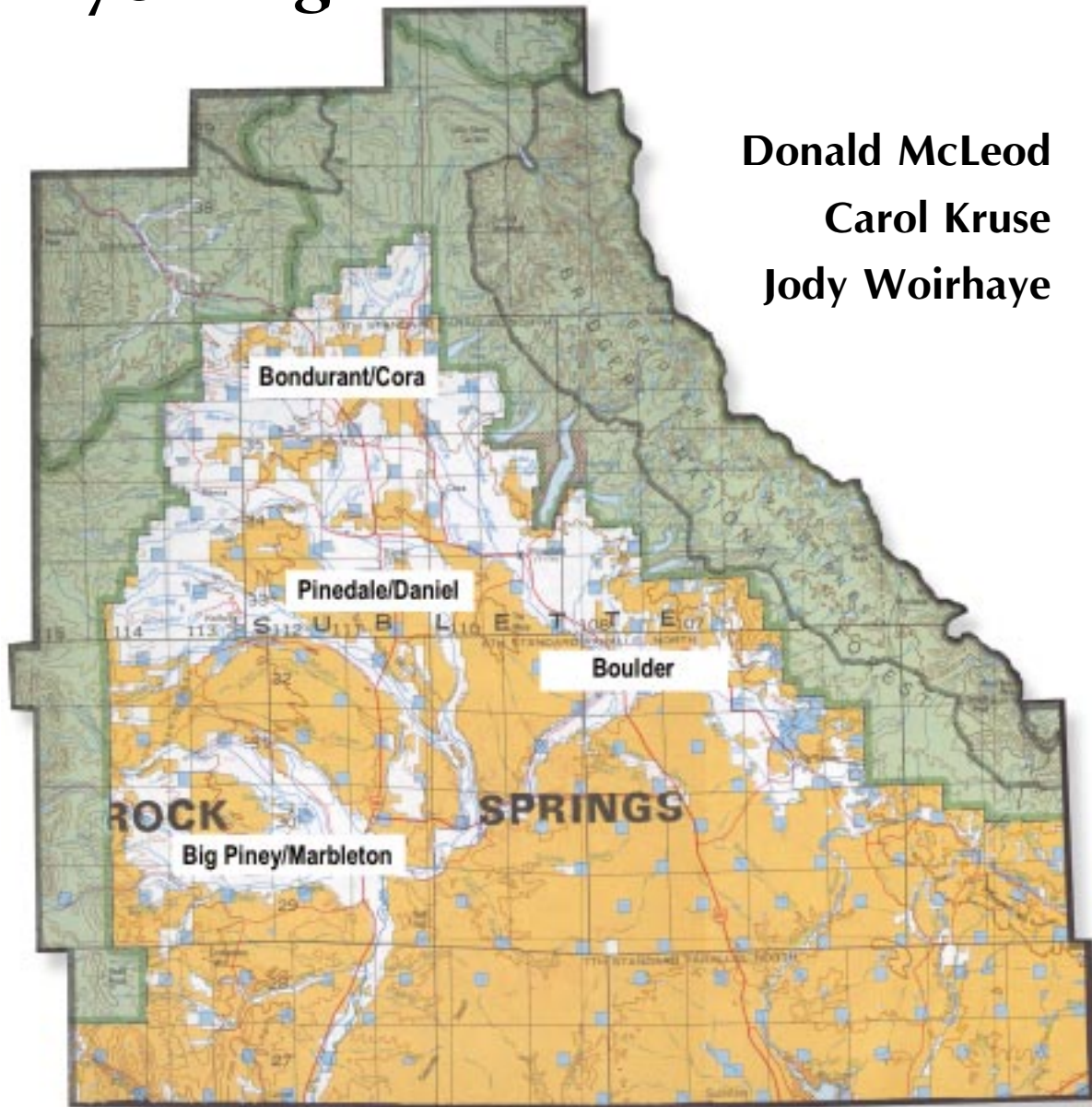


Results from a Land Use Survey in Sublette County, Wyoming

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B-1067
September, 1998

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The project was funded by the following, listed in order of monetary amount provided:

University of Wyoming Institute for Environment and Natural Resources

University of Wyoming Agricultural Experiment Station

University of Wyoming Office of Research

Editor: Diana Marie Hill-Chavez

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Executive Summary

Purpose of the research

Mountain counties in states neighboring Wyoming have experienced a high rate of growth in the past two decades. Counties west and north of Sublette County also have grown rapidly in both population and number of rural residences. Sublette County has been growing faster than the state average and is forecast to grow faster than the current growth leader, Teton County, in the near future.

Based on these growth trends, interest has been expressed in updating the county Master Land Use Plan. The University of Wyoming has been asked by the Planning and Zoning Commission to provide assistance in gathering information relevant to the updating process. Information presented in this document may be useful for county land-use decisions.

The following county concerns were addressed:

1. Preferences citizens have for land-use forms and structures, densities, and types of land uses.
2. Citizen expectations for the future of the county.
3. Citizen preferences for growth management strategies or land-use controls.

Importance of the research

The work performed is important for several reasons:

1. Mountain counties in Wyoming are growing rapidly, and the University of Wyoming can provide useful research to assist in rural land-use planning.
2. A comprehensive population has been surveyed and constituencies supporting various land-use management approaches have been identified.
3. Respondents indicated that management of private land was at least somewhat of a public matter, which is evidence of public support for land-use planning in the county.
4. Pictures of developments and agricultural land were used as the basis for eliciting land-use and development preferences.
5. Survey responses indicate that there are strong preferences for conserving agricultural lands and the associated open space, regardless of who owns the land.
6. The respondents, other than those holding agricultural lands, had supported a federal conservation easement program. Those holding agricultural lands did not favor enrollment in a federal program.

7. Nonresidents make up a majority of the landowners in the county, and nonresident landowners may be likely in-migrants to Sublette County.
8. Nonresidents have markedly different social and economic characteristics.
9. Other counties may model their own data collection activities after the Sublette County efforts.

Research usefulness

Several key uses of the research work have been identified:

1. Local officials need to know what the preferences of landowners and residents are concerning land uses and rural residential development in order to develop a land-use plan that citizens support.
2. The preferences can be used to construct land-use plans to address growth through zoning, regulating subdivisions, or cluster development.
3. Wildlife habitat, scenery, and recreation sites are resources that survey respondents identified as important and that could be protected in the land-use planning process.
4. Some differences in land-use preferences were identified for various areas of the county. A land-use plan may be crafted to address area specific issues.
5. Affordable housing has been identified as being in short supply, and there appears to be support for having developers supply some affordable housing.
6. Respondents expect the county to continue to grow rapidly. They do not think the growth will necessarily reduce the quality of life in the county. The county may be able to absorb growth depending upon how the population is arranged on the county landscape.
7. Nonresident landowners have different expectations than residents concerning the future importance of oil, gas, and mineral activities. An opportunity exists for the county to provide information to newcomers about sources of fiscal operating revenues.
8. Possible future trends have been identified. Residents intend to stay in, and nonresidents to move into, the county. Only half of the residents and about 10 percent of nonresidents intend to work in the county. Given an average age of 52 years, a significant portion of Sublette County's future residents may be retirees.

Research approach

Focus groups were assembled representing a wide range of individuals from four regions in the county. Worksheets were completed by participants based on percep-

tions of slides of rural landscapes, of development types, and of growth management options. Those responses and group discussions were used to develop issues and concerns to be addressed in a mail survey.

The survey went through several rounds of review both by the county and at the University of Wyoming. The Dillman technique for administering a mail survey was used.

Property tax rolls and 1996 Sublette County telephone books were used to construct a list of potential respondents. Every effort was made to contact all county households and all property owners, regardless of place of residence.

Research outcomes

Outcomes are given for selected survey findings. Findings are reported on a section-by-section basis, corresponding to the format of the survey. Each set of responses per survey question is considered by total response, by within- or without-county responses, and by the four within-county areas. The areas are loosely defined as:

- Bondurant/Cora
- Pinedale/Daniel
- Big Piney/
Marbleton
- Boulder

Fifty-four percent of all Sublette County private property owners live outside the county. Twenty-seven percent live outside of the state.

A 52 percent response rate occurred.

A higher percentage of nonresidents responded than residents.

