,396	46,614	63.44%
Connecticut	36,592	38,941	40,895	42,682	45,486	46,993	46,852	48,328	51,007	52,954	54,814	58,029	58,395	59.58%
Delaware	30,711	32,188	33,969	35,157	36,535	38,427	39,684	40,954	42,487	44,622	46,285	47,308	47,569	54.89%
Florida	25,641	26,673	28,184	28,935	30,560	31,553	32,426	33,544	35,186	36,800	38,485	39,746	40,568	58.22%
Georgia	27,492	29,037	30,856	32,332	34,214	35,136	35,734	36,626	37,866	39,096	40,370	42,178	42,585	54.90%
Idaho	23,353	24,062	24,868	26,044	27,701	27,768	28,163	28,677	29,871	30,777	32,580	33,544	33,897	45.15%
Illinois	31,296	33,024	34,715	36,296	38,045	39,083	39,688	40,540	42,277	43,744	45,650	47,685	48,719	55.67%
Indiana	26,477	27,635	29,108	30,027	31,030	31,779	32,603	33,379	34,694	35,431	36,553	37,528	38,403	45.04%
Kansas	24,609	25,694	26,845	28,031	29,361	30,153	30,825	31,489	32,738	33,864	35,696	37,044	38,178	55.14%
Massachusetts	33,937	35,716	37,774	40,352	44,168	44,975	44,954	46,323	48,916	50,095	52,435	55,244	56,746	67.21%
Michigan	31,522	32,780	34,521	35,750	37,011	37,391	38,135	39,433	40,373	41,214	42,157	43,357	44,245	40.36%
Minnesota	28,866	30,231	32,075	33,487	35,414	36,587	37,458	38,610	40,398	40,800	42,185	44,375	45,826	58.75%
Montana	21,146	21,946	22,648	23,260	24,272	25,195	26,001	26,907	27,830	29,150	30,596	32,224	33,305	57.50%
Nebraska	23,294	24,565	25,539	26,632	27,693	28,377	29,448	30,382	31,507	32,422	33,814	35,238	36,243	55.59%
Nevada	27,788	28,672	30,203	31,213	32,277	33,121	33,993	35,329	37,106	38,763	40,070	42,149	42,984	54.69%
New Jersey	35,928	37,514	39,516	41,038	43,676	44,320	45,182	46,351	48,064	49,471	51,645	53,853	55,280	53.86%
New Mexico	23,716	24,684	25,711	26,267	27,498	28,702	29,431	30,202	31,411	32,605	34,567	36,379	37,910	59.85%
New York	36,816	38,543	40,684	42,179	45,358	46,727	46,328	47,247	49,941	51,937	55,479	59,439	60,288	63.75%
North Dakota	21,242	22,049	22,990	23,751	24,683	25,707	26,550	27,628	28,987	29,956	31,316	33,086	35,075	65.12%
Ohio	27,776	29,094	30,392	31,395	32,508	33,283	34,214	35,153	36,441	37,333	38,568	39,917	40,784	46.83%
Oklahoma	23,329	24,226	25,122	25,813	26,988	28,016	28,654	29,699	30,743	31,721	34,022	35,491	37,284	59.82%
Pennsylvania	28,973	30,163	31,584	32,696	34,015	34,978	35,808	36,995	38,555	39,661	41,349	43,239	44,381	53.18%
South Dakota	20,724	21,648	22,751	23,767	24,802	25,601	26,360	27,210	28,281	29,149	30,291	31,655	32,822	58.38%
Texas	28,129	29,699	31,515	32,898	34,943	36,045	36,248	36,968	38,511	40,150	42,458	44,695	45,939	63.32%
Utah	24,572	25,736	26,873	27,895	29,229	30,077	30,585	31,106	32,171	33,328	35,130	37,054	37,980	54.57%
Washington	28,881	30,769	33,076	35,736	37,099	37,459	38,242	39,021	39,361	40,721	42,897	45,021	46,569	61.24%
Wyoming	22,870	23,866	24,725	25,647	26,836	28,043	28,975	29,924	31,210	33,251	36,662	39,254	41,487	81.40%

N/A - Data is not available.

Source: Statistical Abstract of the United States.

US Department of Commerce, Economics and Statistics Administration. Bureau of the Census. Bureau of Labor Statistics.

Demographic Trends

The user will find population data for Cheyenne and Laramie County in this section along with population forecasts. The population figures include the Decennial Census statistics for Cheyenne, Albin, Burns, Pine Bluffs and Laramie County. However, 2010 Census data for unincorporated areas of the county and other socio-economic data pertaining to City and County were not made available at the time of this report. Readers are cautioned about drawing conclusions given these facts. Such data will be released in coming months.

One last comment about the newly released 2010 Census figures – the County’s Hispanic population grew by 34.6 percent from the 2000 Census, up 3,081 persons and stood at 11,978 in 2010. This ethnic group now accounts for 13.1 percent of the total population. Whites comprise 80.8 percent, Blacks 2.5 percent, Asian 1.1 percent and Native American 1.0 percent. Table 4.3 provides further details.

The median age for residents resumed its long-term rise in 2009 after declining in 2008. The median age rose to 36.6 years in 2009 after falling to 35.8 years in 2008. It was desirable that the decline in 2008 remain permanent going forward because a continuing rise in the median age creates a disturbing trend with profound implications for the county’s future economy. An aging population has the potential to create a shortage of young workers to replace retiring workers, and thus diminish tax revenues necessary to cover an increased demand for social services and programs from an ever increasing retirement population. It is important that the continued rise in median age be slowed or reversed in coming years. Table 4.4 provides further details surrounding the aging population.

Table 4.4 presents migration statistics for Laramie County from 2000 forward. The County has experienced for the past 10 consecutive years greater in-migration than out-migration. The new Census numbers suggest that net in-migration was greater than natural population growth (births minus deaths) over the past decade. Total net in-migration over this period stood at 7,035 persons through the first half of 2010. Year 2009 saw the largest net positive migration in any year since 2000, with 1,042 additional persons. This positive net migration during a recession period violates the long established local rule of thumb that when unemployment increases and personal income decreases, Laramie County experiences net out-migration. In other words, the unemployed leave the community to find work elsewhere. Thus far during the current recession and the recovery period, the county has apparently not lost population, but gained.

Table 4.5, in conjunction with Figures 11 and 12, provide insights as to the role commuters play in Laramie County’s economy. The table presents inflow and outflow earnings and the net residence adjustment between the two. The inflow of earnings represents the amount of money brought back into the county’s economy by Laramie County residents who commute to work outside of the county. The outflow of earnings represents workers who commute into the county for work but live outside of the county.

Net outflows have been consistently larger overtime which means more dollars flow out of the local economy than are returned by county residents working outside of Laramie County. Figure 11 clearly presents this trend. Figure 12 presents the ratio between the net residential adjustments and total county personal income. This ratio steadily decreased from 1.63 percent in 1990 to 0.63 percent in 2007, but then increased marginally in 2008 to 0.71 percent. In 2008, net outflows accounted for only 0.71 percent of total personal county income which is an insignificant percentage. Commutation has been and remains a

SECTION 4 DEMOGRAPHIC TRENDS

Table

- 4.0 Census Detail (1990-2010)
- 4.1 Population & Household Estimates (1990-2015)
Figure 10 - Population Forecasts
- 4.2 Population Profile (1960-2009)
- 4.3 Population By Race & Ethnic Groups (1980-2010)
- 4.4 Migration & Commuters
Figure 11 - Commuting Flows
Figure 12 - Net Commuting Residential Adjustment
- 4.5 Commuter Income Flows (1990-2008)
- 4.6 Education Profiles & ACT Scores
- 4.7 School Enrollments (1982-2010)
Figure 13 - School Enrollments

non-factor in the Laramie County economy. If the assumption is made that commuters, local and non-local, earn average compensation rates as found in Table 3.0, this would suggest that approximately 1,600 Laramie County workers commute to jobs outside of the county and 2,150 non-resident workers commute into the county for work.

Table 4.6 provides education profiles for Laramie County. Attention is called to the continued decline (4 consecutive years) in ACT scores which can be attributed to a steady increase in the number of students taking the exam.

Also in this table, 22.2 percent of county residents held a bachelor's degree or higher in 2009. The overall U.S. percentage of this critical measure of workforce capability, stood at 27.7 percent in 2008. Colorado's and Connecticut's percentage was 35.6 percent, Massachusetts' was at 38.1 percent, and Maryland's stood at 35.2 percent. These were the top five states in the nation. If Laramie County and Cheyenne want to attract high-tech firms and state-of-art manufacturing firms, it will be critical to attract and retain above average educated workers. As these figures suggest, there is much work to be done in this area.

