



# Community Economic Profile

## Fremont County, Idaho

**Dr. Richard Gardner  
Bootstrap Solutions  
Boise, Idaho**

# Community Economic Profile

## Fremont County, Idaho

November 2014 – Review Draft

**By:**

**Dr. Richard Gardner**  
Bootstrap Solutions  
Boise, Idaho

## ***Introduction***

---

This report is an update of a presentation given to leaders and residents of Fremont County in St. Anthony on November 28 and in Island Park on November 29, 2006, as part of a Community Economic Profile Workshop. The workshop was an informal effort hosted by Fremont County, BLM, and the Caribou-Targhee National Forest to lay a foundation of mutual understanding of socio-economic conditions for developing a county economic development strategy, for updating the county comprehensive plan, as well as to initiate a dialogue around local economic development and the role public lands could play. A separate report detailed that meeting.

A recent USDA ERS study showed that rural counties tend to suffer more employment loss during a recession and recover at slower rates than urban counties. Farming and energy-dependent counties did better. Rural counties suffered because their workers tended to be less well educated and sometimes older. A key question for places of high amenities is whether the basic value proposition of the place still holds after the Great Recession in terms of natural amenities, cultural amenities, services, and cost of living. Where does Fremont County stand as the United States emerges from the Great Recession?

To answer this question, this document describes the local economic and demographic situation in Fremont County as of fall 2014. It is not intended to be comprehensive but to capture areas of significant change since the report was first issued in 2006. The data provide a snapshot in time of the county, though some effort has been made to identify changes and trends. Data limitations make most of the description countywide; community-level observations are made where possible. This report has retained the observations of the 2006 meeting participants where it may provide insight into local developments that have occurred since then.

**Acknowledgments.** This report is drawn from conventional secondary data sources such as the U.S. Census Bureau and Bureau of Economic Analysis. Several data points were interpolated on the county business data to fill in data gaps. The Census Bureau's American Community Survey makes annual estimates based on multiple years' worth of data. Other references are for the full and more accurate decennial census done in 2010.

This report relies heavily on two, publicly available compilations of Idaho data. They are the Economic Profile System maintained by Headwaters Economics and the Indicators Idaho website maintained by the University of Idaho Extension. All of their data is from the same secondary, and largely federal, data sources. The report derives much from the *Profile of Rural Idaho*, first developed by the author in 1988, with a fourth edition published in 2005.

## ***A Simple Model of a Local Economy***

---

The figure below is the *Static Rain Barrel Model* adapted from the work of David Darling at Kansas State University. Here, the metaphor is that the level of economic activity, or prosperity, in a community is like the water level in an old wooden rain barrel (Figure A).

Water flows into the rain barrel as dollars are earned or captured within the community. They come in the form of wages, sales, profits, and investments in “basic” or “export” industries. Economists call this Export Base Theory, and historically it referred to industries that created new wealth, often by capturing flows of value from the land. Crops, livestock, timber, and minerals are produced from the land and sold to create a stream of local income. Manufacturing, which combines physical inputs at various stages of development with local labor and technology, is also a basic industry providing new income. **A basic industry is any business or individual who brings new money into the community by exporting a product beyond the community.**

In more recent years, economists have recognized that services provided to markets outside the region and services provided to visitors coming in from outside the region also qualify as base industries producing streams of new revenue. Other sources of new money are construction, government offices, retired persons, and wealthy persons. These basic economic activities are sometimes called “region-building.” Such businesses are the preferred target of economic development efforts.

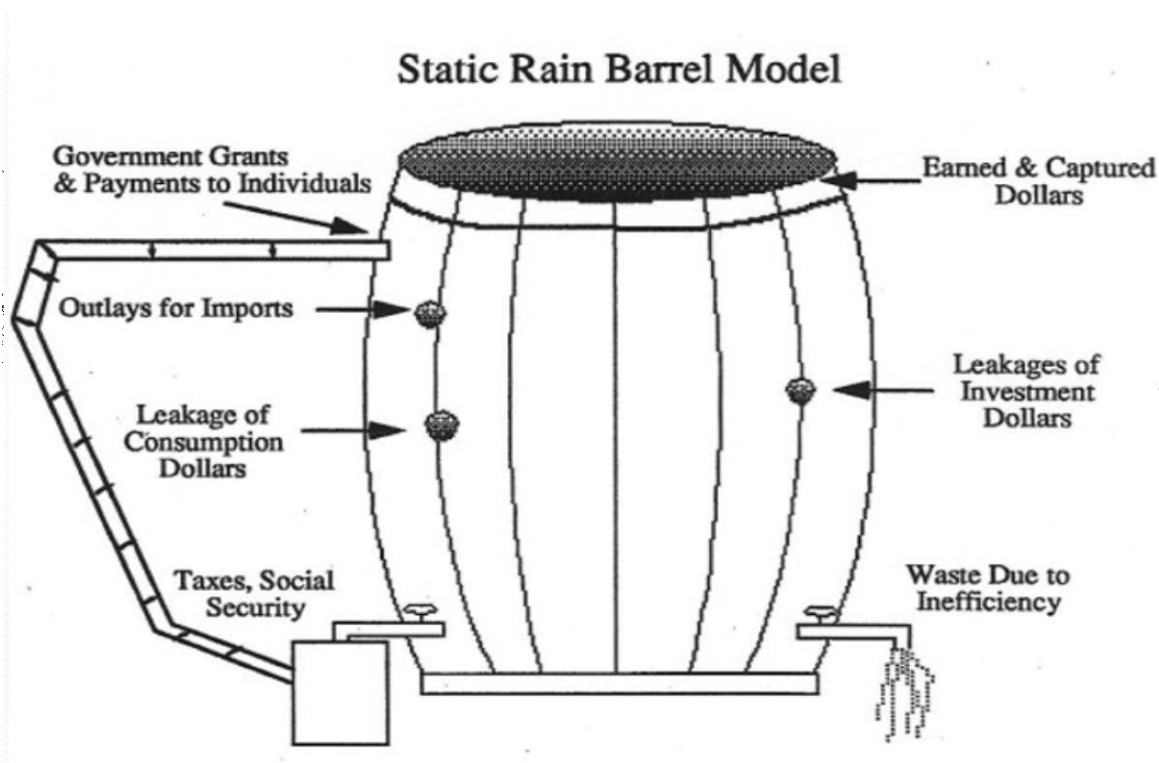


Figure A

The wages and profits of these basic industries are often used to buy local goods and services from businesses and individuals who rely primarily on those purchases to make a living. **Businesses and individuals who do not make their living from outside dollars are "non-basic" or "region-filling" businesses.** Examples of non-basic businesses are grocery stores, car dealers, hairdressers, accountants, and other retailers or personal services. As the wages and profits of the basic industries turn over to local suppliers and non-basic industries, part of this income may be passed around several times before it leaves the community. This is called the **multiplier effect**.

The more self-sufficient a community is, the more goods and services are purchased locally and the higher the multiplier effect. The higher the multiplier, the more a dollar circulates around a community prior to leaving. The more that happens, the greater the employment impacts of the base industry and the greater the prosperity of the community. In general, the smaller the town and its retail sector, the smaller the multiplier. The national trend toward "big box" warehouse stores and the consolidation of health care toward regional medical centers are factors that may cause multipliers in many rural communities to become smaller over time.

The relationships of households and businesses in a community to whom they sell or from whom they buy are called **linkages**. The more linkages within a community, the higher is the multiplier, and the greater the prosperity. Communities should examine linkages to find opportunities for bringing more economic activity into the community that is currently performed outside the community. To the degree that purchases of goods or services are made outside the community, these are called **leakages**. Most financial investments tend to end up outside the rural community, in bonds or mortgages or shares of stock of national or multi-national firms. This is an often-overlooked leakage.

It is often thought that payments for taxes or Social Security are a type of leakage out of the local economy. Most local government revenues and a large share of state tax dollars are spent in local communities supporting infrastructure, education, and government programs. Rural Western states have long received much more than one dollar in return for every dollar of Federal taxes paid. For instance, Idaho received \$1.21 for every \$1.00 in federal taxes paid in 2005, according to the Tax Foundation. This is due to the geography of the West and the large number of highway miles, public lands, national parks, national labs, and military installations operated in remote areas. In many rural Western communities, public employers like federal agencies, schools, or hospitals are large and stable parts of the local economy.

**The Rain Barrel and Community Economic Development.** As water flows into the community bucket in the form of sales, wages, and profits and circulates around the community, the prosperity level rises. This is economic/community development. If the bucket overflows, a community can build a bigger bucket (the community grows; infrastructure expands) or the community can build a better bucket (the quality of community facilities and lifestyles improves). So how can the community make its bucket overflow? The answer is simple. Increase the flow of dollars coming in, and plug the leaks.

**Begin fixing the bucket by taking care of basic infrastructure needs.** The quality of a community's education system, transportation facilities, telecommunication linkages, utilities, health care and recreational facilities will affect the performance of existing businesses and will determine whether new businesses and individuals will move to or visit the community. For this reason, an infrastructure improvement strategy is essential to "fixing the bucket."

While the bucket is being improved, **community leaders need to increase the flow of new dollars to the community by preserving existing businesses, by helping them to expand, and by attracting new businesses and individuals to the community.** Focus on basic or export industries in this effort. A business retention and expansion strategy and an economic diversification plan are essential to identify opportunities to expand the flow of dollars into the community and raise the level of community prosperity.

As a final strategy, **plug the leaks that allow prosperity to leave the community.** Leaks are caused by a community not being self-sufficient. Some leaks cannot be helped. A sawmill may

need a new blade, but steel is not made in town. Some earnings will have to be spent outside the community to get that new blade. A community member might want a Ford pickup truck, but Ford trucks are not built in town. Taxes must be paid (though a surprising amount comes back to the community as local services, salary and pension payments to individuals, or government grants). As such, there is nothing that can be done about those leaks, but there are some leaks that can be plugged.

Leaks that can be plugged are local households that go out of town to buy goods and services that are available in town or could easily be provided. Each non-basic business patches a potential leak in the community bucket. When out-of-town business purchases of some good or service, e.g., machine tooling or accounting, are large enough to sustain a local supplier, a leak can be identified and plugged. Other leaks are local savings that are invested outside the community because there is a lack of opportunity to invest at home. Leaks can be plugged by providing the goods and services that are missing. Sometimes the community must be convinced a service is available and of the quality and price they desire, e.g., using the local hospital. The community can also plug leaks by taking local savings and making wise investments in new businesses or business expansions.

***Fremont County Population: Lagging Behind the Rest of Idaho***

---

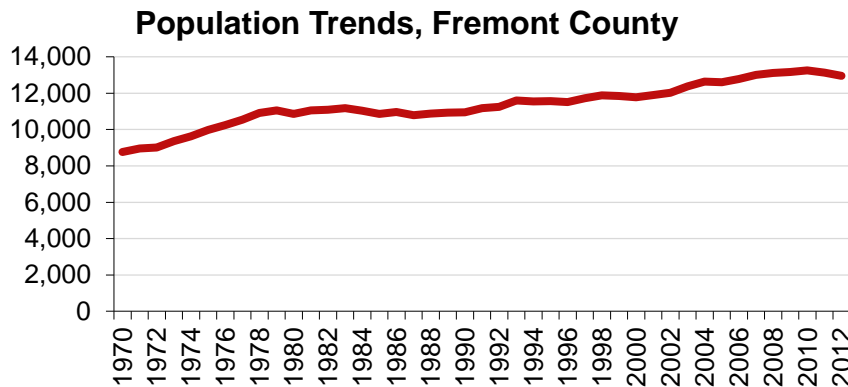


Figure B

From 1970-2013, the population of Fremont County grew by 4,217 people to a total county population of 12,927 in 2013 (Figure B). This is an average annual growth rate of 1.0%, a slow, but steady, growth rate over the 43 year period. However, most of the growth occurred during the 1970s, with growth stagnating in recent years. In fact, in some communities, the population has been stagnant for decades. For instance, Ashton actually lost 74 people in population from 1940-2005, and its population fell 21% between 2000 and 2012 (Table 1).

During the “Rural Renaissance” of 1975-81, Fremont County outgrew both the nation and for part of that time, the State of Idaho. Fremont County actually ended the 1980s with 1.1% growth, which was a show of strength in a decade when 18 rural Idaho counties lost population. Fremont County grew only 8% in the 1990s, compared to Idaho’s 29% and the United States’ 13%. From 2000 – 2010, Fremont County grew 10% and nearly paced with the national growth rate of 12%, but still lagged far behind Idaho’s 21% growth in population.

Figure C shows how Fremont County grew initially in the face of the Great Recession of 2008. Spiking to an all-time high population in 2010, the county's population has slowly eroded since to 12,927 in 2013.

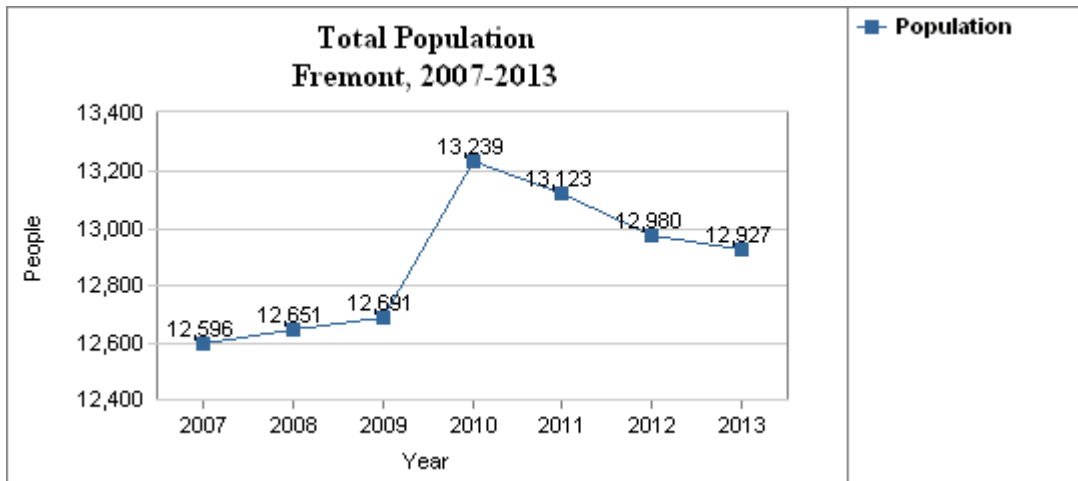


Figure C

Table 1 shows 2012 Census estimates of population for all of the communities in Fremont County, as well as growth rates from 2000 - 2012. The county seat of St. Anthony is by far the largest city at 3,527, followed by Ashton at 894, Teton at 683, Newdale at 312, and Parker at 321. Ashton actually lost 20.8% of its population from 2000 to 2012 and Island Park City lost 20%. Note the far faster growth rates in the open countryside and Island Park CCD (which is largely outside city limits), compared to the growth within cities. Teton was the only city to grow faster than the county

	<u>2000</u>	<u>2012</u>	<u>% Growth</u> <u>2000-12</u>
Fremont County	11,819	12,980	9.8%
St. Anthony	3,342	3,527	5.5%
Ashton	1,129	894	-20.8%
Teton	569	683	20.0%
Newdale	358	312	-12.8%
Parker	319	321	0.6%
Island Park City	215	172	-20.0%
Island Park County			
Census Division	1,097	1,280	16.7%
Drummond	15	11	-26.7%
Warm River	10	0	-100.0%
Rural Countryside	5,862	7,060	20.4%

Source: US Dept of Commerce, Census, 2013 American Community Survey.

Island Park is a very unusual community. The City of Island Park is a strip along U.S. Highway 20, 36 miles long and roughly 500 feet on either side of the highway. It had only 172 residents in 2012, yet the Census County Division of Island Park, which represents most of north

Fremont County north of Ashton Hill and north of the St. Anthony Sand Dunes, had a population of 1,280. Most of Island Park's growth has been in subdivisions in the woods off the highway and out of the city limits. In this report, we will use the terms Island Park CCD, or Island Park area to refer to the larger community.

