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The Road to Work: Commuting in Wyoming is another joint publication by the Wyoming Workforce Development Council, the Wyoming Department of Workforce Services, and the Wyoming Department of Employment’s Research & Planning section.
Download a PDF of The Road to Work: Commuting in Wyoming at http://doe.state.wy.us/LMI/commute.pdf or request a copy by calling R&P at (307) 473-3807.

WYOMING WORKFORCE ANNUAL REPORT 2008

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“Your Source for Wyoming Labor Market Information”
In partnership, the Wyoming Department of Employment, the Wyoming Department of Workforce Services, and the Wyoming Workforce Development Council are excited to present the Wyoming Workforce Annual Report 2008. Inside these pages, you’ll find important information relating to Wyoming’s workforce. You’ll discover data relating to:

- Employment Growth
- Wages
- Unemployment
- Benefit Data
- Employment Projections
- Barriers to Growth
- And Much More!

This year’s edition includes a focus on workforce housing as well as commuting data. With this information, economic developers, state agencies, and concerned citizens can work to develop plans to attract workers to the state.

The Wyoming Workforce Annual Report 2008 is designed to highlight many of the issues facing the state in the coming year. How we deal with these challenges will impact the future of Wyoming. Representatives from the Department of Workforce Services, the Department of Employment, and the Wyoming Workforce Development Council are dedicated to building a strong foundation for the state’s workforce and we are hopeful that this document will aid in that construction.
KEY POINTS

- From 2002 to 2007, Wyoming job growth was positive for all but one month, and faster than the U.S. average for all but two months.

- In 2007, Wyoming job growth slowed to a somewhat more moderate (and sustainable) pace of approximately 3.5%.

- Wyoming’s unemployment rate remains among the nation’s lowest (3.1% for March 2008).

- Although nearly 90% of private firms in the state employ fewer than 20 workers, larger firms employ more than 60% of the state’s private-firm workers.

- The percentage of full-time workers who enrolled in dependent health insurance, dental plans, and vision plans decreased by at least 10% between 2003 and 2006.

- The percentage of part-time employees in Wyoming increased from 22.7% in 2003 to 26.2% in 2006.

- The industry with the largest percentage of projected growth from 2004 to 2014 is mining (55.8%), followed by construction (45.5%).

- Wages for women continue to lag behind those for men, across all age groups.

- From 1994 to 2006, the percentage of nonresident workers in the state grew from 7.6% to 21.8%.

- Much of Wyoming’s current expansion – and the state’s ability to maintain that growth – is directly related to natural gas export capacity.

- Factors such as housing availability and prices, availability of labor (in-state and out-of-state), and health care will likely affect Wyoming’s economy and growth in the future.
Wyoming employment has been growing steadily for several years. Seasonally, employment peaks each June and is at its lowest point in January (see Figure 1). Wyoming’s seasonal pattern is largely driven by two industry sectors, construction and leisure & hospitality, both of which (Text continued on page 6)

![Figure 1: Wyoming Nonagricultural Wage and Salary Employment, January 2003 to December 2007](image)

![Figure 2: Nonagricultural Employment Growth (Percentage Change over Previous Year)](image)

![Figure 3: Wyoming Average Weekly Wage](image)

Strong wage growth was evident starting in 2005 and moderating in 2007 (see Figure 3). Bonuses cause wages to peak in the fourth quarter of each year.
employ their highest number of workers during the summer months.

When Wyoming’s job growth is compared to that of the United States from 2002 through 2007 (see Figure 2, page 5), Wyoming shows consistent positive job growth except during March 2003, and faster job growth than the U.S. average for all but two months (September and October 2004). Starting in late 2004, U.S. job growth accelerated to more than 2.0% in early 2006 and has since slowed to 0.9% in December 2007. In contrast, Wyoming job growth, driven primarily by natural resources & mining and construction activity rose to more than 5.0% in 2006. In 2007, Wyoming job growth slowed to a moderate pace of approximately 3.5%.

In second quarter 2007, local government, including public schools, colleges & hospitals, had the largest employment (42,510; see Figure 4) followed by leisure & hospitality (33,484).