Table 4.0

Census Detail 1990 - 2010

	1990	2000	2010
Cheyenne City	50,008	53,011	59,466
Burns	N/A	285	301
Fox Farm/College	2,965	3,272	N/A
Pine Bluffs	1,054	1,153	1,129
Ranchettes	4,038	4,869	N/A
South Greeley	3,723	4,201	N/A
Warren AFB	3,832	4,440	N/A
Albin Town	120	120	181
	65,740	71,351	N/A
Bal. of County	7,402	10,256	N/A
TOTAL	73,142	81,607	91,738

Source: U.S. Census Bureau Decennial Census 1990, 2000, 2010

Table 4.1

Population Estimates and Projections
Laramie County
1990 - 2015

YEAR	LARAMIE COUNTY POPULATION	CITY OF CHEYENNE POPULATION ESTIMATES	ESTIMATED LARAMIE COUNTY HOUSEHOLDS
1990	73,142 (a)	50,197 (a)	28,092 (a)
1991	73,979 (c)	50,607 (c)	28,584 (c)
1992	75,826 (c)	51,758 (c)	29,084 (c)
1993	77,495 (c)	52,628 (c)	29,593 (c)
1994	78,885 (c)	53,329 (c)	30,111 (c)
1995	79,513 (c)	53,472 (c)	30,638 (c)
1996	80,186 (c)	53,692 (c)	31,174 (c)
1997	80,328 (c)	53,626 (c)	31,719 (c)
1998	80,526 (c)	53,780 (c)	32,274 (c)
1999	81,009 (c)	53,925 (c)	32,837 (c)
2000	81,607 (a)	53,011 (a)	31,927 (a)
2001	82,392 (c)	53,717 (c)	32,364 (b)
2002	83,144 (c)	54,103 (c)	32,808 (b)
2003	84,287 (c)	54,709 (c)	33,257 (b)
2004	85,195 (c)	55,461 (c)	33,713 (b)
2005	85,270 (c)	55,533 (c)	34,394 (d)
2006	85,974 (c)	55,885 (c)	33,463 (d)
2007	86,601 (c)	56,313 (c)	33,261 (d)
2008	87,759 (c)	57,048 (c)	33,871 (b)
2009	88,854 (c)	57,618 (c)	34,176 (b)
2010	90,187 (a)	59,466 (a)	36,075 (b)
2011	91,314 *	60,180 *	36,479 (b)
2012	92,456 *	60,902 *	36,888 (b)
2013	93,611 *	61,633 *	37,301 (b)
2014	94,782 *	62,372 *	37,719 (b)
2015	95,966 *	63,121 *	38,141 (b)

Notes: (a) U.S. Census Bureau Count
 (b) Center for Business & Economic Data
 (c) U.S. Census Bureau Estimate
 (d) American Community Survey (ACS)
 * Projections by the Wyoming Division of Economic Analysis

FIGURE 10

Population Forecasts
Laramie County
1990 - 2015

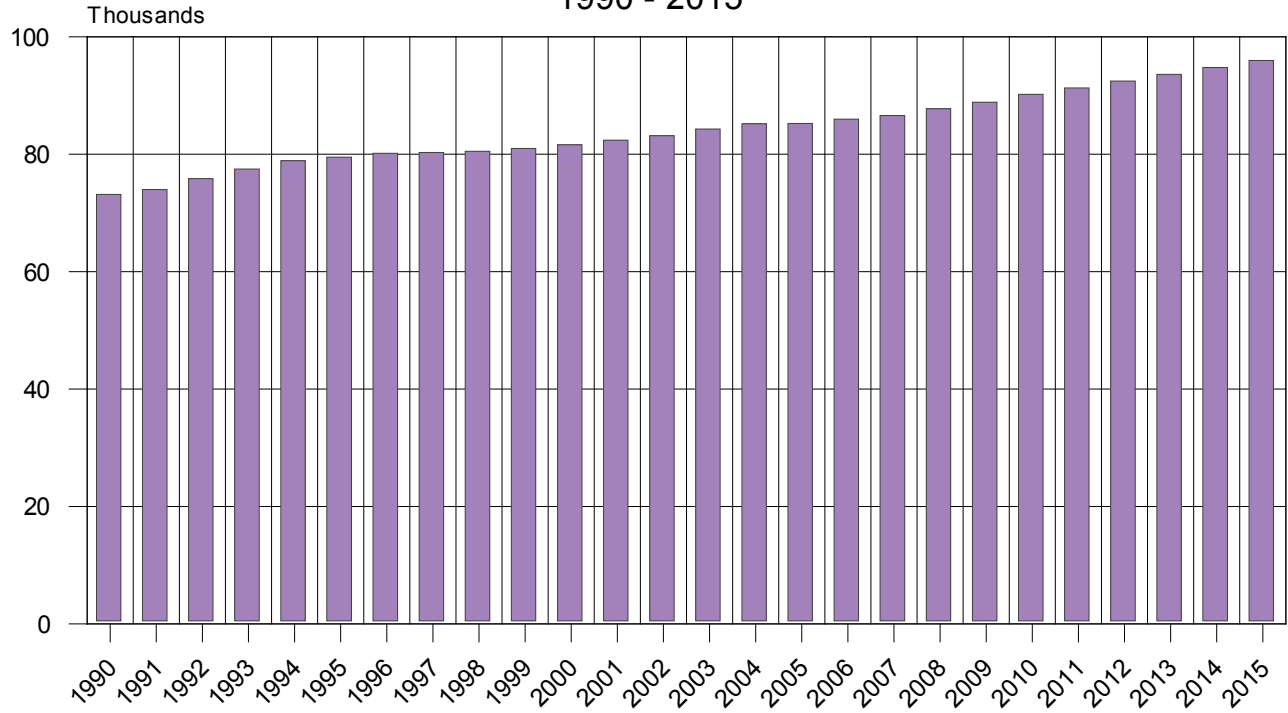


Table 4.2

Laramie County Population Profiles 1960 - 2009

	1960	1970	1980	1990	2000	*2006	*2007	*2008	*2009
Census Population	60,149	56,360	68,649	73,142	81,607	85,384	86,353	87,542	88,854

Age Distribution

Less than 5	7,889	4,965	5,797	5,907	5,384	6,528	6,390	6,534	6,967
5 - 19 years	16,385	17,232	17,197	16,360	17,910	16,210	17,787	18,667	16,677
20 - 44 years	21,779	18,592	27,630	20,141	30,427	30,328	29,423	29,590	19,108
45 - 64 years	10,584	10,863	12,035	13,295	18,535	22,568	22,325	22,208	23,425
65 and over	3,512	4,708	5,990	7,439	9,351	9,750	10,425	10,545	11,277

Less than 5 (a)	N/A	N/A	5,797	5,907	5,384	6,528	6,390	6,534	6,967
5 - 16 years	N/A	N/A	12,354	13,088	14,475	N/A	N/A	N/A	N/A
16 years and older	N/A	N/A	50,986	55,067	62,981	N/A	N/A	N/A	N/A
18 years and older	N/A	N/A	48,884	53,063	60,584	64,546	69,283	65,321	67,396
5 - 20 years	N/A	N/A	18,639	17,465	19,024	N/A	17,787	18,667	16,677
18 - 20 years	N/A	N/A	4,670	3,293	3,385	3,647	N/A	3,535	2,186
21 - 24 years	N/A	N/A	5,766	4,016	4,419	N/A	N/A	4,987	5,623
25 - 44 years	N/A	N/A	20,422	25,020	24,894	24,231	24,141	25,046	23,752
45 - 54 years	N/A	N/A	6,566	7,323	11,489	12,432	12,817	12,637	12,360
55 - 59 years	N/A	N/A	2,859	2,998	3,929	6,171	5,351	5,246	6,431
60 - 64 years	N/A	N/A	2,610	2,974	3,117	3,965	4,157	4,325	4,634
65 and over	N/A	N/A	5,990	7,439	9,351	9,750	10,425	10,545	11,277

Median Age	26.7	26.7	28.1	31.9	35.3	36.0	36.4	35.8	36.6
Persons Per Household	N/A	N/A	2.81	2.55	2.45	N/A	2.51	2.58	2.50

Per Capita Income

City	N/A	3,180	7,626	13,351	19,469	N/A	28,240	N/A	26,634
County	N/A	4,071	11,446	18,656	28,044	40,752	43,351	N/A	24,903

Median Household Income

City	5,916	9,599	16,935	28,117	38,307	N/A	52,521	56,820	49,176
County	5,667	9,162	17,630	27,571	39,607	50,907	52,521	56,820	49,744

Median Family Income

City	N/A	N/A	N/A	N/A	45,995	N/A	65,716	70,306	61,521
County	N/A	N/A	N/A	N/A	46,536	60,737	65,716	70,306	69,209

Note: (a) 1980 numbers were interpolated to match 1990 census age cohorts.

Sources: US Census of Population and Housing 1960, 1970, 1980, 1990, 2000

* American Community Survey

Table 4.3**Population by Race and Ethnic Groups**
1980 - 2010

	TOTALS	WHITE	HISPANIC	BLACK	NATIVE AMERICAN	ASIAN
LARAMIE COUNTY						
1980	68,649	58,838	6,643	1,952	661	555
1990	73,142	62,265	7,310	2,218	528	821
2000	81,607	67,901	8,897	2,124	693	777
2010	91,738	74,120	11,978	2,248	878	976

WYOMING

1980	469,557	431,503	24,474	3,270	8,266	2,044
1990	453,588	411,946	25,751	3,606	9,479	2,806
2000	493,782	438,799	31,669	3,722	11,133	2,771
2010	563,626	483,874	50,231	4,748	13,336	4,426

Source: US Census Bureau

Table 4.4

Migration & Commuters

Laramie County Migration Data⁽¹⁾ 2000 - 2009

YEAR	IN-MIGRANTS	OUT-MIGRANTS	NET MIGRANTS
2000	3,052	2,439	613
2001	3,007	2,294	713
2002	2,822	1,978	844
2003	2,577	1,793	784
2004	2,565	2,254	311
2005	2,545	2,116	429
2006	2,519	2,009	510
2007	2,678	2,072	606
2008	2,735	2,085	650
2009	2,714	1,672	1,042
2010 (first half)	1,351	818	533
Total	28,565	21,530	7,035

1. Driver Licenses Exchanged & Surrendered

Source: Wyoming Housing Database Partnership Reports

Commuters from Laramie County 1990 - 2000

FROM LARAMIE COUNTY TO:	1990	2000	FROM LARAMIE COUNTY TO:	1990	2000
Larimer, CO	109	525	Lincoln, NE	0	25
Weld, CO	80	244	Cheyenne, NE	44	25
Albany, WY	145	199	Carbon, WY	14	25
Denver, CO	35	95	Scottsbluff, NE	0	24
Kimball, NE	55	88	Wyandotte, KS	0	20
Adams, CO	0	78	Seward, NE	0	20
Other Countries	0	64	Clay, IA	0	20
Jefferson, CO	6	39	Bernalillo, NM	0	18
Boulder, CO	0	39	Not Reported	0	0
Adams, NE	0	39	Natrona, WY	57	0
Sweetwater, WY	25	32	Johnson, WY	0	0
Converse, WY	0	29	Jackson, CO	0	0
Arapahoe, CO	0	29	Goshen, WY	64	0
Platte, WY	33	28	Elsewhere	430	0
El Paso, CO	0	28	Total Commuters	488	1,556