In terms of population density, Fremont County might be said to have a split personality. The entire county averages 7.0 persons per square mile. Yet the density of the large Island Park CCD, comprising most of the north county, was only 1.0 person per square mile in 2012! Sociologists sometimes use the rule of thumb of calling anything less than six persons per square mile a "frontier." 2006 workshop participants agreed that when going north up Ashton Hill into the Island Park area, or across the sand dunes on Red Road, one has the feeling of entering a frontier area very different from the agricultural communities to the south.

Another point to make about Fremont County's population is that in 2012 most of the people were living in the open countryside outside of any city limit. The proportion in the open countryside grew from 49.6% in 2000 to 54.4% in 2012. According to county planners, rural subdivisions and acreage homes have made up most of the new residential construction in recent years.

Fremont County's population growth rate may well begin to accelerate in the near future. Applied Geographic Solutions provides forecasts for the Idaho Department of Commerce and projects growth to 14,044 by 2018, or 8.2% growth from 2012. Rocky Mountain Power makes projections 25 years into the future to the year 2030. Population in Fremont County is expected to rise from the current 12,242 in 2005 to 17,420 in 2030. This increase of 5,178 amounts to a 42.3% increase.

### ***Fremont County Population: Age, Gender, and Ethnicity***

---

Figure E below shows the pattern of population in Fremont County by age cohorts of five years. The left hand graph shows the actual numbers in each age bracket in the year 2012; females are above in pink, and males are below in blue diagonal stripes. Note the bulges in the graph for ages 45-64 and ages 18-34. These are mostly the result of the Baby Boom generation born after World War II and the Baby Boom echo of that generation's children. Interestingly, the largest cohort is for children, which may reflect the increase in married student couples attending BYU-Idaho. Next to each age cohort is the percentage of Fremont County's population that it contains. The right-hand graph shows the change in the age bracket over the 12 years from 2000 to 2012. Note the decline in adults aged 35-44, yet the growth in children.

There is relative growth in the number of older persons. This is partly due to longevity increasing and partly to retirees moving to the Island Park area. Workshop participants in 2006 indicated that many of Island Park's retirees tend to be part-year residents and may not have been counted in the Census. They also observed that year-round retirees tend to be in the younger range of 55-70 years old, and the cohort 45-64 does show the largest gain. The Island Park CCD shows 30.2% in the 45-64 age bracket and another 24.0% 65 or older.

## Figure E: Fremont County Age Cohorts, 2012

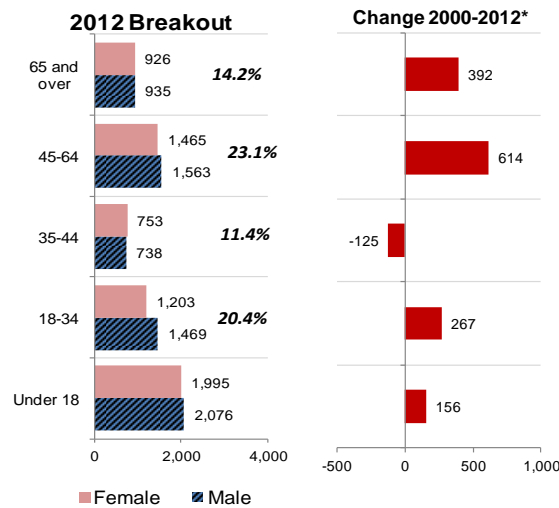


Figure E

Figure F underscores the increase in retirees migrating to the high natural amenity region of northern Fremont County. The median age is the age that evenly divides a population so that half are older and half are younger. The median age is growing nationally as the bulge of Baby Boomers ages into retirement. Fremont County, whose median age was 33.8 in 2012, is significantly younger than the U.S. at 37.2 years, and somewhat younger than Idaho at 34.7 years. Yet note the extreme case of the Island Park CCD, whose median age is 50.5 years! The growth between from 2000 to 2012 shows that a retirement community is emerging here.

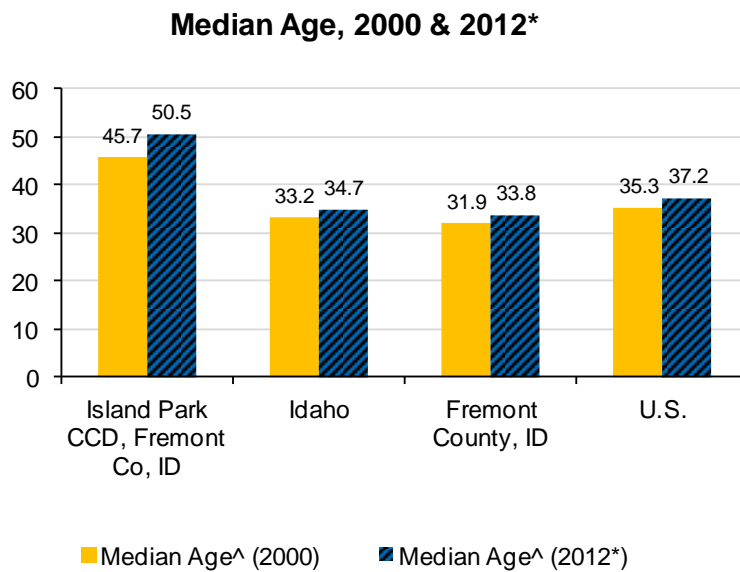


Figure F

**Key Point #1: Senior citizens and young retirees are growing in north Fremont County.**

Figures G and H show that people of Hispanic or Latino origin have grown to 12.4% of the county's population in 2012. Note that this proportion has been growing steadily since 1980, with sharp growth until 2010, as patterns of seasonal migration gave way to permanent residence. In fact, Fremont County moved from less than the Idaho average share of Hispanics in 1980 to higher than average in 1990. The proportion of Hispanics in 2000 ranged from a low of 0.0% in Island Park and Island Park CCD to 5.9% in Parker, 9.5% in Ashton, 17.1% in St. Anthony, 17.9% in Newdale and 32.5% in Teton.

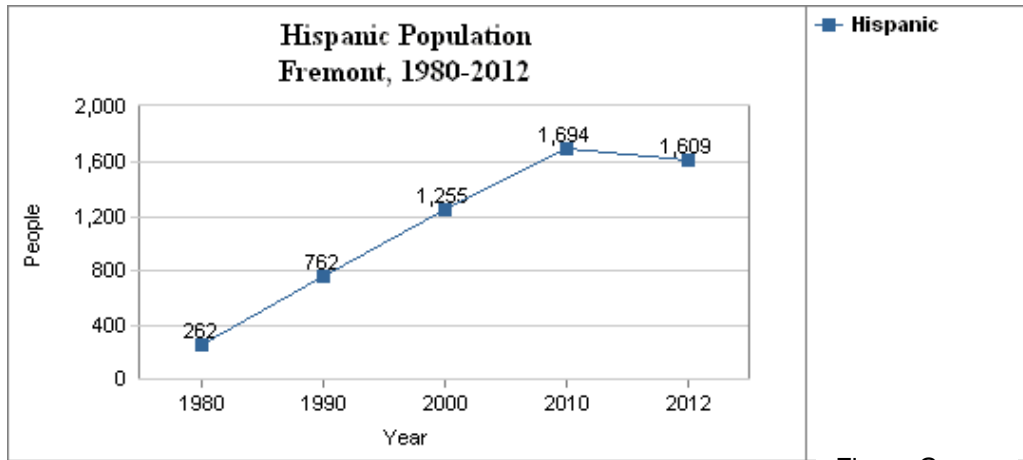


Figure G

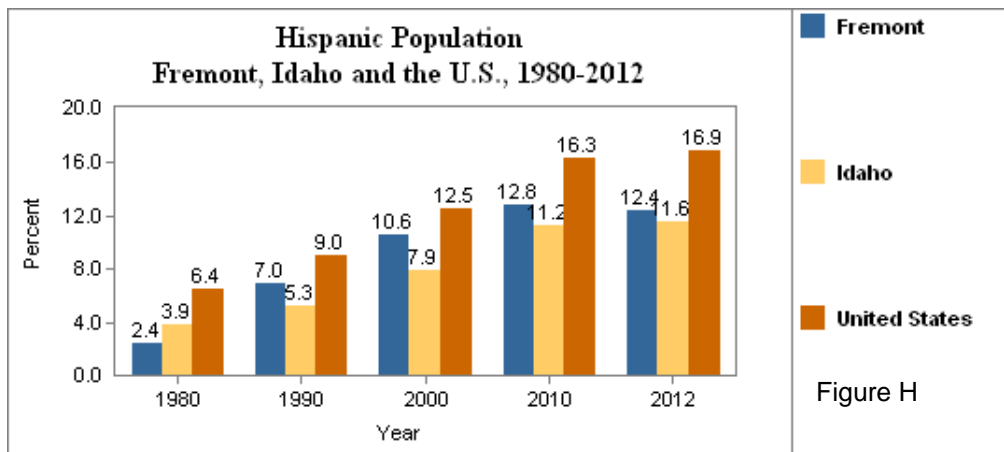


Figure H

It is interesting to see the flattening of the Hispanic population over the last three years. Is this a plateau or a pause in this trend of a growing Hispanic community? The rapid rise in the Hispanic community is a trend that has caught many Idaho communities unaware. One key to economic vitality will be for communities to find ways to build bridges between the two often separate cultures and to find ways to embrace the contributions of Hispanics to a new and more diverse Fremont County.

A clue to Fremont County's future may lie in the Magic Valley where communities routinely have 20-30% Hispanic populations. However, Fremont County has somewhat less reliance on agriculture than the Magic Valley, and the growth of BYU-Idaho and amenity retirees in north Fremont County may mean that the Hispanic community is reaching its equilibrium.

## ***Point #2: The Hispanic community is growing.***

Beyond the Hispanic community, the ethnic diversity lessens. Fremont County has less than 1% of any other racial or ethnic minorities.

### ***Fremont County Migration Patterns***

---

A natural question is why Fremont County is growing more slowly than the State of Idaho? Fremont County grew 11.0% from 2000 to 2012, while Idaho grew 21.2%. There are two components to population growth, the natural rate, or births minus deaths of the existing population, and the net migration rate, or the number of people moving into the county less those moving out (Figure I). Fremont County has had a somewhat high natural growth rate of 2.4% in the last four years, faster than state or nation. However, the net migration rate, the number of people moving into the county, less the number moving out, has been negative, with 638 more people leaving than coming into Fremont County from 2010-2013. This stands in marked contrast to the 0.5% net in-migration that Idaho has been experiencing recently. The out-migration in Fremont County is very likely due to residents seeking better employment opportunities (e.g. higher wages or career advancement opportunities) outside the county.

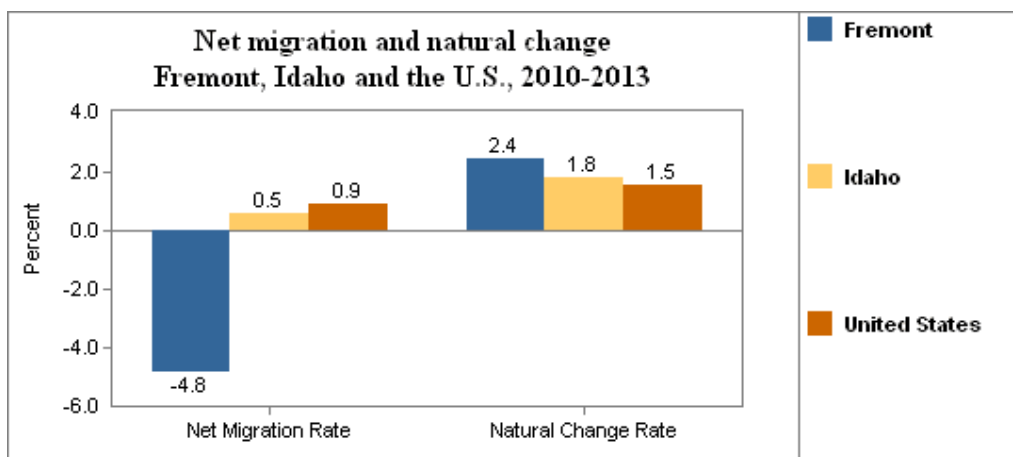


Figure I

The graph below takes a slightly longer look at migration patterns from the year 2000 to 2013. Over this period, Fremont County had natural growth of 125 persons. Net migration was a loss of 74 persons, for a net county population growth of 49 people. Look at the detail of migration for one important point. Domestic migration of US residents out of Fremont County was a loss of 110 people. However, there were 36 more people of international origin that moved into Fremont County than moved out. This may be another artifact of the rise in Hispanic residents, or it may be due to BYU-Idaho international students residing in Fremont County.

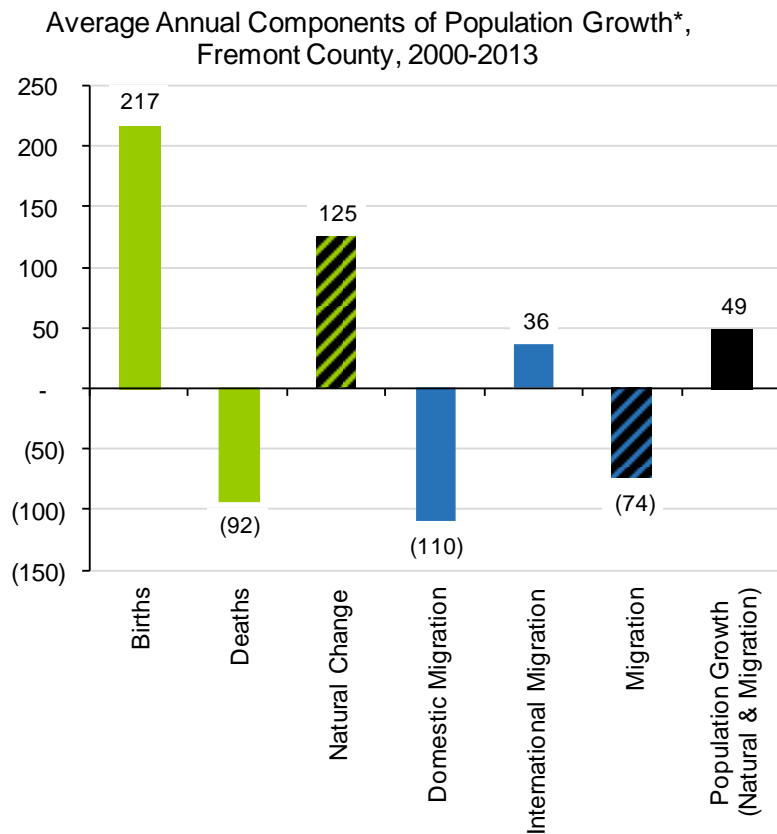


Figure J

### ***Looking at Commuter Patterns***

Since 2005 the Census Bureau has been working on a new program that allows local areas to examine commuter patterns. It is made possible because local employment data is gathered in two ways: where people work and where they live.

Many Fremont County residents work in St Anthony and Ashton, but many more work in the Rexburg area and in Idaho Falls. A primary job in the private sector is the job a person reports as their main job. Of the 4,309 workers living in Fremont County in 2011, only 30% worked in Fremont County. A whopping 29%, or 1,233, jobs were in Madison County, with 995 in Rexburg. Note that BYU-Idaho jobs count as private sector, but government jobs or the self-employed are not included. Another 15%, or 624, jobs are in Bonneville County. This is a very significant pattern of commuting out of county. Another 61 residents (1.4%) commute to Gallatin County, Montana (likely to West Yellowstone), and 94, or 2.2%, work in Teton County, Wyoming.

Where do workers live who are employed in Fremont County? There were 2,364 primary jobs in Fremont County in 2011. Fifty-four percent of Fremont County jobs were held by county residents. There were much smaller streams of 276 residents (11.7% of jobs) commuting the other way from Madison County into Fremont County, 179 from Bonneville County (7.6%), and 137 came into Fremont County from Jefferson County (5.8%). Only 29 West Yellowstone residents (1.2%) commuted into the Island Park area to work in 2011.

