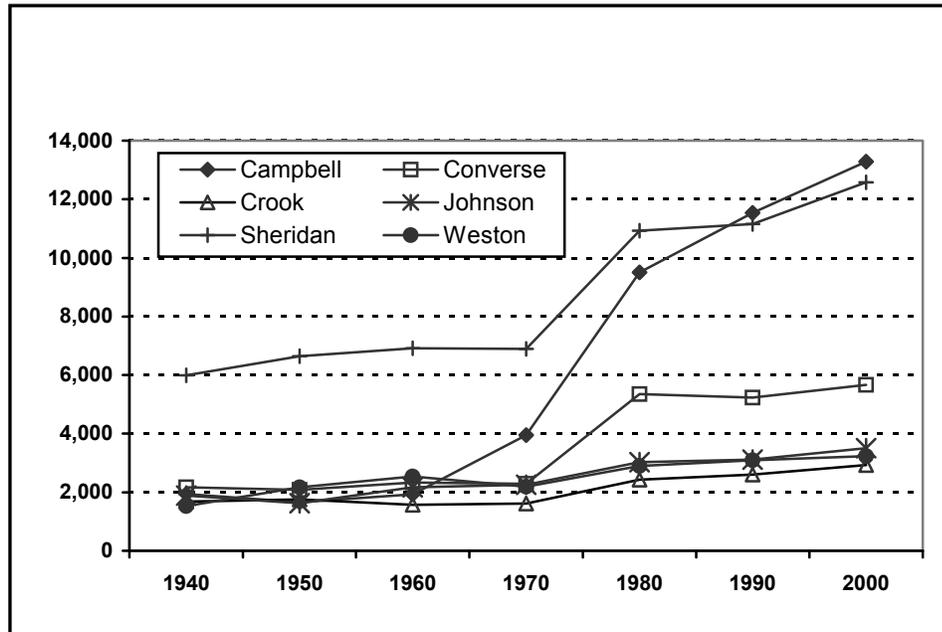


3.6 Housing

This section presents current housing data, as well as trends from the decennial censuses of 1940 through 2000. The data are presented for counties and for the main cities and towns. Totals for the State of Wyoming are included for comparison.

3.6.1 Housing Stock

While the population grew by 55 percent in the 1970s, the housing stock in the study area grew by almost 78 percent. Housing growth was especially rapid during the 1970s in Campbell County, where population grew by 88 percent and the housing stock grew by 140 percent. This left housing vacancies in the PRB for some time. **Figure 3-29** graphically illustrates the long-term trend in the housing stock for the six counties of the study area. The data, along with information for the principal places in each county, are presented in **Table 3-14**.



Source: U.S. Census Bureau, various years.

Figure 3-29 County Housing Stock Trend (1940 - 2000)

3.6.2 Housing Vacancy

A more recent trend of tightening housing vacancy in the PRB is depicted in **Figure 3-30**, comparing vacancy rates in 1990 to 2000 for owner and renter units in the study area counties. As shown, the number of housing units in the study area has become more closely aligned with population since the booms of the 1960s and 1970s. After resumed growth in the 1990s, most county-level vacancy rates for owner (i.e., for sale) units in 2000 were at or below the state levels. Vacancy rates for rental units declined even more sharply in most study area counties during the

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1990s. By 2000, the rental vacancy rates in Campbell County were below the state average and were well below the state average in Johnson County and Sheridan County.

Table 3-14
Housing Units (1940 - 2000)