Sectors with Largest Number of Commuters

Construction	20.3%
Utilities, Transportation & Warehousing	19.7%
Services	18.6%

Source: Bureau of Economic Analysis

FIGURE 11
Commuting Flows
Laramie County
 1990 - 2008

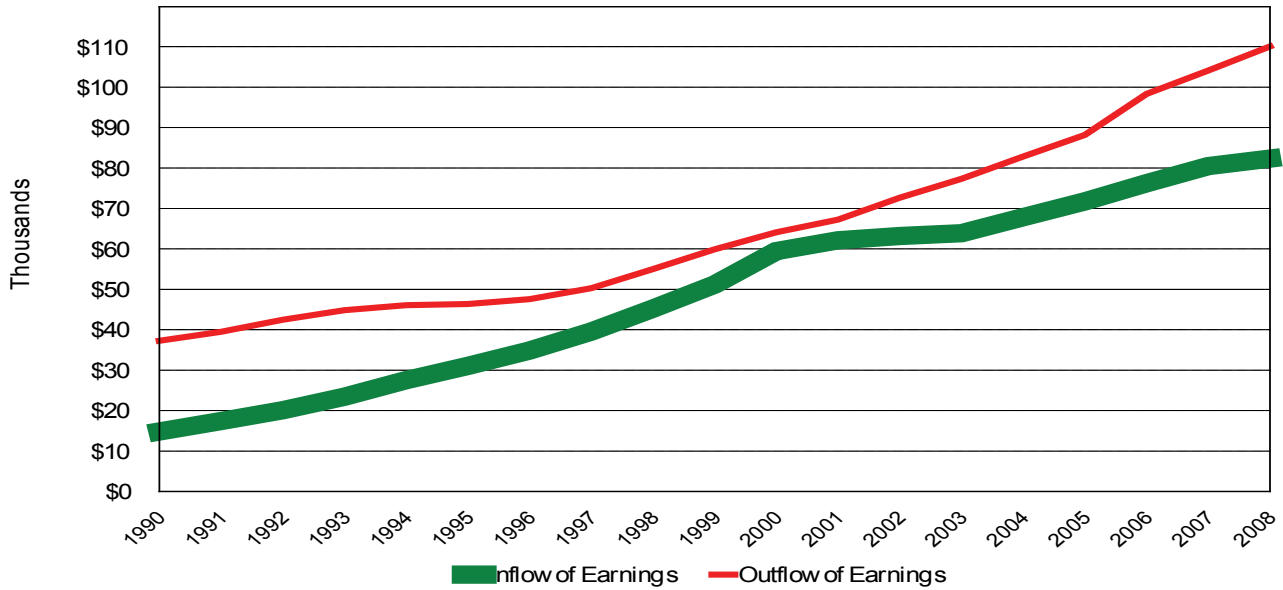


FIGURE 12
Net Residential Adjustment
Laramie County
 1990 - 2008

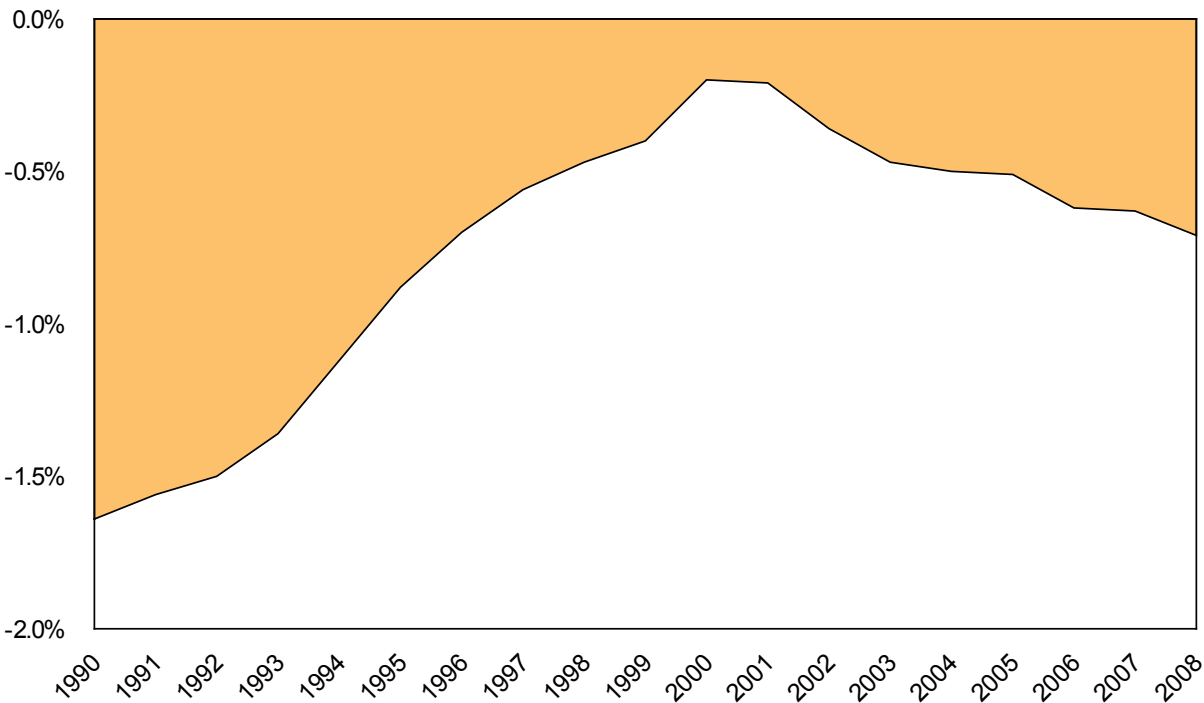


Table 4.5

Commuter Income Flows
Laramie County
1990 - 2008

YEAR	INFLOWS OF EARNINGS (\$000)	OUTFLOW OF EARNINGS (\$000)	NET RESIDENT ADJUSTMENTS (\$000)	% NET ADJUSTMENT/TPY
1990	14,944	37,380	-22,436	-1.64%
1991	17,526	39,598	-22,072	-1.56%
1992	20,195	42,575	-22,380	-1.50%
1993	23,555	44,952	-21,397	-1.36%
1994	27,633	46,175	-18,542	-1.12%
1995	31,159	46,467	-15,308	-0.88%
1996	34,958	47,662	-12,704	-0.70%
1997	39,649	50,387	-10,738	-0.56%
1998	45,318	55,110	-9,792	-0.47%
1999	51,292	60,001	-8,709	-0.40%
2000	59,567	64,207	-4,640	-0.20%
2001	62,224	67,339	-5,115	-0.21%
2002	63,283	72,769	-9,486	-0.36%
2003	63,979	77,434	-13,455	-0.47%
2004	67,935	82,939	-15,004	-0.50%
2005	71,857	88,294	-16,437	-0.51%
2006	76,349	98,442	-22,093	-0.62%
2007	80,573	104,210	-23,637	-0.63%
2008	82,434	110,178	-27,744	-0.71%

Source: Bureau of Economic Analysis

Table 4.6

Laramie County Education Profiles 1960 - 2009

	1960	1970	1980	1990	2000	2006 ^(b)	2007 ^(b)	2008 ^(b)	2009 ^(b)
Education Attainment (Yrs.)^(a)									
Elementary (K-8)	7,499	5,209	3,693	2,373	1,268	1,709	1,406	854	1,163
High School (9-12, no diploma)	5,957	4,705	3,940	4,868	4,107	3,671	4,068	3,746	4,041
Senior High Graduate (12)	11,270	11,569	15,711	13,283	14,053	16,614	16,098	16,350	15,124
College Study (13-15)	4,053	4,561	8,288	15,763	15,916	14,920	14,281	16,067	17,882
College Graduate (16+)	2,825	3,884	6,815	9,467	8,146	8,292	8,392	8,995	7,915
Percent High School Graduates	57.4%	66.9%	80.1%	84.2%	89.1%	90.5%	90.2%	91.0%	90.5%
Percent bachelor's degree or higher	N/A	N/A	N/A	N/A	N/A	22.3%	24.2%	24.1%	22.2%
Associate Degree	N/A	N/A	N/A	N/A	4,868	7,019	6,538	5,597	6,916
Master's Degree	N/A	N/A	N/A	N/A	2,853	3277	3555	3036	3,834
Professional School Degree	N/A	N/A	N/A	N/A	1,136	738	1,168	1,104	744

Notes: (a) 25 years and older
(b) American Community Survey

N/A - Data is not available.

