

# A Social and Economic Profile of Bonneville County and Idaho Falls



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*This document is an integral part of the City of Idaho Falls Comprehensive Plan; a visioning tool used to predicate public policy in regard to land use, transportation, recreation, housing, and utilities.*

**Idaho Falls Division of Planning & Building**

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## EXECUTIVE SUMMARY

This beginning section of the profile summarizes its major findings about the population and economy of Idaho Falls and Bonneville County. Supporting data and more complete analysis is found in each section of the profile.

### Population

- Bonneville County is the most populous in eastern Idaho, with a 2008 estimated population of 99,135. The County seat, Idaho Falls, is a major regional trade center for eastern Idaho and adjoining areas in western Wyoming and southwestern Montana. Idaho Falls' 2008 population was estimated at 57,388.
- In previous decades, unincorporated areas of the County grew faster than urban areas. However between 1990 and 2000, while unincorporated areas still grew rapidly, Idaho Falls and Ammon both outpaced the County.
- Both Bonneville County and Idaho Falls experienced steady population growth during the study period. This is consistent with previous decades.
- While the population of Bonneville County has remained generally more youthful than the State of Idaho and the national averages, the gap has narrowed slightly. Previous editions of this report predicted by 2000 nearly half of the local population would be under the age of 20. The 2000 Census, however, reported 35.1% of Bonneville County's residents were under the age of 20.
- Bonneville County has comparatively large household and family sizes compared to the national averages. However, as with population age described above, the gap has narrowed for the County as a whole. Ammon, Iona, and Ucon have the largest household sizes.
- Bonneville County and Idaho Falls have a comparatively well educated populace, with more high school and college graduates than the national or Idaho average.

### Housing

- The housing stock in Bonneville County and Idaho Falls grew rapidly between 2000 and 2008. Most growth has been in single-family homes. Vacancy rates remained low for both single and multi-family dwellings. Between 1990 and 2000 housing costs and values decreased in comparison with other major Idaho Cities. However, an increasing number of homeowners and renters are paying more than 30% of their gross income on housing costs and rent.

### Economy

- During the study period, available jobs grew in the County and unemployment rates were low. This all occurred, however, with a decrease in overall labor force participation including a slight drop in participation by women.
- In 2007 retail trade had the largest share of jobs in Bonneville County. Health Care, though, had the greatest increase in jobs between 2001-2007, other than construction which is seasonal and fluctuates based on numerous factors. Agriculture and professional services were the only basic sectors to see a

decline in employment. Agriculture has been decreasing for a number of decades and professional services changed based on both layoffs and differences in reporting methods.

- The 2000 Census found that 10% of all Bonneville County workers commute to jobs in other counties. This is a decrease from 1990 data at 12.1%. There is also extensive commuting into the county from nearby communities.
- Bonneville County has comparatively high per capita incomes and exceeds the state level. Effective buying income for the County is higher than both the state and the nation.
- Basic industry sectors in Bonneville County are agriculture, wholesale and retail trades, health care, and professional services. Manufacturing and tourism are growing industries. INL remains a major employer for the area.
- Bonneville County remains a major regional trade center. Although the actual trade boundaries may have decreased as cities such as Missoula, Butte, and Twin Falls have increased in economic strength, the county continues to serve a large area, including surrounding states.

### **Beyond the Profile**

It is important to note that this profile provides just one perspective on the social and economic life of Idaho Falls and Bonneville County, not a complete picture. Local quality of life always suffers where growth statistics are the sole guides to the future. The information presented here is genuinely useful only when integrated into a comprehensive understanding of the community and its environment.

# Introduction

## INTRODUCTION

This profile is intended to foster a better understanding of the human resources and economy of Bonneville County and the City of Idaho Falls. It is designed for use by elected officials, City staff, planning and zoning commission members, and interested citizens who help make decisions about their community's future. It should also prove useful to social and health services providers, educators, land managers, business people, and economic development organizations.

### **Preview**

The profile begins with a brief description of the landscape and communities of Bonneville County, material that is provided primarily for readers who are not familiar with the area. The Social Characteristics section examines data, trends, and projections relative to the County's population, housing, and other demographics needed for planning purposes. The Economic Characteristics section supplies basic data on local employment and personal income. It also includes an analysis of the economic structure of the County and the regional context in which its economy exists.

### **Limitations**

Much of the information used here is taken from published sources, such as the 2000 Census of Population. The limitations on this kind of information must be kept in mind when reading and using the profile. First, by the time information on localities is published, it may be two to three years old. While this profile uses the most recent data available, it does not always present of accurate picture of today's situations. A clear example of the issues this creates is this profile presents a picture of a strong, growing economy both in the County and nation-wide. The reality is the nation is currently in the midst of a two-year recession.