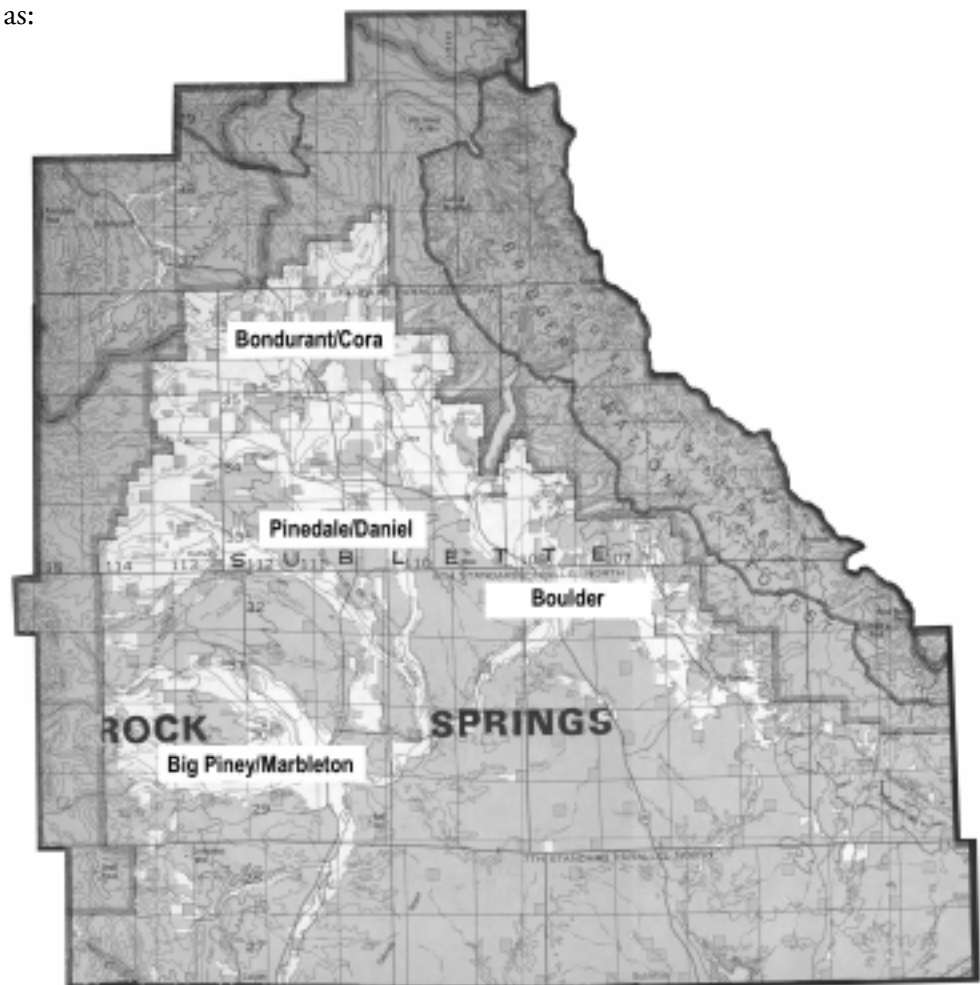


Figure 1. Sublette County survey areas.

Preferences for development type

A majority of all respondents preferred landscaped subdivisions to un-landscaped, regardless of frame or mobile home units.

Preferences for amount of development (density)

Several pictures were provided showing increasing amounts of development on a forested foothill. Eighty percent of the respondents, regardless of place of residency, indicated that the single house development was an appropriate amount of development for the landscape. Seventy percent responded that the four-house development was appropriate. The earth-tone colors of the latter may have had an influence on respondents' perceptions. The clustered subdivision was deemed unsuitable for the landscape.

A majority of all respondents indicated both that a lack of affordable housing existed in the county and that developers should be required to build some affordable housing.

Preferences for types of commercial development

All groups preferred western motif commercial development with businesses aligned along a main street preferred to a modern strip mall, even if the former appeared to lack parking space.

Private land management preferences

Over 70 percent of all respondents indicated that the management of private land was at least somewhat a public matter.

Thirty-three percent of nonresident respondents indicated that private land management was at least equally a public and private matter.

Preferences for land management options

A majority of all respondents favored the following land management options in order of highest to lowest percent:

- Regulating subdivisions

- Zoning

- Cluster development

Private land use and potential willingness to sell

Three pictures of agricultural land, irrigated cropland, sub-irrigated rangeland, and mountain rangeland were given to respondents as examples of land-use choices of agricultural, residential, or recreation-wildlife.

A majority of all respondents stated that agriculture was the most preferred land use for the irrigated cropland.

A majority of all respondents stated that recreation-wildlife was the most preferred land use for the subirrigated rangeland. The exception was Boulder, where a majority of the respondents preferred residential land use.

Resident households narrowly chose agricultural use over recreation-wildlife while nonresident respondents chose recreation-wildlife use for the mountain rangeland, respectively.

Land ownership was not tied to land-use preferences. All of these results held, regardless if a “parcel of land in the county” or “your land in the county” was being considered.

Less than 30 percent of respondents were willing to sell the lands described above if approached. Of those willing to sell, average prices ranged from \$1,600 to \$9,500 per acre for between 500 to 600 acres. Selling price greatly exceeded the productive value of the land.

USDA conservation easements

A majority of all non-agricultural landowners and non-landowners indicated that agricultural landowners ought to enroll in a USDA conservation easement program. Agricultural landowners were split. Out-of-county respondents favored enrollment, and in-county respondents were against enrollment, particularly in the southern half of the county.

Those willing to enroll sought annual payments of between \$200 and \$450 per acre to enroll an average of 400 to 1,000 acres for between 12 and 29 years.

Respondent expectations for Sublette County

Eighty-eight percent and 64 percent of resident and nonresident respondents, respectively, intend to live in Sublette County in 10 years.

Fifty-five percent and 16 percent of resident and nonresident respondents, respectively, intend to be employed in Sublette County in 10 years.

Resident respondents tended to believe that oil and gas will be more important than the hospitality industry in the county in 10 years. This is primarily due to responses from the southern portion of the county. Nonresident respondents indicated that the hospitality industry would be more important than the oil and gas industry in 10 years.

Resident and nonresident respondents tended to believe that the hospitality industry will be more important than agriculture in the county in 10 years. The Big Piney/ Marbleton area was the exception.

Oil and gas combined with agriculture was reported by a majority of all respondents as being more important in 10 years to the county's economy than the hospitality industry.

A majority of all respondents would reside in Sublette County even if the population increased beyond 14,000 people.

The most common population estimate for Sublette County 10 years in the future was 10,000 people. Approximately 65 percent of respondents felt that if their estimate of population growth occurred, the quality of life in the county would not change.

Reasons for residing in Sublette County

Respondents were asked to indicate which reasons (as many as applied) listed motivated them to reside in the county. A majority of residents indicated these reasons were most important, listed in order from most to least:

- Rural lifestyle
- Scenery*
- Low population
- Recreation opportunities*
- Air and water quality
- Safety

*Nonresidents selected the categories with asterisks.

Respondent demographics

The average respondent, regardless of place, tended to

- Own property in the county for over 17 years
- Be 50 to 55 years of age
- Obtain primary source of income from wages and salaries

Compared to resident respondents, nonresidents tended on average to exhibit the following differences:

- Higher incomes
- More formal education

- Derive very little of their income from activities within the county
- Derive more of their income, than residents, from investments or pensions
- Own much smaller parcels of property in the county

Importance of results

Apparently there are grounds for developing different master land-use plans for the northern part of the county as compared to the southern. Resident and nonresident respondents indicated some differences. Interestingly, there are more same than different majority responses, regardless of place of residence. The responses provided above may permit some insight into current and future resident preferences and perceptions of the county. This, in turn, may assist county officials and citizens in anticipating and coping with changes in county land use.

Results from a Land Use Project in Sublette County, Wyoming

Purpose of the research

Change has taken place and continues to occur in Sublette County. An interest in updating the County Master Land Use Plan has been expressed. The Sublette County Planning and Zoning Commissioners and the Sublette County Planner requested that the University of Wyoming's Institute for Environment and Natural Resources (UW-IENR) assist with information gathering. The planner wanted to determine county landowner and resident preferences for future growth and construction in Sublette County. The commissioners and planner asked the University for assistance in acquiring input from county residents and landowners about their future vision for the county.

The survey of Sublette County landowners and households provides Sublette County officials and citizens information that may be useful in making decisions concerning present and future land use. Hopefully, this report will inform the county debate concerning preferences for land use and the amount and type of future residential growth.

Rationale for the research

Recent population trends in the Rocky Mountain West, Wyoming, and Sublette County in particular, indicate that development is occurring in the Rocky Mountain region at a faster rate than elsewhere in the United States. Figure 2 shows that from 1980 to 1996, Colorado, Idaho, and Utah experienced 10 to 20 percent increases in population, and Montana and Wyoming grew rapidly in the 1990s (U.S. Census, 1997). Wyoming grew at a rate of nearly 6 percent between 1990 and 1996. Utah, Colorado, and Montana ranked first, third, and fourth nationally, respectively. The growth of real estate sales in 1992 (Wright, 1993) is evidence that housing starts also are growing rapidly in the region.

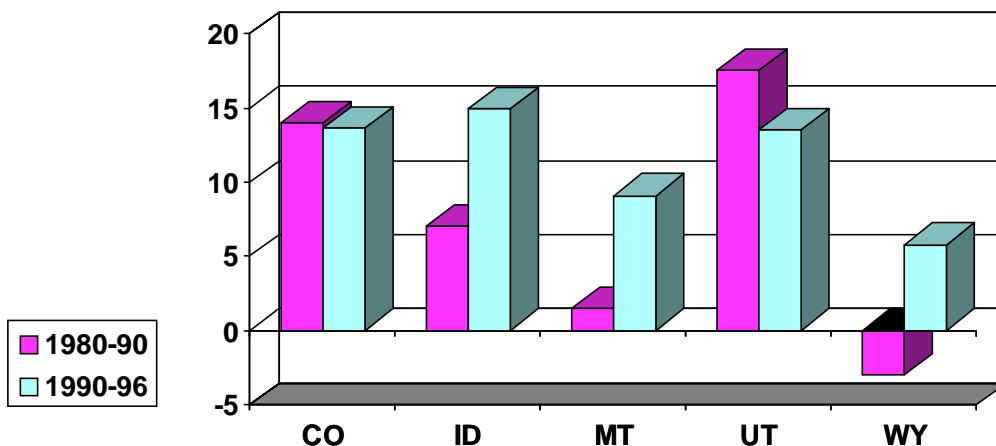


Figure 2. Percent change in population of five Rocky Mountain states, 1980 to 1996

Not all counties in these states have experienced the same rate of population growth. Counties containing or bordering national forests and wilderness areas tend to gain population faster than non-mountainous counties (Rudzitis and Johansen, 1989). Indeed, Sublette County grew by 15.2 percent from 1990 to 1996 (Wyoming Department of Administration and Information Data Center, 1997), compared with 5.8 percent growth statewide. The county is expected to experience an *additional* 10 percent growth by the year 2001 (Wyoming Department of Employment, 1997, as quoted in the *Casper Star Tribune* 5/7/97). That will be more than a 20 percent increase in population over a 10-year period, in one of Wyoming's most rural counties.

