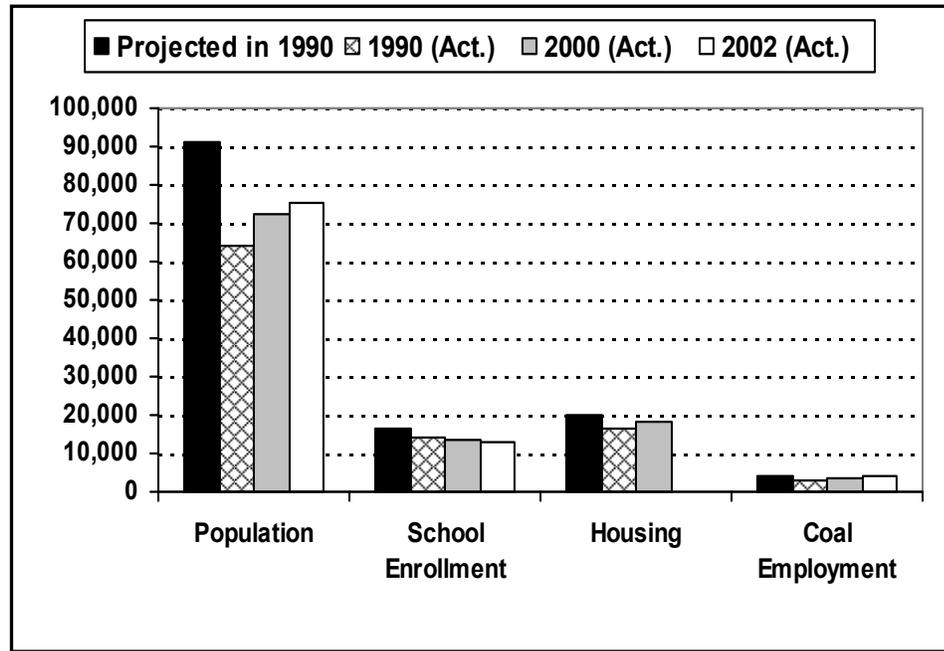


### 3.3 Changes in Population and Other Key Indicators

The protocol underlying the 1996 Coal Development Status Check (BLM 1996) process was to compare the projected levels of key variables considered in the regional EISs with actual levels. The key variables for economic and social conditions include population, school enrollment, total housing units, and direct coal mine employment. **Figure 3-14** and **Table 3-1** summarize projected and actual levels of these key variables.



Sources: BLM 1996; U.S. Census Bureau 1990, 2000, 2004a; Wyoming Department of Education 1975-2003c; Wyoming Department of Employment 2004.

**Figure 3-14 Population and Other Selected Economic and Social Indicators**

Population increases in Campbell, Converse, and Sheridan counties have been substantially below projected levels, even when comparing actual 2002 population to the levels projected for 1990 and the fact that total annual coal production was more than double that projected in the 1979 analysis and 13 percent higher than projected in the 1981 analysis. In fact, population in the PRB had peaked in 1985-1986 as construction activities at several of the mines were completed. Even at the peak, the combined population of the three counties was about 75,000 residents, nearly 18 percent below the 1979 projection for 1990. In addition to the impact of higher than anticipated productivity on employment in the coal industry, lower than anticipated activity in the uranium and coal enhancement sectors and declining oil and gas employment also contributed to declining population (**Figure 3-15**). **Table S-2** in the Appendix presents population estimates for the period 1977 to 2003, on a county-by-county basis.