Figure K

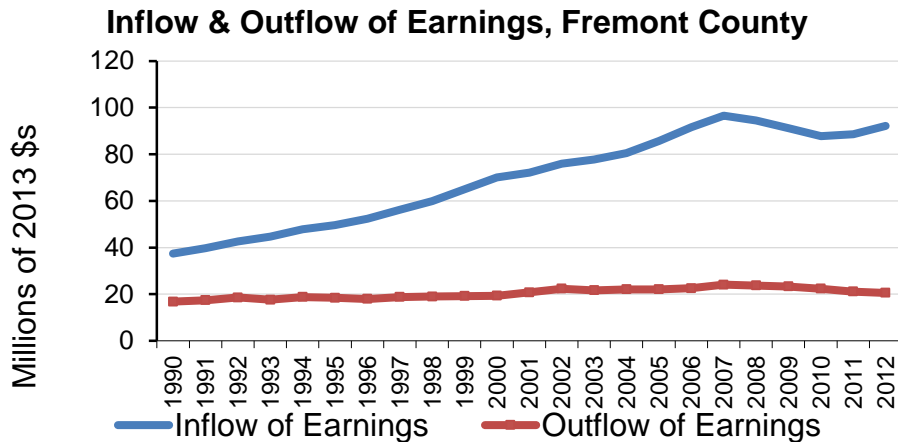
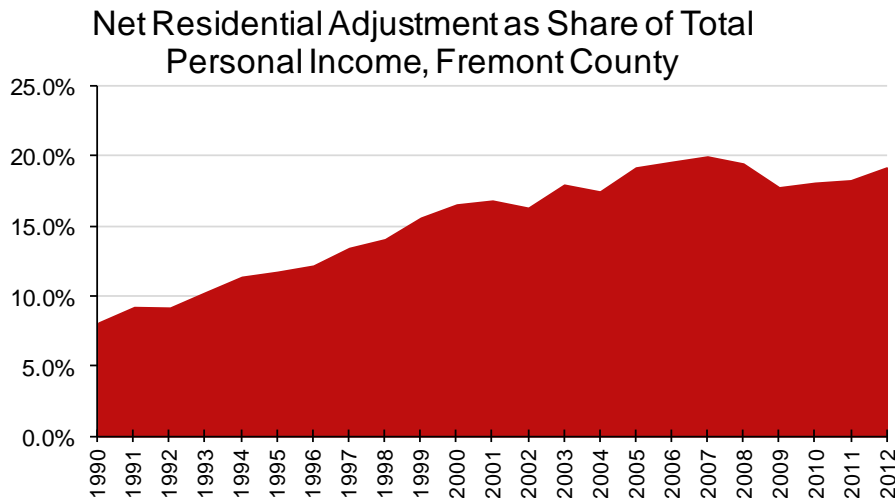


Figure K

**Key Point #3: Commuting out of Fremont County is an important mixed blessing.**

Look at what these commuting patterns mean in terms of flows of earnings across county lines in Figure K. The outflow of earnings caused by workers living outside the county has been fairly stable, growing slowly over time. Meanwhile, the inflow of earnings from Fremont County residents commuting out of the county has grown sharply from 8.1% of county personal income to 19.2% in 2012. This was no doubt aided by sawmill closures. Inflow of earnings now totals over \$71 million coming into the county each year. Each commuter might be said to leave the county each day in order to bring a paycheck back into Fremont County. Is it any wonder that a former mayor of St Anthony said he wanted his town to become the best bedroom community that it possibly can be?

Figure L

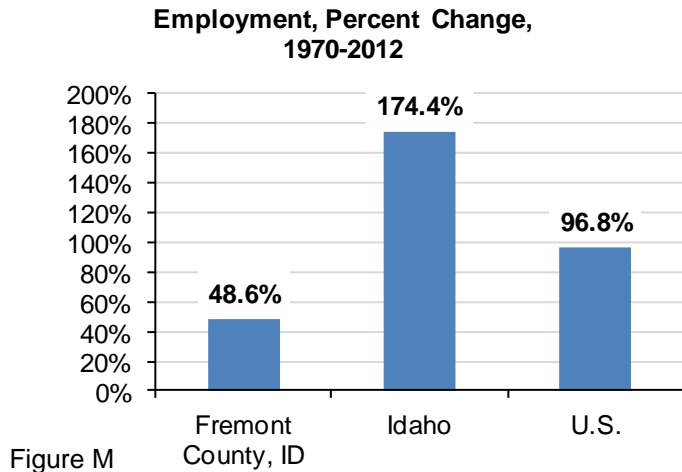


The net effect of earnings movements amounts to 19.2% of total income (Figure L above). This number has been rising over time, slipped during the Great Recession, but will likely continue to grow as BYU-Idaho grows and the Rexburg and Idaho Falls economies continue to expand and draw more commuters.

What is this analysis missing? The impact of spending leakage out of the county. The workers who are traveling out of Fremont County will naturally do much of their purchasing of goods and services in the course of their work day. In addition, others have been buying in Rexburg and Idaho Falls as the retail sector transforms. The presence of big box retail stores on the northern edge of Rexburg adversely affects retail spending in Fremont County (aided by the expected opening of a new SuperWalmart in 2016). So this benefit of commuting is softened by retail spending patterns shifting out of Fremont County.

### ***An Economy in Transition***

---



Since 1970, Fremont County has lagged behind Idaho and the U.S. in job formation (Figure M). In 2012 there were 49% more jobs in Fremont County than there were in 1970. Meanwhile, Idaho added 174% more jobs, or grew almost four times faster. The U.S. nearly doubled its employment, with a 97% gain. Still, Fremont County grew from 3,587 jobs in 1970 to 5,332 jobs in 2012.

Figure N: Employment by Industry, Fremont County

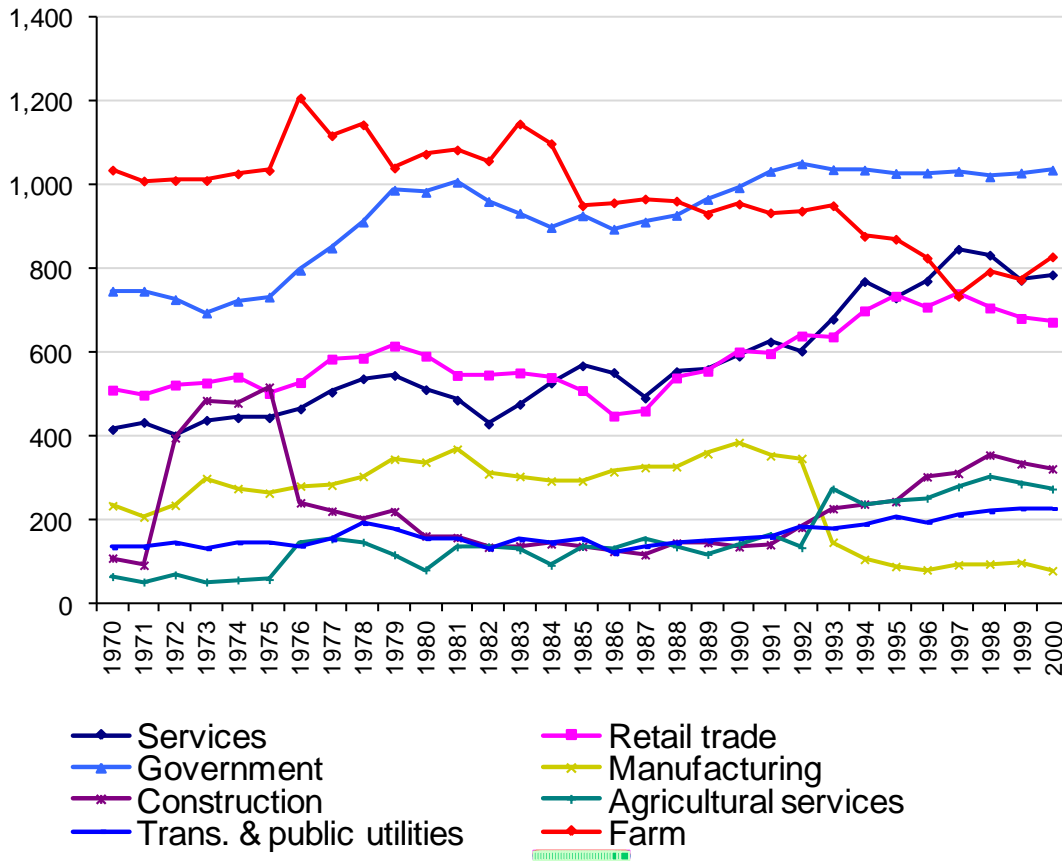


Figure N shows how employment in Fremont County's major industries grew over the years from 1970 to 2000. The red line shows the decline in farming employment, through this industry is still much more important here than elsewhere. Agricultural services have grown slowly over this period. The blue line shows how government has grown over time. While some of the growth is due to population growth, the jumps are likely tied to the opening of detention facilities. Service sector jobs and retail trade have trended upward over time. The yellow line shows manufacturing employment dropping sharply around 1992, as timber harvest declines led to mill closures. Manufacturing (which includes forest products) declined from 6.6% to 1.6% of Fremont County's employment. Note how construction employment spiked in the mid-1970s and was rising in the late 1990s due to housing booms. Construction experienced a significant rise from 3.1% to 8.1%.

The national system for classifying jobs changed in 2000 from SIC codes to NAICS codes, so it is not possible to show changes over time past the year 2000 on the same data scale. Below, data from 2001-2012 is used to show the relative shares of Fremont County agriculture compared to Idaho and the U.S.

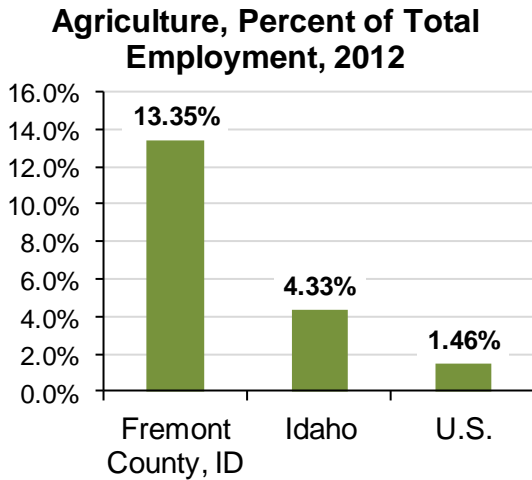


Figure O

Farm employment declined from 808 in 2001 to 712 employees in 2012. However, farming was still far more important, at 13.4% of county employment, than it is for Idaho at 4.3%, or the U.S. at 1.5%. And while agricultural processing has grown somewhat, the sector has to be considered mature. The timber industry accounts for only 1.3% of employment and mining a mere 0.14%.

***Key Point #4: Traditional resource industries are not engines of future growth.***

Similarly, government is roughly half again as important in Fremont County at 21% of jobs, as it is in Idaho at 14.3% or the U.S. at 13.4%. Again, this is due to detention facilities in the county, as well as the presence of federal land management agencies and the need to manage many miles of roads within the county.

Services jobs have grown from 39% of employment in 1970 to 48% in 2012. Real estate has grown from 3.2% of jobs in 2001 to 5.7% of jobs in 2012. Transportation and warehousing jobs have also grown in this period. What might be called travel and tourism service jobs have fallen from 19.2% of private employment in 2001 to 14.8% in 2012. Both wholesale and retail trade employment turned down in the late 1990s; this could reflect the rise in “big box” retail in Rexburg and Idaho Falls, which appear to have “hollowed out” the downtown core of St. Anthony. Note that this 48% share of services employment is much lower than the Idaho average of 67% services jobs.

## Is Government Growing?

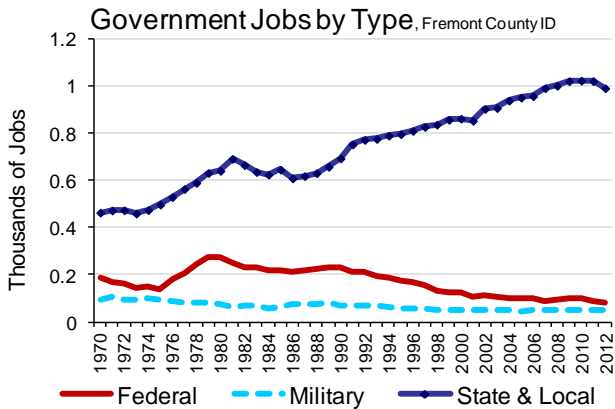


Figure P

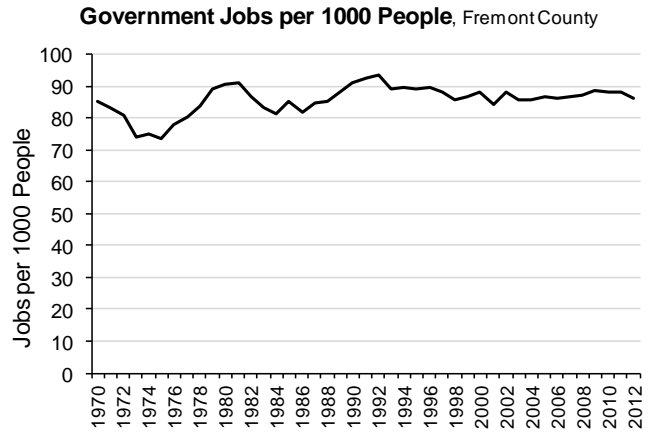


Figure Q

One often hears fears that government is growing too fast. This perception is especially true in times of rising property valuations. Figures P, and Q show the size of government employment over time in Fremont County. You can see that state and local government grew, especially in the 1990s with the addition of detention facilities. Federal and military employment declined slightly. Figure Q shows that government employment per 100 residents of the county has remained relatively constant. Nevertheless, as Figure R shows below, the government sector is twice more important to Fremont County than it is to Idaho or the United States, again due to the presence of state and local detention facilities within southern Fremont County.

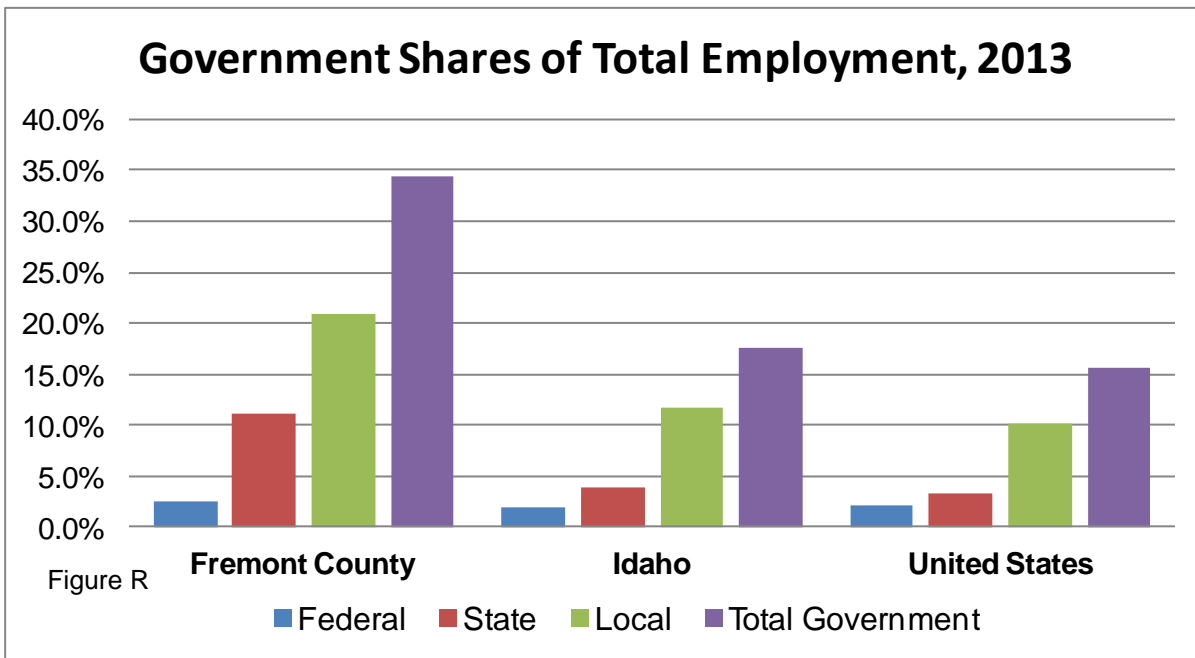


Figure R

**Key Point #5: Government is an important stabilizing economic sector for Fremont County.**

## The Importance of Proprietors

An important concept to mention is the role of proprietors in Fremont County's economy. These are self-employed persons operating as sole ownerships, partnership, or tax-exempt corporations. Of the county's 5,332 jobs in 2012, wage and salary employees account for 3,005 and proprietors account for 2,327. This rate of self-employment, 46.3%, is significantly higher than the State of Idaho average of 26.5%. (Figure S) Fremont County ranks 6<sup>th</sup> in Idaho counties in self-employment.