Source: US Census Bureau

Average ACT Scores 1998 - 2010

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Laramie County	21.8	21.7	21.7	21.5	22.2	22.5	22.1	22.3	22.3	21.9	21.4	20.6	19.1
Wyoming	21.4	21.4	21.6	21.5	21.4	21.4	21.4	21.4	21.6	21.5	21.1	20.0	20.0
United States	21.0	21.0	21.0	21.0	20.8	20.8	20.9	20.9	21.1	21.2	21.1	21.1	21

Source: US Census of Population and General Social and Economic Characteristics 1980, 1990
Wyoming State Data Center Bulletin Volume II, Number 3
ACT, Inc., Iowa city, IA
Laramie County School District Number 1

Table 4.7

Public and Private School Enrollment
Cheyenne and Laramie County
1982 - 2010

YEAR	ELEMEN-TARY	JUNIOR HIGH	SENIOR HIGH	PRIVATE	HOME SCHOOLED	TOTAL	LCCC HEADCOUNT	LCCC FTE
1982	6,930	3,047	2,816	N/A	N/A	12,793	N/A	N/A
1983	7,139	3,204	2,900	675	N/A	13,918	N/A	N/A
1984	7,186	3,330	2,820	631	N/A	13,967	2,818	1,676
1985	7,225	3,296	2,827	616	N/A	13,964	2,588	1,532
1986	7,499	3,189	2,899	560	N/A	14,147	2,707	1,392
1987	7,639	3,145	2,951	497	N/A	14,232	2,877	1,481
1988	7,740	3,081	2,908	510	N/A	14,239	2,900	1,565
1989	7,913	3,010	2,860	499	N/A	14,282	3,151	1,637
1990	7,989	3,004	2,865	488	N/A	14,346	3,509	1,753
1991	8,330	3,112	2,885	433	N/A	14,760	3,483	1,855
1992	8,226	3,327	2,908	368	96	14,925	3,564	1,978
1993	8,260	3,509	2,937	352	118	15,176	3,149	1,944
1994	8,244	3,536	2,918	375	297	15,370	3,287	1,584
1995	8,175	3,512	2,949	379	190	15,205	3,279	1,588
1996	8,133	3,507	3,059	389	221	15,309	3,220	1,521
1997	7,905	3,537	3,092	460	238	15,232	3,218	1,426
1998	7,790	3,585	3,080	478	269	15,202	3,035	1,632
1999	7,732	3,548	3,059	450	305	15,094	3,327	1,376
2000	7,642	3,533	3,169	424	333	15,101	3,054	1,434
2001	7,609	3,431	2,902	360	346	14,648	2,918	1,292
2002	7,478	3,516	3,093	360	326	14,773	3,089	1,416
2003	7,330	3,458	3,028	409	317	14,542	3,567	1,851
2004	7,277	3,480	3,015	535	305	14,612	3,488	1,879
2005	7,190	3,459	3,083	471	295	14,498	3,718	1,935
2006	7,153	3,405	3,047	415	331	14,351	3,157	1,942
2007	7,224	3,272	3,074	394	357	14,320	3,837	2,037
2008	7,245	3,147	3,078	406	380	14,257	3,942	2,039
2009	7,188	3,167	3,116	453	377	14,301	4,248	2,075
2010	7,744	3,179	3,134	433	336	14,825	4,499	2,336

N/A - Data is not available.

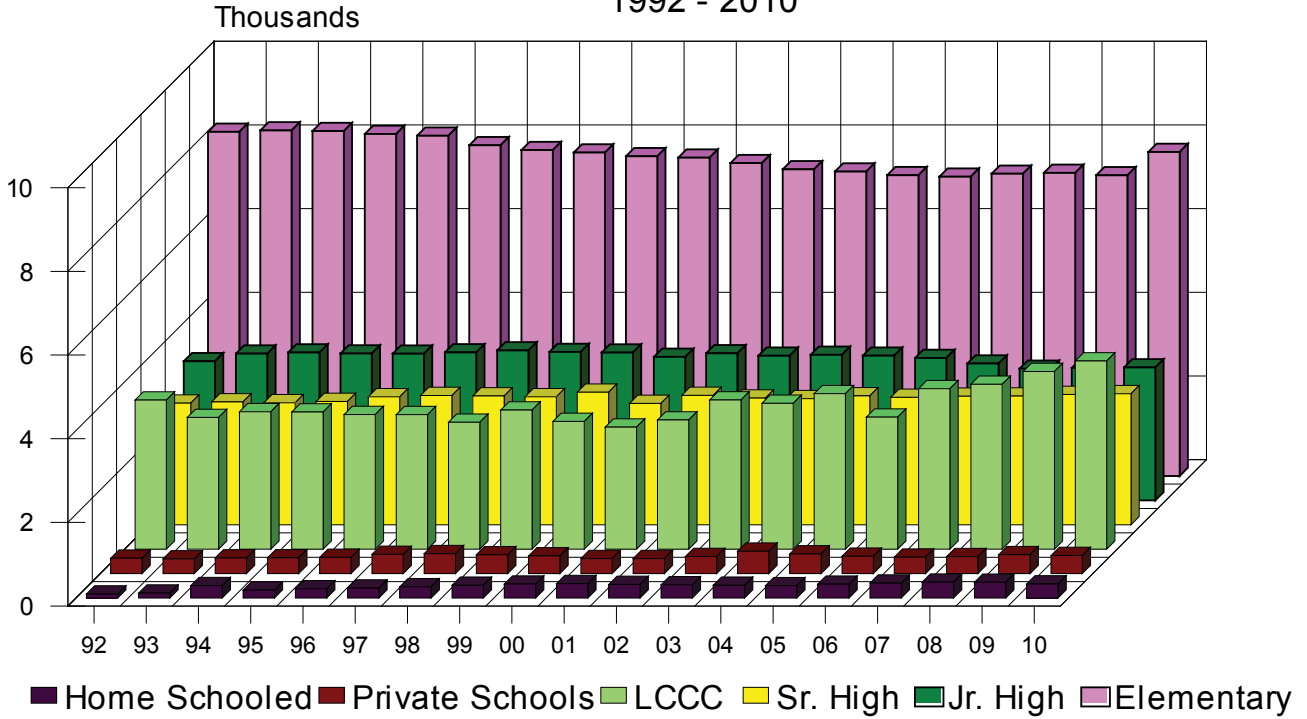
Footnote for School Districts: LCCC Headcount and FTE numbers are for the Cheyenne Campus and F.E. Warren AFB only.

These figures do not include the Albany County Campus.

Source: Laramie County School District #1
 Laramie County School District #2
 Laramie County Community College
 Private Schools

FIGURE 13

Public School and College Enrollment
City of Cheyenne and Laramie County
1992 - 2010



Housing Trends

This section contains data compiled from various sources that should be useful in assessing the local housing market. The financial and economic health of a community's housing sector is critical for future economic development efforts and thus the statistics presented in this section of the **Trends** are designed with this goal in mind.

Table 5 presents seven comprehensive and historical data sets relevant to the local residential housing market. The available supply of homes for sale in Cheyenne rose 6.8 percent year-over-year in 2010, the same indicator for non-city areas shrank by 8.3 percent last year. Both measures, however, do not include the majority of homes that have been foreclosed on over the past two years and thus, understate the actual supply of homes for sale. Our best estimate is there are approximately another 260 homes that are not reflected in the reported supply of homes available for sale.

The total 2010 supply of homes available for sale as reported by the Cheyenne Board of Realtors averaged 653 per month as compared to 889 in pre-recession 2007. Add the 260 foreclosed homes and the supply averaged 913 in 2010 which better matched current market conditions as discussed below.

The key market barometer of a housing market is the number of homes sold. Total home sales in the greater Cheyenne market in 2010 were 1,086 as compared to 1,391 (down 21.9%) in 2009 and 1,431 in 2008 (-24.1%). Sales in 2010 were, therefore, off 24.1 percent from 2008. Compared to pre-recession 2007, current sales were down 34.7 percent in 2010.

Another key indicator supplied by the Cheyenne Board of Realtors (CBR) that defied local market conditions and rational free market behavior is their reported average home selling prices for homes within Cheyenne and those outside of city limits. According to their data, the average selling price (\$182,630) within City limits rose 8.6 percent in 2010 on a year-over-year basis. This average also stood 4.6 percent higher than 2007's average price of \$174,613. Rural home prices also increased 3.7 percent from 2010 and were 0.8 percent higher than 2007. We continued to be puzzled at how housing prices can continue to increase in the local market with sharply lower sales, rising interest rates and tougher credit standards. Table 5.0 presents historical local selling prices from 1987 forward.

The average number of days a home stood on the market was reported separately for the first time by the CBR for the City and rural area in 2010. The average for the City was 75 days and for the rural area it was 97 days. Add at least 30 days to both numbers to get a more accurate picture of time on the market since the CBR calculates days on the market from the date of listing to the date of a contract, not to the date of closing. The latter method is a more accurate depiction of actual market conditions.

A total of 312 new housing units were added to Laramie County's housing stock during 2010. This was a sharp decline of 135 units from 2009's total of 447 units (-30.2%). However, the number of new single-family residential homes increased by 36.2 percent (83 units) last year while there were virtually no new apartment units constructed in 2010. In 2009, 216 apartment units were built. Thus the decline in new units in 2010 was due entirely to the lack of new apartment construction. It should be noted that average rental rates for a two bedroom apartment rose 5.8 percent between second quarter 2009 and second quarter 2010 (See Table 5.1). Table 5.7 presents apartment vacancy rates which showed that such rates fell over the course of 2010. Large apartment complexes averaged 36 vacant units per month during 2010 versus 40 in 2009. During 2008 the average was 28. The Wyoming Housing Database Partnership reported an apartment vacancy rate of 3.48 percent over second quarter 2010 as compared to 3.64 percent in second quarter 2009.

