

MEMORANDUM



TO: Wyoming Water Development Commission
FROM: Edward Harvey and Doug Jeavons
RE: **Task 4. Basin Water Demand Projections**
Memo 1: Historic and Current Economic and Demographic Conditions
DATE: October 6, 2000

Introduction

This memorandum provides the starting point for development of Bear River Basin (Basin) water demand projections by describing:

- an overview of current economic and demographic conditions in the Basin;
- historical changes and trends in Basin economic and demographic measures; and
- a more detailed evaluation of current and historic conditions in the Basin's most important sectors from an economic and/or water use standpoint.

Information summarized in the memorandum was gathered from publicly available secondary sources and from personal and telephone interviews conducted by BBC Research & Consulting (BBC) from May through August 2000. References are listed at the end of this memorandum. Subsequent memoranda related to water demand forecasting describe the three alternative planning scenarios and the overall economic and demographic projections for the Basin in year 2030 (Memo 2), the water demand projections for year 2030 (Memo 3) and future recreational demands (Memo 4).

Demographic Overview

At present, a total of nearly 15,000 people reside in the Wyoming portions of the Basin. More than 80 percent of the population of the Basin lives within the boundaries of the City of Evanston or the Town of Cokeville, the two principal population centers within the Basin. The Basin includes nearly 70 percent of the total population of Uinta County,

but only about seven percent of the total population of Lincoln County. A breakdown of the current population of the Basin is provided in Exhibit 1.

The Basin population estimates reflect year 2000 population projections for Evanston and Cokeville produced by the Wyoming Department of Administration and Information, Division of Economic Analysis. Population in unincorporated portions of the Basin was estimated using estimated 1999 population totals for census tracts within the Basin produced by PCensus (AGH, Inc., 2000).

Exhibit 1.
Estimated 1999 Population for Political Jurisdictions
in the Basin

Location	Lincoln	Uinta	Total
Bear River Basin			
Principal Towns			
Evanston	---	11,870 *	11,870
Cokeville	541 *	---	541
Unincorporated Area	<u>399</u>	<u>2,032</u>	<u>2,431</u>
Basin Total	940	13,902	14,842
Remainder of County	<u>13,032</u>	<u>6,830</u>	<u>19,862</u>
County Total	13,972	20,732	34,704

*2000 Projections

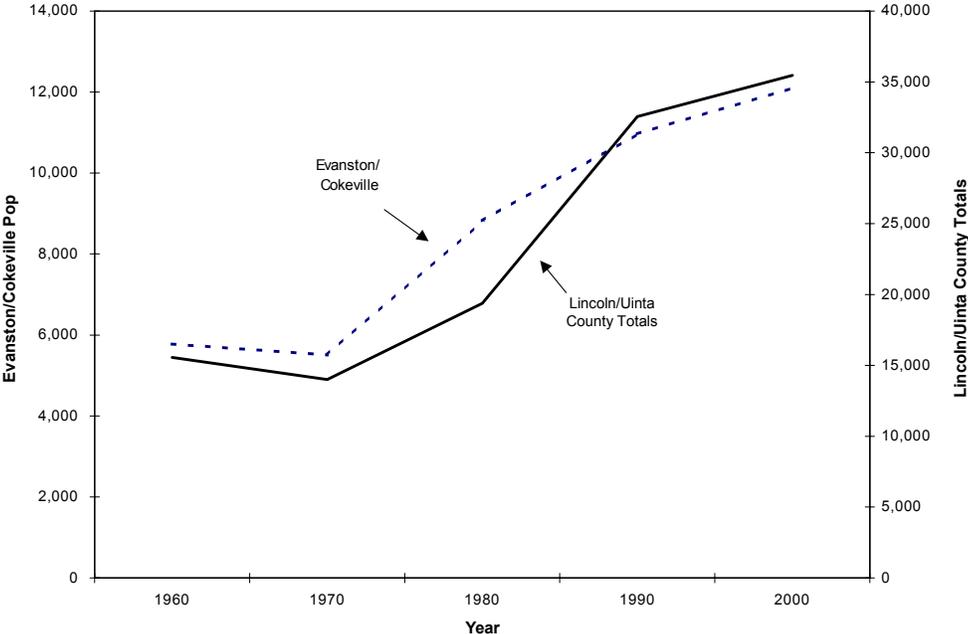
Source: PCensus, 1999 projections; Census of Population and Division of Economic Analysis Forecasts, 2000 projections.