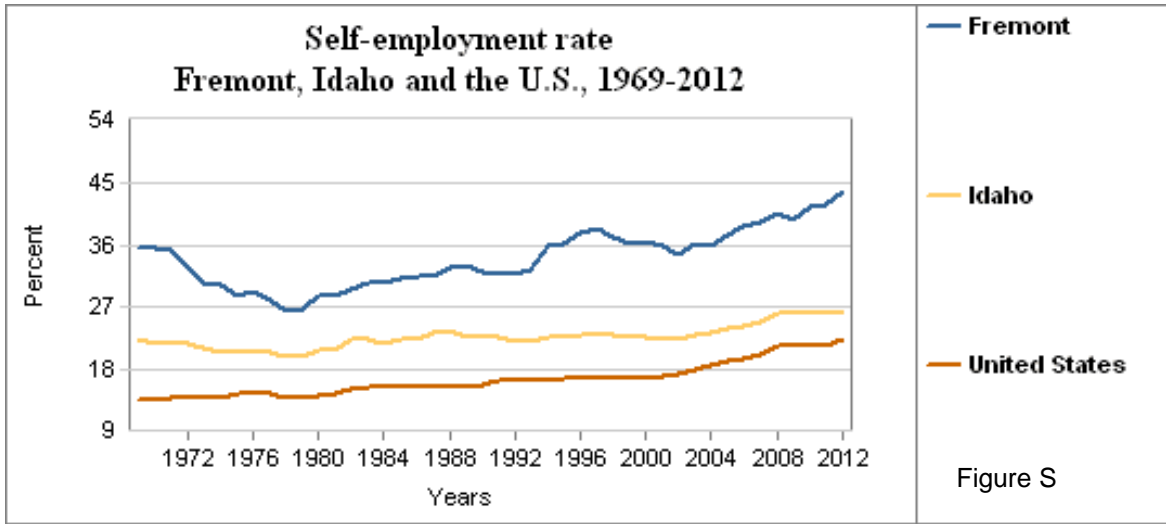


Figure S

Note the sharp rise in self-employment in the early 1990s. This rise seems to correspond to a series of mill closures in the timber industry within Fremont County.

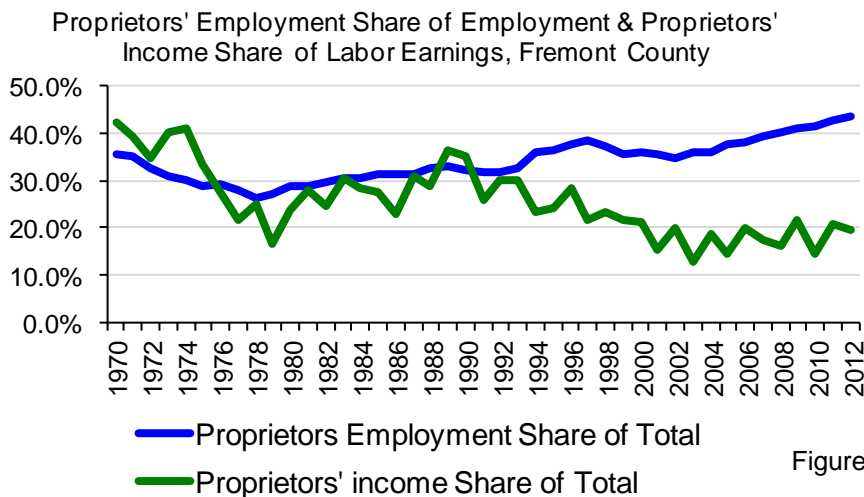


Figure T

Figure T shows how during the 1990s the share of self-employed jobs rose, while self-employment's share of income fell. Specifically, the self-employment income share fell to 20% at the same time the self-employment job share rose to over 46%. Average proprietor's income dropped below the average wage and salary. The average non-farm proprietor income was \$18,422 in 2012, less than average wage and salary income of \$30,621.

This combination of rising self-employment and falling average proprietor's income is a pattern that occurs when many people lose work at once, such as with mill closures. Faced with deep roots in the community and home ownership, many former wage earners choose to start their own business if replacement jobs are not available. These new businesses may struggle and produce little income in early years. We call such people, survival, or necessity, entrepreneurs. 2006 workshop participants suggested a second reason for the rise in self-employment could be Island Park residents who are semi-retired and start a new business to provide supplemental income. The rising number of necessity entrepreneurs testifies to their love of the place called Fremont County. An unintended consequence of having so many self-employed people who answer only to themselves, is that their experience in working cooperatively in volunteer community groups may be limited. In other words, the nature and number of these rugged individualists may contribute to the county's history with divisive community issues.

**Key Point #6: The rise in self-employed underscores the importance of nurturing entrepreneurs.**

**Looking at Personal Income**

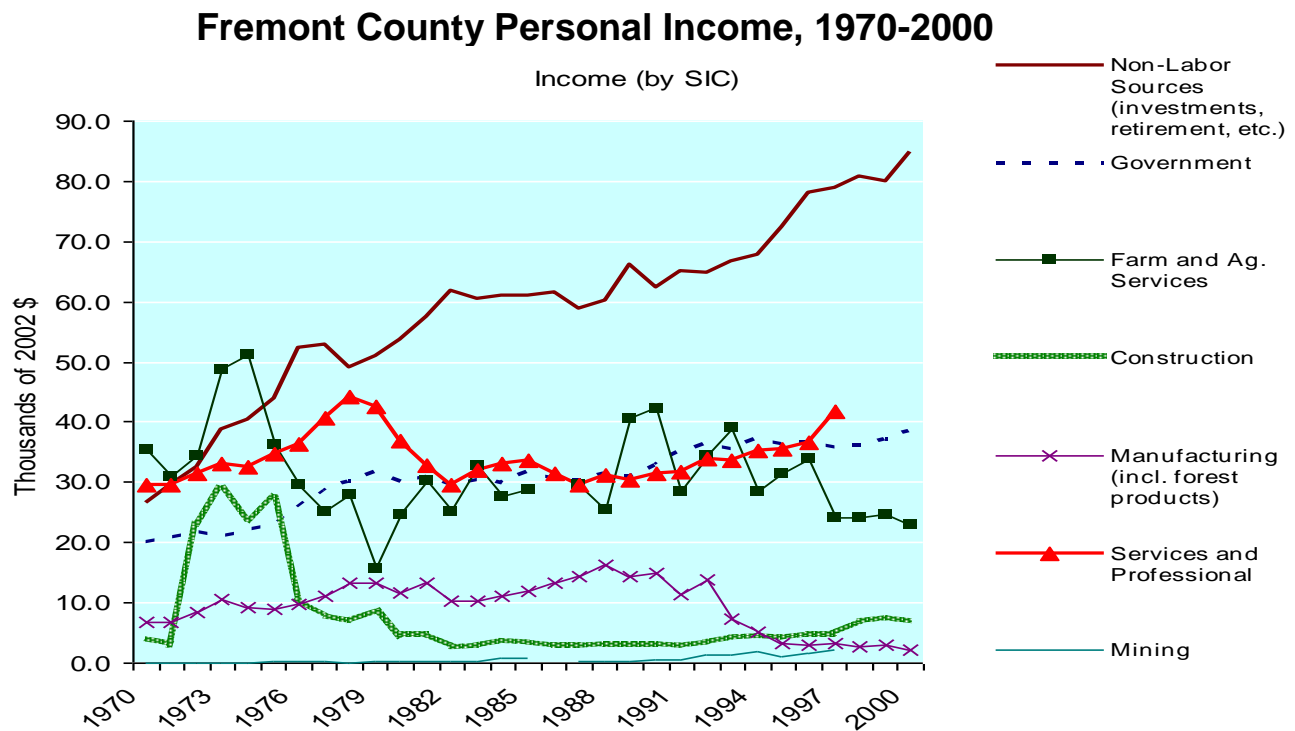


Figure U

Employment measures only tell part of the economic story of a region. Remember the rain barrel: There is money flowing into the area from other sources than wages and salaries. Economists say that personal income equals consumption expenditures, plus investment, plus government expenditures, plus exports less imports. However, let's begin by looking at personal income deriving from the different industry groups (Figure U). Personal income will

remove the variable of different wage rates as we examine the relative importance of industry sectors.

The Fremont County economy totaled \$373 million in 2012. One is immediately drawn in Figure U to the rapid growth in non-labor sources of income, and to a lesser degree in services, government, and construction. Manufacturing income sharply declined in the mid-1990s. Farming and ag services have been erratic and declining, with mining appearing trivial in personal income terms.

Since 2000, construction income rose until 2007 and then declined with the advent of the Great Recession. It appears to have stabilized in 2011-12 at around \$12 million, or roughly the same level as 2001. Net farm income is an erratic measure from year to year, but is generally higher than in 2001.

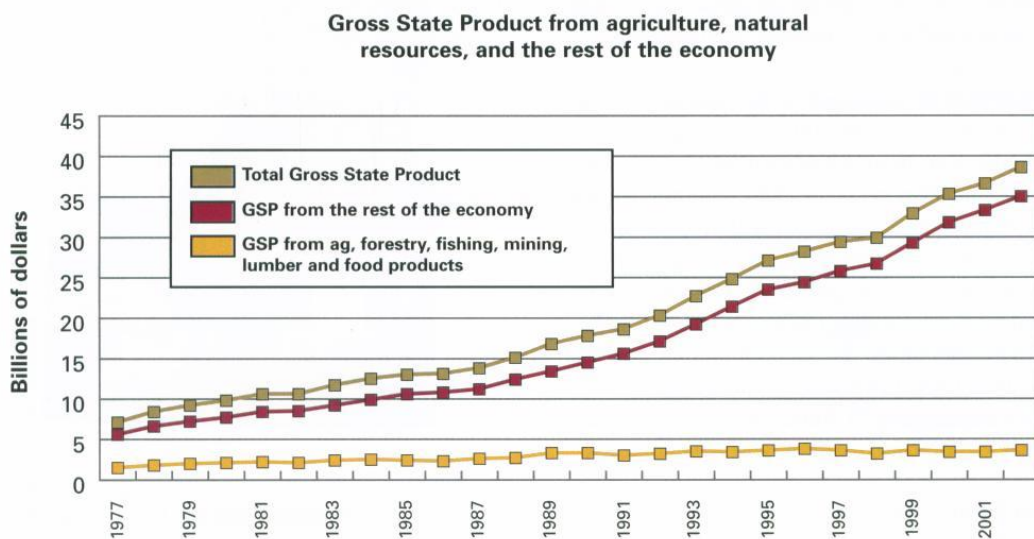


Figure V

Source: Profile of Rural Idaho, 2004

Figure V is taken from the *Profile of Rural Idaho* and is for the entire Gross State Product. It clearly makes the point that whether in terms of jobs or income, our natural resource industries have not driven the Idaho economy since the 1970s. Figure W below comes from the economic forecast by Idaho’s Division of Financial Management. It shows that the trend continues with recent and projected Idaho employment. Jobs in goods-producing industries grows ever so slowly, while significant growth in nongoods-producing industries has led Idaho out of the Great Recession. Both graphs underscore Key Point #4.

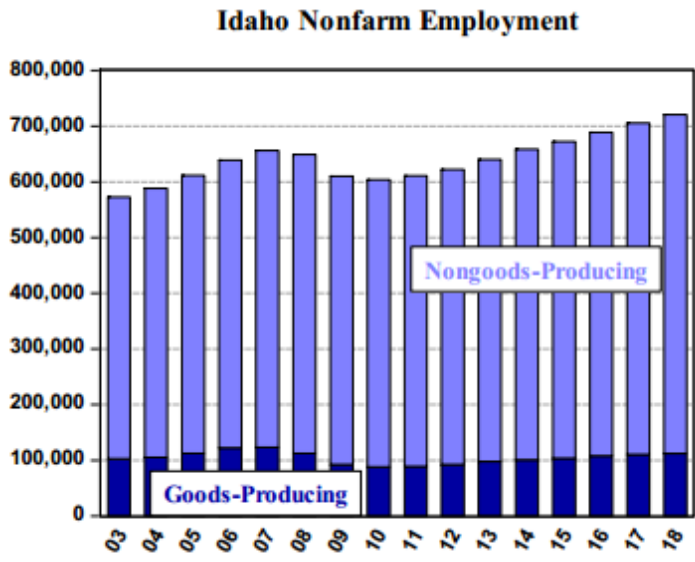


Figure W

### Looking More Closely at Non-Labor Income

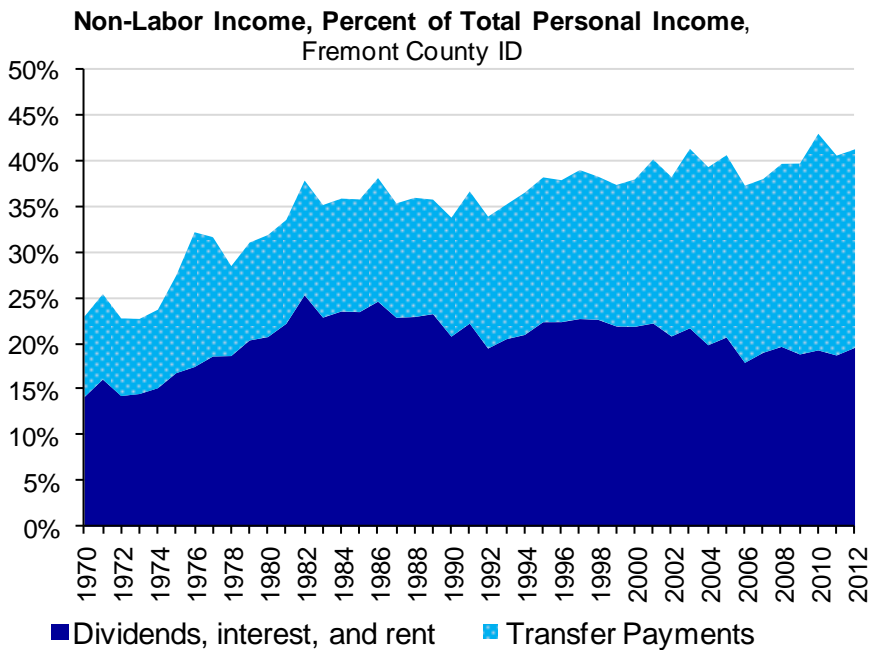


Figure X

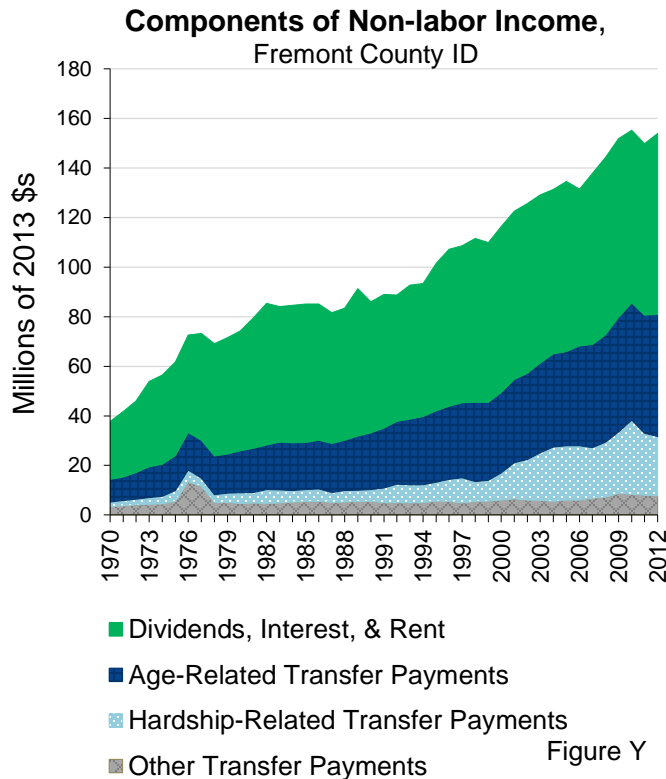
Figure X shows how non-labor income has grown over time to account for 41.2% of Fremont County personal income. While wages are the return on productive labor, the returns on dividends, interest, and rent are the returns on fixed assets, like stocks, bonds, and rental property. They account for 19.6% of the local economy in Fremont County, which is higher than the Idaho average of 19.2% or the U.S. average of 18.2%. Dividends, interest and rent are generally a very steady source of personal income. Their rise may reflect an influx of the

senior citizens, who own the majority of such assets. Increasing returns to investment properties and farmland might also be a contributing factor to growing rental income.