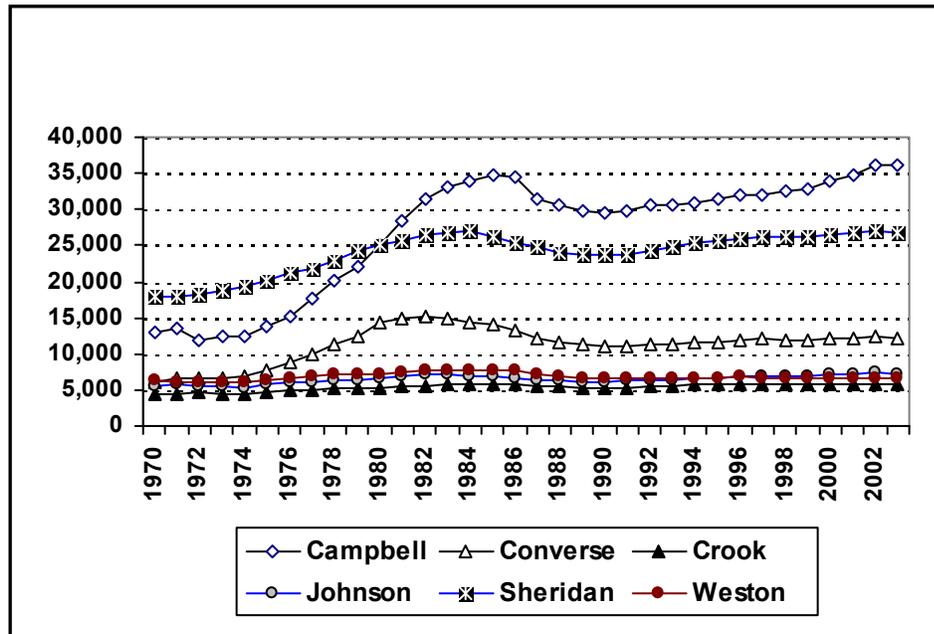
Population declined across the region in the late 1980s. Since then, population growth has been relatively steady at a moderate rate. Between 1990 and 2003, the largest gains occurred in Sheridan (3,128) and Campbell (6,718) counties. Not until 2001 did the population of Campbell County, driven by CBNG activity, again exceed the previous peak of 1984.

### 3.3 Changes in Population and Other Key Indicators

**Table 3-1**  
**Changes in Population and Other Key Socioeconomic Variables**  
**Campbell, Converse, and Sheridan Counties, Wyoming**

	1979 Prediction for 1990	1981 Prediction for 1990	Actual 1990	Actual 1994	Actual 2000	Actual 2002
<b>Annual Coal Production (Tons)</b>						
Campbell and Converse Counties	174,300,000	318,400,000	162,586,000	216,874,000	323,181,235	359,638,965
<b>Population</b>						
Campbell County	39,583	47,400	29,370	30,835	33,698	36,240
Converse County	19,811	21,600	11,128	11,492	12,052	12,361
Sheridan County	31,666	34,000	23,562	25,256	26,560	26,964
<b>Total</b>	<b>91,060</b>	<b>103,000</b>	<b>64,060</b>	<b>67,583</b>	<b>72,310</b>	<b>75,565</b>
<b>School District Enrollment</b>						
Campbell County District #1	6,711	N/A	7,759	8,029	7,488	7,368
Converse County District #1	3,376	N/A	1,785	1,809	1,660	1,688
Sheridan County District #1	742	N/A	783	923	895	871
Sheridan County District #2	5,930	N/A	3,768	3,622	3,247	3,172
<b>Total</b>	<b>16,759</b>	<b>N/A</b>	<b>14,095</b>	<b>14,383</b>	<b>13,290</b>	<b>13,099</b>
<b>Housing Units</b>						
Gillette	7,938	9,460	7,078	8,391	7,931	N/A
Douglas	4,097	3,635	2,267	1,950	2,385	N/A
Wright	-	-	527	466	544	N/A
Sheridan	7,937	8,900	6,475	N/A	7,413	N/A
Ranchester	N/A	N/A	N/A	N/A	240	N/A
<b>Direct Coal Mine Employment</b>						
Campbell and Converse Counties	3,889	11,900	2,862	3,126	3,477	3,895
Sheridan County	N/A	1,400	27	18	11	0

Sources: BLM 1996; U.S. Census Bureau 1990, 2000, and 2004a,b; Wyoming Department of Education 1975-2003c; Wyoming Department of Employment 2004.