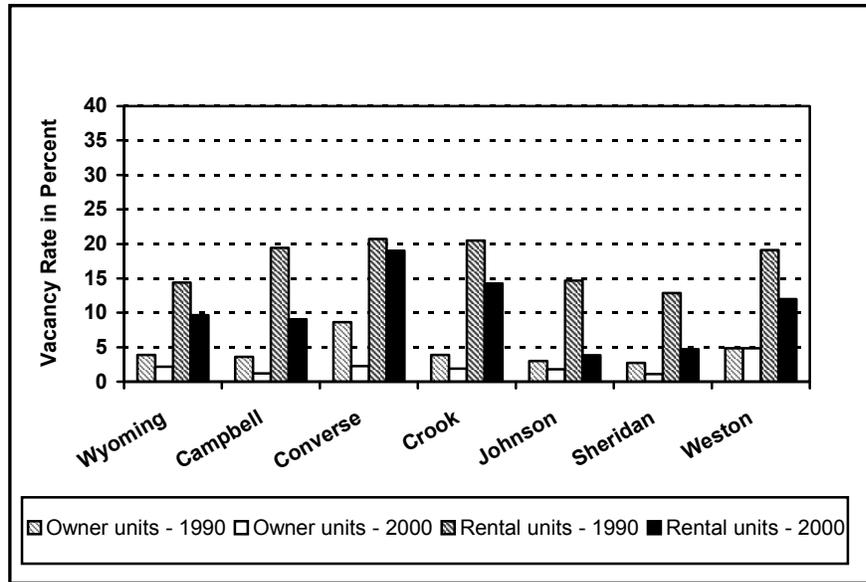
County/Location	1940	1950	1960	1970	1980	1990	2000
Campbell							
Gillette (city)	-	804	1,182	2,228	4,857	7,078	7,931
Wright (town)	-	-	-	-	514	527	544
Rest of county	1,944	852	749	1,723	4,134	3,933	4,813
Total	1,944	1,656	1,931	3,951	9,505	11,538	13,288
Converse							
Douglas (city)	-	881	1,060	1,066	2,338	2,267	2,385
Glenrock (town)	-	372	-	514	1,044	1,052	1,131
Rest of county	2,170	827	1,277	711	1,968	1,915	2,153
Total	2,170	2,080	2,337	2,291	5,350	5,234	5,669
Crook							
Moorcroft (town)	-	-	-	-	442	369	375
Sundance (town)	-	-	-	359	479	511	545
Rest of county	1,682	1,755	1,578	1,258	1,513	1,725	2,015
Total	1,682	1,755	1,578	1,617	2,434	2,605	2,935
Johnson							
Buffalo (city)	-	949	1,094	1,295	1,673	1,627	1,842
Rest of county	1,890	677	1,073	960	1,356	1,485	1,661
Total	1,890	1,626	2,167	2,255	3,029	3,112	3,503
Sheridan							
Sheridan (city)	3,373	4,065	4,359	4,438	6,604	6,475	7,413
Rest of county	2,620	2,580	2,559	2,455	4,324	4,679	5,164
Total	5,993	6,645	6,918	6,893	10,928	11,154	12,577
Weston							
Newcastle (city)	-	1,075	1,373	1,228	1,443	1,439	1,458
Upton (town)	-	-	-	-	525	450	441
Rest of county	1,531	1,092	1,162	964	932	1,201	1,332
Total	1,531	2,167	2,535	2,192	2,900	3,090	3,231
Six-county Study Area							
Selected places	3,373	8,146	9,068	11,128	19,919	21,795	24,065
Rest of area	11,837	7,783	8,398	8,071	14,227	14,938	17,138
Total	15,210	15,929	17,466	19,199	34,146	36,733	41,203
State of Wyoming	76,868	92,086	113,096	116,323	188,217	203,411	223,854

Source: U.S. Census Bureau 2004b.