SECTION 5 HOUSING TRENDS

Table

- 5.0 Residentials For Sale, Sold & Price (1987-2010)
- 5.1 Cheyenne Housing Rental Rates (1990-2010)
- 5.2 County Housing Profile (1982-2010)
Figure 14 - New Residential Housing Permits
- 5.3 Cheyenne City Housing Profile (1998-2010)
- 5.4 Building Permits (1997-2010)
- 5.5 Residential Construction Activity (1985-2010)
- 5.6 Historic Housing Occupancy (1960-2009)
- 5.7 Vacancy Rates (1985-2010)

Table 5.0

Residential for Sale, Sold & Price 1987 - 2010

YEAR	AVERAGE RESIDENTIAL UNITS FOR SALE CITY	AVERAGE RESIDENTIAL UNITS FOR SALE RURAL	AVERAGE DAYS ON THE MARKET CITY & RURAL		AVERAGE SELLING PRICE CITY	AVERAGE SELLING PRICE RURAL	LARAMIE COUNTY AVERAGE SALES PRICE REPORTED BY ASSESSOR(3)	TOTAL UNITS SOLD CITY & RURAL
1987	724	124	N/A		\$65,825	\$82,942	N/A	1,513
1988	675	136	N/A		\$65,125	\$91,575	N/A	1,189
1989	645	114	N/A		\$66,900	\$88,133	N/A	1,364
1990	575	113	N/A		\$67,667	\$86,833	N/A	1,231
1991	467	84	N/A		\$65,350	\$96,317	N/A	1,481
1992	320	54	34		\$70,250	\$104,633	N/A	1,634
1993	222	44	53		\$76,808	\$104,867	N/A	1,710
1994	240	59	47		\$81,775	\$123,725	N/A	1,872
1995	133	42	64		\$21,981	\$34,828	N/A	N/A
1996	330	78	59		\$88,868	\$129,079	N/A	2,135
1997	407	82	68		\$99,140	\$144,695	N/A	2,093
1998	486	114	95		\$100,053	\$156,345	N/A	2,393
1999	380	121	129		\$107,081	\$154,805	\$110,429	2,899
2000	345	117	126		\$108,509	\$168,607	\$119,107	1,321
2001	333	99	112		\$114,819	\$186,935	\$123,583	1,508
2002	247	110	102		\$123,556	\$195,434	\$131,599	1,497
2003	271	102	98		\$136,139	\$216,344	\$145,087	1,605
2004	371	111	116		\$147,921	\$231,846	\$155,467	1,858
2005	475	145	136		\$158,997	\$247,107	\$165,743	1,954
2006	680	189	78 ⁽¹⁾		\$169,781	\$252,330	\$179,338	1,946
2007	717	172	85		\$174,613	\$259,920	\$191,863	1,662
2008	670	205	89		\$173,476	\$253,321	\$202,304	1,431
2009	456	181	89		\$168,237	\$252,674	\$193,759	1,391
2010	487	166	75 ⁽²⁾	97 ⁽²⁾	\$182,630	\$262,112	N/A	1,086

(1) Note: As of January 2006, Cheyenne Board of Realtors (CBR) changed the calculation of the average days on the market from the day listed to the day under contract.

Prior to 2006, the avg days on the market was calculated from day listed to the day of closing.

(2) Beginning 2010, CBR reported average days on the market separately for city and rural areas.

(3) Source: Laramie County Assessor's Office

Source: Cheyenne Board of Realtors

Table 5.1

Cheyenne Housing Rental Rates 1990 - 2010

QUAR- TER/ YEAR	HOUSE	APART- MENT	MOBILE HOME	MOBILE HOME LOT RENT	QUAR- TER/ YEAR	HOUSE	APART- MENT	MOBILE HOME	MOBILE HOME LOT RENT
2Q90	442	324	306	154	4Q00	637	440	498	205
4Q90	434	329	314	133	2Q01	681	453	485	209
2Q91	425	333	306	138	4Q01	757	470	566	208
4Q91	451	315	293	137	2Q02	730	480	555	214
2Q92	451	315	293	137	4Q02	762	478	487	215
4Q92	544	375	382	149	2Q03	820	503	521	225
2Q93	556	384	395	160	4Q03	843	528	524	224
4Q93	554	421	424	149	2Q04	854	542	553	219
2Q94	586	447	N/A	149	4Q04	839	569	579	227
4Q94	592	444	423	154	2Q05	829	542	594	243
2Q95	501	375	385	159	4Q05	816	573	546	221
4Q95	501	379	382	162	2Q06	860	551	631	245
2Q96	584	433	422	166	4Q06	835	564	588	252
4Q96	550	419	396	158	2Q07	864	558	575	230
2Q97	622	433	433	182	4Q07	864	557	594	239
4Q97	588	431	480	177	2Q08	899	601	559	290
2Q98	559	429	417	177	4Q08	856	587	616	266
4Q98	606	424	450	176	2Q09	892	587	576	293
2Q99	666	428	508	175	4Q09	902	594	633	265
4Q99	628	433	485	184	2Q10	936	621	630	309
2Q00	651	441	497	203					

Note: House - 2 or 3 bedroom, single-family, excluding gas or electric.
 Apartment - 2 bedroom, unfurnished, excluding gas or electric
 Mobile Homes - Total monthly expenses, including water and lot rent
 Mobile Home Lot Rent - Single wide, including water

Source: State of Wyoming Economic Analysis Division

Table 5.2

Housing Profile

Laramie County

1982 - 2010

YEAR	AUTHORIZED CONSTRUCTION IN PERMIT ISSUING AREAS					PER UNIT VALUATION	
	SFU	DUPLEX UNITS	TRI & FOUR PLEX	MULTI-FAMILY	TOTAL UNITS	SFU 2008 REAL \$ VALUE	% CHANGE
1982	150	14	36	54	254	101.15	-0.048
1983	334	52	244	5	635	92.48	-0.086
1984	226	0	4	0	230	100.04	0.082
1985	214	2	68	36	320	91.43	-0.086
1986	377	4	16	11	408	82.17	-0.101
1987	190	0	24	0	214	109.70	0.335
1988	160	2	0	162	324	122.00	0.112
1989	100	0	20	0	120	134.59	0.103
1990	79	0	0	0	79	146.61	0.089
1991	91	0	0	0	91	146.02	-0.004
1992	229	2	4	8	243	141.43	-0.031
1993	263	4	16	0	283	148.49	0.050
1994	353	0	4	12	369	141.56	-0.047
1995	258	22	4	14	298	137.94	-0.026
1996	302	2	68	292	664	142.44	0.033
1997	254	6	17	198	475	139.75	-0.019
1998	320	24	4	121	469	139.86	0.001
1999	289	0	4	30	323	154.43	0.104
2000	245	0	0	0	245	171.02	0.107
2001	257	2	4	56	319	175.20	0.024
2002	446	12	0	20	478	161.24	-0.080
2003*	565	0	200	8	773	159.44	-0.011
2004*	726	4	48	88	866	161.46	0.013
2005*	674	0	44	132	850	169.53	0.051
2006*	460	2	0	8	470	187.35	0.105
2007*	321	0	0	0	321	173.98	-0.071
2008*	203	0	44	6	253	131.02	-0.247
2009*	229	2	0	216	447	167.56	0.279
2010*	312	0	0	0	312	N/A	N/A

N/A - Data is not available

* 2003 - 2010 are calculated by the Wyoming Center for Business & Economic Analysis, estimates before that time were calculated by the Census Bureau

Source: Census Bureau
Wyoming Center for Business & Economic Analysis

FIGURE 14

New Residential Housing Permits (By Type) Laramie County 1997 - 2010

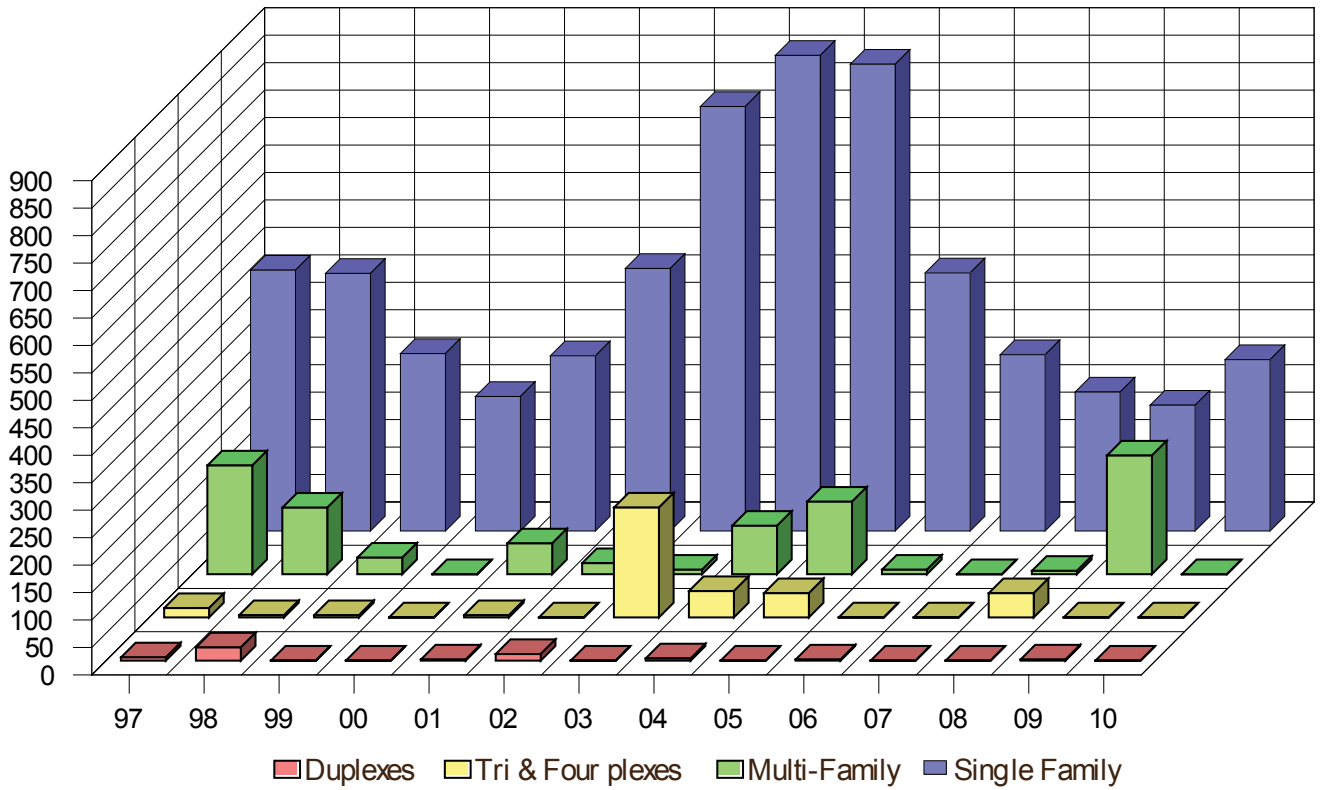


Table 5.3

Housing Profile Cheyenne Area 1998 - 2010

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Housing Units	23,835	24,052	24,214	24,495	24,763	25,367	25,973	26,545	26,841	27,045	27,222	27,613	27,851
Single Family Units	17,310	17,456	17,582	17,731	17,992	18,396	18,905	19,340	19,634	19,838	19,965	20,138	20,376
% of Total	72.6%	72.6%	72.6%	72.4%	72.7%	72.5%	72.8%	72.9%	73.1%	73.4%	73.3%	72.9%	73.2%
Multi-Family Units	6,525	6,596	6,632	6,764	6,771	6,971	7,068	7,205	7,207	7,207	7,257	7,475	7,475
% of Total	27.4%	27.4%	27.4%	27.6%	27.3%	27.5%	27.2%	27.1%	26.9%	26.6%	26.7%	27.1%	26.8%

Notes: (a) End of year figures – Do not account for demolished condemned or unoccupied units.