Historic population growth. Changes in census tract definitions from decade to decade and the imprecise relationship of census-defined geography to the watershed make it difficult, if not impossible, to precisely quantify historic population totals for the unincorporated portions of the Basin. However, population changes in the two principal communities that comprise most of the Basin's population can be readily tracked over time from the decennial censuses.

Since 1960, the combined population of Evanston and Cokeville has increased at an average annual rate of about four percent. This long-term average, however, masks considerable fluctuation during this 40-year period. As shown in Exhibit 2, the population of the two communities actually declined during the 1960s, but grew rapidly during the decades of the 1970s and 1980s. The 1990s have been characterized by comparatively slow, but steady, growth, with the combined population of Evanston and Cokeville increasing at an average annual rate of less than one percent over the past ten

years. In general, the rates of population growth in Evanston and Cokeville closely correspond to the rates of population growth for Uinta and Lincoln Counties as a whole over the past four decades.

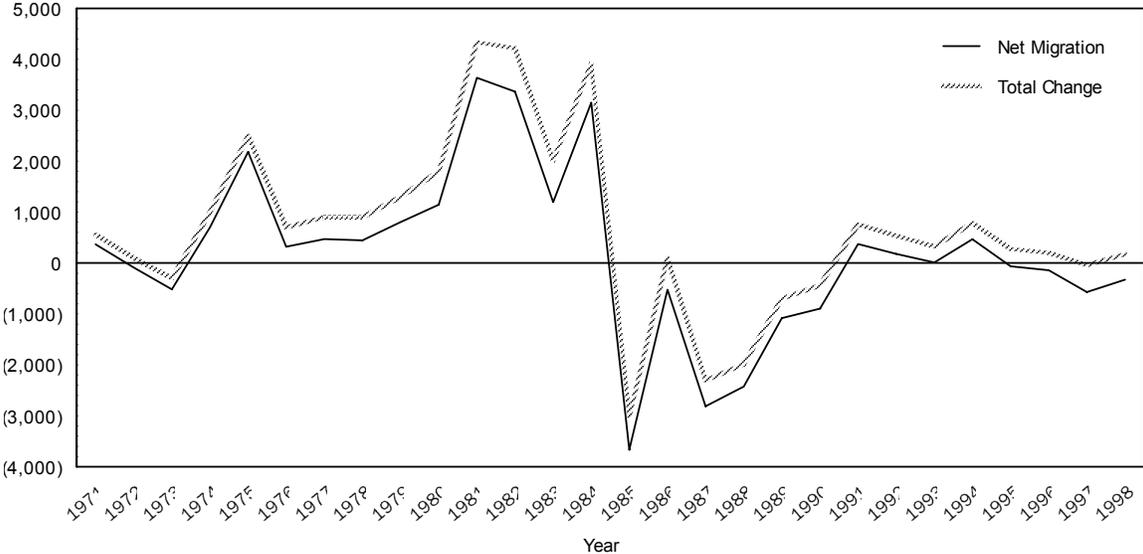
Exhibit 2.
Population of Evanston and Cokeville, Wyoming and the Remainder of Lincoln and Uinta Counties, 1960 to 2000



Source: Colorado Economic and Demographic Information Service; U.S. Department of Commerce, Bureau of Census.

Since 1971, the combined population of Uinta and Lincoln Counties has generally increased by between 100 and 500 residents per year due to resident births exceeding resident deaths, termed "net natural increase", according to State of Wyoming, Department of Health data. However, population changes in Uinta and Lincoln Counties have historically been driven primarily by migration to or from the area, presumably in response to changing economic opportunities. Exhibit 3 portrays annual net migration and total annual changes in population for the combined county area from 1971 through 1998. The annual population changes for each county were calculated from annual population estimates reported in the U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System (BEA-REIS).

Exhibit 3.
Components of Population Change, 1971 to 1998,
Lincoln and Uinta Counties



Note: Area between lines represents natural population increase, annual difference between birth total and death total for Lincoln and Uinta Counties.