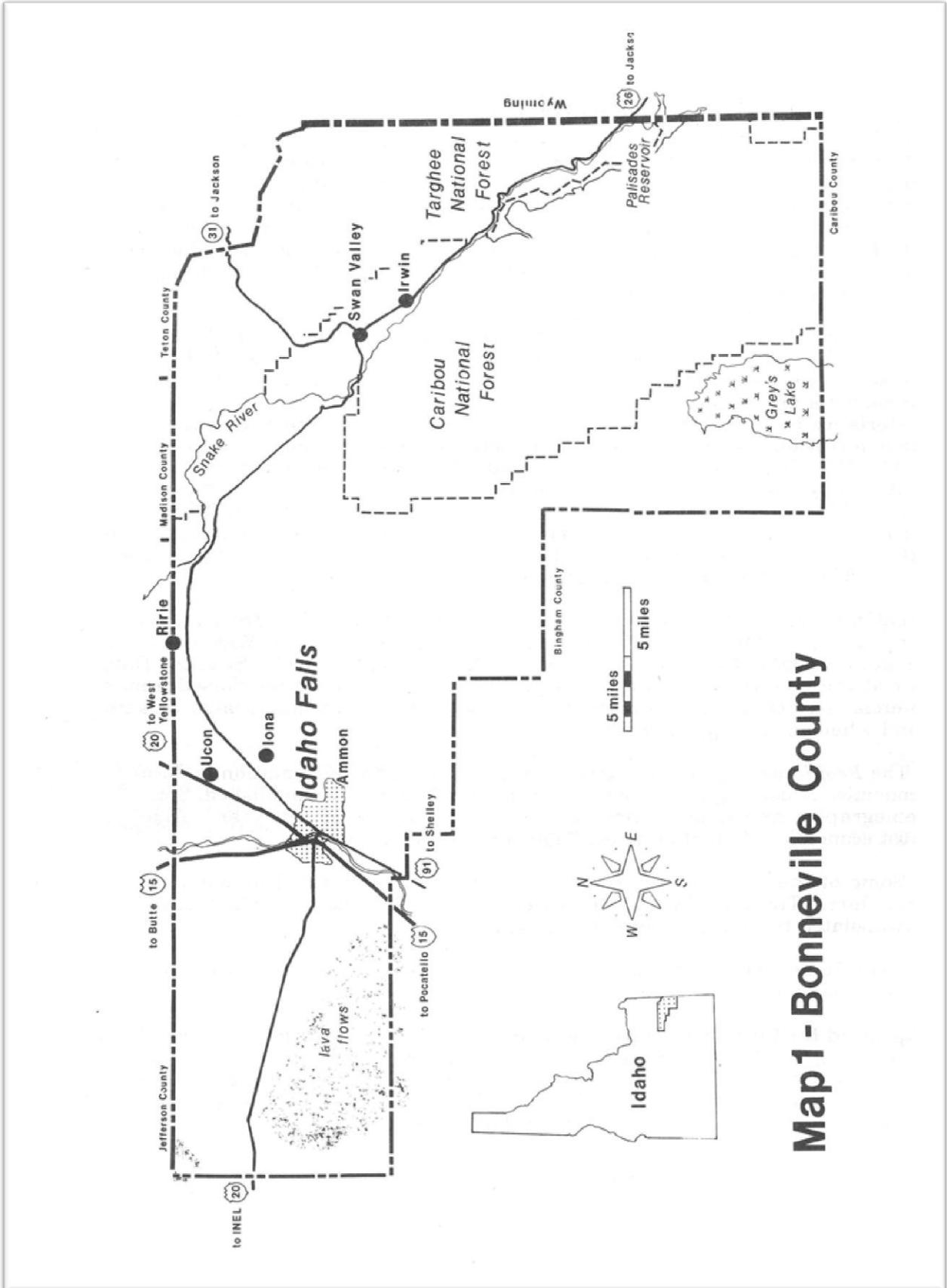
Second, much of the information presented here is based on samples, estimates, or projections, all of which may involve some error. More specific limitations on the data and analytical methods used are described in the appropriate sections. Any planning guided by this profile must be based on an awareness of the limitations on the information presented.

### **Trends**

The population projections and descriptions of economic trends included in this profile are tools for further analysis and a basis for discussion of the community's future. They are not definitive forecasts and should never be used or referred to as such.

### **Additional Information**

This profile contains the socioeconomic data most frequently needed as a basis for local planning decisions. State and Federal agencies publish more information on many of the topics covered here. Most of this is published on the World Wide Web.



**Map 1 - Bonneville County**

## BONNEVILLE COUNTY

This section provides a brief geography of Bonneville County for profile readers who are not familiar with the area. As Map 1 shows, Bonneville County, Idaho stretches from the Snake River and Caribou Ranges along the Wyoming border, across the farmlands of the Snake River Plain, to the lava fields of the Great Rift on the west. The Snake River unifies the County. Its South Fork flows northwest from Palisades Reservoir through the Swan Valley and a rugged canyon on the southwest edge of the Big Hole Mountains to the Jefferson County line. The South Fork joins the Henry's Fork in Jefferson County and the Snake then turns south back into Bonneville County, passing through downtown Idaho Falls before flowing on south into Bingham County.

Bonneville County occupies approximately 1,826 square miles, of which about 754 square miles are in national forests. The Caribou National Forest administers extensive areas in the Caribou Range in the eastern and southern portions of the County. Targhee National Forest lands are in the Big Hole and Snake River ranges on the County's northeast border. The Bureau of Land Management administers approximately 132 square miles, mostly in the western part of the County. Other Federal agencies manage about 83 square miles, including Grey's Lake National Wildlife Refuge in the southwestern part of the County. The State of Idaho administers about 79 square miles of land, mostly in scattered parcels. The remaining area, some 778 square miles or 42.6% of the County's land area, is in private ownership.

Idaho Falls, which has an estimated population of about 57,388, is the Bonneville County seat and eastern Idaho's regional trade center. First known as Eagle Rock, Idaho Falls was the natural place for the Utah and Northern Railroad to cross the Snake River on its way to mines in Montana. It developed slowly as a farm town and trade center until the late 1940's when "the site", the Idaho National Laboratory, developed as the center for atomic energy research. Idaho Falls and Bonneville County have experienced relatively steady population and economic growth since 1950. The County's smaller incorporated cities include: Ammon, Iona, and Ucon; former farm towns which are now suburbs of Idaho Falls; and Irwin and Swan Valley, small resort and retirement communities in the eastern part of the County.

# Social Characteristics

**TABLE 1  
BONNEVILLE COUNTY POPULATION TRENDS 1980-2000**

	1980	1990	2000
<b>State of Idaho</b>	<b>943,935</b>	<b>1,006,749</b>	<b>1,523,816</b>
Percent Change	--	6.6%	51.3%
<b>Bonneville County</b>	<b>65,980</b>	<b>72,207</b>	<b>82,522</b>
Percent Change	--	9.4%	14.2%
Share of State Population	6.9%	7.1%	5.4%
<b>Idaho Falls</b>	<b>39,509</b>	<b>43,973</b>	<b>50,730</b>
Percent Change	--	11.2%	15.3%
Share of County Population	59.8%	60.8%	61.4%
<b>Ammon</b>	<b>4,669</b>	<b>5,000</b>	<b>6,187</b>
Percent Change	--	7.0%	23.74%
Share of County Population	7.0%	6.9%	7.5%
<b>Iona</b>	<b>1,072</b>	<b>1,049</b>	<b>1,245</b>
Percent Change	--	-2.1%	18.6%
Share of County Population	1.6%	1.4%	1.5%
<b>Irwin</b>	<b>113</b>	<b>108</b>	<b>156</b>
Percent Change	--	-4.4%	44.4%
Share of County Population	0.17%	0.14%	0.18%
<b>Swan Valley</b>	<b>135</b>	<b>141</b>	<b>213</b>
Percent Change	--	4.4%	51.0%
Share of County Population	0.2%	0.19%	0.25%
<b>Ucon</b>	<b>833</b>	<b>896</b>	<b>943</b>
Percent Change	--	7.56%	5.2%
Share of County Population	1.26%	1.24%	1.14%