3.6.3 Housing Mix

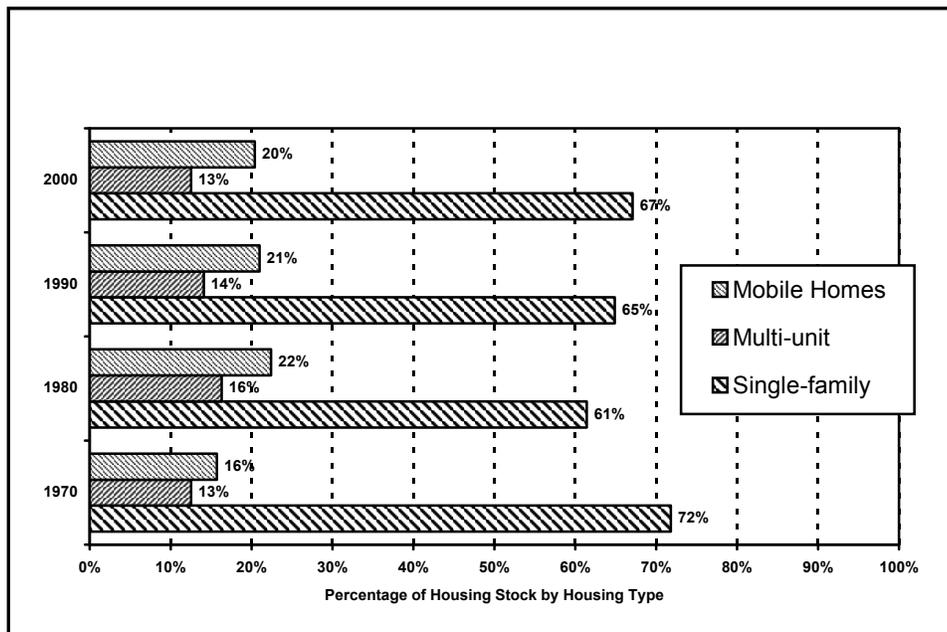
A consequence of the 1970s boom growth is that the mix of structures in the housing stock of the PRB is now one of relatively fewer one-unit structures (single-family homes) than in 1970 and relatively more mobile homes. **Figure 3-31** and **Table 3-15**, which show the composition of the housing stock, depict the shift in units by housing structure type since 1970. Data from 1980 reflect the relatively large number of apartment units and mobile homes added to the housing stock during the 1970s boom. Since 1980, the share of the housing stock in single-family units gradually has recovered.

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Source: U.S. Census Bureau, various years.

Figure 3-30 Housing Vacancy Rates by County (1990 and 2000)



Source: U.S. Census Bureau, various years.

Figure 3-31 Composition of the Housing Stock in PRB Study Area (1970 – 2000)

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Table 3-15
Housing Units by Structure Type (1970 – 2000)

County	Units by Structure Type				Share by Structure Type (percent)			
	1970	1980	1990	2000	1970	1980	1990	2000
Campbell								
Single-Family	1,782	4,333	6,350	7,492	45.3	46.1	55.0	56.4
Multi-Unit	491	1,490	2,183	2,276	12.5	15.9	18.9	17.1
Mobile Home	1,664	3,572	3,005	3,520	42.3	38.0	26.0	26.5
Total	3,937	9,359	11,538	13,288				
Converse								
Single-Family	1,741	3,197	3,466	4,113	77.5	60.7	66.2	72.6
Multi-Unit	254	757	695	481	11.3	14.4	13.3	8.5
Mobile Home	252	1,314	1,073	1,075	11.2	24.9	20.5	19.0
Total	2,247	5,268	5,234	5,669				
Crook								
Single-Family	1,143	1,455	1,634	1,895	72.5	62.9	62.7	64.6
Multi-Unit	112	400	103	161	7.1	17.3	4.0	5.5
Mobile Home	321	457	868	879	20.4	19.8	33.3	29.9
Total	1,576	2,312	2,605	2,935				
Johnson								
Single-Family	1,684	1,845	2,195	2,717	78.0	66.6	70.5	77.6
Multi-Unit	277	469	370	297	12.8	16.9	11.9	8.5
Mobile Home	197	457	547	489	9.1	16.5	17.6	14.0
Total	2,158	2,771	3,112	3,503				
Sheridan								
Single-Family	5,528	7,241	8,198	9,258	81.3	70.6	73.5	73.6
Multi-Unit	1,023	1,877	1,606	1,738	15.0	18.3	14.4	13.8
Mobile Home	248	1,138	1,350	1,581	3.6	11.1	12.1	12.6
Total	6,799	10,256	11,154	12,577				
Weston								
Single-Family	1,698	2,114	1,991	2,186	77.6	73.3	64.4	67.7
Multi-Unit	200	352	233	203	9.1	12.2	7.5	6.3
Mobile Home	290	418	866	842	13.3	14.5	28.0	26.1
Total	2,188	2,884	3,090	3,231				
Study Area								
Single-Family	13,576	20,185	23,834	27,661	71.8	61.4	64.9	67.1
Multi-Unit	2,357	5,345	5,190	5,156	12.5	16.3	14.1	12.5
Mobile Home	2,972	7,356	7,709	8,386	15.7	22.4	21.0	20.4
Total	18,905	23,886	36,733	41,203				