Transfer payments are the other piece of non-labor income, and they amount to 21.7% of Fremont County’s personal income. Again, this exceeds the Idaho average of 18.8% of state personal income being transfer payments, or the U.S. average of 17.2%. Transfer payments have risen everywhere since the Great Recession, as government programs to stabilize family income take effect.

In total , non-labor income amounts to 41.2% of Fremont County’s personal income in 2012. This compares to 38% for Idaho and 35.4% for the United States. It can also be compared to the 51.1%, 41.8%, and 36.9% of personal income in Blaine, Payette, and Teton counties, three comparable high amenity resort counties.

Figure Y below displays various components of transfer payments in Fremont County and how they have changed over time. Some readers might think of “welfare payments” when they hear the expression “transfer payments.” However, the table shows that “hardship-related” transfer payments only account for 6.4% of the economy in 2012. “Other transfer payments” include veterans’ benefits, educational payments, and workers’ compensation. Retirement, medical, and other age-related payments account for 13.2% of the county economy. Together with the 19.6% of personal income coming from dividends, interest, and rent, non-labor income that is mostly controlled by senior citizens comes to 32.8% of the county economy. Put another way, if one ignored retirees and focused only on jobs and the money workers bring in, about one-third of the economy would be ignored.



**Key Point #7: Non-labor income is very important and growing steadily.**

## Agriculture is Still Big Business in Fremont County

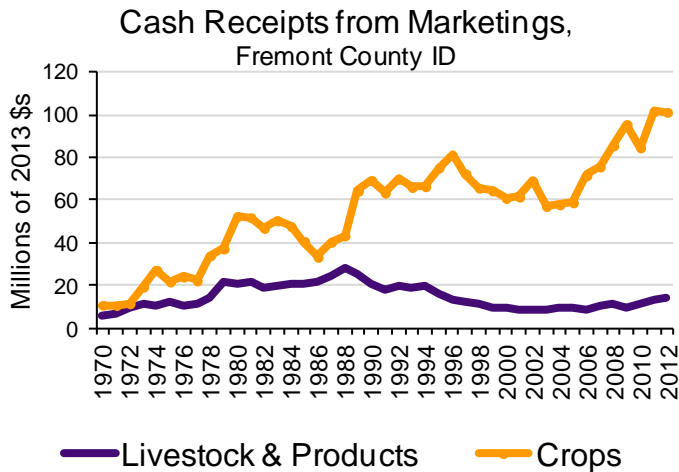


Figure Z

Agriculture in Fremont County means barley, wheat, potatoes, hay and cattle. Figure Z above is corrected for inflation into year 2013 dollars. Note that the crop share of gross income has risen in importance from 58% in 1970 to 88.5% in 2012. This increase in relative importance has occurred because the livestock share has declined through 2006, at which time crop receipts jumped sharply. Government payments have been fairly steady, but have declined slightly in recent years to \$3.5 million in 2012, or \$10,097 per farm receiving payments (2012 Census of Agriculture).

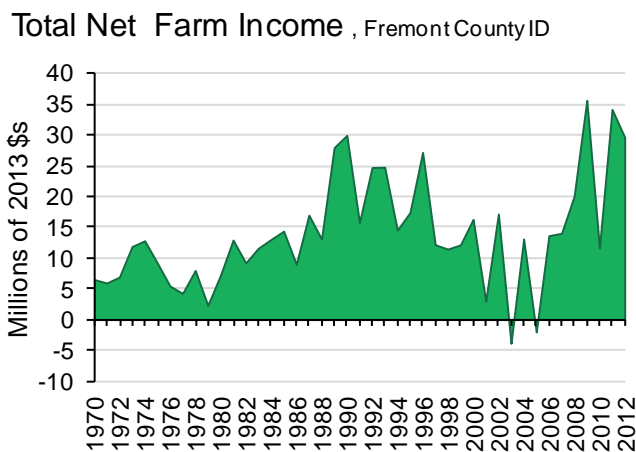


Figure AA

Net farm income, which is the contributor to personal income, is shown in Figure AA to be quite erratic. It, too, has trended upward in recent years and is a minor contributor to the Fremont County total personal income of \$373 million. Agriculture's importance comes more as its spending on inputs and labor reverberates within the economy.

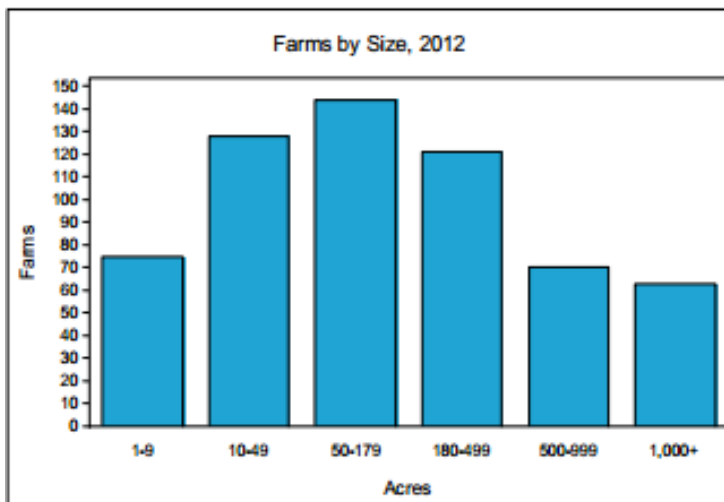


Figure AB Source: 2012 Census of Agriculture, Fremont County, Idaho

All this is playing out in an industry that continues a structural shift toward a more corporate structure, and toward more integrated systems of supply and marketing. The number of farms in Fremont County has grown by 64 in five years, from 536 in 2007 to 601 in 2012. However, the growth has been in smaller farms, while consolidation continues, as shown in Figure AB. For instance, 316 of the 601 farms produce less than \$10,000 in sales. Continued conversion of crop and ranch land into residential development puts additional pressure on Fremont County's key traditional industry.

### ***Effects of Residential Development***

---

Residential development has proceeded at a rapid pace across Fremont County. The construction industry is important and represents about 7.2% of employment and 7.3% of personal income in 2012. Figure AB offers a comparison of how quickly residential development has been proceeding. It shows the percentage change in the amount of land occupied by residences from 2000 to 2010. Fremont County's residential development has taken up five times more land than for the U.S. as a whole. Much of this is due to large lots of 5-10 acres being developed in the farmland of southern Fremont County, Island Park lots average over one-half acres, with a full acre being required for a well permit. In fairness, the national figure includes a great many urban multi-family dwellings re-developed on land already in residential use, lowering new U.S. development in terms of land area.

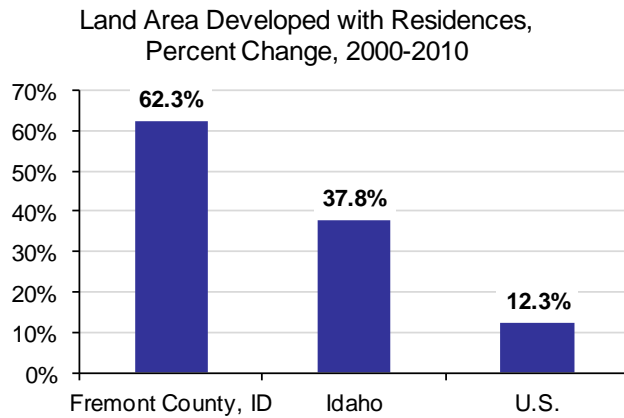


Figure AC

The next graph shows an important environmental consequence of the subdivision development that has occurred in Fremont County. New GIS technology allows the acres of land on the boundary between development and wildland to be estimated. It is called the Wildland-Urban Interface, and this is where many land use conflicts occur, such as with wildlife or involving wildfire. Figure AD shows that as of 2010, nearly 28% of Fremont County WUI has been developed, compared to only 12.6% across Idaho. Of all the homes in Fremont County, 24.1% are built in the Wildland Urban Interface, compared to 6.5% for all of Idaho and 7.0% for all of the West. Much of the recent encroachment has been in the rapid development of second homes in north Fremont County, but some also occurs within the WUI along agricultural areas. Second homes account for 84.2% of the homes within the WUI in Fremont County. Note that the City of Island Park adopted a WUI building ordinance on October 23, 2014.

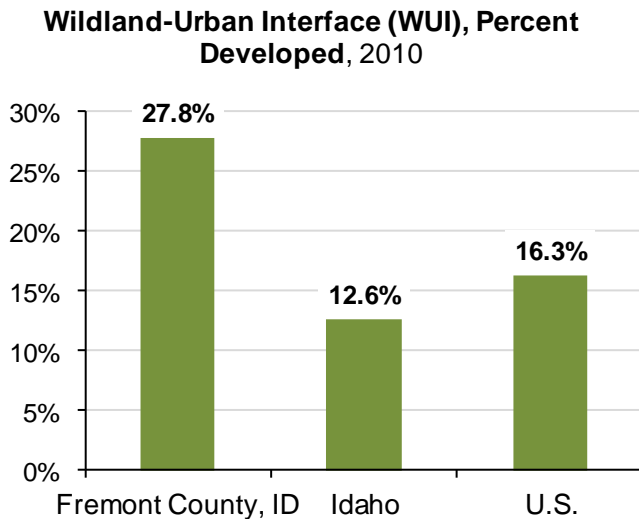
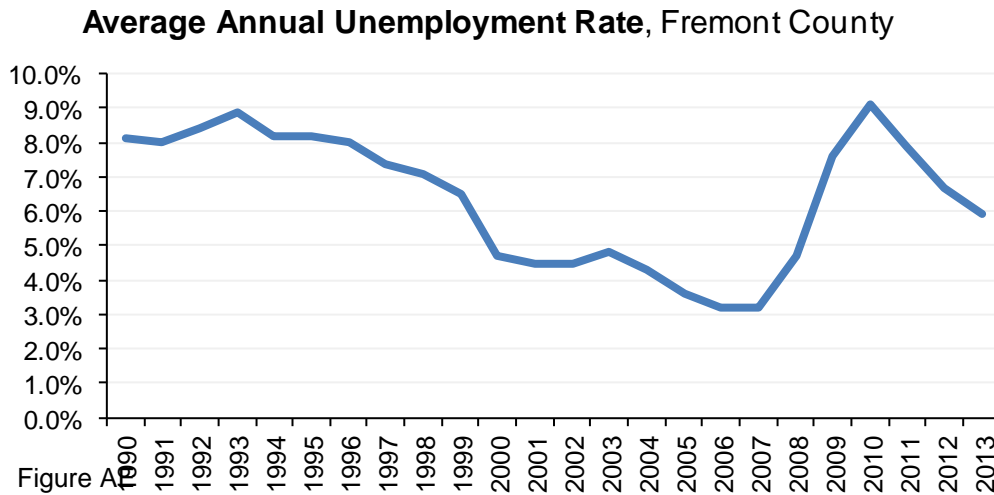


Figure AD

***Key Point #8: Second home development increases chances for conflict within the Wildland-Urban Interface.***

## Effects on Households

So far, this analysis has looked at big patterns within the county economy. Let's begin to focus on individual families. Unemployment rates are a good place to begin. Figure AE shows the Fremont County unemployment rates over the years. Unemployment steadily dropped due to the construction boom of the 1990s into 2007. Unemployment then spiked with the coming of the Great Recession. But it has declined almost as quickly from 2010 to the present. Unemployment in Fremont County was 3.5% in July 2014.



The next graph, Figure AF, shows how Fremont County in recent years has been lower than both the state and national average unemployment. For 2013, Fremont County average 5.9%, compared to 6.2% for Idaho and 7.4% for the U.S.

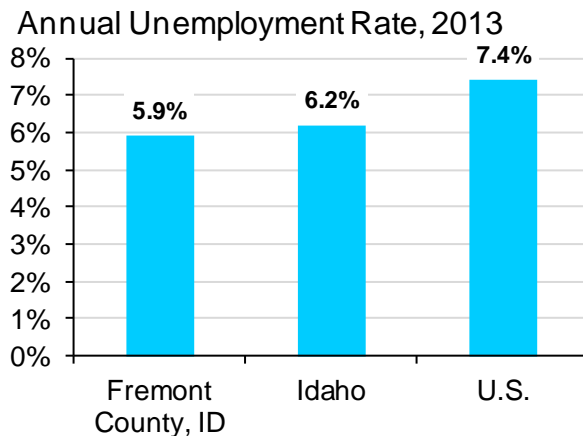


Figure AF

There is a clear seasonal variation in unemployment that occurs in Fremont County, as shown in Figure AG. It peaks in the February/March time frame and generally declines slowly to a low during harvest time in October.

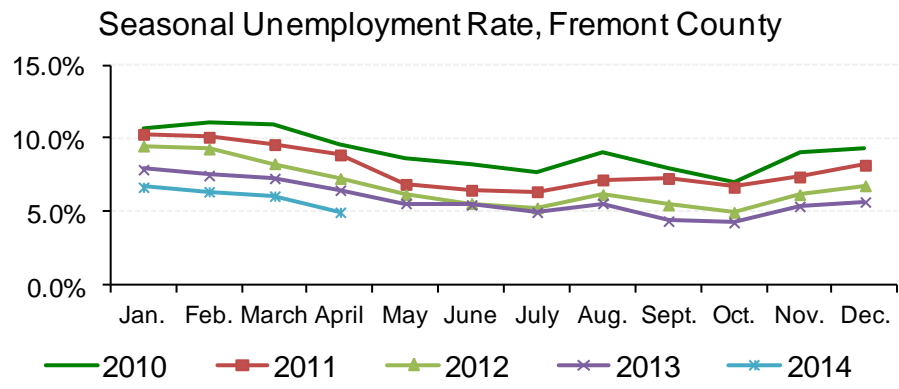


Figure AG

### Average Earnings per Job, 2012

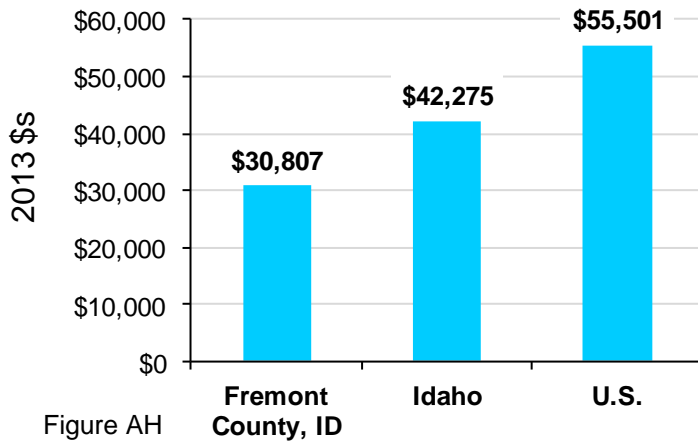


Figure AH

The next three graphs demonstrate that Fremont County residents earn less and have lower incomes than the average Idahoan or American. Figure AH above shows average earnings per job in 2012. Earnings per job were \$30,807 in Fremont County, but had grown to \$42,275 in Idaho and \$55,501 in the U.S. by 2012. The lower earnings in the county could be due to several things: the loss of high-wage jobs over time, the addition of women to the workforce and the lower wages they have historically received, and/or growth in lower-wage sectors of the economy, such as retail trade, agriculture and call centers. Note that this graph leaves out self-employed proprietors, who have been shown to earn less than wage workers.