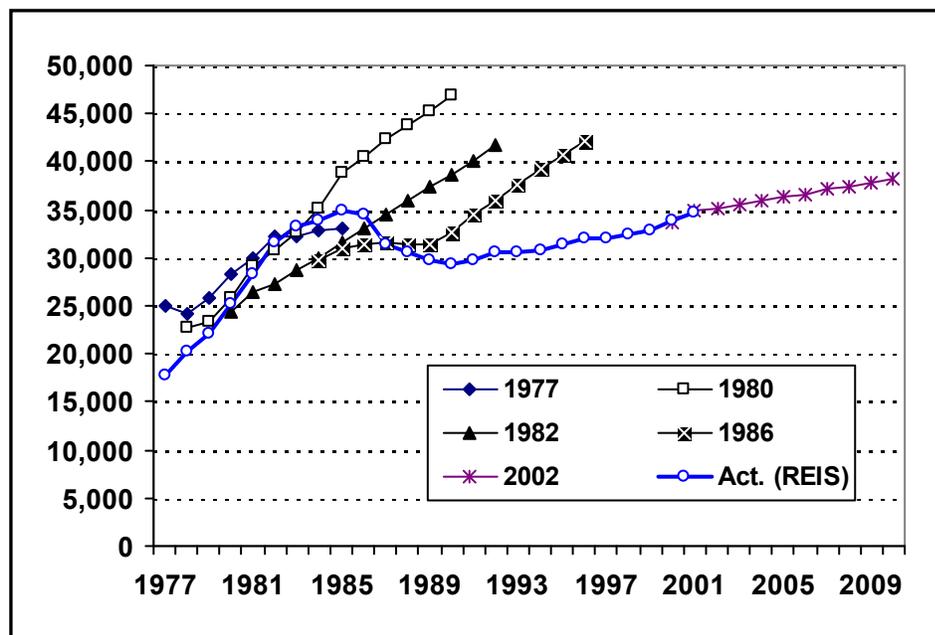
Source: U.S. Bureau of Economic Analysis 2004.

**Figure 3-15 Population by County (1970 to 2003)**

### 3.0 Description of Current Social and Economic Conditions

Comparing actual to projected population growth in Campbell County over time provides an interesting perspective on the cumulative impacts of past and present actions as well as the existing conditions in the Campbell County and to some extent the entire PRB. Beginning early in the 1970s, recognition of the pending economic, fiscal, and social implications associated with development of the region's vast coal reserves resulted in a series of planning efforts intended to help prepare for and mitigate major adverse impacts. Underlying those efforts were population forecasts prepared by various local, state, and federal agencies. Those forecasts embodied available data regarding future coal production and labor productivity, other projects, the relationships between direct and secondary employment, demographic factors, and expected residency distribution.

One such series of forecasts were prepared by the Division of Research and Statistics, now the Economic Analysis Division in the Wyoming Department of Administration and Information (WDAI) (WDAI, various years). The forecasts, which typically had a 10-year projection horizon, were updated over time to reflect changing expectations and information and remain part of the division's current portfolio of research. Reviewing those forecasts sheds some insights as to the challenges and uncertainties associated with the initial development and expansion of the PRB. **Figure 3-16** below illustrates the population forecasts during those early years, as well as more recent forecasts to 2010 and estimated population.



Source: U.S. Bureau of Economic Analysis 2004; WDAI, various years.