Notes: 1970 and 1980 include year-round housing units only, calculated as total housing units minus units held vacant for seasonal or migratory use. 1990 and 2000 include all housing units. In 1990 and 2000, the one-unit structure category includes both 1-unit attached and 1-unit detached structures, and the mobile home category includes a small number of other types of units (boat, recreation vehicle [RV], van, etc.). Shares subject to rounding.

Source: U.S. Census Bureau, various years.

3.6.4 Housing Values

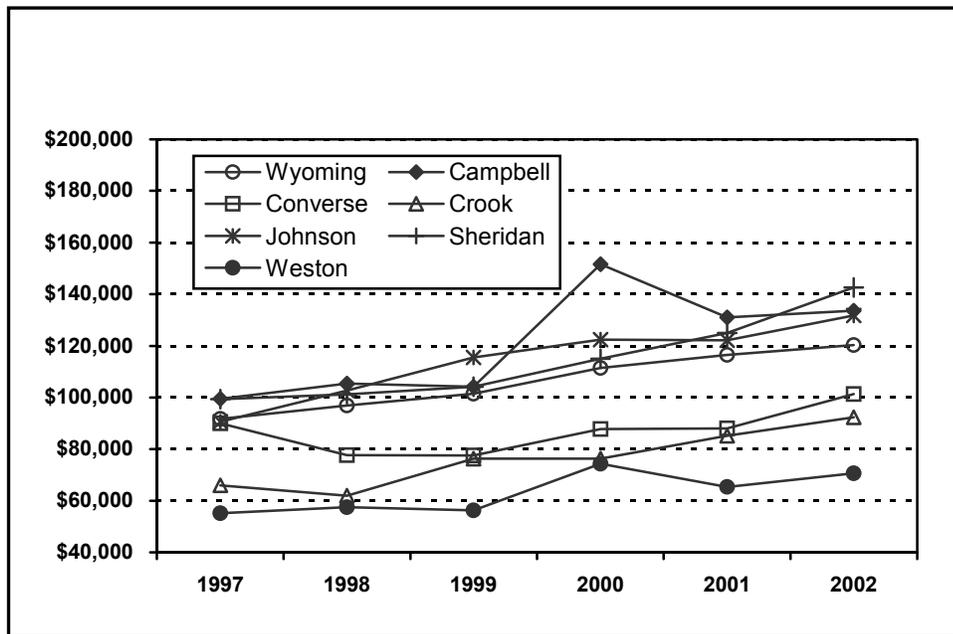
Housing values in 2002 in the PRB reflect a compounded average rate of appreciation of 6.1 percent per year since 1997, compared to 5.6 percent for Wyoming as a whole. Housing price appreciation from 1997 to 2002 was highest in Johnson County (7.8 percent per year), Sheridan County (7.5 percent per year), and Crook County (7.0 percent per year). In Campbell County, housing prices appreciated an average of 6.1 percent per year from 1997 to 2002. This is the same annual rate as the state for the entire period, although the change in housing prices in Campbell County fluctuated more on a year-to-year basis. After adjusting for inflation, housing price appreciation rates between 1997 and 2002, on a CAGR basis, were 3.3 percent statewide and 3.8 percent in Campbell County. Average appreciation in real terms, based on 2003 constant

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dollars, for the other counties were 0.2 percent in Converse County, 2.8 percent in Weston County, 4.6 percent in Crook County, 5.2 percent in Sheridan County, and 5.4 percent in Johnson County. The appreciation in housing prices in Johnson County likely reflect the combined effects of a relatively smaller housing stock and demand associated with increasing local employment, including that tied to CBNG development in the PRB.