Source: State of Wyoming, Department of Health.

Labor force participation and unemployment. A high proportion of Basin residents over the age of 16 are currently active in the labor force. County level figures based on labor force estimates published by the Wyoming Department of Employment and estimates of the population aged 16 or older from PCensus (AGH, Inc., 2000) indicate that about 83 percent of Uinta County residents over the age of 16 are either employed or actively seeking work, compared to the state average labor force participation rate of about 74 percent. The participation rate in Lincoln County is lower than the state average, at 70 percent, but still well above the national average labor force participation rate of about 67 percent.

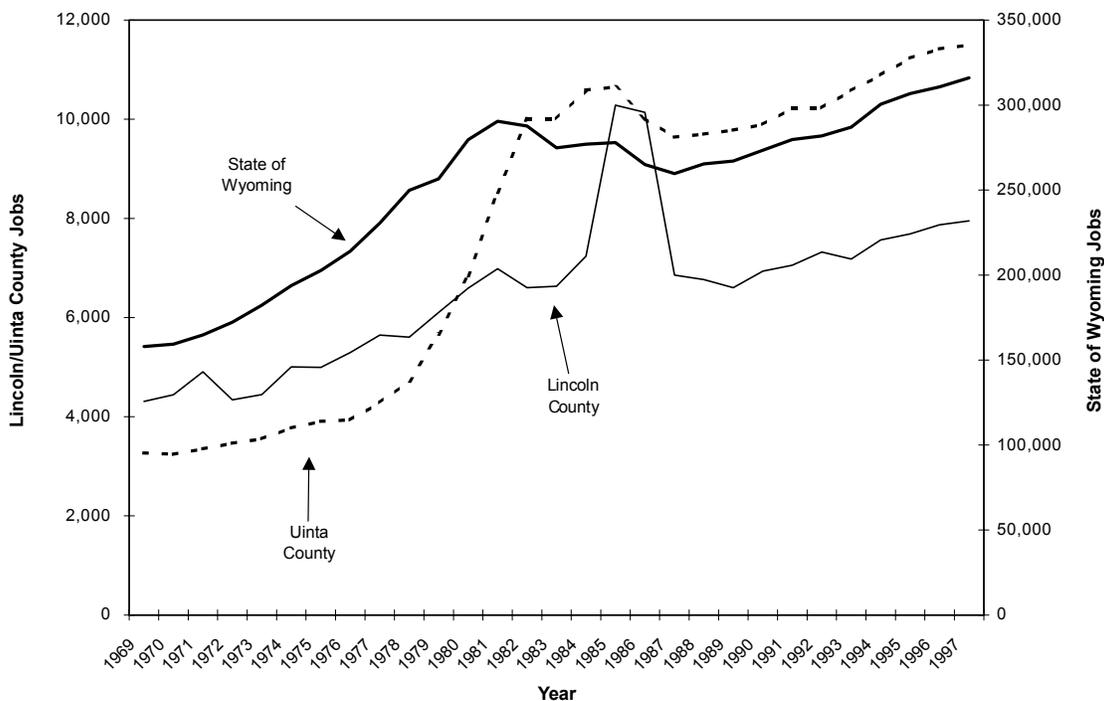
The most recent average annual unemployment rates published by the Wyoming Department of Employment, for 1999, were 6.9 percent in Uinta County and 6.2 percent in Lincoln County. As has generally been the case since the mid-1980s, these unemployment rates were higher than the 4.9 percent state average for the same period.

Economic Overview

Based upon extrapolation of 1998 data from BEA-REIS to the year 2000, the study team estimates that there are currently about 20,000 full and part-time jobs located in Uinta and Lincoln Counties. The study team estimates that approximately 10,000 of these jobs are located within the Basin portions of the two counties, with approximately 9,500 jobs located in the Uinta County part of the Basin (principally in and around Evanston) and about 500 jobs located in the Lincoln County portion.