Source: City of Cheyenne Building and Engineering Department

Table 5.4

Building Permits
City of Cheyenne
1997 - 2010

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	TOTAL
Total Single Family	180	183	179	144	160	262	454	509	443	294	204	127	173	238	3,550
Detached	156	161	159	129	152	222	329	498	443	287	204	127	173	238	3,278
Attached	24	22	20	15	8	40	124	11	0	7	0	0	0	0	271
New Apartments/ Duplex	92	35	33	18	11	1	50	24	16	1	0	12	2	0	295
Townhouses	24	22	20	15	8	40	124	7	0	6	0	0	0	0	266
Condos	0	0	0	0	0	0	1	4	0	1	0	0	0	0	6
Mobile Homes/Constr. Trailers	33	28	26	12	14	15	22	36	10	10	7	8	12	1	234
Demolish	29	25	25	18	30	26	24	24	33	28	13	32	17	0	324

Note: Attached Single Family Permits are Townhouses and Condos

Source: City of Cheyenne Building and Engineering Department

Building Permits
Laramie County (not including City of Cheyenne)
1997 - 2010

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	TOTAL
Total Rural Single Family Permits*	83	118	126	108	105	172	173	219	231	166	117	76	56	74	1,824
Total Multi-Family Permits	N/A	N/A	N/A	N/A	N/A	12	80	58	24	8	0	0	0	0	182

* Does not include Mobile or Modular Home permits.

N/A - Data is not available

Source: City of Cheyenne Building and Engineering Department

Source: Laramie County Planning and Development Office

Table 5.5

Residential Construction Activity

City of Cheyenne

1985 - 2010

YEAR	HOUSING PERMITS	FIVE YEAR AVERAGE	NEW NET HOUSING UNITS (A)	NEW PERMIT VALUATION (\$)
1985	214	N/A	133	4,132,198
1986	377	N/A	189	7,940,560
1987	190	192	132	8,879,170
1988	160	143	115	8,091,088
1989	100	129	76	4,674,833
1990	79	112	49	4,345,707
1991	91	85	55	4,861,916
1992	229	86	141	11,470,136
1993	263	103	206	16,648,538
1994	353	132	234	15,110,883
1995	258	158	194	12,686,701
1996	237	268	551	16,005,852
1997	189	260	386	13,349,673
1998	218	206	346	13,419,234
1999	175	215	204	14,639,384
2000	143	192	143	15,069,862
2001	158	177	210	17,125,015
2002	262	191	279	29,060,916
2003	404	228	604	36,668,479
2004	509	295	606	67,770,878
2005	443	355	587	65,952,762
2006	295	383	296	49,764,021
2007	204	371	204	32,930,502
2008	139	318	177	23,947,298
2009	175	251	391	46,116,022
2010	238	210	238	37,359,022

N/A - Data is not available.

Notes: (a): Housing units are defined as New Residences, Townhouses, Condominiums, Multi-plexes and Apartment units.

1983 - 1988: Reported Apartment permits were not extended into units.

1989 - 1991: No new apartments or multi-plexed units were built.

Source: City of Cheyenne Engineer's Office

Table 5.6

Historic Housing Occupancy

Laramie County
1960 - 2009

	1960	1970	1980	1990	2000	2009
Owner Occupied Units	10,377	11,220	16,930	18,406	22,054	24,117
% of Total	53.9%	57.7%	62.1%	60.3%	64.4%	69.0%
Renter Occupied Units	7,871	6,646	8,362	9,686	9,873	10,828
% of Total	40.9%	34.2%	30.7%	31.8%	28.9%	31.0%
Vacant	988	1,571	1,983	2,415	2,286	3,320
% of Total	5.1%	8.1%	7.3%	7.9%	6.7%	8.7%
Total Units	19,236	19,437	27,275	30,507	34,213	38,265

Source: US Census of Population and Housing

Table 5.7

Vacancy Rates
Laramie County
1985 - 2010

YEAR	LARGE APARTMENT COMPLEXES ONLY ⁽¹⁾			VACANCY RATE ⁽²⁾
	AVG # UNITS SAMPLED	AVG # UNITS VACANT	% VACANT	
1985	624	30	4.82%	—
1986	607	10	1.58%	—
1987	603	34	5.68%	—
1988	641	50	7.74%	—
1989	605	38	6.28%	—
1990	668	52	7.84%	—
1991	670	21	3.13%	—
1992	665	1	0.10%	—
1993	665	0	0.06%	—
1994	665	3	0.40%	—
1995	665	6	0.96%	—
1996	665	42	6.32%	—
1997	617	41	6.59%	—
1998	790	86	10.87%	—
1999	1003	88	8.78%	—
2000	961	71	7.41%	—
2001a	862	27	3.17%	3.94
2001b	858	19	2.18%	1.96
2002a	847	21	2.52%	0.81
2002b	803	20	2.53%	2.35
2003a	808	18	2.27%	1.83
2003b	817	26	3.18%	3.35
2004a	814	27	3.36%	3.01
2004b	805	44	5.42%	5.30
2005a	852	45	5.28%	3.95
2005b	879	52	5.95%	4.75
2006a	920	44	4.75%	2.38
2006b	903	45	5.02%	3.97
2007a	893	52	5.86%	2.27
2007b	838	31	3.66%	1.99
2008a	822	30	3.61%	2.82
2008b	855	29	3.36%	4.16
2009a	864	30	3.51%	3.64
2009b	870	46	5.27%	4.2
2010a	873	35	4.01%	3.48
2010b	896	36	4.02%	—

Note: a = 2nd quarter data
b = 4th quarter data

(1) Source: Wyoming Center for Business and Economic Analysis Inc.

(2) Source: Wyoming Housing Database Partnership

Development Trends

The City of Cheyenne added 178 acres or slightly less than one percent to its boundaries in 2010. Over the past fifteen years, the average rate of expansion was 1.4 percent. By the end of 2010, the city's size stood at 25.2 square miles.

Table 6.1 presents detailed statistics on the level of commercial construction undertaken between 1984 and 2010 within city borders. New commercial construction in 2010 rebounded from 2009 which experienced the lowest level of commercial construction in the past seventeen years (1993). The total dollar valuation of new commercial construction last year hit 27.3 million dollars as compared to the paltry 2009 total of 3.9 million dollars. The rebound in commercial construction reflected the turnaround in economic activity enjoyed by the greater Cheyenne economy as 2010 progressed and was to some extent also driven by the absorption of previously vacant commercial properties back into the market. Table 6.2 provides summary vacancy statistics for commercial properties through 4th quarter 2010. Vacant warehousing space decreased by 70,000 square feet in 2010 and commercial office space also fell 71,000 square feet by the end of last year.

For the first time in a decade, Assessor property values in both the city and county decreased. Total city valuation decreased by approximately 1.7 million dollars or by a scant 0.3 percent from 2009. Total County valuation fell 4.9 million dollars last year which was a decline of 1.2 percent. Both of the declines were primarily attributed to decreases in industrial property values. Table 6.3 provides all of the details.

SECTION 6 DEVELOPMENT TRENDS

Table

- 6.0 Annexation Trends (1982-2010)
- 6.1 Commercial Construction Activity (1985-2010)
Figure 15 - Residential & Commercial Construction Valuation
- 6.2 Commercial Property (2009-2010)
- 6.3 Assessed Real Property Values (2000-2010)
Figure 16 - Assessed Real & Personal Property Values
- 6.4 Major Property Tax Districts (1999-2010)
Figure 17 - Major Property Tax Districts Revenues

ECONOMIC DEVELOPMENT

Laramie County's economic development organization, *Cheyenne LEADS*, reported working with 53 contacts in 2010 of which 36 were new contacts. Six prospects committed to relocating to Cheyenne which was one less than the recording setting seven in 2009.

These firms will add somewhere between 107 to 132 new jobs to the community. More importantly, another 2 companies committed to Cheyenne in early 2011 and 2 more apparently will commit. These firms have the potential to add over 800 new jobs to the local economy by the end of 2011.

In case the reader missed the obvious, through LEADS' efforts no less than 17 new firms have re-located to Cheyenne in a little over two years. A remarkable accomplishment in its own right but even more remarkable given the presence of the Great Recession and the prevailing wisdom that firms do not relocate during bad economic times.

Table 6.0

Annexation Trends
City of Cheyenne
1982 - 2010

YEAR	ACRES ANNEXED	CITY SIZE SQ. MI.	ANNUAL GROWTH %
1982	134.95	16.09	1.39%
1983	54.17	16.17	0.50%
1984	562.09	17.05	5.44%
1985	18.79	17.08	0.18%
1986	6.14	17.09	0.06%
1987	156.89	17.33	1.40%
1988	19.65	17.36	0.17%
1989	1,152.63(a)	19.16	10.37%
1990	306.10	19.64	2.51%
1991	114.21	19.82	0.92%
1992	54.08	19.91	0.45%
1993	22.01	19.94	0.15%
1994	12.96	19.96	0.10%
1995	307.82	20.44	2.40%
1996	18.11	20.47	0.15%
1997	66.66	20.57	0.49%
1998	0.99	20.57	0.00%
1999	640.00	21.20	3.06%
2000	6.25	21.30	0.47%
2001	48.73	21.38	0.38%
2002	942.53	21.70	1.50%
2003	93.67	22.10	1.84%
2004	74.00	22.22	0.54%
2005	332.82	22.74	2.34%
2006	945.53(b)	24.22	6.51%
2007	39.33	24.31	0.37%
2008	185.26	24.60	1.19%
2009	205.45	24.92	1.30%
2010	177.87	25.15	0.92%
Total	6,699.69	24.87	1.06%

Note: (a) Includes the Cheyenne Business Parkway: 1069.2 Acres

(b) Does not include the North Range Business Park.