In 2002, the average sales price of a house in the study area varied from \$70,674 in Weston County to \$142,565 in Sheridan County. The average home price statewide in 2002 was \$120,314.

Counties with an average housing sales price above the state average in 2002 were Sheridan, Campbell, (\$133,482) and Johnson (\$131,782). **Figure 3-32** depicts the change in the average sales price, in nominal dollars, of a house in the study area counties since 1997 compared to the average statewide.



Source: Wyoming Housing Database Partnership 2004.

Figure 3-32 Average Sales Price of Houses in Nominal Dollars as Reported by County Assessors (1997 - 2002)

3.6.5 Rental Housing Cost

Monthly costs for rental housing in the PRB, measured in the fourth quarter of 2003, generally were highest in Campbell County. **Table 3-16** presents the 2003 rental cost and the average annual appreciation rate from 1998 to 2003 for the counties in the study area.

Monthly rental costs in Campbell County averaged \$707 per month for a house at the end of 2003, \$590 per month for a mobile home on a lot, \$563 per month for an apartment, and \$228 per month for a mobile home lot.

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Table 3-16
Monthly Housing Costs in Nominal Dollars, PRB Study Area (1998-2003)

County	Apartments		Mobile Home Lots		Houses		Mobile Homes on a Lot	
	Rental Cost 2003	Average Annual Change 1998-03 (percent)	Rental Cost 2003	Average Annual Change 1998-03 (percent)	Rental Cost 2003	Average Annual Change 1998-03 (percent)	Rental Cost 2003	Average Annual Change 1998-03 (percent)
Campbell	\$563	9.8	\$228	5.3	\$707	6.1	\$590	7.0
Converse	\$385	3.1	\$150	5.5	\$488	3.4	\$374	0.3
Crook	\$345	2.1	\$120	4.8	-	-	-	-
Johnson	\$443	3.9	\$208	11.1	\$606	6.8	\$414	2.8
Sheridan	\$465	4.9	\$273	11.3	\$667	7.3	\$502	3.1
Weston	\$333	-0.8	\$99	0.8	\$380	4.0	\$365	6.1
Wyoming	\$466	4.3	\$195	4.4	\$658	5.4	\$484	4.8

Notes: 2003 data are for the fourth quarter. Data were not collected for Crook and Johnson counties prior to 1999. General price inflation was about 2.4 percent per year from 1998 to 2003 as measured by the National Consumer Price Index.

Source: WDAI 2004a.

Weston County had the lowest rental housing costs in the study area during the same period. In Weston County, rental costs were \$380 per month for a house, \$365 per month for a mobile home on a lot, \$333 per month for an apartment, and \$99 per month for a mobile home lot. Comparable statewide averages were \$658 for a house, \$484 for a mobile home on a lot, \$466 for an apartment, and \$195 for a mobile home lot.

Escalation in rental housing costs since 1998 has varied widely by housing type and by county in the PRB. A high rate of cost escalation has characterized the market for mobile home spaces in Sheridan and Johnson counties, where space rents increased more than an average of 11 percent per year. The demand for apartments in Campbell County also has risen rapidly in the same period, driving up costs at a compound average rate of 9.8 percent per year. In at least one market (apartments in Weston County) rental costs were lower in 2003 than in 1998.