SOURCE: U.S. Department of Commerce, Bureau of the Census

## BONNEVILLE COUNTY POPULATION

This section describes the past, present, and estimated current population of Bonneville County and the City of Idaho Falls. Most of the data used here comes from the 2000 Census of Population, which generally provides accurate and reliable data. It should be emphasized however, current population estimates are exactly that: estimates, not actual counts.

### Past Population Trends

Table 1 (pg. 6) shows recent population trends in Bonneville County. Highlighted areas denote growth rates greater than 10%. Both Bonneville County and Idaho Falls outpaced the State’s growth rate in the 1980’s. The State, however, experienced very rapid growth during the 1990’s. Only the rural areas such as Irwin and Swan Valley experienced growth similar to the State’s during the time period. Idaho Falls increased its share of the County population throughout the period.

A report from the U.S. Census Bureau examines domestic migration as a factor of population growth. The study period covers 2000-2004. During this period, Idaho had the third highest rate of net in-migration in the nation at 7.2 persons per 1,000. When viewed at the county level, in-migration during this period occurred in only 23 of Idaho’s 44 counties. Bonneville County experienced an average in-migration rate of 0.0-9.9 persons per 1,000 during this period or 0-4,999 persons annually.

### Population Geography

The geographic distribution of Bonneville County’s population has been changing. Table 1 shows significant growth rates in Ammon and the small towns of Irwin and Swan Valley. Recent building permit records suggest the trend toward greater population growth in rural areas may have been reversed. The City of Idaho Falls has issued 221 permits for new and replacement dwelling units since July 2009, while Bonneville County has issued 232 since June 2009. Also, some estimates show Ammon’s population has doubled since the 2000 census. The 2010 Census and future editions of this report will likely show a trend toward strong urban growth. More detailed information on housing permits is discussed on page 15.

### Current Population Estimates

Population forecasts for Bonneville County and the City of Idaho Falls provided by Intermountain Demographics are illustrated in Table 2. Population projections for the County and City are discussed in detail in the section “Bonneville County Population Projections.”

<b>TABLE 2 – POPULATION ESTIMATES AND PROJECTIONS</b>								
	2000	2008	2010	2015	2020	2025	2030	2035
<b>Bonneville County</b>	<b>82,522</b>	<b>99,135</b>	<b>105,594</b>	<b>118,494</b>	<b>132,487</b>	<b>147,073</b>	<b>173,458</b>	
<b>Idaho Falls</b>	<b>50,730</b>	<b>57,388</b>	<b>58,077</b>	<b>65,172</b>	<b>72,868</b>	<b>80,890</b>	<b>88,542</b>	<b>91,586</b>
<b>SOURCE: Intermountain Demographics</b>								

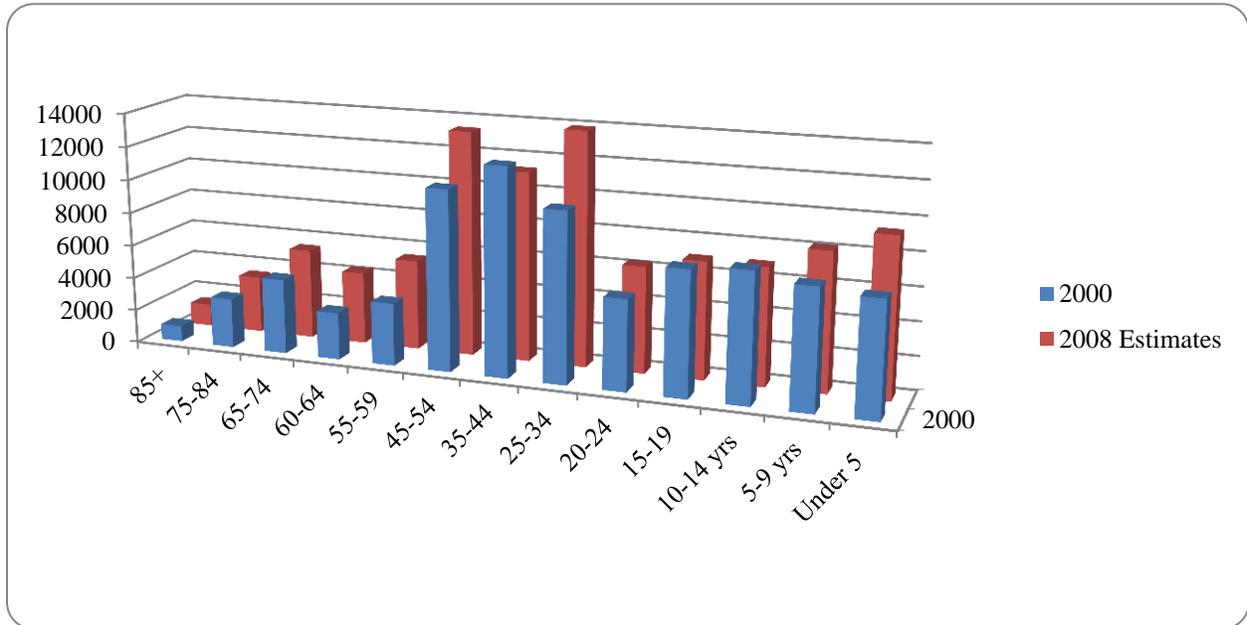
## BONNEVILLE COUNTY POPULATION CHARACTERISTICS

This section describes the populations of Bonneville County and Idaho Falls in terms of age, household composition, and other characteristics often relevant for planning purposes. The data used here is helpful in assessing public facility and services needs and preparing market and feasibility studies for private sector enterprises.