Source: City of Cheyenne Engineer's Office

1982 - 2007 Data: City of Cheyenne Building and Engineering Department Annual Report.

Commercial Construction Activity

City of Cheyenne

1985 - 2010

Table 6.1

YEAR	NEW CONSTRUCTION PERMITS	VALUATION (\$)	ADDITIONS & REMODELS PERMITS	VALUATION (\$)	ANNUAL TOTAL PERMITS	VALUATION (\$)	PERCENT CHANGE PERMITS (%)	VALUATION (%)
1985	29	4,841,463	121	3,613,950	150	8,455,413	11.9	6.9
1986	9	2,796,756	112	2,790,457	121	5,587,213	-19.3	-33.9
1987	14	3,806,496	102	1,662,001	116	5,468,497	-4.1	-2.1
1988	3	629,419	97	2,712,453	100	3,341,871	-13.8	-38.9
1989	7	3,375,503	106	3,261,830	113	6,637,333	13.0	98.6
1990	12	4,572,715	106	3,559,211	118	8,131,926	4.4	22.5
1991	11	7,275,590	124	6,484,012	135	13,759,602	14.4	69.2
1992	15	9,750,000	92	5,891,709	107	15,641,709	-20.7	13.7
1993	11	2,700,325	113	3,205,416	124	5,905,741	15.9	-62.2
1994	29	10,871,043	118	10,359,677	147	21,230,720	18.5	259.5
1995	20	16,434,056	133	7,295,663	153	23,729,872	4.1	11.8
1996	19	12,925,969	121	6,029,289	140	18,955,258	-8.5	-20.1
1997	19	20,839,102	168	12,317,511	187	33,156,613	33.6	74.9
1998	32	12,161,139	134	14,437,090	166	26,598,229	-11.2	-19.8
1999	20	7,846,454	142	11,044,908	162	18,891,362	-2.4	-29.0
2000	31	24,320,755	191	15,831,825	222	40,152,580	37.0	112.5
2001	50	51,451,096	166	19,480,513	216	70,931,609	-2.7	76.7
2002	51	30,844,547	190	26,125,665	241	56,970,212	11.6	-19.7
2003	30	7,462,620	124	15,901,576	154	23,364,196	-36.1	-59.0
2004	20	18,912,595	142	16,961,616	162	35,874,211	5.2	53.5
2005	67	35,703,309	116	12,515,338	183	48,218,647	13.0	34.4
2006	62	30,680,571	87	10,286,203	149	40,966,774	-18.6	-15.0
2007	51	40,113,164	103	33,570,621	154	73,683,785	3.4	79.9
2008	33	28,163,235	109	22,082,443	142	50,245,678	-7.8	-31.8
2009	20	3,857,698	61	20,823,825	81	24,681,523	-43.0	-50.9
2010	14	27,254,322	84	12,754,133	98	40,008,455	21.0	62.1

N/A - Data is not available.

Source: City of Cheyenne Building and Engineering Department

FIGURE 15

Residential and Commercial Construction Valuation 1985 - 2010

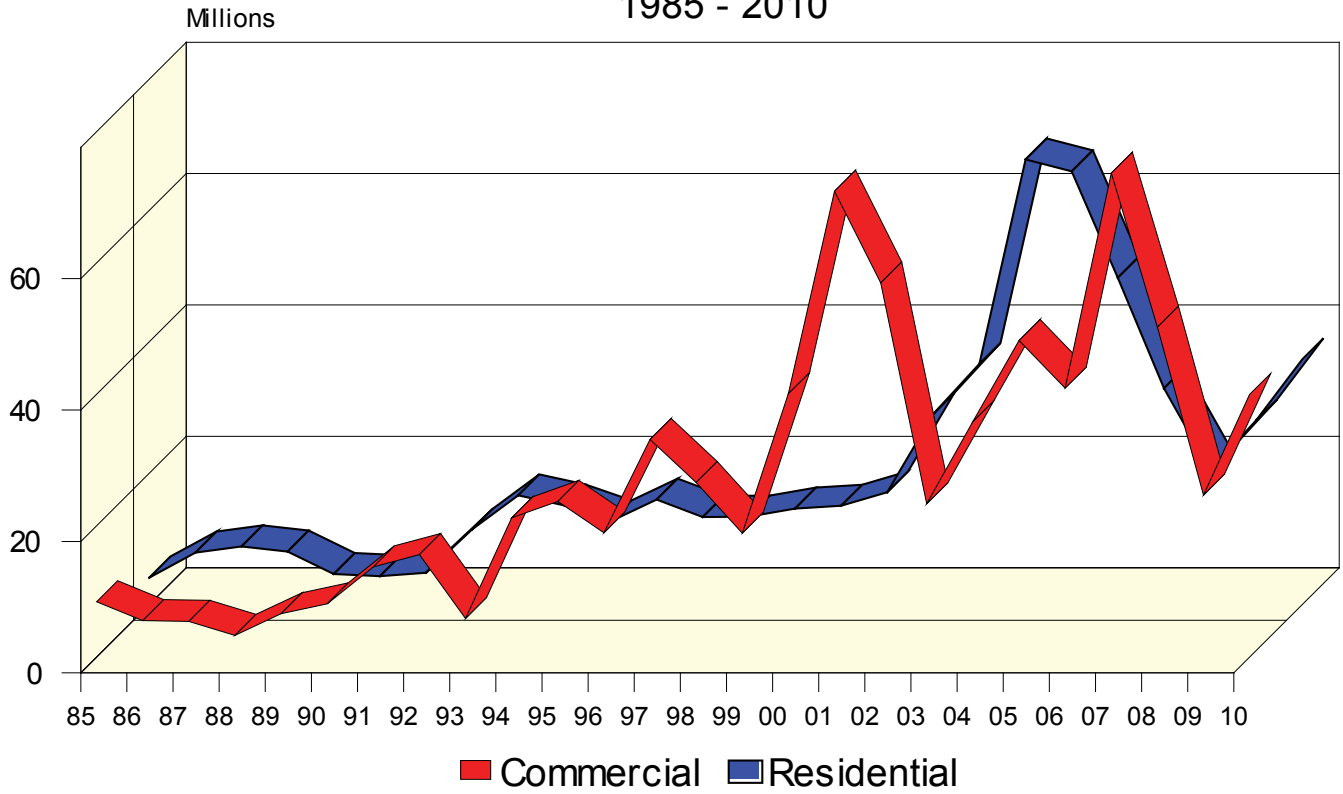


Table 6.2

Commercial Property
For Sale & Lease (1,500 Sq. Ft. and Above)
2009 - 2010

PROPERTY TYPE	# PROPERTIES	SQUARE FOOTAGE	AVG. LEASE RATE	MIN./MAX. RATE	VACANCY RATE
First Quarter 2009					
Warehouse	23	329,041	\$5.72	3.95-5.50	N/A
Retail	18	75,000	129.28 (1)	6.00-42.00	N/A
Office Space	50	320,417	\$12.55	5.00-17.00	N/A
Land	29	5,071,646	\$3.30	1.38-104.44	N/A
Second Quarter 2009					
Warehouse	36	1,496,041	\$4.30	3.34-8.18	N/A
Retail	30	100,710	188.68 (1)	5.00-15.50	N/A
Office Space	82	496,107	\$12.28	5.00-18.00	N/A
Land	47	12,024,089	\$3.45	1.53-104.44	N/A
Third Quarter 2009					
Warehouse	37	1,752,686	\$5.43	3.68-9.18	N/A
Retail	41	271,071	\$14.28	9.50-24.00	N/A
Office Space	70	380,018	\$12.02	5.00-17.00	N/A
Land	53	13,521,791	\$3.57	0.86-25.99	N/A
Fourth Quarter 2009					
Warehouse	39	546,226	\$5.13	3.34-10.00	11.99%
Retail	41	281,665	\$10.16	6.00-16.00	6.38%
Office Space	84	484,262	\$12.54	4.94-17.00	23.10%
Land	53	13,521,791	\$3.57	0.86-25.99	N/A
First Quarter 2010					
Warehouse	45	521,350	\$5.23	3.34-10.00	11.50%
Retail	53	343,180	\$10.64	4.61-16.00	8.65%
Office Space	86	490,256	\$14.34	4.80-17.00	22.20%
Second Quarter 2010					
Warehouse	54	755,892	\$5.57	3.34-13.06	15.50%
Retail	66	376,641	\$11.25	4.61-17.00	8.12%
Office Space	88	520,529	\$12.18	4.80-18.00	22.80%
Third Quarter 2010					
Warehouse	51	605,041	\$5.99	3.34-13.06	10.50%
Retail	74	321,469	\$10.84	4.61-17.00	6.83%
Office Space	77	473,770	\$11.53	4.00-17.64	20.80%
Fourth Quarter 2010					
Warehouse	36	476,507	\$5.89	3.34-13.06	9.10%
Retail	68	358,737	\$11.66	7.00-16.00	7.83%
Office Space	72	413,248	\$11.99	5.14-17.00	23.10%

(1) Avg. selling price

Source: Wyoming Center for Business & Economic Analysis, Inc.