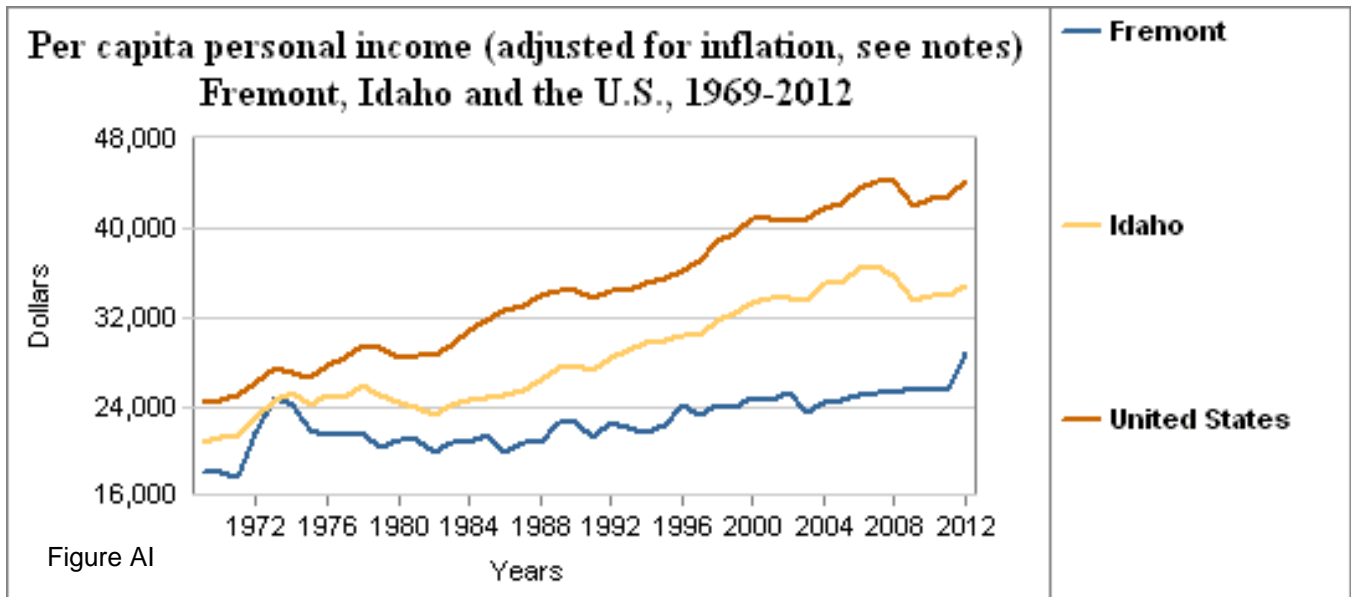
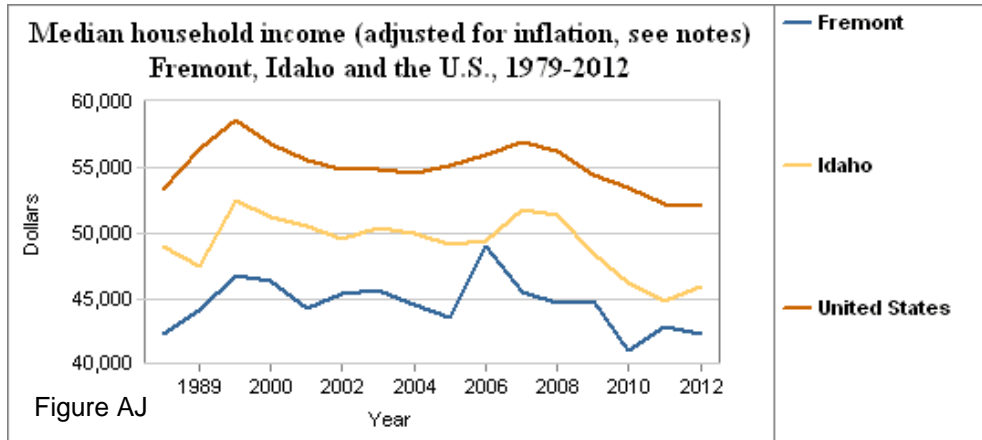


Figure AI

Moving from average earnings to per capita income, we see a more strikingly divergent pattern in Figure AI above, which is inflation-adjusted in 2013 dollars. This income concept divides total personal income by the population, so it includes non-labor income sources like retirement income. Still, it shows Fremont County per capita income staying relatively flat while Idaho and U.S. income levels rise faster, especially during the years prior to the Great Recession, 2003-2008. Per capita in Fremont County in 2012 was \$28,810, compared to

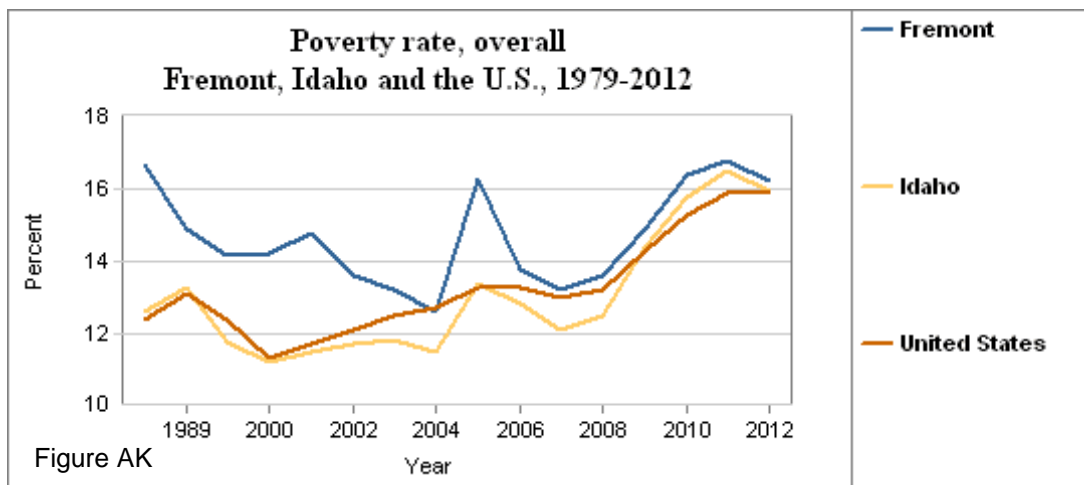
\$34,986 for Idaho, and \$44,376 for the U.S. Fremont County's per capita income was only 65% of the national per capita income in 2012! Fremont ranked 40th of Idaho's 44 counties in this measure. The only good news in Figure AI is that Fremont County's per capita income did turn upward sharply in 2012.

**Key Point #9: Fremont County incomes are quite low.**



Median household income may be a better measure, given that the county's households are a bit larger than the national average. Yet Figure AJ still shows the same pattern of lower incomes in Fremont County. Note that real household income in Fremont County has not increased significantly in inflation-corrected terms since 1979. It was \$42,239 in 2012, after nearly matching the Idaho level in 2006. Household income in Fremont County ranked 26th in Idaho in 2012, so it does compete better by household income than by per capita income. The base year for Figure AJ is 2013 dollars.

In 2012, median household income was highest in the City of Teton among Fremont County communities. Drummond had the lowest median household income. It is interesting to note that the income of households in the Island Park Census County Division was \$12,000 higher than the City of Island Park. In 2006, workshop participants thought this was because residents of the Island Park area live in newer and larger homes off the highway, while city residents tend to work in retail businesses along the highway.



How do these income measures play out in terms of poverty? Fremont County has a persistent pattern of poverty higher than the Idaho average, as shown in Figure AK, but the gap appears to be closing. In 2012, Fremont County's poverty rate was 16.3% versus 16.0% for Idaho. The federal definition of poverty for 2012 is \$23,492 for a family of four.

Poverty is a special problem for some groups of people. Poverty levels are significantly higher for children under 18 years of age; an estimated 24.5% of children county-wide lived in poverty in 2012. Fremont County families led by females with children but no husband, had an extremely high poverty rate of 46.2%, compared to 42.2% for Idaho. The poverty rate for Hispanic people is 19.7% in Fremont County, which is much lower than Idaho's Hispanic poverty rate of 28.9%, but still higher than average. Finally, it should be noted that poverty in Fremont County tends to be concentrated within the city limits of its communities and to be less of an issue for residents of the open countryside.

Figure AL below shows how education attainment levels have been improving over the years. There has been a strong reduction in the proportion with no high school diploma from 24% in 1990 to 13% in 2008-12, but this is still higher than the 11.4% average for the State of Idaho. Similarly, there has been a strong increase in the number of adults with Bachelor's degrees or higher, from 11% in 1990 to 19.1% in 2008-12, compared to the 24.7% state average. Teton, Ashton, and Parker have especially high rates of adults with less than high school educations.

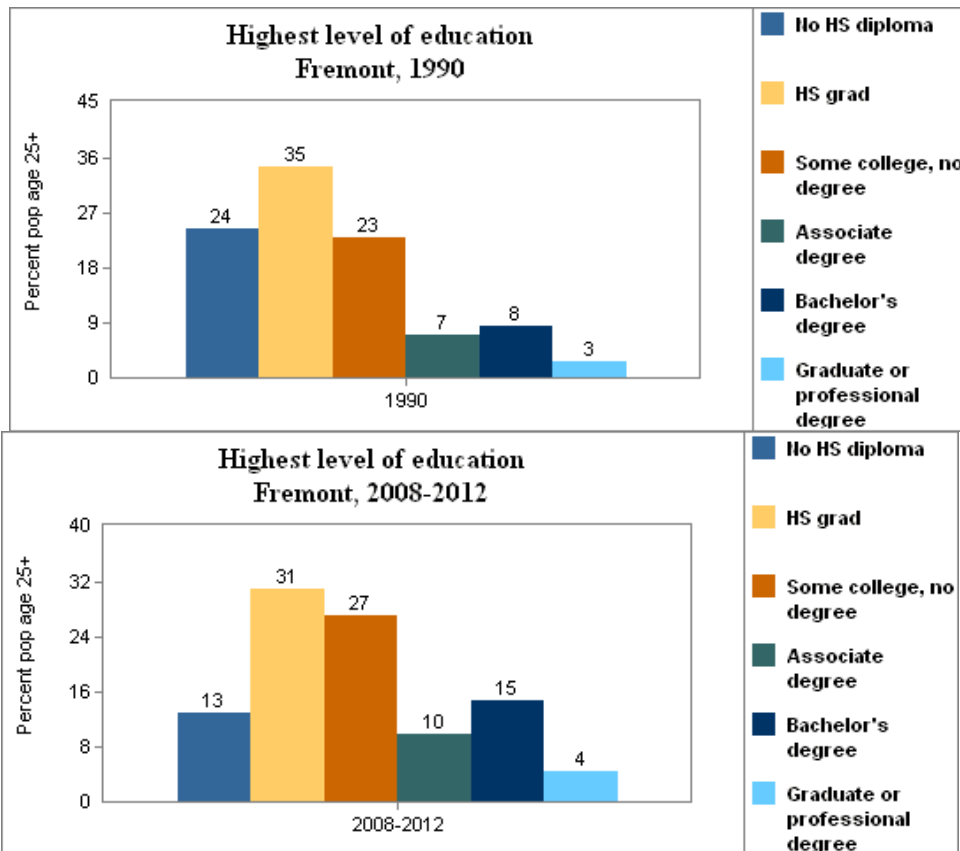


Figure AL

## Housing

Housing stock is another important dimension of socio-economic vitality. Housing is a key ingredient for a productive workforce, often the major piece of household assets, and represents an important part of local assessed valuation for property taxes. The construction of housing can become an important contributor to the local economy.

Housing has become less affordable since 1990, as the average housing value increased from \$86,000 to \$145,000 in 2012. Figure AM below shows that housing affordability is roughly comparable to the United States for homeowners. In Fremont County 36.4% of households had to pay more than 30% of household income for their mortgage, compared to 36.6% of U.S. households. Renters in Fremont County have it somewhat better; 39% of households pay over 30% of their income, compared to 44.9% of Idaho households and 48.1% of U.S. households. Thirty percent of household income is a standard measure of housing costs for budgeting purposes.

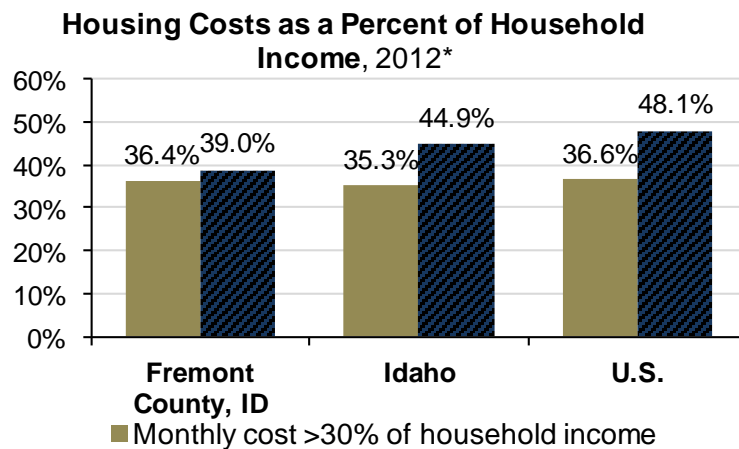


Figure AM ■ Gross rent >30% of household income

Figure AN shows the growth in the number of housing units in Fremont County. There were 8,531 total housing units in the county in 2010, a 24% increase since 2000. It is this recent construction that has been driving up the average value of housing in the county.

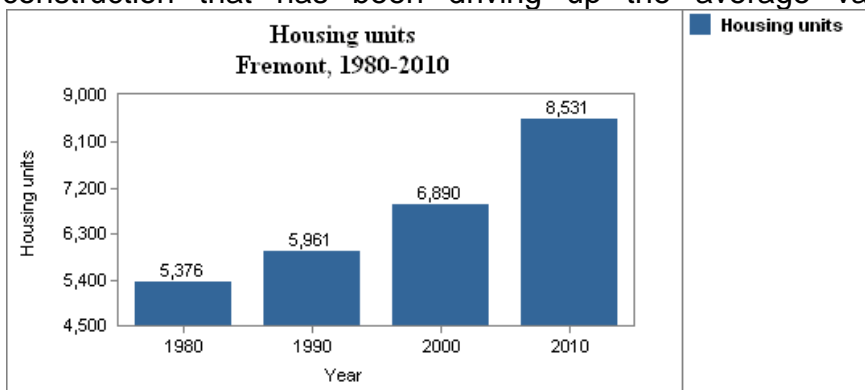


Figure AN

Only 45.4% of the 8,495 housing units in 2012 were occupied. Countywide, 41.2% of the housing stock is for seasonal, recreational, or occasional use, and this is a sharp increase from 34% in 2006. In the Island Park CCD, that proportion increases to 85.4%, nearly nine of ten homes! This shows the degree to which part-year residents affect the local economy. On a busy three-day weekend, the population of the Island Park area could increase seven-fold, not even counting tourists in motels or campgrounds.

By comparison, occupancy is a high 94.5% in St Anthony, with seasonal use under 1%. Rents are reasonable in the county, with a median gross rent of \$629 in 2012, but they have risen by half from \$420 in 2000. BYU-Idaho students coming into St Anthony and Ashton are likely one reason behind this trend.

**Key Point #10: Part-year residents are a large and growing part of northern Fremont County.**

**Looking Further at the Seasonality of North Fremont County**

There are two more pieces of evidence that reveal the seasonal pattern of the north Fremont County economy. Figure AO below shows the average daily traffic counts by month in 2013 for two counters on U.S. Highway 20 north of Ashton and on State Highway 47 east of Ashton going to Warm River and Mesa Falls. The U.S 20 counter had an average daily traffic count of 3,500 vehicles for 2013, and the SH-47 counter had a much lower average of 443 vehicles. Both show a high degree of seasonality with a distinct summer peak, even more pronounced than in 2005.