### Age Structure

In 2000, 35.1% of Bonneville County’s population was under 20 years of age compared with 32% in Idaho. The 2007 Idaho Vital Statistics report produced by the Idaho Department of Health and Welfare estimates this percentage has increased slightly to 35.8%. If those projections are accurate, there are 2,566 more people under the age of 20. Children under 5 increased 34.8% (2,368 persons) during the time period; the largest increase of all age cohorts under 20. Age groups 10-14 and 15-19 actually decreased during the period. Consequently over the next 5-10 years school enrollments should see an increase in lower grade levels.

**Figure 1: Bonneville County Age Structure**



SOURCES: 2000 Census of Population; 2007 Idaho Vital Statistics

### Elderly Population

The population of the United States is aging. In 2000, 12.4% of all Americans were over 65. By the year 2008, that figure increased to 12.8% and by 2020 it is projected to rise to 16.0%-18.0%. Bonneville County had 10.6% of its population over 65 in the year 2008 compared to 10.1% in 2000. As Table 3 (pg. 9) shows, elderly people tend to be concentrated in Idaho Falls, Irwin, and Swan Valley. In 2000, 10.5% of the County’s residents who were over 65 lived in Idaho Falls, which was home to just 61.4% of all County residents.

**TABLE 3**  
**Percentage of Population Younger than 18 Years and 65 Years and Older**

Jurisdiction	Percentage Younger than 18 Years			Percentage 65 Years and Older		
	1980	1990	2000	1980	1990	2000
State of Idaho	36.4	31.5	28	9.9	12.0	11.3
Bonneville County	40.3	28.7	20.3	9.9	9.0	10.5
Idaho Falls	33.1	32.2	30.3	8.3	10.3	11.1
Ammon	---	---	39.8	3.9	---	9.59
Iona	---	---	47	6.8	---	11.2
Irwin	---	---	33	10.6	---	23.8
Swan Valley	---	---	28	20.0	---	19
Ucon	---	---	38	7.3	---	7.75

SOURCES: Social and Economic Profile, 1988; U.S. Department of Commerce, Bureau of the Census

### Racial Composition

As Table 4 indicates, the 2000 population of Bonneville County was predominantly white. Members of minority racial groups are concentrated in Idaho Falls.

### Persons of Spanish Origin

Table 4 also shows 6.91% of Bonneville County's 2000 population was of Spanish origin. This is an 89.4% increase (2,693 people) from 1990. This is consistent with the 92.1% statewide increase during the same time period.

**TABLE 4**  
**Racial Composition 2000**

	White	Black	American Indian	Asian	Hispanic Origin (any race)
United States	80%	13%	2%	4%	6.9%
Idaho	91.0%	0.4%	1.4%	0.9%	7.9%
Bonneville County	92.8%	0.5%	0.6%	0.8%	6.91%
Idaho Falls	92.1%	0.62%	0.76%	1.05%	7.18%
Ammon	95.85%	0.27%	0.44%	0.57%	3.12%
Iona	98.42%	0.08%	0.17%	0.08%	2.91%
Irwin	98.09%	0.0%	0.0%	0.64%	1.91%
Swan Valley	91.08%	0.0%	0.47%	0.47%	2.35%
Ucon	95.33%	0.11%	0.42%	0.0%	4.14%

SOURCE: U.S. Department of Commerce, Bureau of the Census

### Number and Size of Households

Households include both families and groups of unrelated people sharing living quarters. Table 5 shows the number and average size of households in Bonneville County for 2000. Household size in the County shrank slightly between 1990 and 2000 from 2.94 to 2.83 causing the number of households to outpace population growth for the second consecutive decade. Number of households increased 18.3% from 1990-2000 while population in the County only increased 14.2%.

	<b>Number of Households</b>	<b>Average Household Size</b>
<b>United States</b>	<b>115,904,641</b>	<b>2.59</b>
<b>Idaho</b>	<b>527,824</b>	<b>2.69</b>
<b>Bonneville County</b>	<b>28,753</b>	<b>2.83</b>
<b>Ammon</b>	<b>1,843</b>	<b>3.27</b>
<b>Idaho Falls</b>	<b>18,793</b>	<b>2.65</b>
<b>Iona</b>	<b>372</b>	<b>3.23</b>
<b>Irwin</b>	<b>71</b>	<b>2.21</b>
<b>Swan Valley</b>	<b>79</b>	<b>2.70</b>
<b>Ucon</b>	<b>280</b>	<b>3.30</b>

**SOURCE: U.S. Department of Commerce, Bureau of the Census**

### Number and Size of Families

The Bureau of the Census defines a family as, “A group of two or more people who reside together and who are related by birth, marriage, or adoption.” There were 21,463 families in Bonneville County in 2000, accounting for 74.6% of all local households. 54.3% of families included children under the age of 18. The average family size in the County was 3.33 persons. Idaho Falls families were smaller at 3.21. Idaho families averaged 3.17 persons and nationally the average family was 3.14.

### Family Structure

Families consisting of a married couple with children at home accounted for 32.1% of all households in Bonneville County in 2000 and 43% of all families down from 48.5% in 1990. This is still significantly higher than both State and National levels in which married couples with children accounted for 28.1% of all Idaho, and 23.5% of all U.S. households.