Historic employment growth. Exhibit 4 depicts historical employment growth for Uinta and Lincoln counties (graphed against the left axis) and the State of Wyoming (graphed against the right axis) from 1969 through 1997. Uinta County employment grew rapidly from the late 1970s through the mid-1980s during the period of intense oil and gas development activity, now known locally as "The Boom." After experiencing a slight decline in total employment during the late 1980s, Uinta County jobs have grown steadily at about the same rate as the State as a whole during the 1990s. In general, Lincoln County employment growth during the past three decades has been slower than either Uinta County or the State as a whole. An exception was the brief period of power plant construction during the mid-1980s; county employment fell back shortly thereafter to levels comparable to the pre-construction period.

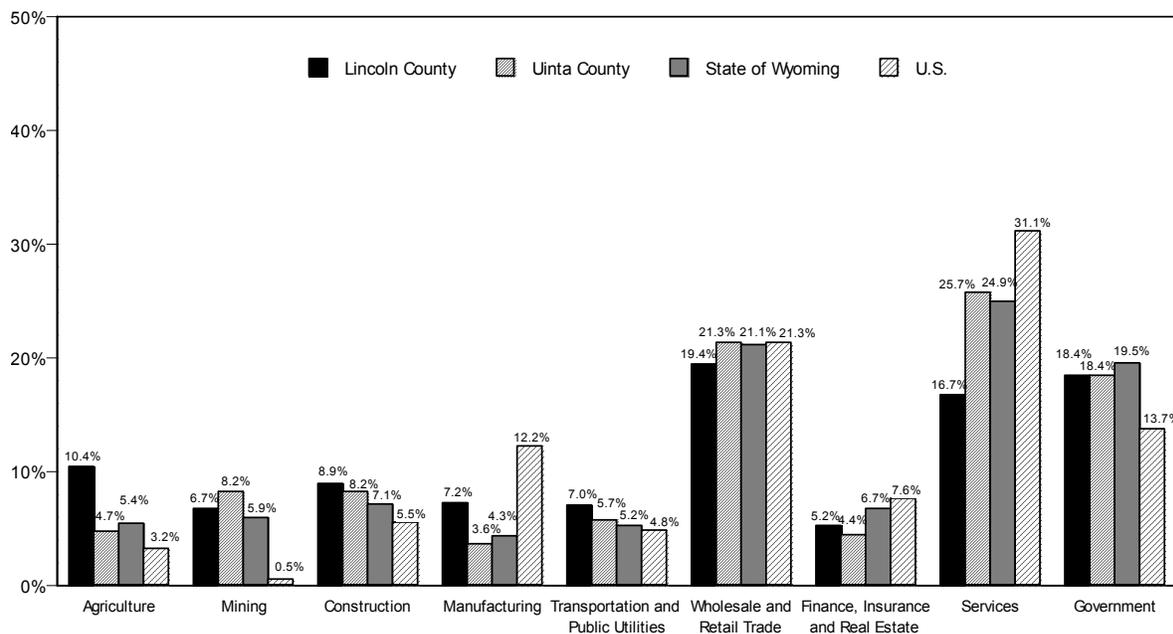
**Exhibit 4.
Composition of Total Employment Growth: Lincoln
and Uinta Counties and the State of Wyoming, 1969-1997**



Source: Colorado Economic and Demographic Information Service; U.S. Department of Commerce, Bureau of the Census.

Employment and Earnings by Sector. Exhibit 5, based upon BEA-REIS data for 1998, depicts the shares of total employment in Lincoln County, Uinta County, the State of Wyoming and the U.S. for each major industry division. As indicated in the exhibit, the three largest employment sectors in both Basin counties (as well as in the Wyoming as a whole and the U.S.) are services, retail trade and government.

**Exhibit 5.
Composition of 1998 Employment by Sector**



Source: Bureau of Economic Analysis, Regional Economic Information System.