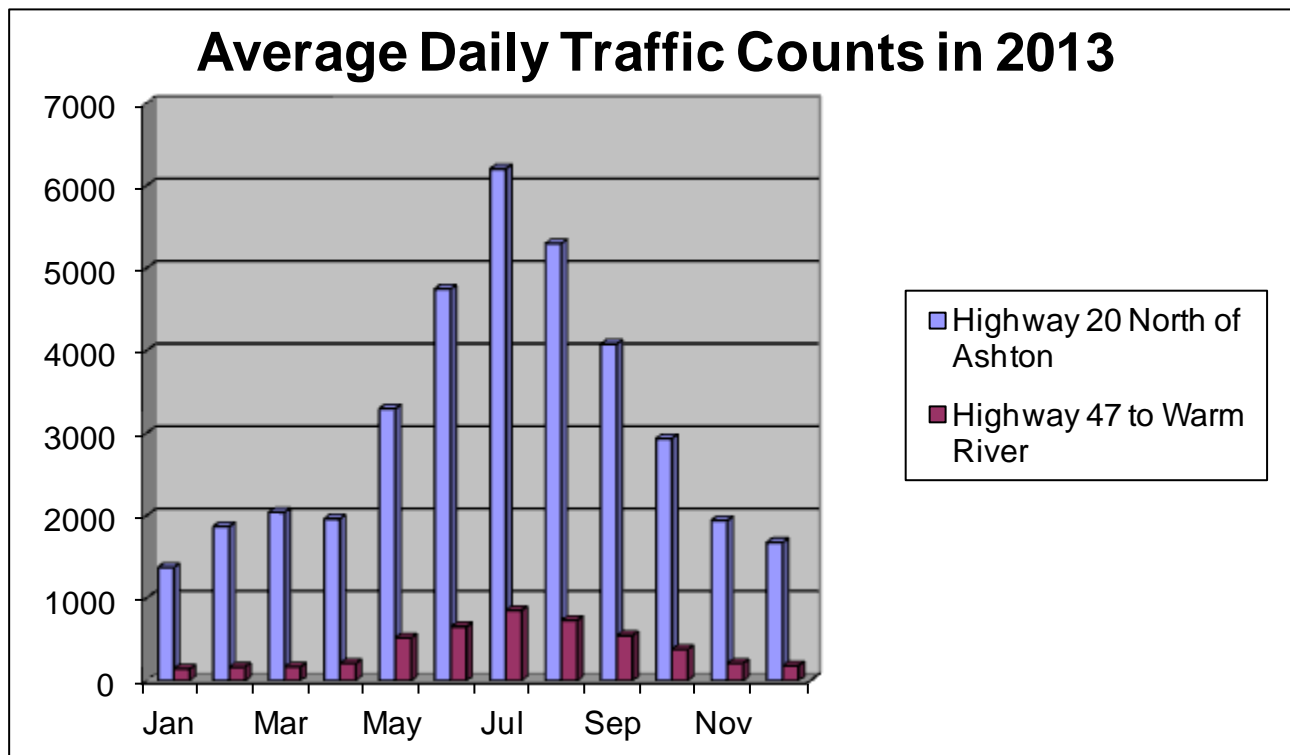


Figure AN

**Figure AP: Fremont County Annual Lodging Sales**

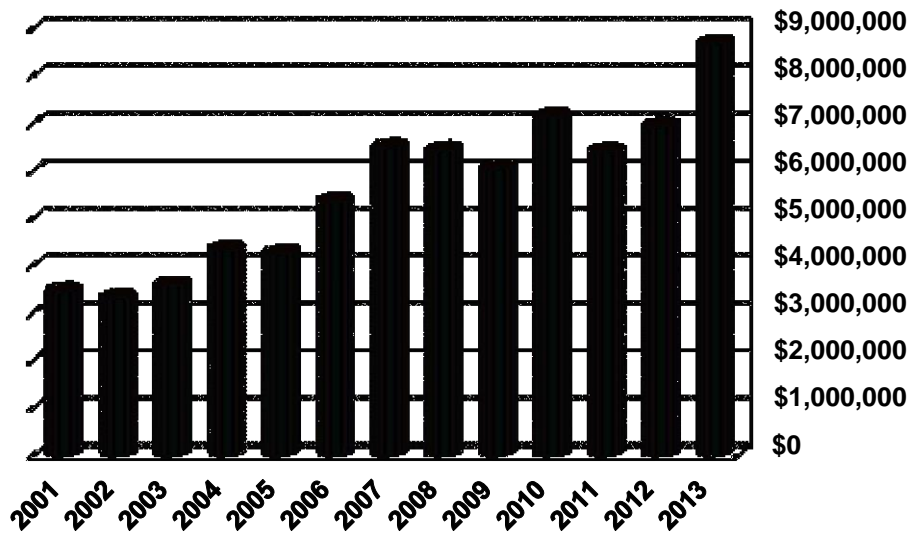


Figure AO

Figure AP above shows how average annual lodging sales have increased over time. Fremont County's lodging sales fell in 2008, 2009, and 2011 due to the Great Recession, but jumped significantly in 2013. Lodging sales are not reported by city, but it is expected the majority of sales occur in the Island Park area. Note that short-term rental of vacation homes are not required to pay lodging tax, and so these lodging sales are not reflected in this data.

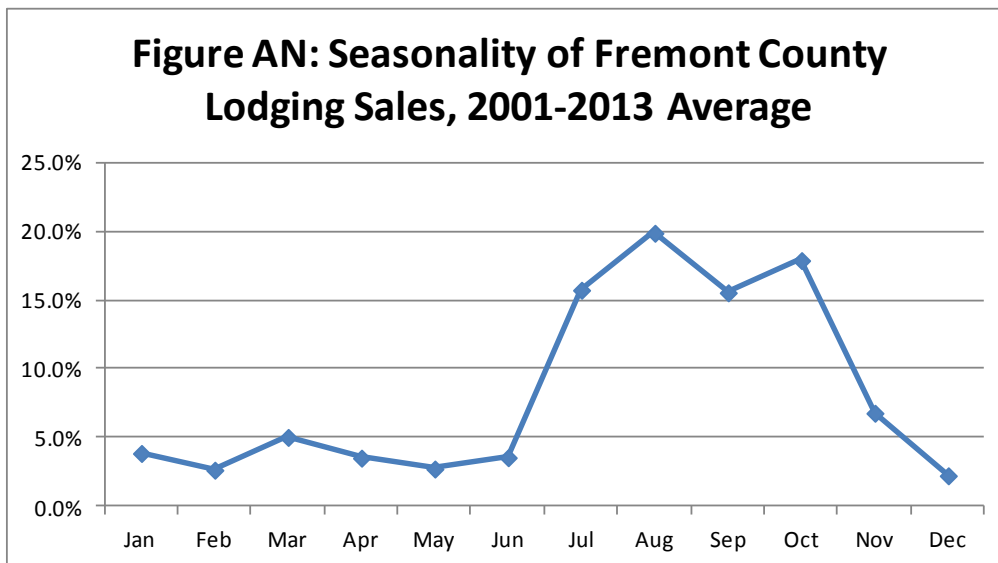


Figure AQ

While the average monthly lodging sales in Fremont County have been steadily growing over time, there is a clear seasonality of the sales that persists from year to year. Figure AQ above shows monthly lodging sales in Fremont County averaged over the last 13 years, as a percentage of the annual total. Note that lodging sales are reported one month after they occur, so the peak in August and October reflect July and September tourist activity. So the peaks could relate to July 4<sup>th</sup> and Labor Day holidays. Similarly, there is a much smaller bulge in winter lodging sales during March that could reflect the long President’s Day weekend.

## ***Access to Health Care***

---

Access to health care is not only a critical social service, but it can also be a key criteria for retirees or businesses making location decisions. In 2011, there were only 0.2 physicians per 1,000 population in Fremont County, compared to 1.6 physicians in Idaho and 2.3 for the U.S. Residents are clearly either using mid-level practitioners who are not counted in Figure AR or traveling to Rexburg and Idaho Falls for many health care needs. Again, this graph points to an important leakage in health care services and a potential strategy for the county’s development.

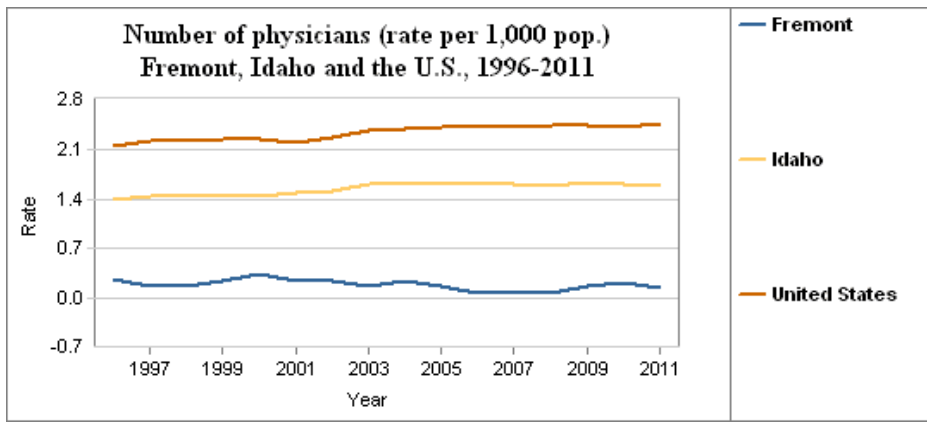


Figure AR

Another key determinant of access to health care is health insurance coverage. The next graph, Figure AS, shows the percentage of Fremont County’s residents under age 65 with no health insurance. While the uninsured rate has declined in 2011 and 2012, there remains a persistent pattern of Fremont County having higher rates of uninsured than Idaho, which in turn is higher than for the United States. Fremont ranks 16<sup>th</sup> highest of Idaho’s 44 counties by this measure.

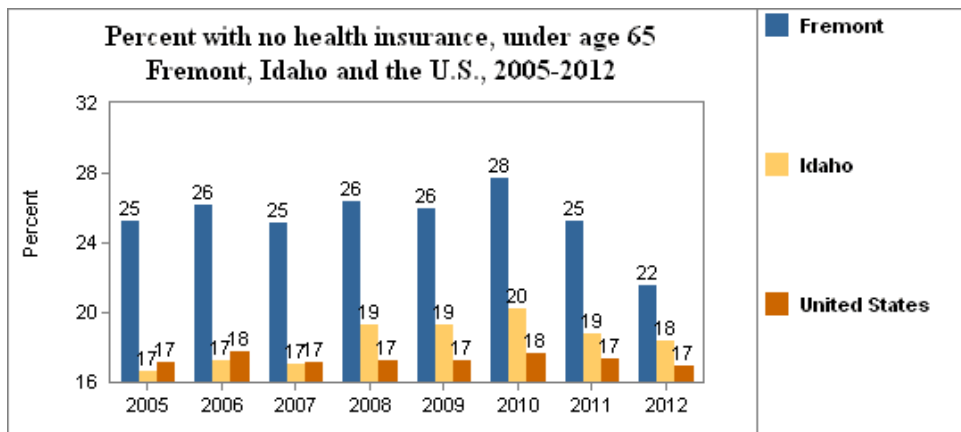


Figure AS

The last health measure is a relative asset. Fremont County currently has a teen birth rate of 6 per thousand females age 15-17, which is half the rate of 12 teen pregnancies for Idaho.

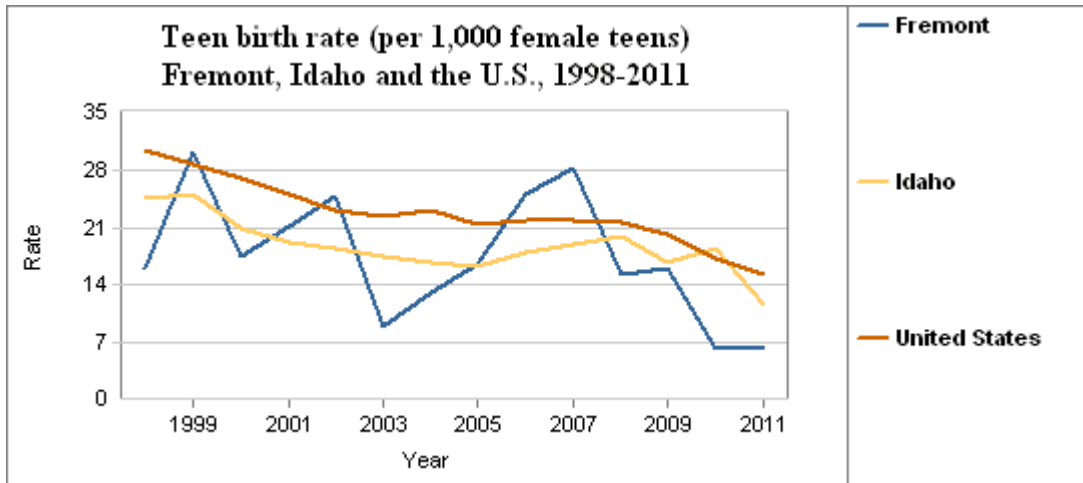


Figure AT

### Crime Rates

Finally, relatively low crime rates are an asset for Fremont County. In 2022, there were 5 crimes per 10,000 people in Fremont County, compared to 219 per 10,000 for the State of Idaho (Figure AU below). During the 1990-2012 timeframe, Fremont County's crime rate dropped 25%, compared to a 21% drop in Idaho's rate, while the national rate dropped by nearly a third.

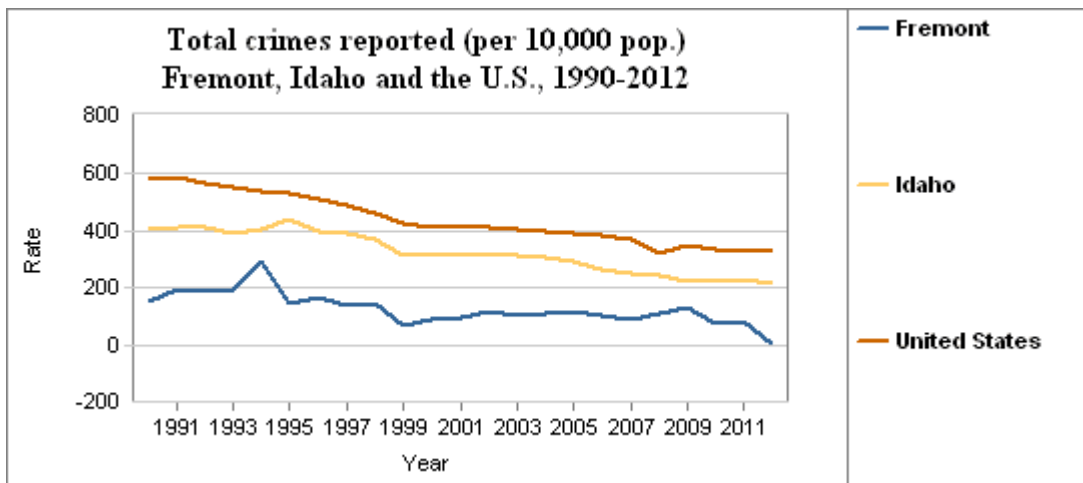


Figure AU

## The Contribution of Public Lands

The USDI Bureau of Land Management (BLM) and USDA Forest Service administer more than 68 percent of the 1.2 million acres in Fremont County, which is managed for multiple uses for the people of the United States. Resource management, both commodity based and non-commodity recreation, contributes to the local economy in a number of ways including employment and earnings in the government sector.

Figure AV shows the history of all federal land payments to Fremont County. For FY2013, these payments totaled \$1.65 million, with \$803,000 in PILT payments, \$818,000 in Forest Service payments that includes the Secure Rural Schools program, and \$27,000 in BLM payments for grazing and timber programs. There were no appreciable mineral payments in FY2013.