**Figure 3-16 Campbell County Population Forecasts (1977 – 2002)**

As shown, the earliest forecasts extended to 1985, but were relatively accurate when compared to the actual population 8 years later (33,098 projected versus 34,864 actual). Subsequent forecasts, which began to reflect additional uranium development, as well as coal enhancement projects, anticipated strong continued growth. As time passed, subsequent population growth forecasts were dampened, either reducing the peak population achieved within the 10-year time horizon, or deferring the growth such that defined population levels occurred later in the time horizon. For

### 3.3 Changes in Population and Other Key Indicators

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example, the forecasts prepared in 1986 called for a population of 40,678 in 1995, whereas forecasts prepared in 1982 had Campbell County's population reaching that level in 1991. While actual growth did not achieve the anticipated peak levels, the forecasts fed into expectations and planning efforts regarding future facility requirements and potential service demands that underlie some conditions found today in the PRB.

Current forecasts, prepared following the early years of CBNG development, project population rising to 38,240 in 2010, a net increase of 4,256 from the 2000 census population and a compounded annual growth rate of 1.2 percent. However, that forecast is approximately 9,000 residents lower (19 percent) than the 47,000 peak population once forecast for Campbell County.

The actual number of housing units in 1990 fell below the needs projected in regional coal EISs, particularly in Sheridan and Douglas counties, again mirroring lower than anticipated population growth. The 1990 census identified a total of 16,337 dwelling units in five selected communities addressed in the regional analyses, 3,625 fewer than the 19,962 units projected in the 1979 analysis and 5,658 fewer units than projected in 1981. The total included 527 dwelling units in the town of Wright, founded in 1976 and incorporated in 1985, not included in those EISs. The demand met by units in Wright had most likely been assigned to Gillette.

Housing development has continued across the region at a pace above the rate of population growth. Between the 1990 and 2000 decennial censuses, the total number of housing units increased by 1,750 units in Campbell County, 435 units in Converse County, and 1,423 units in Sheridan County. Across the six-county study area, the total housing stock more than doubled, from 19,199 in 1970 to 41,203 in 2000, an increase of 22,004 units or 115 percent (U.S. Census Bureau, various years).

Two underlying trends of note with respect to housing are the large amount of residential development in unincorporated areas of the region and the shifts in the mix of housing. With regard to the former, most housing was to be found in the major communities at the time of the 1970 census; for example, 2,228 of 3,951 units in Campbell County were in Gillette, and 4,438 of 6,893 units in Sheridan County were in Sheridan. Of the new residential construction since 1970, 25.9 percent is in Gillette; 32.9 percent is in Sheridan, Douglas, Buffalo, Newcastle, and other selected communities; and 41.2 percent is located in unincorporated areas or smaller communities.

Construction over the past three decades has substantially altered the mix of housing in the region. The effects, however, have been different in Campbell County than in the other counties. In Campbell County, most of the expanded housing stock is single-family homes. Consequently, the housing mix in 2000 was 56 percent single family, 17 percent multi-family, and 27 percent mobile homes. In 1970, mobile homes comprised 42 percent of the housing in the county. In contrast, the combined number and share of the housing stock accounted for by mobile homes in the other five counties in the study area increased dramatically from 1,308 units (8.7 percent) in 1970 to 4,866 units (17.4 percent) in 2000. The differences in the housing stock between Campbell County and the other counties likely reflects the well-paying and stable jobs associated with the coal mining and related utility and transportation industries, long-term population growth, and housing demand sufficient to support a local residential construction industry, and the positive effects of a far-reaching and multi-faceted community development program in Gillette.

### **3.0 Description of Current Social and Economic Conditions**

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Historical trends in direct coal mining employment were discussed above. Relative to projected employment, direct coal mine employment in Campbell and Converse counties only recently achieved the levels projected to be reached by 1990 in the 1979 study, 3,895 in 2002 compared to 3,889, even at annual production levels more than twice those that were the basis for those projections. At the same time, direct coal mine employment is only 29 percent of the projected 1990 levels in the 1981 analysis, 3,895 compared to 11,900, again even though actual production exceeds the projected volume; 359.6 million actual tons compared to 318.4 projected tons. As discussed previously, higher than anticipated productivity and increases in productivity over time are the major factors underlying the differences.