Figure 3 shows the 1980 to 1996 growth rates in Sublette County (Sublt) and the five contiguous Wyoming counties: Fremont (Frmt), Lincoln (Lncn), Park, Sweetwater (Swtwtr), and Teton. All but Sweetwater County have grown at higher rates than the state as a whole. Sublette County grew faster than any other county in Wyoming, with the exception of Teton. Projections from the Wyoming Department of Administration and Information (1997) are that Sublette County will grow at a faster rate than Teton County over the next five years.

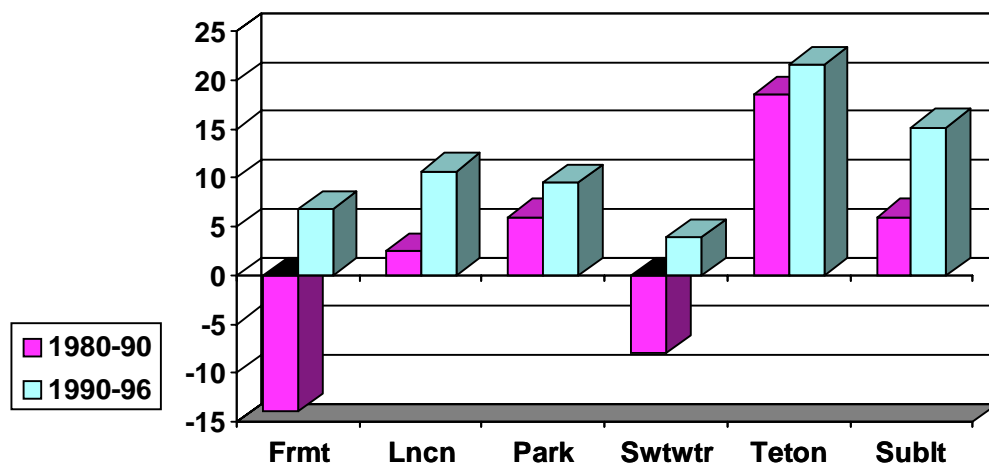


Figure 3. Percent change in the population of six western Wyoming counties, 1980 to 1996

Recent growth along the front range of Colorado, in the Gallatin Valley of Montana, and along the foothills of the Wasatch Mountains in Utah suggest that open space, particularly that which offers scenic vistas, is a valuable commodity for attracting immigration and housing construction (Williams and Jobes, 1990; Rasker, 1994). Open space found on private, primarily agricultural, land is the principle source of land for development. Like many other counties in the Rocky Mountain region, Sublette County is predominately publicly-owned land; only 15 percent of Sublette

County's land area is privately owned. The projected population growth will create pressure to develop Sublette County's agricultural open land.

Other factors can contribute to development pressure on agricultural lands in mountain counties. Cyclic cattle prices can eliminate producers' profits during the low ends of the cycle, and producers may have to sell off some assets to remain solvent. The residential or commercial development value of agricultural lands can be higher than the agricultural production value. If adjacent property owners have sold their land for development, the remaining producer may have to cope with nuisance complaints from the new neighbors. High estate taxes can force heirs to sell off assets.

The rising rate of land fragmentation due to residential development on private land has important consequences for the quantity of open space, the economic base of rural Rocky Mountain counties, and the quality of life of county residents. Economic benefits of open space to residents include income from extractive or recreational industries, wildlife hunting and viewing, and revenue from tourism attracted to scenic view-scapes.

Wildlife are adversely affected by the fragmentation of agricultural lands caused by development of dispersed rural residences. Wildlife habitats are reduced, and migratory corridors can be blocked. Access to public lands that was once available across open space may no longer be available across residential properties. Congestion and over-use may result at public entry points. These impacts are particularly prevalent when ranches are subdivided into "ranchettes" or rural subdivisions (Knight, Wallace, and Riebsame, 1995).

Fragmentation leads to irreversibilities that limit future opportunities for agricultural production, recreational use, and wildlife habitat, on both private *and* public lands. Development of private lands increases the pressure on public lands to support wildlife, recreation, range, and scenic vistas. How public lands are managed for fire, timber harvest, recreation, and wildlife is affected by development on adjacent private lands. The limitation of future choices becomes increasingly important as public lands in the Rocky Mountain region experience increasing conflicts among the variety of consumptive and non-consumptive users.

The importance of this issue is reflected in efforts to conserve agricultural land at the state level (Oregon, Delaware, and Pennsylvania, for example), at the regional level (Western Governors' Association), at the federal level (1996 Farm Bill), and by private entities (American Farmland Trust, Wyoming Open Lands, and Sonoran Institute). National attention to the importance of and threat to open space has been heightened by a *National Geographic* article (Long, Nov. 1996) about development along the front range in Colorado. Governor Geringer of Wyoming has imple-

mented an Open Space Initiative to help local communities and individuals define goals and manage for the future (*Ways to Conserve Wyoming's Wonderful Open Lands*, Wyoming Governor's Office, 1997). Baseline information concerning social perceptions of and preferred management options for open spaces can provide useful input for rural community planners and landowners.

Scope of the report

This document reports the results of the University of Wyoming Land-Use Survey for Sublette County, Wyoming, which was sent to Sublette County property owners and residents in late 1996. Separate reports will be, or have been, provided for the Geographic Information Systems (GIS) and costs of development components of this research.

The setting: Sublette County, Wyoming

Located in western Wyoming, Sublette County is typical of many Rocky Mountain counties. The Wind River Mountains along the eastern border and the Wyoming Range on the west provide spectacular “wrap around” mountain scenery from almost any point in the northern two-thirds of the county. The Wind River Range includes several popular wilderness areas, the state's tallest peaks, many trails, several glaciers, and hundreds of lakes. The county lies within the greater Yellowstone area. The county seat of Pinedale is less than two hours from Jackson Hole and Grand Teton National Park by car, and three hours from the south entrance of Yellowstone National Park. These are exactly the amenities sought by the latest immigrants to the Rocky Mountain West.

Agriculture, mining extraction, and services have traditionally constituted the county's economic base. Personal income from jobs in the mining industry declined from 1979 to 1994 (United States Census, 1997). Conversely, earnings from the construction, service, and retail sectors rose in the same period. All earnings have been deflated to 1979 values as a baseline. These trends substantiate growth in home building and in-migration, combined with an increased demand for amenity-related services and the decline in non-recreational, natural resource-based extractive industries.

Figure 4 illustrates personal income trends in Sublette County from 1979 to 1994. The income sectors depicted in the table include: **mining**, which in Sublette County is primarily oil and gas extraction; **service**, such as recreation, amusement, lodging, and repair services; **retail**, such as grocery or apparel stores, hardware stores, and pharmacies; **construction** (Constr.) of both private and commercial facilities and highways; and **agriculture** (Agric.), which includes only agricultural production, not agricultural service incomes.

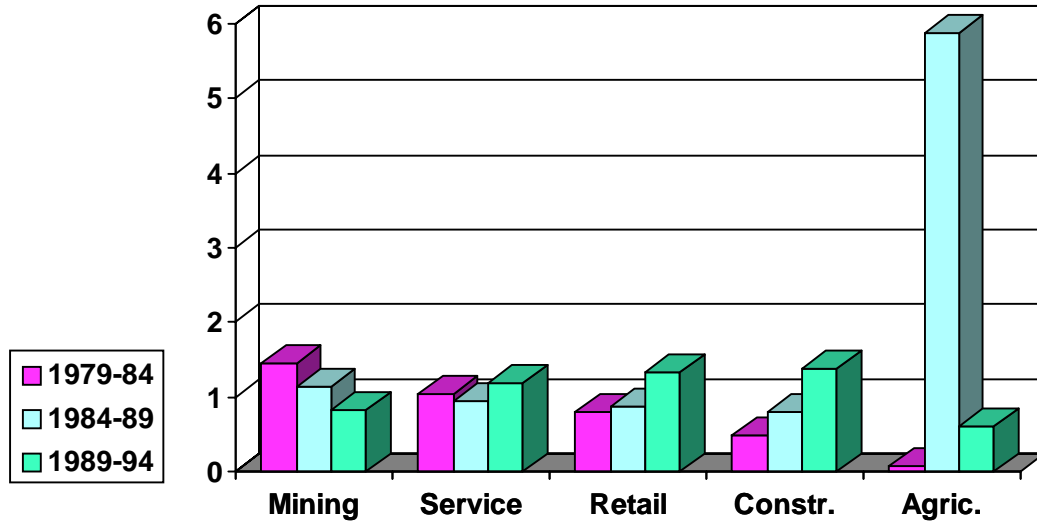


Figure 4. Percent change in Sublette County earnings by sector, 1979 to 1994

Research methodology

Researchers began obtaining Sublette County landowner and resident preferences for development and growth by holding focus group sessions to determine which issues were specific to Sublette County. The focus groups consisted of eight to 12 participants. They represented a cross-section of county residents with respect to age, gender, occupation, and length of residence. Four focus groups were assembled, one each in the following loosely-defined areas of the county: Bondurant/Cora, Pinedale/Daniel, Big Piney/ Marbleton, and Boulder. Group discussions and individual responses during the focus groups were used to define population growth issues and other concerns specific to county residents, and to capture any within-county differences that might exist.