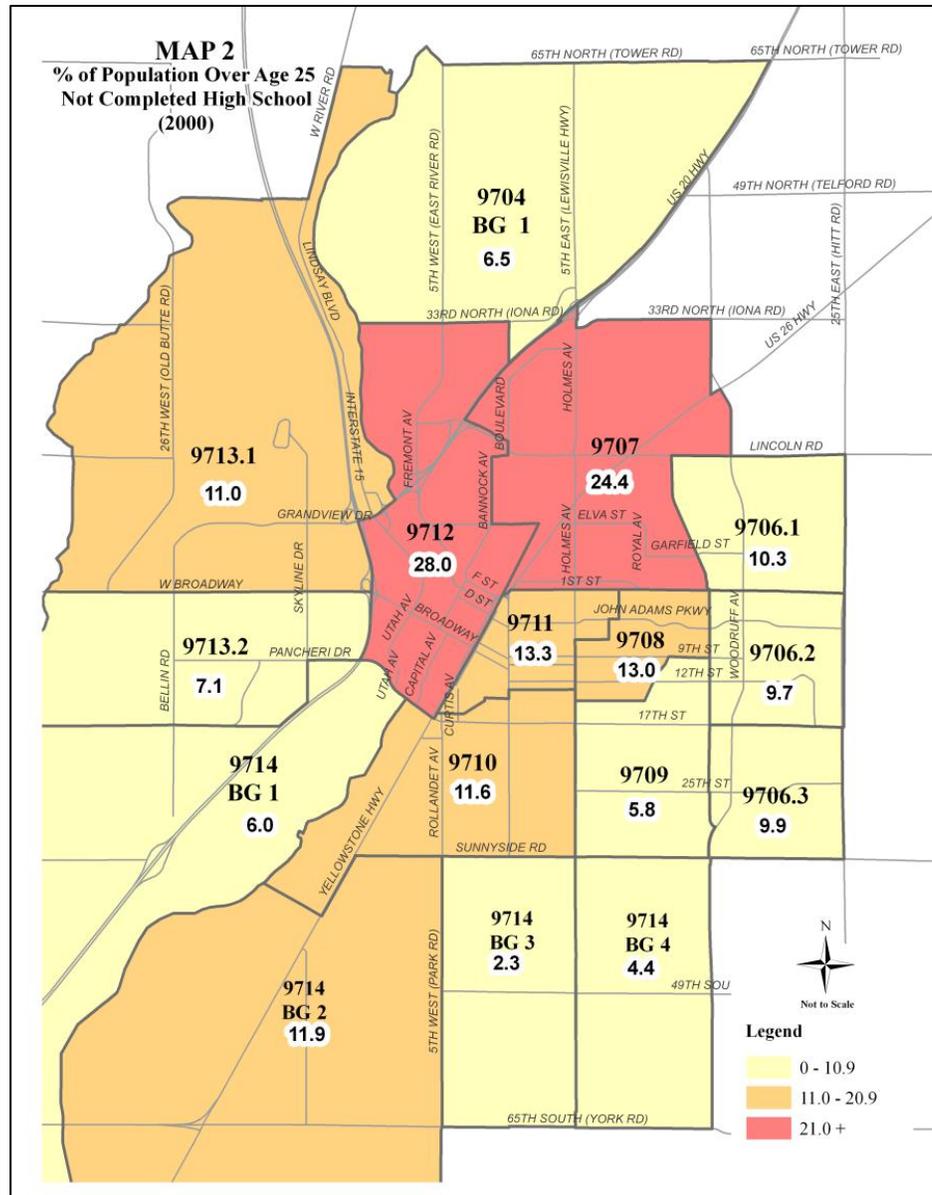
### Single Parent Families

There were more than 2,000 single parent families in Bonneville County in 2000. Those families comprised 9.3% of all local households, and 12.4% of all families. Single parent families made up 8.7% of all Idaho and 12.2% of all U.S. households in 2000.

### Educational Attainment

Table 6 shows the levels of educational attainment of Bonneville County and Idaho Falls residents in 2000. It also compares the local level of education attainment with the U.S. and Idaho levels. These numbers indicate both the County and City of Idaho Falls have higher percentages of people with bachelor's degrees than the U.S. Idaho Falls also has a higher number of residents with advanced degrees.

Map 2 shows the percentage and geographic distribution of the Idaho Falls population over the age of 25 who have not completed high school, or equivalent. These areas have high correspondence levels with areas of the City with lowest household incomes and greatest percent of persons below the poverty level. Maps depicting this data can be found on pages 27 and 28.



**Table 6**  
**Educational Attainment 2000**

	Not a High School Grad	High School Grad	Bachelor's Degree	Graduate Degree
<b>United States</b>	<b>19.6</b>	<b>80.4</b>	<b>15.5</b>	<b>8.9</b>
<b>State of Idaho</b>	<b>15.3</b>	<b>84.7</b>	<b>14.8</b>	<b>6.8</b>
<b>Bonneville County</b>	<b>12.2</b>	<b>87.8</b>	<b>17.3</b>	<b>8.9</b>
<b>City of Idaho Falls</b>	<b>12.4</b>	<b>87.7</b>	<b>18.4</b>	<b>9.8</b>

SOURCE: U.S. Department of Commerce, Bureau of the Census

## BONNEVILLE COUNTY POPULATION PROJECTIONS

This section presents population projections for Bonneville County and the City of Idaho Falls. Readers are reminded these projections are planning tools intended to illustrate current trends. While they are not definitive forecasts, they are based on established methods of projecting populations.

### Projection Method

There are many population projection methods, no one of which has a definite advantage in accuracy or is clearly best for use in a given area. The choice of projection methods for this profile was based on experimentation with potentially useful techniques and experience. Useful population projections for Bonneville County were obtained using two methods: mathematical extrapolation and the cohort survival method. In general, cohort survival tends to be a more accurate method. Those methods, their major limitations, and the results they produce are described here.

### Mathematical Extrapolation

This projection method is based on the assumption future population change will be just like past population change and can, for that reason, be projected using simple mathematical functions. Two types of extrapolations were tested this profile: linear and linear regression. Linear techniques are based on the assumption change will come in constant arithmetic increments (for example: 1, 2, 3, 4.). The extrapolation methods were tested by applying them to data from the past to see how well they projected the known 2000 population. The results of this test are in Table 7. Because of the historically consistent growth rates of both the County and City, the models show fairly accurate projections. The weakness of these methods is they only account for two variables: year and population. Clearly there are other factors such as fluctuations in the local and national economies, housing inventory, job creation or reduction, residential preferences, and others: factors a mathematical extrapolation cannot properly take into account. A linear regression projection for the County and City is presented in Table 8.