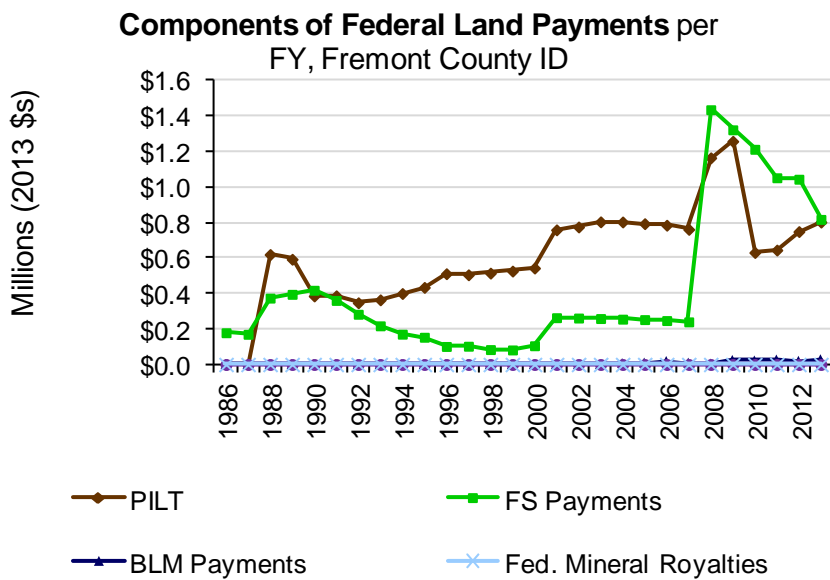


Figure AV

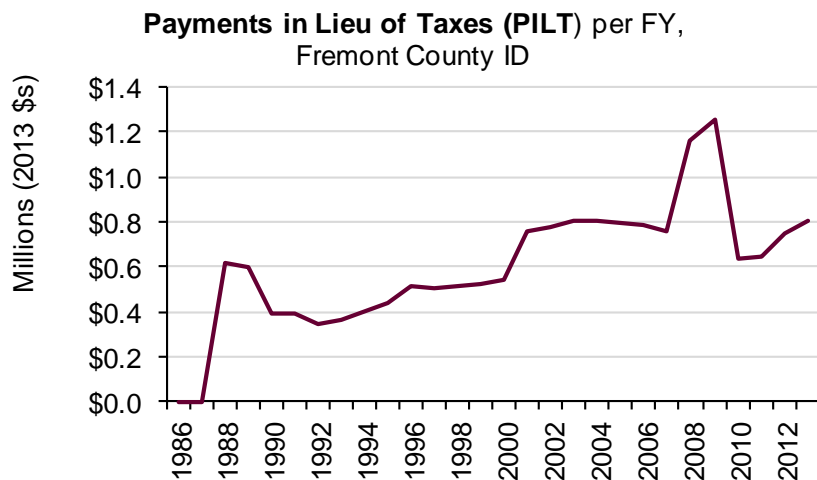


Figure AW

BLM disburses Payments-In-Lieu of-Taxes (PILT) to counties for all federal lands. These amounted to \$802,736 for Fremont County in FY 2013. Congress appropriates PILT payments each year. The formula used to compute the payments is contained in the PILT Act and is based on population, receipt sharing payments, and the amount of Federal land within an affected county. PILT payments are in addition to other Federal revenues (such as oil and gas leasing, livestock grazing, and timber harvesting) that the Federal Government transfers to the States.

PILT payments help local governments carry out such vital services as firefighting and police protection, construction of public schools and roads, and search-and-rescue operations. The payments are made annually for tax-exempt Federal lands administered by the BLM, the National Park Service, the U.S. Fish and Wildlife Service (all agencies of the Interior Department), the U.S. Forest Service (part of the U.S., Department of Agriculture), and for Federal water projects and some military installations. Figure AW shows PILT payments to Fremont County over time.

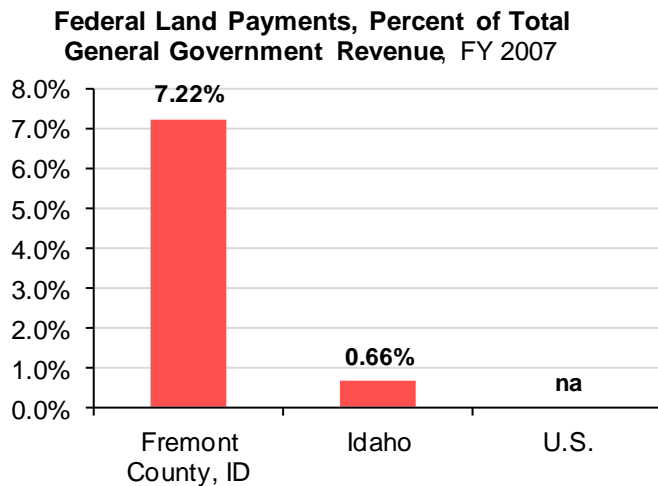


Figure AX

The graph above underscores the importance of federal land payments to the county government. In FY2007, the \$1.02 million in federal intergovernmental payments accounted for 7.22% of Fremont County’s \$14.1 million general revenue.

**Recreational Opportunities:**

St. Anthony Sand Dunes This unique area of largely BLM land offers 10,000 acres of dunes rising to 400 feet. There are endless OHV opportunities to be enjoyed on 15 continuous miles of open sand. This playground of clear, shifting, white quartz sand is known for its unique beauty and exceptional recreation opportunities. It offers outstanding all-terrain vehicle (ATV), dune buggy, and motorcycle riding as well as horseback riding, picnicking, and playing in the sand. Winter activities include sledding, tubing, and viewing the approximately 2,000 elk, 50 moose, and 1,400 mule deer that winter in the vicinity.



Sandy slopes at St. Anthony Sand Dunes

Figure AY

Figure AY below shows the amount of use the dunes have received expressed as both visits and visitor-days. Use has been fairly constant with a modest decline during the Great Recession and in 2012. Average use for the last decade has been 222,300 visits and 67,200 visitor-days.

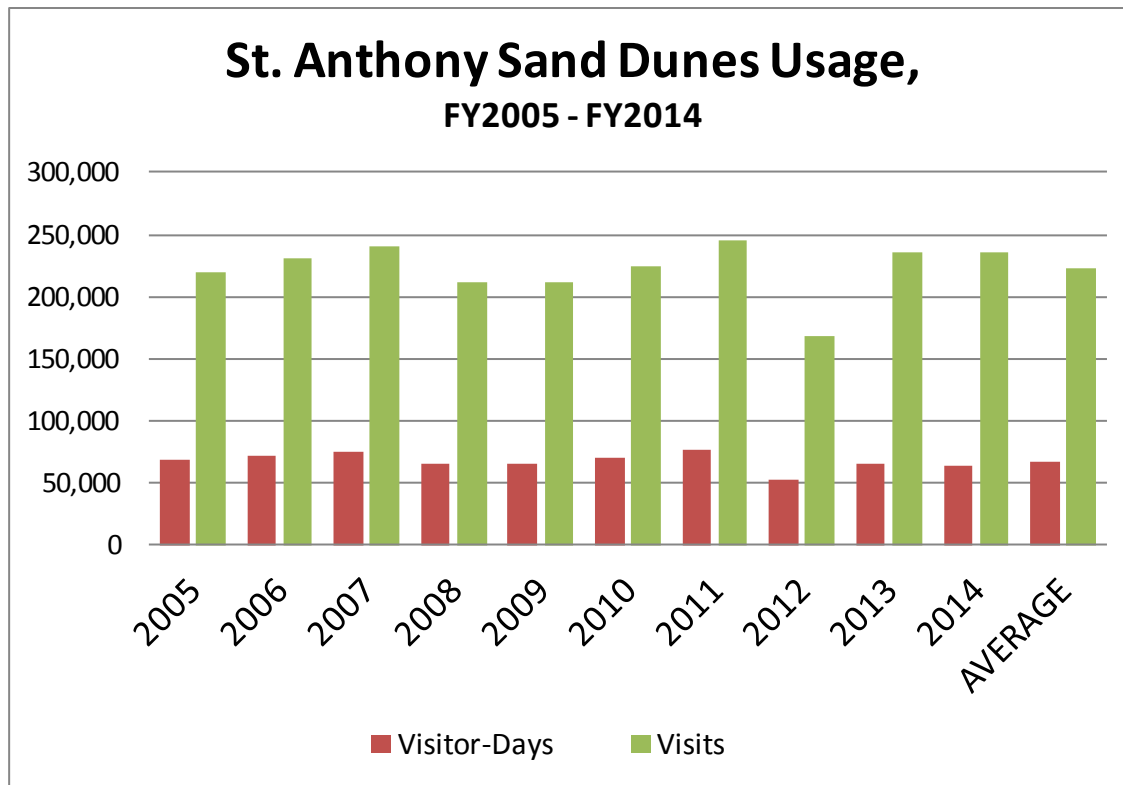


Figure AY

Source: BLM Recreation Management Information System

In addition to Saint Anthony Sand Dunes and Mesa Falls, both the Forest Service and BLM contribute to other recreational opportunities to Fremont County. Foremost among them in terms of use is Idaho's most extensive system of over 500 miles of snowmobile trails. Fremont County routinely has more snowmobile permit designations than any other county in Idaho.

As depicted in the pictures below, there are both traditional and nontraditional opportunities for future growth and development of the local/regional economy in the greater eastern Idaho area. These opportunities equate to recreational equipment sales and rentals, including services, in support of the numerous recreational activities available on the federal lands.

### EASTERN IDAHO BLM RECREATIONAL OPPORTUNITIES



List of Areas

- |                            |                          |
|----------------------------|--------------------------|
| Big Springs                | Birch Creek Campground   |
| Harriman State Park        | Henry's Fork Snake River |
| Henry's Lake State Park    | Kelly Island Campground  |
| Mesa Falls Recreation Area | Nez Perce Historic Trail |
| St. Anthony Sand Dunes     | Stinking Springs Trail   |
| Teton Dam Site             |                          |

Figure AZ

The Upper Snake/South Fork Snake River and the Henry's Lake Area of Critical Environmental Concern (ACEC) have numerous Land and Water Conservation Fund (LWCF) projects. BLM's partnership with its conservation partners has resulted in 70 river and lake-front private properties being protected from development, with a value of approximately \$40 million.

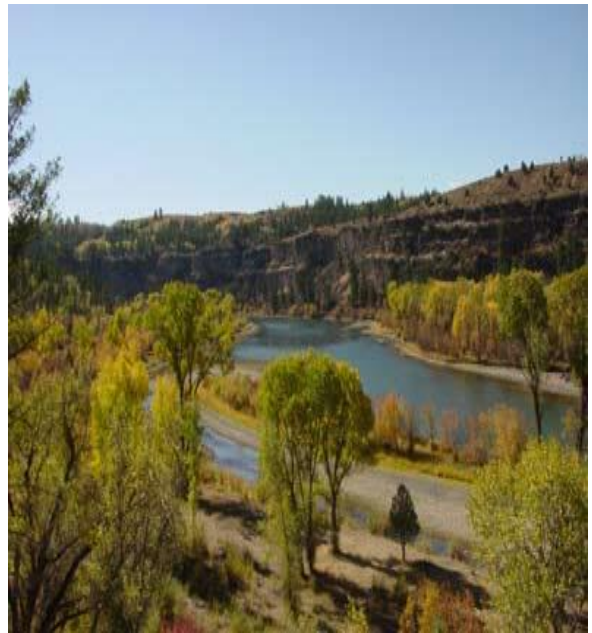


Figure BA



Figure BE

Mesa Falls provides numerous recreational and viewing opportunities for visitors to the Island Park area of Fremont County. Its spectacular waterfall and reconstructed cabin are drawing points to this corner of northeastern Idaho.



Figure BF

---

***Key Point #11: Changes in retailing and tourist basing in West Yellowstone and Rexburg mean high retail leakage out of the county.***

---

### Key Point Summary

1. Senior citizens and young retirees are growing in north Fremont County.
2. The Hispanic community is growing.
3. Commuting out of Fremont County is an important mixed blessing.
4. Traditional resource industries are not engines of future growth.
5. The rise in self-employed underscores the importance of nurturing entrepreneurs.
6. Non-labor income is very important and growing steadily
7. Second home development threatens the Wildland-Urban Interface.
8. Fremont County incomes are quite low.
9. Part-year residents are a large and growing part of northern Fremont County.
10. Changes in retailing and tourist basing in West Yellowstone and Rexburg mean high retail leakage out of the county.

Fremont County is a place of remarkable natural resources. The county has highly productive farm land on the Egin Bench and in the Newdale/Teton area with senior irrigation rights. It is prime barley and potato country. Fremont County is the only county in Idaho that contains a national park – Yellowstone. In addition, the Henry's Fork, one of the world's top blue ribbon trout streams, flows through the entire county. To the southwest lies what some consider to be the nation's best sand dunes for motorized recreation. Grizzly bears, wolves, elk, moose and deer roam the Island Park region, which is also the primary winter home to the entire Rocky Mountain population of trumpeter swans. The county contains two fine state parks at Harriman Ranch and Henry's Lake, plus the Mesa Falls Recreation Area. Residents truly have much for which to be grateful.

However, Fremont County is also a land of contrasts. The agricultural southern county has a very different feel from the frontier north. Fertile fields abut the noise and traffic of the St Anthony Sand Dunes on a summer weekend. The large and beautiful second homes of the Island Park area distract one from the 10% poverty rate of the households in the City of Island Park. The shaded streets and city parks of St Anthony hide a growing Latino population who may live in substandard housing.

Fremont County's timber industry has all but disappeared, and its solid agricultural base is not producing new jobs. Instead, the north end of the county relies more and more on tourism and part-year residents, while in the south, nearly 1,900 workers commute to jobs in Rexburg or Idaho Falls. Retail leakage from Fremont County is large, with commuters stopping elsewhere

for supplies and services. Tourists recreate in Fremont County, but many stay in West Yellowstone or Rexburg for the visitor services. Still, hundreds of Fremont County residents prove their love of place by building one of the highest levels of self-employment in the state.

There are tensions that underlie Fremont County's economy. Its people are rich in heritage, in scenery and in recreation, but ranking 40<sup>th</sup> of 44 counties in per capita income, they are hardly wealthy. The wealth of new residents and long-time landowners is counterbalanced by significant numbers of working poor. The old ways and industries will not lead the economy forward. Some change will be required, and that usually brings discomfort. Will the people of Fremont County accept more diversity in race and religion? Will tourists, part-year residents, and retirees be welcomed regardless of background? Will the needs of the county's entrepreneurs be met? Can new land development be allowed in ways that preserve the agricultural base and protect the Wildland-Urban Interface?

The future of Fremont County seems bright. A place with this natural abundance will get its turn at popularity as the Mountain West becomes more fully inhabited. It is up to the residents of Fremont County to find ways to preserve the natural amenities and heritage of the area while at the same time looking for actions that can bring keep more of the economic benefits at home. If its independent people can find ways to overcome differences and work collaboratively, the future of this surprising county is unlimited.

## ***References***

---

Bureau of Census, *County Business Patterns*, US Department of Commerce, <http://www.census.gov>

Bureau of Census, Local Employment Mapping Program, <http://LEHD.dsd.census.gov/>

Bureau of Economic Analysis, Regional Economic Information System, US Department of Commerce, <http://www.bea.doc.gov>

Bureau of Labor Statistics, US Department of Labor, <http://stats.bls.gov:80/bishome>

Hertz, Thomas, Lorin Kusmin, Alexander Marré, and Timothy Parker, *Rural Employment in Recession and Recovery*, *Amber Waves*, Oct. 6, 2014, USDA-Economic Research Service, [http://www.ers.usda.gov/amber-waves/2014-october/rural-employment-in-recession-and-recovery.aspx#.VGDtp\\_l4r5k](http://www.ers.usda.gov/amber-waves/2014-october/rural-employment-in-recession-and-recovery.aspx#.VGDtp_l4r5k)

---

Idaho Department of Commerce and Labor, *County and Community Profiles of Idaho*, <http://www.idoc.state.id.us/idcomm/profiles/index.html>

Idaho Division of Financial Management, *Idaho Economic Forecast*, Vol XXXVI, No. 4, October 2014, [http://dfm.idaho.gov/Publications/EAB/Forecast/2014/ieffulldocument\\_oct2014.pdf](http://dfm.idaho.gov/Publications/EAB/Forecast/2014/ieffulldocument_oct2014.pdf)

Northwest Area Foundation Indicator Website, <http://www.indicators.nwaf.org/>

Sonoran Institute, [http://www.sonoran.org/programs/si\\_se\\_program\\_tools.html](http://www.sonoran.org/programs/si_se_program_tools.html)

Tax Foundation, *Federal Spending Received Per Dollar of Taxes Paid by State, 2005*, <http://taxfoundation.org/article/facts-figures-2014-how-does-your-state-compare>