Slides of various landscapes which might be seen in Sublette County to elicit concerns about development were shown. The pictures consisted of forested mountain, range, meadow, and broken lands, some with different amounts of residential or ranch structures. Participants were asked to list what did and did not appeal to them about each picture; if there was anything they were glad was missing from the picture; and to rank their first, second, and third most-preferred use for that type of land. Participants from the northern, mountainous parts of the county preferred photographs with mountains and trees. Those from the southern, open plains areas favored photographs with broad, distant views.

Next, focus-group members were shown a series of slides beginning with a scene of cattle grazing in a mountain pasture. The cattle were then removed through computer simulation, and different types and amounts of housing and roads were added. Focus-group members responded to the different types and amounts of development,

as well as arrangement, size, and design of buildings and roads. Housing and roads that blended into the landscape were preferred.

Finally, the groups were shown a series of slides with brief explanations of eight different public, private, and part public and part private growth management strategies. Participants were asked their views on each approach, and listed what they perceived as the strengths and weaknesses of each strategy. Most participants preferred local rather than federal control. They also preferred zoning and subdivision regulation to other growth management strategies.

Focus group information was used to design questions for the “University of Wyoming Land Use Survey for Sublette County, Wyoming,” which was drafted in the fall of 1996. Successive drafts were reviewed by UW faculty from various departments who have extensive public survey design expertise.

In an effort to contact all households of those living in or owning property in Sublette County, a mailing list of all property owners and residents in the county phone books who were not listed on the property tax rolls, was compiled. A letter was mailed early in November, 1996, to everyone on the mailing list. The letter stated they would be receiving a land-use survey within a week, and explained its purpose and importance. The surveys were mailed in mid-November with a cover letter again explaining the purpose and importance of the research. Postcard reminders were mailed a few days later. Early in December a second survey, with a cover letter, was mailed to everyone on the mailing list who had not returned a survey. This approach follows the Dillman (1979) design method for mail surveys.

Survey statistics

More than half (54 percent) of the property owners on the Sublette County property tax rolls do not live in Sublette County. Approximately half of those non-resident landowners, or 27 percent, live elsewhere in Wyoming. The other half (27 percent) live in 46 other states and seven foreign countries.

Figure 5 shows the percent of property owners living in various geographic areas (Total); those living in Sublette County (Sublt Co); those living elsewhere in Wyoming (Rest of Wyo), which is further broken down by those living in the five bordering counties of Fremont, Lincoln, Sweetwater, Park, and Teton (Nearby) and those living in all other Wyoming counties (All Other); and those living in 46 other states and seven foreign countries, again broken down further by those living in the seven contiguous states of Utah, Idaho, Montana, North and South Dakota, Nebraska, and Colorado (Nearby) and those living in all other states and foreign countries (All Other).

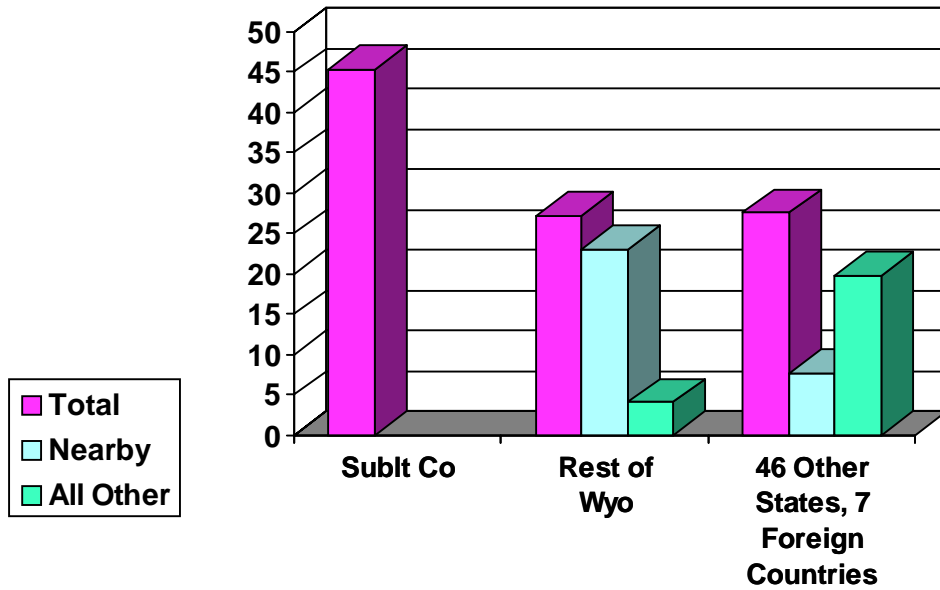


Figure 5. Percent of Sublette County property owners by geographic location

A total of 4,493 surveys was distributed in mid-November, 1996. Three thousand eight hundred eleven were mailed to Sublette County property owners and 682 were mailed to non-property-owning households of the county. Two hundred eighty-two surveys were returned with undeliverable addresses, 220 of which were non-property-owning (npo) county households. In total, there were 4,211 possible respondents, of which 3,749 were property owners and 462 were non-property-owning households. Figure 6 illustrates that 52.4 percent of the 4,211 surveys, or 2,205, were completed and returned.

4,493 surveys mailed	3,811 property owners	682 npo households
<u>- 282 undeliverable addresses</u>	<u>- 62 property owners</u>	<u>- 220 npo households</u>
4,211 possible respondents	3,749 property owners	462 npo households

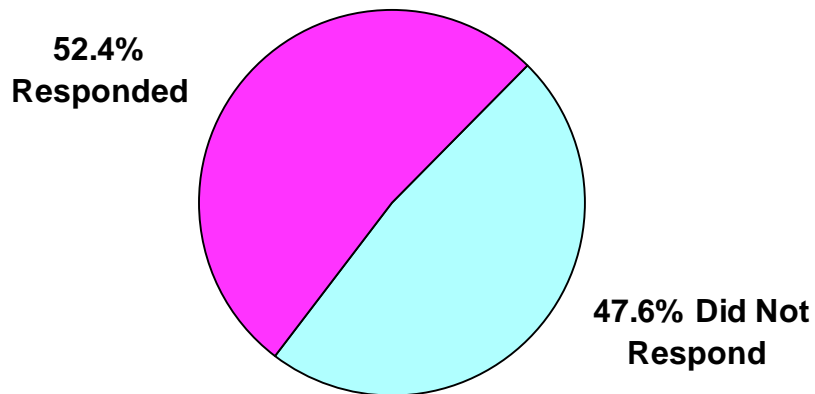


Figure 6. Percent of possible responses completed and returned

The percent of responses received by geographic location is shown in Figure 6. All percents are calculated as the number returned compared to the number of possible survey responses for that location (total number sent minus non-deliverables). Approximately 46 percent of all possible Sublette County (Sublt Co) households responded. This figure includes both resident property owners and non-property-owning households. By comparison, 59 percent of all property owners *not living* in Sublette County returned their surveys. Figure 7 shows that 57 percent of Sublette County property owners residing in counties surrounding Sublette County returned completed surveys (Nearby Co), 65 percent living of Sublette County property owners residing in all other Wyoming counties returned completed surveys (All Other Co), 61 percent of all Sublette County property owners living in the seven states surrounding Wyoming returned completed surveys (Nearby St), and 59 percent of Sublette County property owners living in all other states and foreign countries returned completed surveys (All Other States, 7 Foreign Countries).

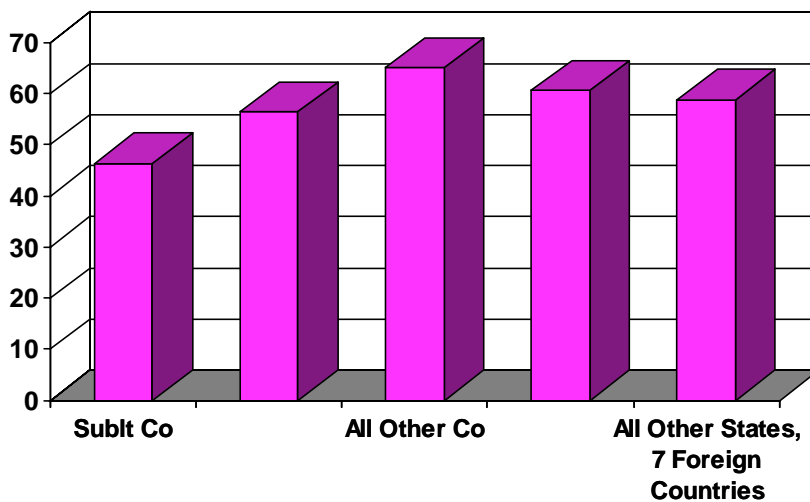


Figure 7. Percent of possible responses received by geographic location

Thirty-seven percent of the possible non-property-owning households of Sublette County returned completed surveys. This may be lower than the actual rate as this group was difficult to construct. Nearly half (49 percent) of property owners residing in the county returned completed surveys. This overall response rate is for the entire population and not just a sample. Concerns about the validity of the results arise when the response rate is below 60 percent. Census data for Sublette County age and income levels was compared with those of the respondents. No significant difference between the two was found.