**Table 7  
Accuracy of Mathematical Population Projections**

	Bonneville County	Percent Difference	Idaho Falls	% Difference
<b>2000 Census Population Count</b>	<b>82,522</b>		<b>50,730</b>	
<b>Linear Extrapolation Projection</b>	<b>83,615</b>	<b>1.2%</b>	<b>48,190</b>	<b>5.1%</b>
<b>Linear Regression Projection</b>	<b>81,744</b>	<b>1%</b>	<b>47,223</b>	<b>7%</b>

SOURCE: U.S. Department of Commerce, Bureau of the Census

**Table 8  
Population Projections Using Linear Regression Analysis**

Year	Bonneville County Population	City of Idaho Falls Population
<b>2005</b>	<b>85,976</b>	<b>53,043</b>
<b>2010</b>	<b>91,318</b>	<b>55,790</b>
<b>2015</b>	<b>94,247</b>	<b>58,538</b>
<b>2020</b>	<b>98,382</b>	<b>61,286</b>

### **Cohort Survival Projections**

This method estimates a community's population by projecting how many people will die, how many will be born, and how many will move into or away from the area during a given time period. It has the advantage of projecting both the total population and the number of people in each cohort or age group. Age specific projections are helpful in planning for many community services. The accuracy of cohort survival projections depends on the quality of the data used in making them. These projections were provided by Intermountain Demographics. The total population projected for each five years between 2000 and 2035 is shown in Table 9. Projections from this method show faster growth rates than the linear regression model.

<b>Year</b>	<b>Bonneville County Population</b>	<b>Idaho Falls Population</b>
<b>2010</b>	<b>105,594</b>	<b>58,077</b>
<b>2015</b>	<b>118,494</b>	<b>65,172</b>
<b>2020</b>	<b>132,487</b>	<b>72,868</b>
<b>2025</b>	<b>147,073</b>	<b>80,890</b>
<b>2030</b>	<b>160,985</b>	<b>88,542</b>
<b>2035</b>	<b>173,458</b>	<b>91,586</b>

**SOURCE: Intermountain Demographics**

## BONNEVILLE COUNTY HOUSING

This section briefly describes the housing stock of Bonneville County and its incorporated cities. It also analyzes selected housing data specific to Idaho Falls. The data used here comes from the 2000 Census.

### Housing Units

Table 10 shows there were 30,484 housing units in Bonneville County in 2000, 16.7% more than the 1990 count of 26,049. Note that “single family” includes both the conventional single family detached dwelling and attached single family units such as condominiums and townhouses.

### Housing Mix

The Bonneville County housing mix experienced a slight increase in single family dwellings between 1990 and 2000 from 72.7% to 73.8%. The 2000 housing mix included fewer mobile homes and more multiple family dwellings. Approximately 93% of the county’s multiple family dwellings were in Idaho Falls.

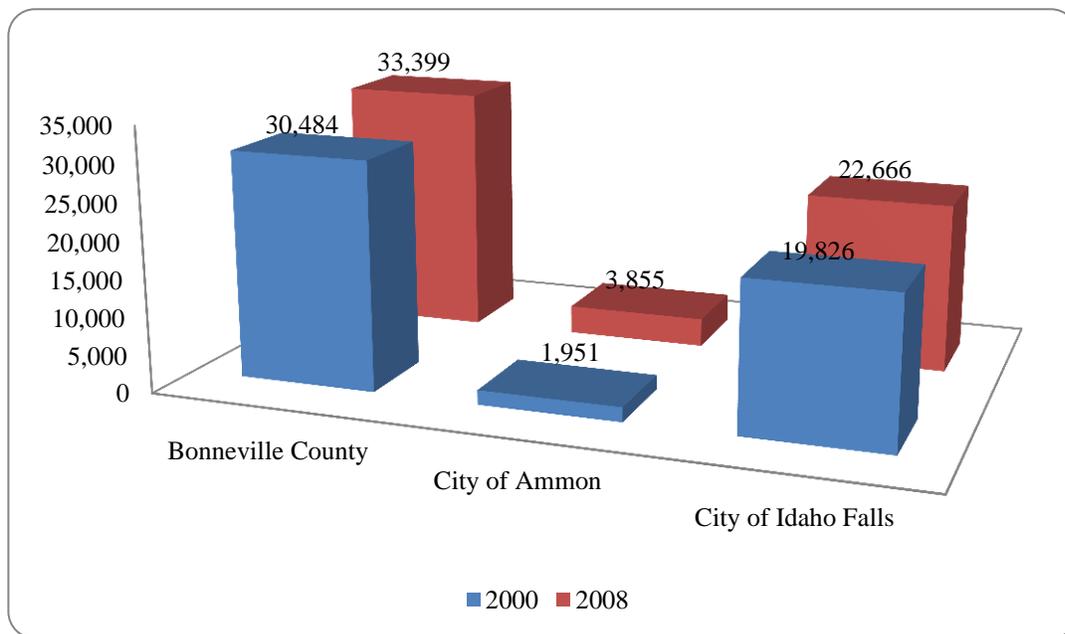
<b>Table 10 Housing Units 2000</b>				
	<b>Total</b>	<b>Single Family</b>	<b>Mobile Home</b>	<b>Multi-family Dwellings</b>
<b>Bonneville County Housing Mix</b>	<b>30,484</b>	<b>22,514 73.8%</b>	<b>2,456 8.1%</b>	<b>5,514 18.1%</b>
<b>City of Ammon Housing Mix</b>	<b>1,951</b>	<b>1,714 87.8%</b>	<b>18 0.9%</b>	<b>219 11.2%</b>
<b>City of Idaho Falls Housing Mix</b>	<b>19,826</b>	<b>14,073 70.9%</b>	<b>624 3.1%</b>	<b>5,129 25.8%</b>
<b>City of Iona Housing Mix</b>	<b>400</b>	<b>382 95.5%</b>	<b>14 3.5%</b>	<b>4 1.0%</b>
<b>City of Irwin Housing Mix</b>	<b>162</b>	<b>114 70.3%</b>	<b>48 29.6%</b>	<b>0 --</b>
<b>City of Swan Valley Housing Mix</b>	<b>116</b>	<b>92 79.3%</b>	<b>19 16.3%</b>	<b>5 4.3%</b>
<b>City of Ucon Housing Mix</b>	<b>298</b>	<b>278 93.2%</b>	<b>15 5.0%</b>	<b>5 1.7%</b>
<b>SOURCE: U.S. Department of Commerce, Bureau of the Census</b>				

### Vacancy Rates

In 1990, the total housing vacancy rate in Idaho Falls was relatively low at 4.9% with the homeowner vacancy rate standing at 1.9% and the rental vacancy rate at 5.7%. These rates remained nearly identical in 2000 with a homeowner vacancy rate of 1.5% and a rental vacancy rate of 5.9%. Bonneville County had similar vacancy rates: overall, 5.7%; homeowner, 1.6%; and rental, 5.9%. Note that Census vacancy rates include units that are “boarded up” and not actually available for immediate occupancy and units that have been sold or rented, but not yet occupied.