Table 6.3 Assessed Real and Personal Property Value
Laramie County
2000 - 2010

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
TOTAL											
City (\$)	270,007,446	284,524,644	301,615,103	333,028,981	360,986,244	402,264,902	443,234,610	468,742,963	491,136,898	512,011,815	510,335,674
County (\$)	172,353,693	180,525,429	190,599,915	205,659,198	229,652,549	244,439,397	280,900,035	305,750,575	360,546,473	403,268,293	398,392,120
RESIDENTIAL											
City (\$)	178,806,953	188,856,479	198,716,884	216,458,096	240,898,699	273,116,519	299,464,953	301,267,635	311,440,645	315,919,042	325,783,658
County (\$)	72,323,848	78,912,255	86,720,823	98,458,096	111,253,557	127,393,533	144,933,887	165,856,111	177,212,824	180,771,757	181,815,093
Assessed % of Actual Value	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50
COMMERCIAL											
City (\$)	62,591,046	67,206,773	73,319,387	87,403,935	90,420,290	95,554,194	108,951,158	130,952,222	134,384,568	139,307,754	137,905,101
County (\$)	11,375,261	12,495,160	13,051,254	13,615,738	14,534,477	15,947,858	17,670,759	17,911,527	29,672,137	30,955,419	30,196,669
Assessed % of Actual Value	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50
INDUSTRIAL *											
City (\$)	24,394,527	24,253,491	25,006,068	24,996,324	24,052,789	27,057,707	27,214,048	27,508,729	35,091,021	47,042,892	37,312,702
County (\$)	65,175,820	66,452,235	67,540,628	69,123,194	76,346,242	70,763,291	81,885,058	93,770,212	123,697,989	161,134,802	155,640,370
Assessed % of Actual Value	11.50	11.50	11.50	11.50	11.50	11.50	11.50	11.50	11.50	11.50	11.50
AGRICULTURAL											
City (\$)	0	0	0	0	0	0	1,096	5,633	4,203	4,213	5,622
County (\$)	18,201,143	17,456,900	17,446,081	18,038,932	20,535,737	22,337,600	25,397,071	12,994,233	13,369,278	14,719,375	16,698,431
Assessed % of Actual Value	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50
VACANT											
City (\$)	4,214,920	4,207,901	4,572,764	4,603,429	5,574,466	6,536,482	7,603,355	9,008,744	10,216,461	9,737,914	9,328,333
County (\$)	5,277,621	5,208,879	5,841,129	6,423,238	6,982,536	7,997,115	11,013,260	15,218,492	16,594,245	15,686,940	14,041,815
Assessed % of Actual Value	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50	9.50

N/A - Data is not available.

(a) 2007 Agricultural data now refers to land only. All other data such as improvements and personal property are now included in residential or commercial data.

* Fluctuations in valuations are due primarily to changes in mineral valuations.

Source: Laramie County Assessor's Office

FIGURE 16

Assessed Real and Personal Property Values Cheyenne and Laramie County

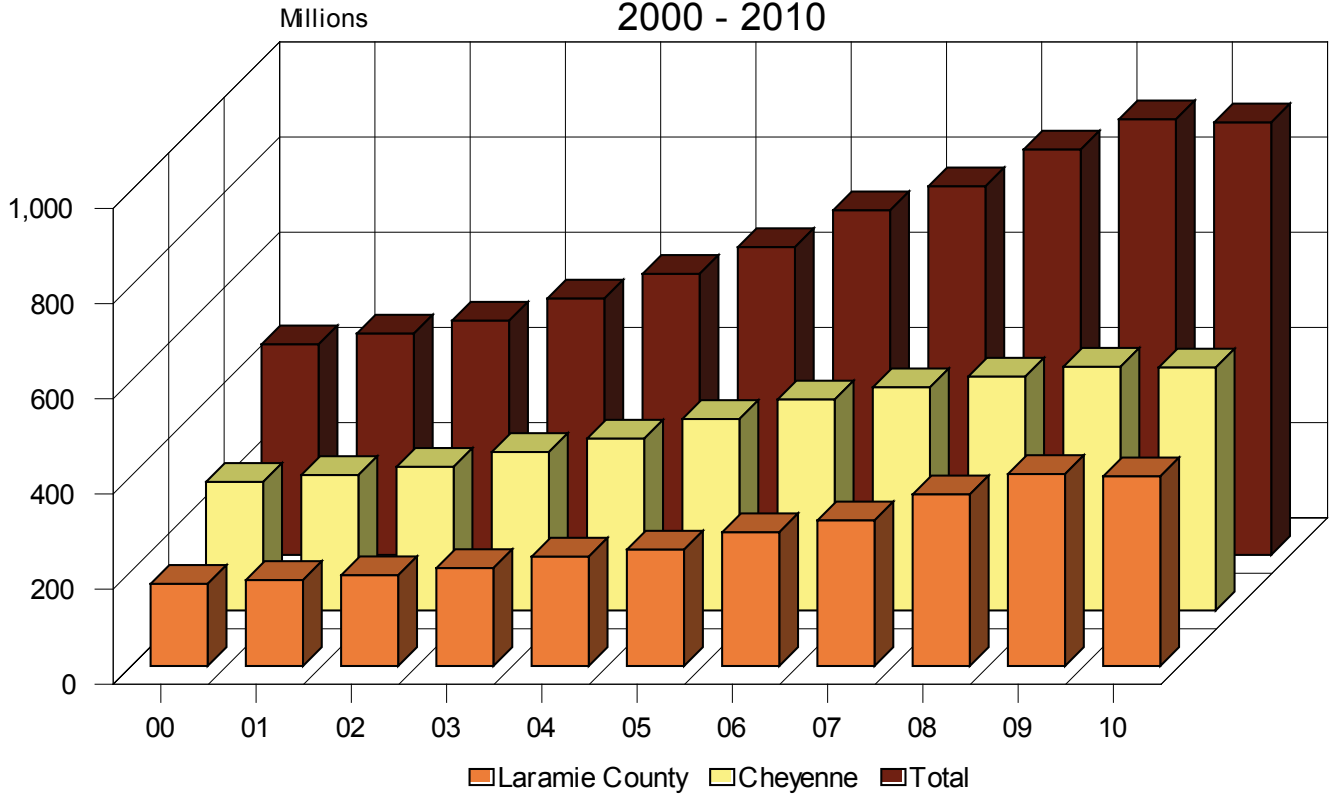


Table 6.4

**Major Property Tax Districts
Revenues
1999 - 2010**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
CITY OF CHEYENNE												
Value (\$)	254,289,189	270,007,446	284,524,644	301,615,103	333,028,981	360,986,244	402,264,902	443,234,610	468,742,963	491,167,735	512,011,815	510,335,674
Mill Levy	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00
Revenue (\$)	2,034,314	2,160,060	2,276,197	2,412,921	2,664,232	2,887,890	3,218,119	3,545,877	3,749,944	3,929,342	4,096,095	4,082,685
LARAMIE COUNTY												
Value (\$)	413,164,716	442,361,139	465,050,073	492,215,018	538,688,179	590,638,793	646,704,299	724,134,645	774,493,538	851,683,371	915,280,108	908,727,794
Mill Levy	22.00	22.00	22.00	22.00	17.00	17.00	17.00	17.00	21.66	20.91	17.00	17.00
Revenue (\$)	9,089,624	9,731,945	10,231,102	10,828,730	9,157,699	10,040,859	10,993,973	12,310,289	16,775,530	17,808,699	15,559,762	15,448,372
LC SCHOOL DISTRICT #1												
Value (\$)	378,706,487	406,805,165	428,814,721	456,486,561	499,696,020	547,178,850	599,968,474	669,240,204	717,792,802	778,434,192	826,511,245	835,786,729
Mill Levy	45.81	43.00	43.00	44.00	44.00	44.00	44.00	44.00	44.00	44.00	44.00	44.00
Revenue (\$)	17,348,544	17,492,622	18,439,033	20,085,409	21,986,625	24,075,869	26,398,613	29,446,569	31,582,883	34,251,104	36,366,495	36,774,616
LC SCHOOL DISTRICT #2												
Value (\$)	34,458,229	35,555,974	36,235,352	35,728,457	36,992,159	43,459,943	46,735,825	54,894,441	56,700,736	73,249,179	88,768,863	72,941,065
Mill Levy	43.00	46.88	46.61	46.42	46.18	46.19	46.20	45.89	45.91	45.91	45.91	44.90
Revenue (\$)	1,481,704	1,666,864	1,688,930	1,658,515	1,708,298	2,007,415	2,159,195	2,519,106	2,603,131	3,362,870	4,075,379	3,275,054
LC CONSERVATION DISTRICT (a)												
Value (\$)	413,164,716	442,361,139	465,050,073	492,215,018	538,688,179	590,638,793	646,704,299	724,134,645	774,493,538	851,683,371	915,280,108	908,727,794
Mill Levy	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Revenue (\$)	206,582	221,181	232,525	246,108	269,344	295,319	323,352	362,067	387,247	425,842	457,640	454,364
SOUTH CHEYENNE WATER & SEWER												
Value (\$)	14,770,147	15,976,468	16,560,782	17,361,258	18,971,122	21,269,437	22,416,670	27,264,776	27,498,980	29,021,285	30,630,610	31,578,226
Mill Levy	2.67	2.78	2.68	4.02	3.69	3.57	2.52	2.49	3.54	3.60	5.16	5.28
Revenue (\$)	39,436	44,415	44,383	69,792	70,003	75,932	56,490	67,889	97,346	104,477	158,054	166,733
WEED AND PEST DISTRICT												
Value (\$)	413,164,716	442,361,139	465,050,073	492,215,018	538,688,179	590,638,793	646,704,299	724,134,645	774,493,538	851,683,371	915,280,108	908,727,794
Mill Levy	1.00	1.00	1.32	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50
Revenue (\$)	413,165	442,361	613,866	738,323	808,032	885,958	970,056	1,086,202	1,161,740	1,277,525	1,372,920	1,363,092

N/A - Data is not available.

Source: Laramie County Assessor's Office

FIGURE 17

Major Property Tax Districts Revenues 1999 - 2010