Comments received on blank surveys, by phone, and by mail indicate that a substantial number of non-property-owning households may not have believed their input was appropriate because they do not own land. Similarly, a substantial number of

property-owning non-residents may not have believed they should respond to the survey because they do not live in the county.

Notable response differences between those claiming primary residency in the county and those claiming primary residency elsewhere are discussed when they arise. Similarly, differences are noted in responses between residents living in each of the areas within the county.

Discussion will be limited to general information from survey questions, which may be useful for analysis by Sublette County officials and citizens in the context of assessing future development options.

Survey responses

Section 1: Preferences for development type

Survey respondents were asked to answer several questions relating to each of four color photographs showing different types of development: a landscaped trailer court, an unlandscaped frame house subdivision, an unlandscaped trailer court, and a landscaped frame house subdivision. Tables 1.1 to 1.3 show the responses. Responses of all participants are noted first. Responses are then provided according to whether or not the respondents claimed Sublette County as their primary residence. Lastly, the number of responses from Sublette County residents is detailed by the area of the county (based on zip codes). All responses are expressed as a percentage of total responses to that question.

Table 1.1 Responses to the question, “In your opinion, would this development improve the appearance of the landscape?” Circle one. YES NO

Development Type	Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
Landscaped trailer court	25	75	27	73	22	78	15	85	22	78	46	54	21	79
Unlandscaped subdivision	11	89	12	88	11	89	2	98	10	90	22	78	8	92
Unlandscaped trailer court	5	95	5	95	4	96	0	100	5	95	9	91	6	94
Landscaped subdivision	69	31	71	29	68	32	47	53	69	31	87	13	54	46

Table 1.2 Responses to the question, “Would you want your family to live in this type of development?” Circle one. YES NO

Development Type	Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
Landsaped trailer court	19	81	21	79	17	83	13	87	16	84	35	65	24	76
Unlandscaped subdivision	13	87	14	86	12	88	5	95	11	89	25	75	14	86
Unlandscaped trailer court	5	95	6	94	4	96	2	98	4	96	9	91	10	90
Landsaped subdivision	64	36	67	33	72	28	48	52	68	32	80	20	44	56

Table 1.3 Responses to the question “Would you prefer to see more developments of this nature in the county?” Circle one. YES NO

Development Type	Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
Landsaped trailer court	19	81	22	78	17	83	11	89	19	81	36	64	20	80
Unlandscaped subdivision	12	88	14	86	11	89	6	94	11	89	24	76	14	86
Unlandscaped trailer court	5	95	7	93	4	96	1	99	6	94	10	90	10	90
Landsaped subdivision	64	36	64	36	64	36	41	59	64	36	78	22	50	50

Section 1 Summary: *Landscaping increased the acceptance and appeal of residential development, regardless of structure type, for all respondents. Landsaped trailer courts were preferred to non-landscaped frame house subdivisions. There were no notable differences between resident and non-resident responses, or among responses from households in various areas of the county.*

Section 2: Preferences for amount of development (density)

Survey respondents were asked to view three photographs showing different amounts of development on several rural acres and to answer questions about each development density. All photographs depicted approximately the same size acreage. Respondent preferences are shown in Tables 2.1 and 2.2. Preferences are expressed as percentages of the total number of responses for each question.

Table 2.1 Responses to the question, “Do you feel this is an appropriate amount of development for the landscape?” Circle one. YES NO

Development Density	Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
1 house	81	19	82	18	81	19	94	6	81	19	78	22	88	12
4 houses	70	30	68	32	73	27	53	47	67	33	77	23	63	37
Clustered subdivision	15	85	14	86	15	85	11	89	13	87	18	82	4	96

Table 2.2 Response to the question, “Would you want your family to live in this development?” Circle one. YES NO

Development Density	Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
1 house	85	15	85	15	85	15	89	11	86	14	82	18	78	22
4 houses	69	31	67	33	71	19	52	48	68	32	75	25	55	45
Clustered subdivision	15	85	15	85	15	85	10	90	13	87	19	81	8	92

Section 2 Summary: *The lowest development density was preferred by all respondents. No differences were noted between residents and non-residents. Moderate density was only slightly less acceptable, possibly influenced by the dwelling color blending with the background. The high-density development was the least preferred choice.*

Section 2a: Affordable housing

Respondents were asked their beliefs about the availability of affordable housing, policy preferences regarding affordable housing, and beliefs about their children's future in Sublette County. Responses to the first three questions are shown in Tables 2a.1 to 2a.3. Responses to question 2a.4 will be discussed in the section 2a summary.

Table 2a1 Responses to the question, "Do you believe there is a lack of affordable housing in your community?" Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
56	44	64	36	53	47	57	43	70	30	59	41	75	25

Table 2a2 Response to the question, "Do you believe residential developers should be required to build at least some affordable housing?" Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
60	40	61	39	58	42	60	40	61	39	66	34	61	39

Table 2a3 Response to the question, "Do you believe children of current residents (including your own) will remain in Sublette County to raise their families?" Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
34	66	32	68	35	65	37	63	29	71	35	65	29	71

Section 2a Summary: *A majority of all respondents believe there is a shortage of affordable housing in Sublette County, and that developers should be required to provide some affordable housing. A majority also believe that Sublette County's children will not remain in Sublette County to raise their children. The high cost of living, the lack of employment, and the unavailability of affordable housing were given as reasons.*

Section 3: Preferences for types of commercial development

Survey participants were asked to indicate their preferences for the type of commercial development occurring in Sublette County now and in the future. Tables 3.1 and 3.2 report those preferences. Responses are expressed as the percent of total responses for each category.

Table 3.1 Response to the question, “Is the commercial development occurring right now in Sublette County more similar to Picture A or Picture B?” Picture A (modern strip mall) Picture B (western motif)

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
34	66	32	68	35	65	37	63	29	71	35	65	29	71

Table 3.2 Response to the question, “Which type of commercial development would you prefer to see in Sublette County, Picture A or Picture B?” Picture A (modern strip mall) Picture B (western motif)

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% A	% B	% A	% B	% A	% B	% A	% B	% A	% B	% A	% B	% A	% B
24	76	27	73	21	79	23	77	21	79	41	59	29	71

Section 3 Summary: Responses show residents perceive current commercial development is of the western motif. All respondents prefer that motif for future commercial development. Availability of parking did not seem to be a factor, since the western motif photograph showed only parallel street parking available, while the strip mall was bordering a parking lot.

Section 4: Private land management opinions and preferences for management options

Survey participants were asked to express their opinions about the degree of private and/or public authority for private land management. Their opinions are reported in Table 4.1. All responses are expressed as percentages of the total number responding to the question.

Table 4.1 Response to the question, “Do you feel the management of private lands is entirely a private matter, mostly a private and somewhat a public matter, equally a private and public matter, mostly a public and somewhat a private matter, or entirely a public matter?”

Opinion	Total response %	Resident %	Non-resident %	Bondurant/ Cora %	Pinedale/ Daniel %	Big Piney/ Marbleton %	Boulder %
Entirely private	21	26	16	24	24	37	26
Mostly private, somewhat public	52	54	52	49	56	49	57
Equally public, private	24	19	30	23	19	12	18
Mostly public, somewhat private	2	1	2	4	1	1	0
Entirely public	1	0	1	0	0	1	0

Survey participants were asked to indicate their preferences for land and growth management options. Four options were listed. The options were described, rather than named, to avoid introducing any bias associated with the names. Respondents were asked to circle **Favor** or **Do Not Favor** after each strategy. The options are typed below in *italics*; the policy name, which was **not** shown on the survey, is typed in **bold**. Table 4.2 identifies the percent of respondents favoring each policy option.

Regulating subdivisions:

An ordinance that governs the ways in which a development is designed. Standards are set for parcel divisions, street locations, and utilities, in addition to guarantees that development will occur only according to how it was approved.

Zoning:

Local governments have authority over land use. Land is typically divided into areas that have specific and differing requirements to regulate the land use and building placement, size, and use.

Purchase of development rights (PDR):

Local governments allow land owners to separate their development rights from their other ownership rights. Those development rights then can be sold to any interested party (an individual or group). Thereafter, that land cannot be developed. This strategy allows landowners to receive cash for development rights, without actually developing their land.

Cluster development:

Homes are located close to one another in a development parcel. The remainder of the parcel is jointly owned by those homeowners and is left undeveloped by mutual agreement.

Table 4.2 Response to question, “Please indicate if you FAVOR or DO NOT FAVOR the following land management strategies.” Circle one answer for each strategy

Policy option	Total response % Favor	Resident % Favor	Non-resident % Favor	Bondurant/ Cora % Favor	Pinedale/ Daniel % Favor	Big Piney/ Marbleton % Favor	Boulder % Favor
Regulating subdivisions	87	86	88	86	87	83	80
Zoning	61	58	65	63	60	50	43
Purchase of development rights	43	43	44	55	41	38	55
Cluster development	58	59	58	64	60	52	58

Section 4 Summary: *While 97 percent of respondents believe private land management is primarily a private matter, 79 percent believe private land management is, to some degree, a public matter. Sublette County residents register stronger “private matter” responses than do non-resident landowners. There were variations in responses by residence area, yet the sub-county responses followed the same pattern as the overall responses.*

All growth management options received generally favorable responses. Respondents preferred the growth management strategy of regulating subdivisions more than other policy options. Zoning and cluster development strategies were preferred to purchasing development rights as growth management options.