### Housing Conditions

Assessing housing conditions is difficult. Indicators like the lack of complete plumbing or kitchen facilities may identify the most deficient units: 0.4% to 1.1% of all housing units in Bonneville County. Other possible indicators, like the year the structure was built, its value, or its rent offer no reliable way to separate “standard” with “substandard” units. A 1987 field survey found that 2.6% of all housing units in Idaho Falls had visible structural defects.



### New Housing Units

Building permit records indicate that the housing stock in Bonneville County and Idaho Falls has grown substantially since 2000.

2,840 housing units were added in Idaho Falls between 2000 and 2008, including 2,089 single-family dwellings and 751 apartment units. This represents an approximately 14.3% increase. Population during this same period increased by only 13.1%.

The number of housing units in unincorporated Bonneville County has also grown during this period. Permits were issued for 2,915 new units, including 2,691 single-family units and 224 apartments.

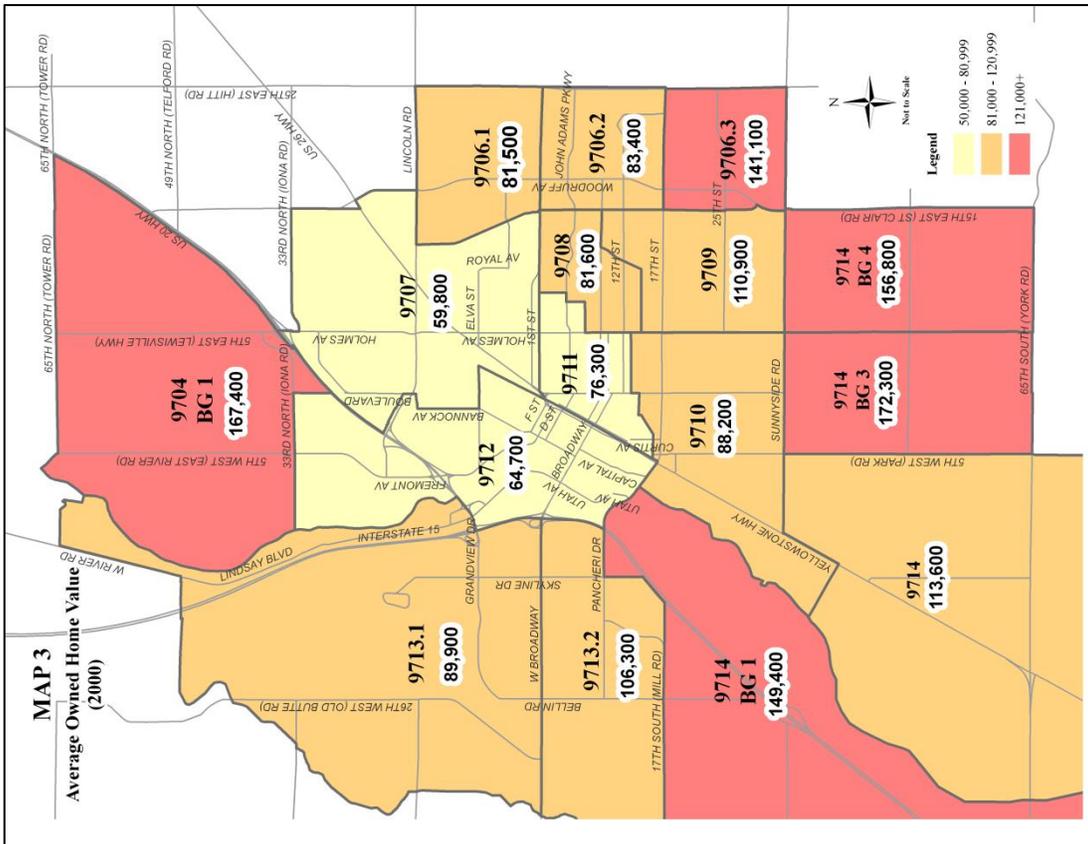
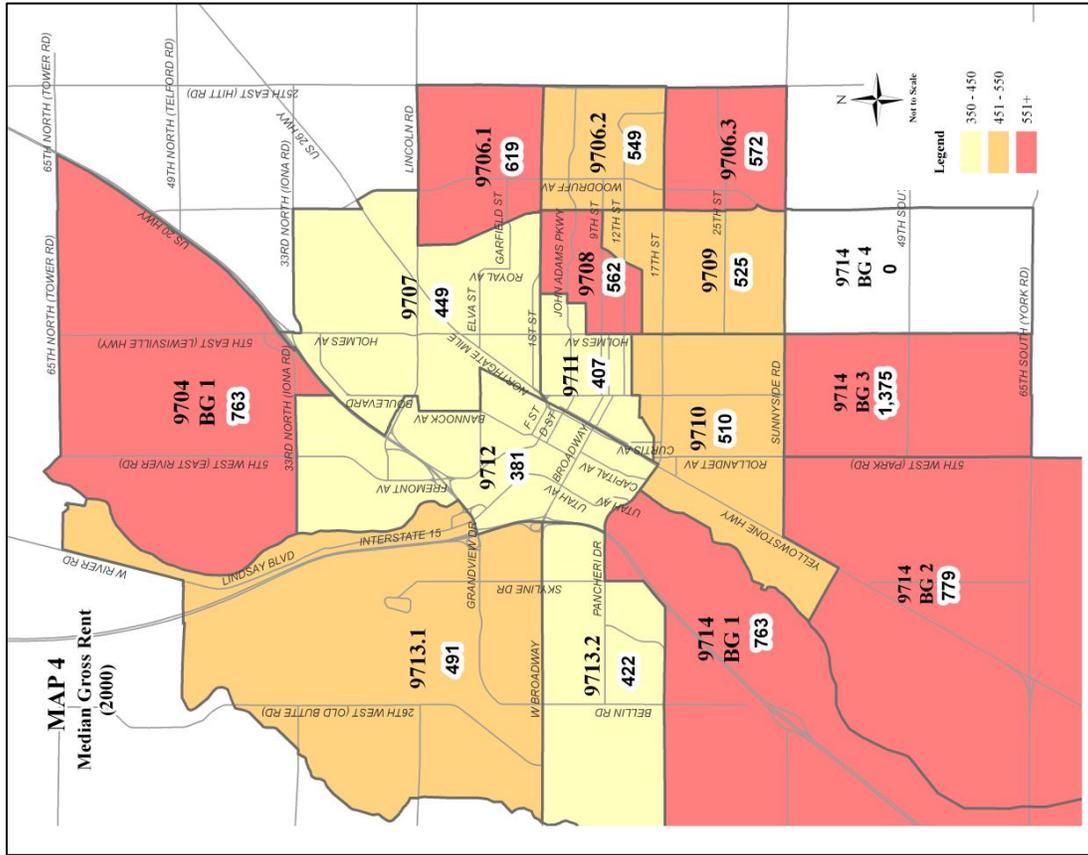
Ammon nearly doubled its total housing units during 2000-2008. The 2000 census showed 1,951 dwelling units. By the end of 2008, permits had been issued for 1,904 new units, including 1,591 single-family units and 313 apartments.