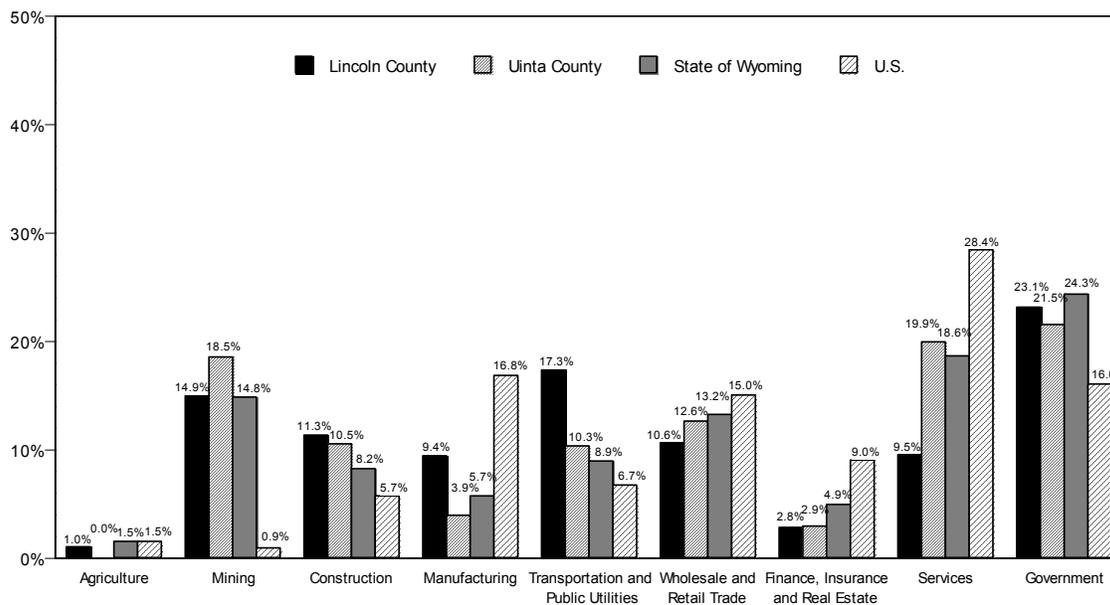
Comparing shares of county employment (and employee earnings) to state and, especially, to national averages can be useful in indicating the categories of economic activities that bring money into the local economy. Such categories comprise the economic base of the local economy.

As shown in Exhibit 5, both Basin counties (and the State of Wyoming as a whole) have disproportionately large shares of employment in the mining sector compared to the national average. In the case of Uinta County, these jobs are predominantly related to oil and gas production. In Lincoln County, many of these jobs are located at the coal mine near Kemmerer, which is outside the Basin. Both counties also have relatively large construction sectors – related both to the importance of road construction and maintenance as an economic activity in many parts of Wyoming and to the local energy sectors which also support numerous construction jobs. Agricultural employment in the Basin counties, and particularly in Lincoln County, is relatively large compared to the national average. There are also a relatively large number of government sector jobs in the Basin counties, and the State as a whole, reflecting, in part, the large amount of federal lands that are administered in each area. Finally, while the share of employment

in retail trade in the Basin counties is only a little higher than the national average, it is relatively large for economies the size of Lincoln and Uinta counties. This is an indicator of the importance of tourism and visitor dollars in the local economic base.

Exhibit 6, also based on BEA-REIS data for 1998, depicts the relative proportion that each major industry division contributes to total earnings in Lincoln County, Uinta County, the State of Wyoming and the U.S. This graphic further emphasizes the importance of the mining sector (e.g., oil and gas in Uinta County and coal, oil and gas in Lincoln County), the construction sector and the government sector in the economic base of the Bear River counties. Transportation and public utilities accounts for a comparatively large share of Lincoln County earnings due to operations of the power plant near Kemmerer – which is outside of the Basin.

Exhibit 6.
Composition of 1998 Earnings by Sector



Source: Bureau of Economic Analysis, Regional Economic Information System.

Key Economic and Water Use Sectors

The remainder of this memorandum describes current conditions in four key sectors in the Basin. Agriculture, while no longer one of the largest sources of employment or income in the Basin, still accounts for the largest amount of water use. Energy related

activities are a key part of the local economic base and account for virtually all of the industrial water use in the Basin. Tourism and visitor related activities are an important component of the local economic base, especially in the Uinta County portion of the Basin. Finally, manufacturing and other businesses that export products or services from the Basin are a relatively small, but growing component of the economic base that may be increasingly important to the Basin economies in the future.