Section 5: Private land use and willingness to sell for development

Participants were shown photographs of three different types of agricultural land that might be at risk for development: the first showed irrigated cropland with a mountain backdrop; the second showed a sub-irrigated, native hay meadow surrounded by sagebrush-covered hills; and the third showed cattle grazing on a sagebrush-covered mountain range with a pine and deciduous forest in the background. For each photograph, participants were asked to list their preferred land use if it were, and were not, their own property. The question was asked both ways to determine if respondents would behave differently if it were their land or someone else’s. Land-use options were agriculture (Ag), residential (Res), and recreation/wildlife (R/W). The

percent of respondents selecting each option is listed in Tables 5.1 and 5.2. Responses for each use are expressed as the percent of total responses.

Table entries may not add up to 100 percent because a small number of respondents chose to select more than one use. For example, some believed agriculture and wildlife, or agriculture and recreation, should be combined. Up to 3 percent of all respondents chose land-use options other than those listed in the survey.

Table 5.1 Response to the question, “If this is a parcel of land in Sublette County, which of the following uses do you most prefer?” Circle one. Agricultural (Ag) Residential (Res) Recreational/Wildlife (RW)

Landscape picture	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW
Irrigated cropland	78	4	16	67	5	26	80	4	15	79	4	15	78	4	17	89	4	8
Subirrigated rangeland	31	7	60	17	6	75	30	8	61	30	8	60	34	7	58	42	56	2
Mountain rangeland	48	4	44	33	6	59	57	4	36	47	4	45	53	4	41	50	2	42

Responses are expressed as percentages of total responses.

Table 5.2 Response to the question, “If this were your land in Sublette County, which of the following uses do you most prefer?” Circle one. Agricultural (Ag) Residential (Res) Recreational/Wildlife (RW)

Landscape picture	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW	% Ag	% Res	% RW
Irrigated cropland	71	8	18	56	13	29	77	3	19	69	11	17	73	6	19	87	6	8
Subirrigated rangeland	33	9	54	18	13	67	31	6	62	34	12	51	37	8	54	41	4	55
Mountain rangeland	47	7	42	33	10	55	55	5	36	46	9	41	50	6	41	52	2	40

Responses are expressed as percentages of total responses.

Next, participants were asked to assume they lived on the pictured 1000 acres, and they had been approached by a developer to sell the land. They were asked if they would sell or not, how many acres they would sell, and at what price per acre.

Irrigated cropland—You live on the 1000-acre parcel of land, and this is a typical view across the parcel. The value of this 1000-acre parcel of land, when used for irrigated hay production, is \$628 per acre (based on a 10-year average for this type of land in Wyoming). You have been approached by a developer to sell all or part of the parcel.

Sub-irrigated rangeland—You live on the 1000-acre parcel of land, and this is a typical view across the parcel. The value of this 1000-acre parcel of land, when used for livestock grazing, is \$189 per acre (based on a 10-year average for this type of land in Wyoming). You have been approached by a developer to sell all or part of the parcel.

Mountain rangeland—You live on this 1000-acre parcel of land, and this is a typical view across the parcel. The value of this 1000-acre parcel of land, when used for livestock grazing, is \$37 per acre (based on a 10-year average for this type of land in Wyoming). You have been approached by a developer to sell all or part of the parcel.

Tables 5.3 to 5.5 record responses to these questions, expressed as percent of total responses. Prior to Tables 5.4 and 5.5, **the range of low to high prices given (Range), the average price given (Average), and the most frequent response given (Mode)** are reported.

Table 5.3 Response to the question, “Would you sell the land?” Circle one. YES NO

Landscape picture	Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
Irrigated cropland	23	77	23	77	24	76	14	86	28	73	19	81	12	88
Subirrigated cropland	26	74	26	74	27	73	18	82	29	71	22	78	13	87
Mountain rangeland	23	77	22	78	23	77	18	82	24	76	19	81	17	83

Table 5.4 Response to the question, “If you would sell, at what minimum price per acre?”

Overall responses:

Irrigated Cropland: *Range, \$0 to \$90,000 per acre Average: \$4,290 per acre Most frequent response (Mode): \$2,000 per acre*

Subirrigated Range: *Range, \$0 to \$70,000 per acre Average: \$3,114 per acre Most frequent response (Mode): \$1,000 per acre*

Mountain Range: *Range, \$0 to \$500,000 per acre Average: \$4,524 per acre Most frequent response (Mode): \$1,000 per acre*

Landscape type	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
Irrigated cropland	0 - 90000	4,395	2000	0 - 50000	3960	1000	1000 - 11000	3791	3000	0 - 90000	5416	2000	600 - 10000	2537	1000	700 - 7000	2650	1000 & 2000
Subirrigated rangeland	1 - 70000	2981	1000	0 - 50000	3083	1000	400 - 10000	2623	1000	1 - 70000	3775	1000	100 - 10000	1729	1000	500 - 5000	1586	500
Mountain rangeland	0 - 500000	6388	1000	0 - 50000	3180	1000	200 - 20000	3243	1000	0 - 500000	9578	2000 & 3000	40 - 20000	2304	1000	350 - 5000	1693	1000

Table 5.5 Response to the question, “How many acres would you sell?”

Overall Responses:

Irrigated Cropland: *Range, 0 to 1,000 acres Average: 563 acres Most frequent response (Mode): 1,000 acres*

Subirrigated Range: *Range, 0 to 1,000 acres Average: 602 acres Most frequent response (Mode): 1,000 acres*

Mountain Range: *Range, 0 to 1,000 acres Average: 511 acres Most frequent response (Mode): 1,000 acres*

Landscape type	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
Irrigated cropland	0 - 1000	567	1000	0 - 3000	570	1000	0 - 1000	402	500	0 - 1000	576	1000	0 - 1000	583	1000	100 - 1000	520	300 & 500
Subirrigated rangeland	0 - 1000	633	1000	0 - 1000	578	500	0 - 1000	425	500	0 - 1000	656	1000	0 - 1000	597	1000	200 - 1000	800	1000
Mountain rangeland	0 - 1000	627	1000	0 - 1000	579	500	0 - 900	399	500	0 - 1000	628	1000	0 - 1000	587	1000	20 - 1000	583	1000

Section 5 Summary: *Residents and non-residents alike preferred agricultural use of the irrigated cropland in the county, whether it is someone else's or their own land. However, preference for agricultural use declined and preference for residential and recreational/wildlife use increased if it were their own land. With the exception of the Boulder area residents' preference for residential use of sub-irrigated rangeland in the county, residents and non-residents preferred recreation/wildlife use of the sub-irrigated rangeland regardless of ownership. Residents preferred agricultural use of mountain rangeland, while non-residents preferred recreation/wildlife use of that type of land. County residents' preferences for agricultural use were higher than non-resident agricultural preferences, and resident preferences for recreation/wildlife use tended to be lower than non-resident, but the overall pattern of responses was the same. Although the percentages changed somewhat when the respondents were answering as if the land belonged to them, the overall preferences for use stayed the same. The one exception is that Boulder residents prefer a recreation/wildlife use for sub-irrigated rangeland if they own the land.*

Three quarters or more of all respondents, regardless of residency or location in the county, would not sell any of these three types of land, were it theirs. There was no consistency across breakout categories for sale price per acre among those who would sell. Most respondents who would sell, regardless of residency or location, would sell 1,000 acres.

Section Six: U.S. Department of Agriculture Conservation Easements Program

Participant opinion toward a federal conservation easement program (Federal Agricultural Improvement and Reform Act, 1996) was elicited through a series of questions. It was reported to the respondents that the Commodities Credit Corporation administered the program. Congress had allocated funds for the program with the intent to limit non-agricultural uses of agricultural land. Commercial and residential development were not allowed on enrolled lands. The payment level and length of time of enrollment were open-ended and negotiable.

Responses to questions in this Section are detailed in Tables 6.1 through 6.5 and are reported as percents of total responses. Before Tables 6.3 to 6.5, the range of answers given (Range), the average of answers given (Average), and the most frequent response (Mode) are reported, as well.

Table 6.1 Response to the question, "If you do not own agricultural land in Sublette County, do you think land owners should enroll in this program?"

Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
62	38	60	40	65	35	73	27	60	40	51	49	74	26

Table 6.2 Response to the question, "If you own agricultural land in Sublette County, would you enroll in this program?" Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
52	48	48	52	55	45	60	40	52	48	30	70	37	63

Table 6.3 Response to the question, "As a land owner who is willing to enroll, what is the maximum length of time for which you would enroll in the program?"

Overall Responses:

Range, 0 to 100 years Average: 17.9 years Most frequent response (Mode): 10 years

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
Length of enrollment	0 - 100	18	10	0 - 100	22	10	0 - 100	29	10	0 - 100	16	10	0 - 100	12	10	5 - 100	21	10

Responses according to residency and location in the county.

Table 6.4 Response to the question, “As a land owner who is willing to enroll, what is the minimum annual payment you would be willing to accept, per acre, to enroll in this program?”

Overall responses:

Range, \$0/acre/yr. to \$10,000/acre/yr. Average: \$317/acre/yr. Most frequent response (Mode): \$100/acre/yr.

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
Minimum annual \$\$ per acre	0 - 3000	259	100	0 - 10000	450	100	0 - 3000	404	0 & 10 & 500	0 - 2000	206	100	0 - 2000	235	100	5 - 500	209	500

Responses according to residency and location in the county.

Table 6.5. Response to the question, “As a landowner who is willing to enroll, how many acres would you enroll?”