Much of the increase in wage growth is related to rapid job growth in the high-paying sectors of mining and construction (see Figure 5). Wages apparently are being bid up as employers compete for a limited supply of labor.
Wages in Wyoming have risen steadily since the mid-1990s. In contrast, the percentage of workers in the state holding two or more jobs declined from 201 to 2004, possibly as a result of rising wages, which may allow workers to drop lower-paying secondary jobs (see Figure 7).

Wyoming’s lowest county unemployment rates are seen primarily in areas experiencing growth due to energy development. Although the state’s overall unemployment rate is typically lower than the national average (see Figure 8, page 8), some counties often exceed that average, as was the case in February 2008 (see Figure 9, page 8).

Several states in the northern Rocky Mountain region are experiencing relatively low unemployment levels (see Figure 10, page 8), which has led to competition for workers in Wyoming, particularly in high-demand occupations.

Only 10.4% of private firms in the state have 20 or more employees, but these firms employ more than 60% of Wyoming’s private-firm workers (see Figure 6). Nearly 90% of all private firms in Wyoming employ fewer than 20 employees. These firms represent 39.6% of all private-firm jobs in the state.

Wyoming Workforce Annual Report 2008

Figure 6: Proportion of Wyoming Private Firms by Employment Size

Figure 7: Percentage of Multiple Jobholders in All Industries, and Average Weekly Wages (Adjusted),
Second Quarter 1993 (1993Q2) to Fourth Quarter 2005 (2005Q4)

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Figure 8: Seasonally Adjusted Unemployment Rate

Figure 9: Unemployment Rate by Wyoming County, February 2008

Figure 10: Seasonally Adjusted Unemployment Rates by State, March 2008

**SUCCESS STORY**

**Upton Regional Industrial Park**

**Profile**

The 600-acre Upton Regional Industrial Park, located near Upton along the Burlington Northern Santa Fe Railroad, will serve as a transloading site for materials such as steel for new construction, cement, and ammonium nitrate to be distributed across the Powder River Basin. This transloading site will off-load materials from railroad freight cars and load the contents onto trucks for distribution.

**Workforce Challenges**

The Burlington Northern Santa Fe Railroad needed a new freight-handling option somewhere between Rozet and Newcastle. What seemed to be a logical choice, Gillette, was impractical due to existing coal traffic.

**Workforce Solutions**

A site formerly occupied by American Colloid northwest of Upton matched the needs of the railroad. This location is conveniently situated by the railroad, U.S. Highway 16 and Interstate 90 at Moorcroft. This site provides a solution to Burlington Northern and stimulates growth for other companies moving into the park.

**Results and Benefits**

The Burlington Northern Santa Fe Railroad has agreed to deliver up to 4,000 cars per year to the Upton Regional Industrial Park, and this number could double over time. Because of the deal with Burlington Northern, Orica, a commercial explosives company, has already built an ammonium nitrate terminal at the park and Bonneville Transloaders, Inc., is hauling material to Campbell County coal mines. Western Biomass Energy is operating a pilot cellulosic ethanol plant, and Materi Operating and Materi Inspection is working out of the park. Cement and chemical plants are expected to be added. In addition, the park will provide jobs that range in wages of $15 to $20 per hour.

With Wyoming’s tight labor market, Wyoming employers must be smart about recruiting and retaining valuable employees; offering quality benefits can help. In 2006, the Government Accountability Office found that although wages had risen, the increase was outpaced by the cost of providing benefits. This has impacted the number of employees enrolled in insurance and retirement plans.

Full-time employees were most likely to enroll in life insurance plans and part-time employees were most likely to enroll in long-term disability plans. Both groups were least likely to enroll in dependent health insurance plans and vision plans.

The percentage of full-time employees who enrolled in dependent health insurance, dental plans, and vision plans decreased by at least 10.0% from 2003 to 2006 (see Figure 11). Enrollment for part-time employees also declined during this time for several of the selected benefits. However, both short-term and long-term disability enrollments experienced

---


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Figure 11: Average Percentage of Wyoming Employees Who Were Offered Insurance and Retirement Plans and Who Chose to Enroll, 2003 and 2006

From 2003 to 2006, the percentage of full-time workers who were offered health insurance and chose to enroll declined from 84.5% to 74.9%. Similar decreases were seen for dependent health, dental, vision, and life insurance.
some growth for part-time employees.