Prospects for these sectors, and specific scenarios incorporating varying assumptions about each sector, provide the cornerstone to the economic, demographic and water demand projections for the Basin. These elements are discussed in the two subsequent technical memoranda for the Basin water demand projections.

Agriculture. In order to understand current agricultural activity in the Basin and the factors affecting local agriculture in the future, BBC interviewed representatives of the local ranching community as well as relevant personnel from a variety of federal and state agencies that are involved with Wyoming agriculture. BBC also gathered and analyzed current and historic livestock and hay production data for the Basin counties published by Wyoming Agricultural Statistics Service. In addition, BBC obtained information on current and historic stocking levels for livestock grazing allotments within the Basin from the Bureau of Land Management (BLM). The following is an abbreviated summary of current agricultural conditions in the Basin.

- **Livestock.** Livestock production (cattle and sheep) is the primary money-making, agricultural enterprise in the Basin. Ranchers typically have permits tied to their operation that allow them to graze their livestock on a particular allotment of public (primarily BLM) land throughout the Basin during the summer months. Cattle are grazed on public lands from roughly early May to mid October, while sheep are grazed from early May through late November. Land ownership on these allotments is primarily alternating sections of BLM and private land in the checkerboard pattern that is common in the inter-mountain west. Some state land is also interspersed.

Sheep inventory in the State of Wyoming has declined dramatically since the end of World War II, although the rate of decline slowed during the 1990's (Wyoming Agricultural Statistics, 1999). The decline is largely due to the poor wool market and the comparatively sparse demand for lamb relative to other types of meat (Burrough, Gustafson). In contrast, Wyoming cattle inventories have generally increased since the 1940s, with the 1990s exhibiting a sharp increase (Wyoming Agricultural Statistics, 1999). With the exception of a short period in the mid 1990s cattle prices have been high since the mid 1980s

(Adamson) and are projected to remain strong for the next decade (USDA Livestock Baseline projections, February 2000). While Basin livestock practices reflect these general trends, the change in Basin livestock numbers has been more gradual than at the State level. Although annual inventories have fluctuated significantly, a trend analysis shows that since 1975, the sheep inventory in Uinta and Lincoln counties has declined annually by roughly one percent, while cattle numbers have increased annually by about one percent during the same period (Wyoming Agricultural Statistics Service). Generally, cattle have been substituted for sheep on Basin public land allotments, but the BLM is curtailing this to some extent in the management plans for larger allotments such as the Cumberland/Uinta allotment (Easley).

- **Crops.** Crop production in the Basin consists mainly of hay (both irrigated meadow and alfalfa) used for supplemental livestock feed. The vast majority of hay grown within the Basin is consumed by Basin livestock (either own-farm or sold to neighbors) as supplemental feed during the winter months (Burrough, Grandy, Grasmick). There is some alfalfa grown, but especially in Uinta County, the majority of hay acreage is irrigated meadow (Wilson). The majority of hay fields in each county are irrigated, with the percentage being especially high in Uinta County (Wyoming Agricultural Statistics, 1999). Irrigated hay production occurs in the areas along the Bear River in both Lincoln and Uinta counties, with significant supplemental acreage along Sulfur Creek in Uinta County and along Smiths Fork north of Cokeville in Lincoln County (LRCWE/Forsgren Assoc. Map, 2000). Irrigated acreage levels have been stable through time, and several sources have confirmed that almost all irrigable land in the Basin is in fact irrigated during years with normal precipitation levels (Burrough, Grandy, Grasmick).
- **Employment.** The number of ranches in the Basin counties, reflected by farm proprietor employment levels, has remained around 800 over the last 30 years. The total number of farm jobs in these counties has gradually declined over this time period, from about 1,250 to its current level near 1,050, reflecting a slight increase in labor productivity, probably due to technological innovation (Employment by Industry, Bureau of Economic Analysis, 1999). Current agricultural related employment specifically within the Basin is estimated to be about one-half the county totals, or roughly 400 farm proprietor jobs and 525 total farm jobs within the Basin.

Energy. In order to understand current energy related activities in the Basin and the factors affecting these activities, BBC interviewed representatives of the two major operators in the area, Chevron and BP Amoco. BBC also gathered and analyzed current

and historic oil and gas production data for the Basin counties, the State of Wyoming and the U.S. as a whole published by the Wyoming Oil and Gas Conservation Commission and the U.S. Department of Energy, Energy Information Administration. The following is an abbreviated summary of current energy related conditions in the Basin.