Overall responses:

Range: 0 to 10,000 acres Average: 504 acres Most frequent response (Mode): 10 acres

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
No. of acres would enroll	0 - 10000	641	500	0 - 8700	382	10	1 - 2000	466	all equal	0 - 8000	553	500	0 - 10000	993	40 & 1000	8 - 3000	1033	2000

Responses according to residency and location in the county.

Section 6 Summary: *More than half of all respondents who did not own land in Sublette County believed land owners should enroll in the conservation easement program. A small majority of resident land owners would not enroll. The most frequent reason given for not enrolling in this program at any acreage or price per acre was dislike of government intervention. Responses by location in the county varied considerably: Bondurant/Cora and Pinedale/Daniel area land owners would enroll; Big Piney/Marbleton and Boulder area residents would not. There may have been some confusion between “providing payment” and “accepting payment.”*

Based on response frequency, a plurality of land owners who would enroll, would enroll 10 acres for 10 years at \$100.00 per acre. There was a response variation to these three questions among the different respondent categories. Boulder area residents would enroll for a higher price per acre per year and would enroll more acres than would other residents. Residents in general would enroll more acres than non-residents.

Section 7: Respondent expectations for Sublette County

Questions in this section elicited respondents' expectations about the future of Sublette County and their personal future in the county. The last question identified the reason(s) people live there.

Table 7.1 Response to the question, "Do you plan to live in Sublette County 10 years from now?" Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
76	24	88	12	64	36	95	5	88	12	85	15	92	8

Table 7.2 Response to the question, "Do you plan to be employed in Sublette County 10 years from now?" Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
35	65	55	45	16	84	45	55	54	46	66	34	64	36

Table 7.3 Response to the question, "In 10 years, do you think that mining, oil, and gas will be more important to the economy of Sublette County than recreation, hospitality, and tourism?" Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
42	58	53	47	31	69	39	61	41	59	87	13	56	44

Table 7.4 Response to the question, “In 10 years, do you think that agriculture will be more important to the economy of Sublette County than recreation, hospitality, and tourism?” Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
31	69	35	65	28	72	31	69	28	72	52	48	40	60

Table 7.5 Response to question, “In 10 years, do you think that mining, oil, gas, and agriculture, combined, will be more important to the economy of Sublette County than recreation, hospitality, and tourism?” Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
63	37	70	30	56	44	70	30	63	37	89	11	76	24

Table 7.6 Response to the question, “The current population of Sublette County is approximately 6,000 people. Please indicate at what increased population level, if any, you would choose to move from the county.” Circle one response for each population level.

Pop. level	Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
	Stay	Move	Stay	Move	Stay	Move	Stay	Move	Stay	Move	Stay	Move	Stay	Move
8000		3		3		3		7		3		3		2
10000		11		12		11		13		12		12		10
12000		17		15		18		15		15		13		12
14000 and over	53	16	55	15	51	17	57	9	55	15	55	18	64	12

Responses are given as the percent of total responses.

Table 7.7 Response to the question, “In your opinion, what will be the population of Sublette County in 10 years?”

Overall responses:

Range: 3 to 140,000 people Average: 5,501 people Most frequent response (Mode): 10,000 people

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
No. of acres would enroll	3 - 140000	9202	10000	1000- 100000	11694	10000	7000- 14000	11886	10000	1300- 120000	10433	10000	3 - 60002	9690	10000	6200- 30000	11216	10000

Responses according to residency and location in the county.

Table 7.8 Response to the question, “At the population level you indicated above in number seven, in your opinion will the quality of life have improved dramatically, improved, improved somewhat, stayed the same, decreased somewhat, decreased, decreased dramatically.”

Change in life quality	Total	Resident	Non- resident	Bondurant/ Cora	Pinedale/ Daniel	Big Piney/ Marbleton	Boulder
Improve dramatically	3	2	3	1	2	3	0
Improve	9	8	10	7	8	9	10
Improve somewhat	20	20	21	14	18	24	19
Stay same	20	19	22	16	14	28	10
Decrease some	25	25	23	38	28	21	19
Decrease	15	16	14	16	18	11	19
Decrease dramatically	8	10	7	9	11	5	23

Table 7.9 Response to the question, “Why do you reside in Sublette County – low population, job or business opportunity, rural lifestyle/sense of community, scenery, family safety, recreation opportunities, air/water quality, low taxes, climate, quality of K-12 education; other.”

Reason reside in Sublette Co.	Total	Resident	Non-resident	Bondurant/ Cora	Pinedale/ Daniel	Big Piney/ Marbleton	Boulder
Low population	53	67	44	74	66	59	69
Job/business	18	36	4	15	33	54	19
Lifestyle	57	74	45	79	72	66	63
Scenery	62	72	56	78	74	56	67
Safety	39	59	24	42	62	60	50
Recreation	59	65	56	66	65	54	67
Air/water	49	62	40	69	65	48	59
Low tax	23	30	18	25	27	31	37
Climate	16	21	14	29	21	17	24
Education	14	27	4	11	22	45	20
Other	11	12	12	11	11	9	24

Section 7 Summary: *Sixty-four percent of non-resident respondents plan to live in Sublette County 10 years from now. Forty-five percent of residents who plan to live in Sublette County 10 years from now do not plan to be working in the county. Respondents who did not expect to be living or working in Sublette County 10 years from now cited retirement, age, lack of medical facilities, job relocation, and lack of opportunities as reasons.*

Residents are more inclined to believe mining, oil, and gas will be more important to the county’s economy in 10 years than do non-resident land owners. Neither residents nor non-residents believe agriculture will be more important to the county’s economy in 10 years than recreation, hospitality, and tourism; but both groups believe mining, oil, gas, and agriculture combined will be more important than recreation, hospitality, and tourism in 10 years. Answers vary according to each respondent’s location in the county.

Most respondents believe the county’s population in 10 years will be 10,000 people, but they would not move from the county, regardless of population growth. The Wyoming Department of Administration and Finance (1997) has projected that Sublette County will experience 10 percent growth in the next five years (by 2001), for a total population of approximately 6,135.

Sixty-six percent of respondents believe the quality of life will stay the same or change somewhat at their projected population levels, 33 percent believe the quality of life will

have improved to some degree, and 48 percent believe the quality of life will have decreased to some extent at their anticipated population levels in 10 years. Of resident responses, Big Piney/ Marbleton respondents indicated that population growth will decrease the quality of life the least. Bondurant/Cora respondents indicated that population growth will decrease the quality of life the most.

The most frequent reasons listed for living in Sublette County—listed in order of response frequency—are scenery, recreational opportunities, rural lifestyle, sense of community, and low population.

Section 8: A little bit about you

Survey participants were asked to provide some information about themselves. Tables 8.1 through 8.10 illustrate the demographic profiles of participants. Demographic information is important both to understand the county’s current population and to provide a context for understanding survey responses.

Table 8.1 Response to the question, “How long have you owned or rented property in Sublette County? (Including land, house, business, or other)”

Overall responses:

Range: 0 to 100 years Average: 17 years Most frequent response (Mode): 20 years

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
No. of years in county	1-100	19	20	0-80	15	20	1-65	17	20	0-70	18	4& 20	1-100	20	20	1-165	18	20

Responses according to residency and location in the county.

Table 8.2. Response to the question, “How many months per year do you reside in Sublette County?”

Overall responses:

Range: 0 to 12 months/yr. Average: 7 mo/yr. Most frequent response (Mode): 12 mo/yr.

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
No. of months per year	0-12	11	12	0-12	2	0	5-12	11	12	0-12	12	12	6-12	12	12	4-12	12	12

Responses according to residency and location in the county.

Table 8.3 Response to the question, “How much acreage to you currently own in Sublette County?”

Overall responses:

Range: 0 to 40,000 acres Average: 197 acres Most frequent response (Mode): 10 acres

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
No. of acres owned	0 - 40000	349	0, 10	0 - 12,000	71	10	0 - 3800	216	10	0 - 15000	220	0	0 - 40000	602	0	0 - 4600	378	0, 10

Responses according to residency and location in the county.

Table 8.4 Response to the question, “Do you have a degree from a four-year college or university?” Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
46	54	39	61	52	48	44	56	41	59	30	70	32	68

Table 8.5 Response to the question, “How young are you?” Age in years

	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode	% Rnge	% Avg	% Mode
Age in years	19-93	53	40	24-92	54	50	26-86	56	40	23-94	52	43	18-87	48	40	22-82	52	49 & 50 & 65

Responses according to residency and location in the county.

Table 8.6 Response to the question, “Are any members of your household employed by a business, including self-employment in Sublette County?”

Yourself: Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
31	69	60	40	5	95	36	64	72	38	74	26	67	33

Others in the household: Circle one. YES NO NOT APPLICABLE

Total # response	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA
1929	51	36	13	4	83	13	29	56	15	54	32	14	65	24	11	42	49	9

Table 8.7 Response to the question, "Is the primary source of income from wages, tips, commissions, and/or salaries?"

Yourself: Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
62	38	67	33	56	44	39	61	68	32	78	22	60	40

Others in the household: Circle one. YES NO NOT APPLICABLE

Total # response	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA
1814	51	27	22	32	31	37	32	39	29	51	26	23	64	21	15	43	37	20

Table 8.8 Response to the question, "Is the primary source of income from interest, dividends, rent, investment earnings, and/or pensions?"