Firms in state & local government, education & health services, and information were most likely to offer retirement plans (see Figure 13). Retirement benefits were most likely to be offered to full-time employees in state & local government, education & health services, and natural resources & mining. In contrast, firms in leisure & hospitality, other services, and construction were least likely to offer retirement benefits. Additionally, full-time employees in these firms were least likely to be offered a retirement plan. These industries typically have higher-than-average turnover, which makes benefits packages more costly.

Figure 12: Percentage of Employees in Wyoming by Full- and Part-Time Status, 2003 and 2006

<table>
<thead>
<tr>
<th>Year</th>
<th>Part-Time</th>
<th>Full-Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>22.7%</td>
<td>77.3%</td>
</tr>
<tr>
<td>2006</td>
<td>26.2%</td>
<td>73.8%</td>
</tr>
</tbody>
</table>


Figure 13: Percentage of Employers Offering and Percentage of Full-Time Workers Offered a Retirement Plan by Industry, 2006

<table>
<thead>
<tr>
<th>Industry</th>
<th>Companies Offering a Retirement Plan</th>
<th>Full-Time Workers Offered a Retirement Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Industries</td>
<td>77.8%</td>
<td>97.4%</td>
</tr>
<tr>
<td>Natural Resources &amp; Mining</td>
<td>46.4%</td>
<td>90.5%</td>
</tr>
<tr>
<td>Construction</td>
<td>24.7%</td>
<td>90.3%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>76.4%</td>
<td>80.5%</td>
</tr>
<tr>
<td>Trade, Transportation, &amp; Utilities</td>
<td>56.9%</td>
<td>85.8%</td>
</tr>
<tr>
<td>Information</td>
<td>38.2%</td>
<td>81.4%</td>
</tr>
<tr>
<td>Financial Activities</td>
<td>35.3%</td>
<td>89.8%</td>
</tr>
<tr>
<td>Professional &amp; Business Services</td>
<td>42.4%</td>
<td>82.2%</td>
</tr>
<tr>
<td>Education &amp; Health Services</td>
<td>57.0%</td>
<td>89.3%</td>
</tr>
<tr>
<td>Leisure &amp; Hospitality</td>
<td>42.8%</td>
<td>90.3%</td>
</tr>
<tr>
<td>Other Services</td>
<td>13.5%</td>
<td>81.4%</td>
</tr>
<tr>
<td>State &amp; Local Government</td>
<td>22.6%</td>
<td>89.3%</td>
</tr>
</tbody>
</table>
Industry Projections

From 2004 to 2014 in Wyoming, employment increases are expected in all industries (see Figure 14). The largest job increases are projected in education & health care (11,435) and mining (11,219).

The largest percentage increases are predicted in mining (55.8%); construction (45.5%); wholesale trade, transportation, & utilities (36.6%); and professional & business services (34.6%).

In 2014, education & health care will continue to provide the greatest share of jobs (20.9%) in the state, with leisure & hospitality and retail trade providing 12.4% and 11.1%, respectively.

Shares are predicted to increase most from 2004 to 2014 in mining (8.1% to 10.0%) and construction (7.7% to 8.9%).

Figure 14: Wyoming Statewide Long-Term Employment Projections by Industry, 2004-2014