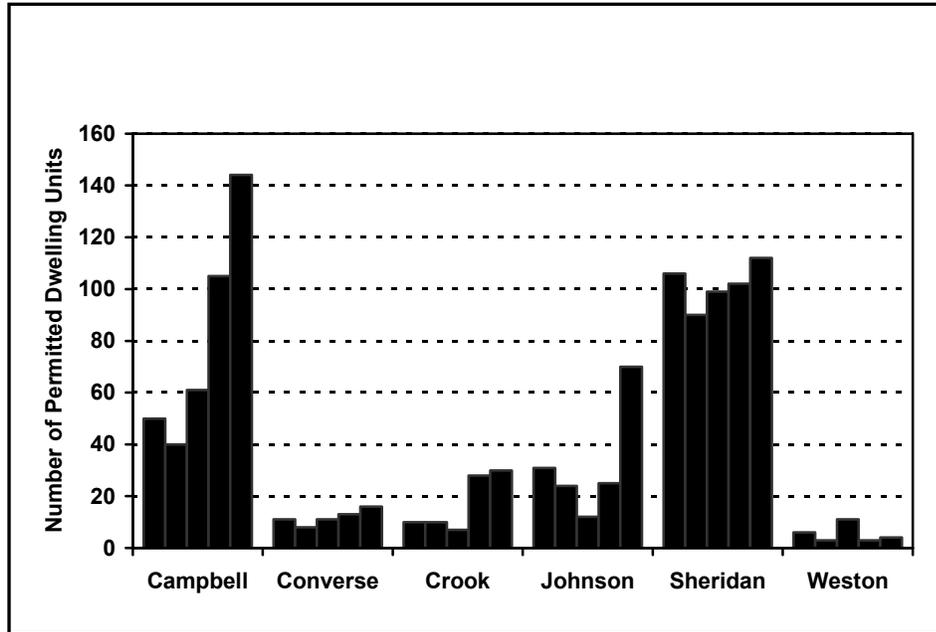
For the same timeframe, apartment costs rose at the rate of 4.3 percent compounded in Wyoming as a whole, and general price inflation was 2.4 percent per year compounded, as measured by the National Consumer Price Index.

3.6.6 Building Permits

With the exception of Weston County, counties in the PRB generally have experienced a rising level of residential construction activity since 1998. A total of 376 units were issued permits in 2002, the highest total recorded in the study area since 1983. The trend in the number of permits issued annually since 1998 is depicted by county in **Figure 3-33**. Although not all local governments in the study area issue permits, these data are a general indicator of residential construction activity.

A cumulative total of 1,242 new housing units were issued permits from 1998 through 2002 in the PRB, including permits for 400 housing units in Campbell County and 509 units in Sheridan County. In 2002, Campbell County issued permits for 144 units, Sheridan County issued permits for 112 units, and Johnson County issued permits for 70 units.

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Source: WDAI 2004b.

Figure 3-33 Building Permits for Residential Units (1998 - 2002)

A large majority (88 percent) of the housing units issued permits in the PRB from 1998 to 2002 were single-family dwellings. However, a rise in the number of permits for denser types of housing also suggests a renewed interest in multi-family structures after a number of years.

Construction of duplexes, triplexes, and larger multi-family structures comprised 5 percent (11 units) of all permitted units in the study area in 1998, 4 percent (7 units) in 1999, 12 percent (24 units in 2000), 16 percent (45 units) in 2001, and 15 percent (56 units) in 2002. The counts of multi-family units do not include activity in Campbell County, which has reported multi-family residential structures as commercial building permits in recent years.

3.6.7 Temporary Housing

Temporary housing resources are available in the PRB in the form of hotel-motel rooms, private and public campgrounds, two large special event facilities, and vacant spaces in mobile home parks. In all, there are an estimated 71 lodging establishments with a total of more than 2,500 rooms. Many of these resources, plus pockets of persistently vacant apartments, townhouses, and mobile home spaces in Gillette and Wright, have served in the past to accommodate the temporary labor force associated with natural resource and energy projects.

Lodging

The majority of the hotel and motel rooms in the study area, 1,369 rooms in 18 establishments, are located in Campbell County, and almost all of these are in Gillette. Sheridan County also has a large lodging bed base (22 establishments with more than 925 rooms), with most of these in the City of Sheridan. Because of Sheridan's travel and tourism orientation, hotel and motel vacancies

3.6 Housing

typically are seasonal in this community. The hotel, motel, and campground portion of the temporary bed base is summarized in **Table 3-17**.