- **Producing fields.** Oil and gas activity in the Basin is concentrated in three fields or units – Painter, Whitney Canyon/Carter Creek and Anschutz. Much of the Anschutz field is in Utah, but the gas processing plant is in Wyoming.
- **Companies.** Two companies dominate Basin oil and gas production – Chevron and Amoco. Chevron has two gas processing plants in the Basin, while Amoco has three.
- **History.** The Basin fields have been producing since the mid-1980s or earlier and are relatively mature. Unconventional recovery techniques are increasingly necessary to maintain production. These are relatively low margin fields, so in the long-term, production levels may be quite sensitive to price and technology changes.
- **Employment.** Direct employment by Chevron and Amoco is currently about 400 employees. Including contractors, smaller oil and gas firms and operations supplying construction services to the energy sector, the sector may directly employ about 900 people in the Basin at present. Total "mining" employment in Uinta County (including areas outside the Basin, but excluding energy related construction) is a little more than 800 according to BEA data.

Tourism and Visitor Related Activity. In order to gain local insight into tourism and visitor related activity in the Basin, BBC interviewed representatives of the Evanston Chamber of Commerce, the City of Evanston Economic Development Director and Community Development Director and the Uinta County Development Coordinator. Given the lack of available estimates of the magnitude of this activity, BBC developed estimates of the current number of visitor nights in the area, average annual expenditures by overnight visitors and pass-through visitors to the area and corresponding estimates of visitor related employment in the area. Primary data used in developing these estimates included monthly net sales tax distributions by minor business class, published by the Wyoming Department of Revenue. Secondary data sources included results from a study on the economic impact of the travel industry in Wyoming, conducted Morey and Associates in conjunction with the University of Wyoming.

The following is a summary of current tourism and visitor related activity in the Basin.

- **Visitor Types.** The primary locale for visitor lodging and other services in the Basin is the City of Evanston. Evanston is the largest population center within the Basin, and lies directly on the I-80 corridor in southern Wyoming. In addition, Evanston provides the primary access route to the rest of the Basin via Highway 189 north. There are two primary types of visitors that come to Evanston: 1) overnight visitors that use the town as a jumping off point for local natural and historical attractions or other trip purposes, and 2) pass through visitors traveling east or west on I-80 that stop in Evanston for food, gasoline or other conveniences. Visitation patterns are highly seasonal as most local attractions are primarily accessible during the peak summer months.
- **History.** To date, Evanston itself has not been a major destination for tourists, although community leaders are attempting to change this. The town does draw summer visitors at the local racetrack, Wyoming Downs, as well as a large number of visitors traveling through en-route to Flaming Gorge and Bear Lake (Joyce, Knopf). Evanston also provides access to historical attractions such as the Wyoming portion of the Oregon Trail. Historically, visitation has occurred largely during the summer months. In 1999, almost half the total annual traffic count occurred during the three month summer peak period (Wyoming Department of Transportation, 1999). While participation in winter recreational activities such as snowmobiling and backcountry skiing continues to grow in places like the Bridger Teton National Forest, winter visitor numbers continue to be modest in comparison to those for the summer months (Marsh). Evanston also attracts a substantial number of visitors from the expanding population of Utah's Wasatch Front region.
- **Expenditures and Employment.** Direct employment within the Evanston tourist/visitor sector occurs largely in five primary expenditure categories: lodging, restaurants, groceries, shopping and automobile services. BBC used sales and use tax distribution data, hotel occupancy data, and information on daily tourist/visitor expenditure patterns (Morey and Associates/University of Wyoming, 2000) to estimate current tourist/visitor spending levels in Evanston. Based on this information, BBC estimates a current annual total of \$15.6 million in overnight visitor expenditures and \$4.4 million in pass through visitor expenditures. Total expenditures in the tourist/visitor sector are estimated to support about 640 local jobs (See Table 1 below).