<table>
<thead>
<tr>
<th>Industry Sector</th>
<th>2004 Employment</th>
<th>2014 (Projected) Employment</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry, Fishing, &amp; Hunting</td>
<td>10,000</td>
<td>20,000</td>
<td>95.2%</td>
</tr>
<tr>
<td>Mining</td>
<td>5,000</td>
<td>30,000</td>
<td>55.8%</td>
</tr>
<tr>
<td>Construction</td>
<td>25,000</td>
<td>50,000</td>
<td>100.0%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>10,000</td>
<td>15,000</td>
<td>50.0%</td>
</tr>
<tr>
<td>Wholesale Trade, Transportation, &amp; Utilities</td>
<td>15,000</td>
<td>25,000</td>
<td>66.7%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>10,000</td>
<td>15,000</td>
<td>50.0%</td>
</tr>
<tr>
<td>Information</td>
<td>5,000</td>
<td>10,000</td>
<td>100.0%</td>
</tr>
<tr>
<td>Financial Activities</td>
<td>2,000</td>
<td>3,000</td>
<td>50.0%</td>
</tr>
<tr>
<td>Professional &amp; Business Services</td>
<td>15,000</td>
<td>20,000</td>
<td>33.3%</td>
</tr>
<tr>
<td>Education &amp; Health Care</td>
<td>35,000</td>
<td>50,000</td>
<td>42.9%</td>
</tr>
<tr>
<td>Leisure &amp; Hospitality</td>
<td>15,000</td>
<td>20,000</td>
<td>33.3%</td>
</tr>
<tr>
<td>Other Services</td>
<td>5,000</td>
<td>10,000</td>
<td>100.0%</td>
</tr>
<tr>
<td>Public Administration (Includes Postal Service)</td>
<td>20,000</td>
<td>30,000</td>
<td>50.0%</td>
</tr>
</tbody>
</table>
**Occupational Projections**

Figure 15 shows occupational employment increases expected for 2014. Occupations with the greatest projected employment increases include construction & extraction (13,719 jobs), transportation & material moving (7,516), and office & administrative support (5,235).

The largest percentage increases are projected to occur in construction & extraction occupations (50.3%), computer & mathematical occupations (36.3%), and health care support occupations (36.2%).

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**Figure 15: Wyoming Employment by Occupational Major Group and Percentage Change from 2004 to 2014 (Projected)**

<table>
<thead>
<tr>
<th>Occupational Major Group</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction &amp; Extraction</td>
<td>50.3%</td>
</tr>
<tr>
<td>Transportation &amp; Material Moving</td>
<td>31.1%</td>
</tr>
<tr>
<td>Office &amp; Administrative Support</td>
<td>14.5%</td>
</tr>
<tr>
<td>Sales &amp; Related</td>
<td>18.3%</td>
</tr>
<tr>
<td>Installation, Maintenance, &amp; Repair</td>
<td>29.0%</td>
</tr>
<tr>
<td>Management</td>
<td>26.4%</td>
</tr>
<tr>
<td>Food Preparation &amp; Serving Related</td>
<td>15.2%</td>
</tr>
<tr>
<td>Healthcare Practitioners &amp; Technical</td>
<td>29.3%</td>
</tr>
<tr>
<td>Production</td>
<td>26.4%</td>
</tr>
<tr>
<td>Healthcare Support</td>
<td>36.2%</td>
</tr>
<tr>
<td>Building &amp; Grounds Cleaning &amp; Maintenance</td>
<td>21.6%</td>
</tr>
<tr>
<td>Education, Training, &amp; Library</td>
<td>14.5%</td>
</tr>
<tr>
<td>Personal Care &amp; Service</td>
<td>26.7%</td>
</tr>
<tr>
<td>Business &amp; Financial Operations</td>
<td>28.6%</td>
</tr>
<tr>
<td>Community &amp; Social Services</td>
<td>29.1%</td>
</tr>
<tr>
<td>Architecture &amp; Engineering</td>
<td>29.6%</td>
</tr>
<tr>
<td>Life, Physical, &amp; Social Science</td>
<td>21.8%</td>
</tr>
<tr>
<td>Protective Service</td>
<td>14.7%</td>
</tr>
<tr>
<td>Computer &amp; Mathematical</td>
<td>36.3%</td>
</tr>
<tr>
<td>Arts, Design, Entertainment, Sports, &amp; Media</td>
<td>16.4%</td>
</tr>
<tr>
<td>Legal</td>
<td>25.7%</td>
</tr>
<tr>
<td>Farming, Fishing, &amp; Forestry</td>
<td>20.9%</td>
</tr>
</tbody>
</table>

For complete industry and occupational projections, regional tables and figures, and detailed narrative, see [http://doe.state.wy.us/LMI/projections.htm](http://doe.state.wy.us/LMI/projections.htm).
Wyoming has received media attention for its gender wage gap, the difference between men's and women's wages, which is the largest in the nation. Wyoming's wage gap spans all occupations and age levels.