Table 3-17
Temporary Housing Resources

County	Lodging		RV Parks and Campgrounds	
	Establishments	Units	Establishments	Units
Campbell	18	1,369	3	209
Converse	11	NA	9	184
Crook	12	> 210	11	> 260
Johnson	6	> 36	15	466
Sheridan	22	> 927	2	60
Weston	2	NA	7	127
Total	71	> 2,542	47	> 1,306

Notes: Many RV spaces are in facilities that operate on a seasonal basis. Campbell County data do not include the CAM-PLEX Campgrounds in Gillette. Converse County data do not include the Wyoming State Fairgrounds Campgrounds. These generally are used by arrangement for special events.

Sources: Wyoming Campgrounds & RV Parks (map produced by CAM-PLEX Multi-Event Facilities, Wyoming RV Parks & Campgrounds Association, and Wyoming Travel & Tourism) and various community websites.

RV Parks and Campgrounds

Numerous RV parks and campgrounds are located in Campbell and Sheridan counties; however, these facilities are more characteristic of the less populated counties in the PRB. Of the more than 1,300 RV spaces identified in the study area, more than half are located in counties where the predominant use is related to travel and tourism associated with nearby attractions including the Big Horn Mountains, Devil's Tower, and the Black Hills. Included in this category are more than 850 RV spaces in Crook, Johnson, and Weston counties. Many of these spaces are in facilities that operate seasonally.

Special Event Sites

Two large special event sites with extensive camping facilities are located in the PRB. These are the CAM-PLEX Multi-Event Facility campgrounds in Gillette, and the Wyoming State Fairgrounds in Douglas.

The massive CAM-PLEX campgrounds contain 1,821 RV sites and ancillary facilities, including 953 full service sites and 90 water and electricity sites. The CAM-PLEX site is available seasonally by arrangement for rallies, rendezvous, and other events, but generally not available for public camping.

The state fairgrounds in Douglas have 312 recreational vehicle or mobile home spaces with water, sewer, and electrical service and an additional 144 spaces with only water and electrical service. Typically, these facilities are used during the fair or are rented by special arrangement to groups of 20 or more. However, the fairgrounds facilities were used to house the work force of a gas transmission system project in Converse County from 1998 to 2001.

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Other Resources

A study of community issues concerning energy development prepared for the Wyoming Energy Commission found that communities in the PRB see temporary work force housing as the responsibility of the private sector (Pedersen Planning Consultants 2001a,b,c,d). Besides lodging and RV facilities, other private resources have been accessed in the past. These include resources located in Wright in the form of vacant apartments, townhouses, and spaces in mobile home courts, leased rental units in Douglas, and a limited number of available rental units in Glenrock.

Campbell County also hosts several mobile home parks with spaces that can open or expand on short notice and with only modest additional investment. These resources represent an expansion factor in the temporary housing resource base that is a legacy of the major labor force boom of the 1970s.

Housing Conditions in the City of Gillette

The City of Gillette began inventorying and monitoring land use in the mid-1970s and has continued to closely track land use and housing development and their determinants through the present.

In 1995, the city's data on housing trends indicated that Gillette's housing market had adjusted from the over-building of earlier years and that the economy had normalized, becoming less influenced by boom forces (City of Gillette 1995). By 2001, the housing market had resumed a gradual growth trend, with the overall vacancy in the housing stock at about 1 percent in both the city and in the surrounding Urban Service Area (City of Gillette 2001).

The growth trend noted by the City of Gillette in 2001 has continued and strengthened through 2003, driven by increased economic activity in the mining sector. The city began observing that tightness in the housing market, indicated by an overall vacancy rate of 1.9 percent in 2003, plus increasing demand for affordable housing, were stimulating the growth of denser housing types (City of Gillette 2004).

In 2003, the number of housing units in the city grew by 2.7 percent in the single-family attached sector, by 4.3 percent in the manufactured housing sector, and by 7.9 percent in the multi-family sector. This contrasted with a growth of 1.2 percent in the number of units in conventional, single-family detached housing (City of Gillette 2004).