Table 1.
Number of Visitors, Visitor Expenditures and Jobs Supported by Tourism
Evanston, Wyoming, 1999

	Number Visitors	Total Expenditures	Number Jobs Supported
Total Overnight	323,940	\$ 15,573,809	493
Peak	147,117	\$ 7,050,773	223
Off-Peak	176,823	\$ 8,523,036	270
Total Pass Through		\$ 4,382,115	144
Peak		\$ 1,380,666	45
Off-Peak		\$ 3,001,449	99
			637
Grand Total		\$ 19,955,924	269
Peak		\$ 8,431,439	368
Off-Peak		\$ 11,524,485	

Table 2 below depicts the current share of total visitor expenditures by expenditure category. Throughout the year, tourist/visitors are estimated to account for 100 percent of total lodging expenditures. During the peak months, tourist/visitors account for 41 percent of total restaurant expenditures and 64 percent of total gasoline expenditures in the Evanston area. During the off-peak months, these restaurant and gasoline totals drop to 29 percent and 39 percent, respectively.

Table 2.
Current Share of Total Visitor Expenditures by Expenditure Category
Evanston, Wyoming

	Lodging	Restaurants	Groceries	Shopping	Gasoline	Total
Total	\$ 5,152,725	\$ 19,077,043	\$ 36,543,601	\$ 35,835,560	\$ 4,585,671	\$ 106,347,324
Overnight	100%	21%	2%	10%	42%	15%
Pass Through	0%	12%	4%	1%	5%	4%
Local	0%	67%	94%	88%	52%	81%
Peak						
Overnight	100%	30%	3%	17%	59%	22%
Passthrough	0%	11%	5%	2%	5%	4%
Local	0%	59%	92%	81%	36%	73%
Off-Peak						
Overnight	100%	17%	1%	8%	34%	11%
Passthrough	0%	12%	4%	1%	5%	4%
Local	0%	71%	95%	91%	61%	85%

Manufacturing and other industry. Apart from activities related to agriculture, energy production and tourism, the economic base of the Basin includes other firms that export goods or services outside of the region and bring money into the area. This aspect of the Basin's economic base is perhaps the hardest to characterize and quantify, but given the changing nature of the economy it may be among the most important over the next 30 years. The following insights are based upon interviews with community leaders in Evanston, Cokeville, Uinta County and Lincoln County and the Wyoming Business Council.

- **Current Major Companies.** At present, four large employers and a number of smaller firms supply manufacturing and business support services to areas outside the Basin that are unrelated to the Basin's other principal economic base activities in energy, agriculture and tourism. MGB Plastics, which produces fruit containers and other plastic products, is a relatively recent "startup" firm employing less than 100 residents of the Evanston area. Union Tank Car is a longer-term Evanston area operation that provides railroad car refurbishment and employs about 100 residents. Carbon Fibre Technologies moved to the Evanston area about three years ago and employs approximately 100 residents. Cento Corporation moved to Evanston from American Fork, Utah and provides software services employing approximately 50 residents at present, with plans to expand to as many as 200 jobs. While the Evanston area has a number of office and industrial park areas, the primary location for new firms of substantial size is the Union Center Industrial Park managed by the City. About 120 acres out of a total of 220 total available acres in the Park have been developed to date (Joyce, Klinker and Knopf).
- **Employment.** Today, Basin manufacturing operations, business services such as Cento Corporation and other non-energy or tourism related industrial and commercial operations employ an estimated 650 people. These operations are almost entirely located in or near the City of Evanston.

Summary

At present, there are approximately 15,000 residents living in the Wyoming portions of the Basin. The Basin population grew rapidly from about 1970 through the middle 1980s, suffered a modest decline in the late 1980s and has grown slowly, but steadily, during the 1990s. About 10,000 jobs are located within the Basin. Most of these jobs are held by Basin residents, although some residents commute to work outside of the Basin

and other jobs in the Basin are filled by residents of nearby counties. Key components of the Basin's economic base include energy related activity, tourism and visitor related activity and a small, but growing, manufacturing and commercial sector that exports goods and services outside the region. Agriculture is not as large a factor in the local economy as it was in the past, but remains a very important sector from the standpoint of Basin water use. Energy is a mature industry. Tourism and visitor related activities and the manufacturing sector are vibrant elements of the Basin economy.

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