There are 272,668 people in Wyoming age 16 and over in the workforce. Of those, 54.1% are male and 45.9% are female. The average wage for men and women in Wyoming by age group in 2006 is as follows:

- Under 20:
  - Men: $0
  - Women: $0

- 20-24:
  - Men: $0
  - Women: $0

- 25-34:
  - Men: $0
  - Women: $0

- 35-44:
  - Men: $0
  - Women: $0

- 45-54:
  - Men: $0
  - Women: $0

- 55-64:
  - Men: $0
  - Women: $0

- 65+:
  - Men: $0
  - Women: $0

- Average, All Ages:
  - Men: $0
  - Women: $0

*Includes nonresidents for whom the age is not known.*
median earnings for male workers in Wyoming is $36,361 compared to female workers at $20,876 annually.¹

According to a Bureau of Labor Statistics Report, “By industry [nationally], women accounted for more than half of all workers within financial activities, education and health services, and leisure and hospitality in 2006. However, women were substantially underrepresented (relative to their share of total employment) in mining, construction, manufacturing, and transportation and utilities.”²

Part of the state’s gender-wage gap can be attributed to the (Text continued on page 16)

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¹ U.S. Census, 2006 American Community Survey.

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Of women who were age 25 to 29 and working in Wyoming in 1992, only 46.3% remained in the state’s workforce in 2005. By comparison, 58.7% of women who were age 30 to 34 and working in Wyoming in 1992 remained in the workforce in 2005.

In 1992, there were 1,654 more women in the age 30-34 cohort than in the age 24-24 cohort. By 2005, the difference between the two cohorts was 2,613 workers.
economic influence of typically male-dominated industries, particularly natural resources & mining. Additionally, the industries in which greater proportions of women work, such as education & health services, typically pay lower wages. Other factors, such as decisions to temporarily leave the workforce or work part time, may also influence the gender-wage gap. Even so, research suggests that a gender-wage gap cannot be fully explained by these factors.\(^3\)

\(^3\) Alexander, et. al., 2003, A Study of the Disparity in Wages and Benefits Between Men and Women in Wyoming.
**SUCCESS STORY**

*Climb Wyoming*

**Profile**
Climb Wyoming, a nonprofit organization, helps to move single mothers out of poverty by providing free job training so that women may enter construction and extraction trades as well as health care, office careers and more.

**Workforce Challenges**
Many single mothers who enter the Climb Wyoming Program in Cheyenne were previously living in poverty and not making a high enough wage to support their children. Many of these women have faced social and economic hardships such as absent fathers, drugs, public assistance, and jail.

**Workforce Solutions**
At the center of the Climb Wyoming model is group solidarity. Groups of single mothers move through Climb Wyoming programs together, and the group becomes the anchor to each individual’s success. According to an article in The New York Times regarding the program, “New skills can only go so far in changing a life; sometimes it takes a sisterhood.” The Climb Wyoming Program trains these women to enter occupations that are traditionally held by men, occupations that generally pay a higher wage for these women to support their families. The key to the success of these programs is combining job training with counseling.

**Results and Benefits**
More than 500 women have gone through one of Climb Wyoming’s programs, and about one-third of those women are working in nontraditional fields such as welding and truck driving. Two-thirds are working in office and medical work such as phlebotomy. The program is led by counselors who provide the training, and who help women deal with many of the life issues that they have faced. At the end of the program, women leave with new job skills, and new skills for coping with demanding social challenges.
December 2007 marked the 57th consecutive month (4 years and 9 months) of over-the-year job growth in Wyoming. However, there are barriers to economic growth that will be affected by policies related to pipeline capacity, labor availability, economic diversification, and housing availability.