Yourself: Circle one. YES NO

Total response		Resident		Non-resident		Bondurant/ Cora		Pinedale/ Daniel		Big Piney/ Marbleton		Boulder	
% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No	% Yes	% No
33	67	30	70	36	64	59	41	29	71	17	83	38	62

Others in the household: Circle one. YES NO NOT APPLICABLE

Total # response	Resident			Non-resident			Bondurant/ Cora			Pinedale/ Daniel			Big Piney/ Marbleton			Boulder		
	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA	Yes	No	NA
1715	18	62	20	17	50	33	38	45	17	18	63	19	11	74	15	22	62	16

Table 8.9 Response to the question, "About how much was your 1995 household gross annual income?" Circle one (85 percent of all respondents answered this question.)

LESS THAN \$10,000	\$70,000 - 79,999
\$10,000 - \$19,999	\$80,000 - 89,999
\$20,000 - \$29,999	\$90,000 - 99,999
\$30,000 - \$39,999	\$100,000 - 109,999
\$40,000 - \$49,999	\$110,000 - 119,999
\$50,000 - \$59,999	\$120,000 - 129,999
\$60,000 - \$69,999	\$130,000 AND ABOVE

Earnings	Resident	Non-resident	Bondurant/ Cora	Pinedale/ Daniel	Big Piney/ Marbleton	Boulder
< 10,000	4	1	4	4	3	8
10-19,999	12	4	14	13	10	20
20-29,999	16	8	9	20	12	26
30-39,999	16	10	14	17	14	22
40-49,999	15	12	16	16	18	4
50-59,999	12	13	17	8	16	6
60-69,999	8	12	4	8	8	0
70-79,999	5	7	9	2	6	4
80-89,999	3	6	3	3	5	2
90-99,999	2	6	1	2	2	2
100-109,999	2	5	2	2	2	0
110-119,999	1	2	0	2	0	2
120-129,999	1	2	0	1	1	0
130,000 or >	5	12	9	3	4	6

Responses are expressed as percent of total responses.

Table 8.10 Response to the question, “About what percent of income noted in number 10 is derived from activities in Sublette County?” (87 percent of all respondents answered this question.)

Percent Income	% Resident	% Non-resident	% Bondurant/ Cora	% Pinedale/ Daniel	% Big Piney/ Marbleton	% Boulder
0 - 10	29	94	63	25	10	30
11 - 20	2	2	2	3	2	4
21 - 30	2	1	3	2	1	4
31 - 40	2	0	6	2	1	0
41 - 50	6	1	7	5	6	11
51 - 60	1	0	1	1	1	2
61 - 70	2	0	0	2	1	0
71 - 80	4	0	4	3	5	7
81 - 90	4	0	3	5	5	2
91 - 100	49	2	13	52	69	39

Responses are expressed as percent of total responses.

Section 8 Summary: *Most resident and non-resident property owners have owned their property in Sublette County for 20 years. Fifty-four percent of the property owners do not claim Sublette County as their primary residence. Twenty-seven percent of non-resident property owners live elsewhere in Wyoming (70 percent of those live in Sweetwater County), and 27 percent live in 46 other states and seven foreign countries. Delaware, Maine, and Hawaii are the only states not represented on the list of property owners. Non-residents average two months per year of residence in Sublette County. Resident landowner parcels are nearly five times larger than are non-resident property owners’ parcels. Parcels in the Big Piney/Marbleton area are on average nearly three times larger than parcels in other areas of the county.*

There was not a notable difference in the average age of residents and non-residents; however, the most frequent responses show the non-resident respondents are about 10 years older than the resident respondents. Just over one-third of residents and about one-half of non-residents have degrees from four-year colleges or universities.

Sixty percent or more of county residents are employed in the county, with the exception of residents in the Bondurant/Cora area. Two-thirds of those residents are not employed in Sublette County. Just over one-half of non-resident land-owners, but two-thirds of resident

landowners, listed wages, tips, commissions, and/or salaries as their primary source of income. Income sources varied from the overall percentages only in the Bondurant/Cora area, where only 39 percent of respondents depend on earned income. Nearly half of county residents' salaries fall in the \$20,000 to \$49,999 per year range. By contrast, nearly half of non-resident land owner salaries fall in the \$40,000 to \$69,999 and \$130,000 and above categories. Almost half of the county residents earn more than 90 percent of their income from activities within the county. Again, the residents in the Bondurant/Cora area are different from the other areas of the county. A majority of those residents earn their income outside Sublette County.

Summary

Despite differences in demographic characteristics, landowners and non-landowning residents who claim Sublette County as their primary residence, and Sublette County landowners who claim primary residence elsewhere, showed similar trends in their preferences about development type and density, land use, and land management. Occasionally, there were striking differences among responses of Sublette County residents, depending on the area of the county in which they resided.

A majority of respondents prefer low-density, landscaped residential developments. A majority also believe there is a lack of affordable housing in the county, and developers should be required to provide affordable housing. Most respondents would prefer to continue the western motif in commercial development.

Many respondents believe private land management is a mostly private yet somewhat public matter and prefer the existing land and growth management options of regulating subdivisions and zoning. More than half of all respondents favor the cluster development option.

Nearly three-quarters of all respondents preferred agricultural or recreation/wildlife uses of currently-undeveloped land and would not sell any such land to developers at any price. Three quarters of respondents would not enroll any of their land in a federally-funded and federally-administered conservation easement program.

Sixty-four percent of non-resident landowners and 88 percent of resident landowners plan to reside in Sublette County 10 years from now. Respondents were consistent in predicting a county population of 10,000 people ten years from now, which is notably higher than the 6,000 to 7,000 predicted by the state. Most foresee a minimal change in the quality of life at that level and would not move from the county even if the population were considerably higher. Respondents cited the scenery, recreational opportunities, rural lifestyle, sense of community, and low population as the most frequent reasons for living in Sublette County.

All respondents believe the county's economic base will change in the next 10 years. Residents believe the amenity industries of recreation, hospitality, and tourism will become more important than agriculture but not more important than mineral extraction (which in Sublette County is primarily oil and gas extraction). In contrast, non-residents believe the amenity industries will become more important to the county's economy than *either* agriculture or mineral extraction. Both groups agree that mineral extraction and agriculture, combined, will remain more important than the amenity industries.

Most residents and non-residents have owned land in Sublette County for 20 years. Non-residents tend to visit for two months a year. Residents own larger parcels of land than do non-residents, though the most frequently-owned parcel size in both groups is 10 acres.

Non-residents tend to have more formal education and higher salaries than residents. A majority of both groups are middle-aged (40 to 50 years old). Most residents are employed in the county, with the exception of those living in the Bondurant/Cora area. Again with the exception of those in the Bondurant/Cora area, residents tend to derive 91 to 100 percent of their income from activities within Sublette County.

Importance of the research

The work performed is important for several reasons.

- Mountain Counties in Wyoming are growing rapidly, and the University of Wyoming can provide useful research to assist in rural land-use planning.
- A comprehensive population has been surveyed and constituencies which support various land-use management approaches have been identified.
- Respondents indicated that management of private land was at least somewhat of a public matter. This is evidence of public support for land use planning in the county.
- Pictures of developments and agricultural land were used as the basis for eliciting land-use and development preferences.
- Survey responses indicate that there are strong preferences for conserving agricultural lands and the associated open space, regardless of who owned the land.
- The respondents, other than those holding agricultural lands, had supported a federal conservation easement program, and those holding agricultural lands did not favor enrollment in a federal program.
- Nonresidents make up a majority of the landowners in the county, which likely may be in-migrants to Sublette County.

- Nonresidents have markedly different social and economic characteristics.
- Other counties may model their own data collection activities after the Sublette County efforts.

Usefulness of the research

Several key uses of the research work have been identified:

- Local officials need to know what the preferences of landowners and residents are concerning land uses and rural residential development in order to develop a land-use plan that citizens support.
- The preferences can be used to construct land-use plans to address growth through zoning, regulating subdivisions, or cluster development.
- Wildlife habitat, scenery and recreation sites are resources that survey respondents identified as important and that could be protected in the land-use planning process.
- There were some differences in land-use preferences identified for various areas of the county, and a land-use plan may be crafted to address area specific issues.
- Affordable housing has been identified as being in short supply; there appears to be support for having developers supply some affordable housing.
- Respondents expect the county to continue to grow rapidly, and they do not feel that the growth will necessarily reduce the quality of life in the county. The county may be able to absorb growth depending how the population is arranged on the County landscape.
- Nonresident landowners have different expectations than residents concerning the future importance of oil, gas, and mineral activities. An opportunity exists for the County to provide information to newcomers about sources of fiscal operating revenues.
- Possible future trends have been identified. Residents intend to stay in, and nonresidents to move into the county. Only half of the residents and about 10 percent of nonresidents intend to work in the county. Given an average age of 52 years, a significant portion of Sublette County's future residents may be retirees.

Conclusion

Sublette County residents and property owners, regardless of residence, prefer to have low-density development. They prefer open space land uses such as agriculture, recreation, and wildlife. A majority of all respondents would accept zoning, regulation of subdivisions, and cluster development designs as land-use controls. Nonresi-

dents prefer rural lands amenities. Residents prefer rural lifestyle and low population. The two groups differ in their views of the oil, gas, and mining industry relative to the hospitality sectors. Respondents predicted that the population of Sublette County will nearly double in 10 years. The number of respondents planning to live in Sublette County 10 years from now indicate that current state of Wyoming population projections may be conservative. The population demographics of Sublette County may change in the next 10 years to include more retired and more affluent people. This could have ramifications for county revenues and for the county's physical and service infrastructure.

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