**Natural Gas Production**

Much of the current economic expansion is directly related to natural gas production. The prices obtained by Wyoming suppliers...
are determined not only by national demand, but also by the ability to efficiently move produced gas to market through pipelines (capacity). When pipeline capacity is reached, prices can decline rapidly, reducing producer profitability and revenues from mineral royalties, taxes, and drilling activity (see Figure 24, page 18).

**Labor Availability**

During the 1990s, Wyoming growth rates lagged behind the rest of the region; at the end of the dot-com boom in 2000, Wyoming growth exceeded that of surrounding states. Industry is growing, workers are aging, youth are moving, and unemployment is low. In January 2008, Wyoming’s seasonally adjusted unemployment rate was 2.7%, its lowest since 1979 (Wyoming Department of Employment, Research & Planning). Strategies to find workers to fill vacancies include enticing youth to stay in the state, training workers with skill upgrades, recruiting from other industries, and recruiting workers from out of state.

**Economic Diversification**

According to the Wyoming Department of Administration and Information, Economic Analysis Division, Wyoming is the least diversified state in the nation in

(Text continued on page 20)

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**Figure 25: Monthly Average Opal and Henry Hub Spot Natural Gas Prices and Wyoming Rotary Rig Counts**

![Figure 25](https://www.theice.com/marketdata/naNaturalGas/naNatGasHistory.jsp)

Figure 25 illustrates the volatility of natural gas prices during the last six years, including the effects of Hurricanes Katrina and Rita. Note that the Opal (Wyoming) price was less than the Henry Hub (Louisiana) price for the entire time. When the differential — the difference in natural gas prices at the two trading hubs — is large, this indicates Wyoming supply exceeds takeaway capacity. A large differential represents a cost to the state because of potentially lost revenue.
The mining industry contributed over 30% of the state’s Gross Domestic Product (GDP) in 2005. Nationally, the mining industry’s contribution to the GDP was 1.7% during the same year.

**Housing Availability**

Wyoming has a housing shortage that intensifies the labor shortage. While housing prices increased steadily from 1997-2002 (7.7% average annual increase), the current economic growth accelerated prices during the period from 2002-2006 (11.5% average annual increase). Rapid increases in home prices can place additional strain on first-time

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**Figure 26: Over-the-Year Employment Change for Wyoming, Neighboring States, and the U.S., 1999-2007Q3**

Figure 26 compares annual employment growth rates for the U.S., Wyoming, and surrounding states (Montana, Idaho, South Dakota, Nebraska, Colorado, and Utah). Wyoming growth rates generally lagged those of the rest of the region in the early part of the decade. After the end of the dot-com boom in 2000, Wyoming growth greatly exceeded that of surrounding states. As the economies of those states began to recover in 2004, regional competition for labor increased. Because of the improving regional economy, Wyoming employers had greater difficulty filling positions in 2006 than in 2000 compared to employers in other states.
buyers and those with lower incomes.

The Wyoming Housing Database Partnership estimates that 5,345 potential renters were on waiting lists statewide in 2007 with nearly 28% of the total in Natrona County alone (see Figure 27). Recruitment efforts aimed at out-
(Text continued on page 22)
of-state workers have had some success, but if workers are unable to find suitable housing, they leave their new-found jobs and return to their home states.

**Health Care Availability**

As Wyoming’s population ages and the baby boom generation retires, the state will experience an increased need for health care services. Specifically, the state will likely need to recruit out-of-state nurses to fill the anticipated demand through 2014 (see Figure 30, page 23).

Additionally, the skills and training required within the state’s health care workforce will have to change to meet the changing needs of an older population. Between now and 2030, the gap between young and old is expected to grow to more than 100,000 (see Figure 31, page 23).
Figure 30: Comparison of the Number of Nurses Graduated from Wyoming Community Colleges and the University of Wyoming Estimated Number of Nurses Required to Meet Growth and Replacement Needs, 2006-2014

Data Sources: Wyoming State Board of Nursing license files, National Center for Education Statistics, and Wyoming Wage Records database.

Figure 31: Projected Population Growth for Wyoming, 2000-2030


Works Cited


Economic Analysis Division, Wyoming Department of Administration and Information.

U.S. Bureau of Economic Analysis.

The Wyoming Housing Database Partnership.