### **Housing Value and Cost**

The median value of owner-occupied homes in Bonneville County in 2000 was \$93,500. In 1990 Bonneville County ranked in the top 10 highest median home values for the State of Idaho. By 2000, it fell to 16<sup>th</sup>. The county's gross median rent in 2000 was \$485. Its ranking in this category also fell dramatically from 4<sup>th</sup> highest in Idaho 1990 to 11<sup>th</sup> by 2000.

Median value for owner-occupied homes in Idaho Falls was \$90,100 in 2000, a 28% increase from 1990 (2.8% per year). As shown on Map 3 homes with the highest values were in the very north and very south portions of the City. Lowest average home values were in the central areas.

Average rents in Idaho Falls follow a very similar pattern to home values. The highest rents, as shown in Map 4 are in the northern and southern areas of the City. The central and some western areas of the City saw the lowest median rent.



# Economic Characteristics

## EMPLOYMENT IN BONNEVILLE COUNTY

This section describes patterns of employment in Bonneville County. Most of the information used here was provided by the Idaho Department of Labor and is supplemented, as necessary, with data from the U.S. Bureau of Labor Statistics, the U.S. Bureau of the Census, the U.S. Department of Agriculture, the U.S. Bureau of Economic Analysis, and employers. Most employment data is generated through a survey process and is subject to some error. Also, different agencies obtain and report data differently, leading to apparent discrepancies. A more important limitation on employment data for Bonneville County is the seasonal nature of much of the employment in the area. Workers on farms, in potato processing plants, and in construction are often idle for part of the year. The averages reported here conceal a great deal of seasonal variation in the availability of work.

### Basic Employment Data

*Civilian Labor Force:* The civilian labor force includes civilians who are employed (full or part-time) or who are actively seeking employment. Bonneville County’s 1990 civilian labor force was 38,704. Ten years later it had grown to 41,612.

*Employment:* Employment includes all full and part-time wage and salary workers, self-employed persons, and unpaid family workers (generally on farms) who live in the County, regardless of whether they work there or in another county. Bonneville County employment increased from 34,714 in 1990 to 40,370 in 2000. Figure 3 indicates that Bonneville County employment increased 22% between 2000 and 2008.

*Unemployment:* Civilians who are not working but are actively seeking work are unemployed. The unemployment rate is the number of unemployed as a percentage of the civilian labor force. The 2000 unemployment rate in Bonneville County was 3.4%, compared with a State rate of 3.8% and a national rate of 3.9%. Table 11 compares Bonneville County unemployment rates since 2000 with the Idaho and U.S. rates. It should be noted that the unemployment rates reported in Table 11 do NOT include “discouraged workers” who have stopped actively searching for a job. Map 5 (pg. 21) shows unemployment rates for specific areas of Idaho Falls. The highest rates were in the central areas of the City. The lowest rates were found in the southeast section of the City as well as on the west side. The above data is also depicted in Figure 3 on page 21.

<b>Table 11</b>								
<b>Average Annual Unemployment Rate 2001-2008</b>								
	2001	2002	2003	2004	2005	2006	2007	2008
<b>Bonneville County</b>	<b>3.5</b>	<b>3.7</b>	<b>3.5</b>	<b>3.3</b>	<b>2.9</b>	<b>2.4</b>	<b>2.2</b>	<b>3.4</b>
<b>Idaho</b>	<b>4.9</b>	<b>5.4</b>	<b>5.3</b>	<b>4.7</b>	<b>3.9</b>	<b>3.2</b>	<b>2.7</b>	<b>4.9</b>
<b>U.S.</b>	<b>4.7</b>	<b>5.8</b>	<b>6.0</b>	<b>5.5</b>	<b>5.1</b>	<b>4.6</b>	<b>4.6</b>	<b>5.8</b>
<b>SOURCES: Idaho Department of Labor; U.S. Department of Commerce, Bureau of Economic Analysis</b>								

### Labor Force Participation

In 1990, 70% of all Bonneville County residents over the age of 16 were in the civilian labor force. By 2000 labor force participation decreased to 67.6%. Current labor force numbers and population estimates suggest civilian labor force participation has increased slightly to 68.2%. Bonneville County labor force participation rates are consistently higher than the U.S. rate, which was 66% in 2000 and now stands at about 64.2%.

### Women in the Labor Force

The 2000 Census showed that 59.0% of all Bonneville County women over the age of 16 were in the labor force (working or unemployed). Of those households with children under the age of six, 57.6% have both parents in the workforce. These figures are slightly higher than the State and nation: 58.9% of all Idaho and 57.4% of all U.S. women were in the labor force in 2000.

### Underemployment

Underemployment is a common economic problem in rural areas. The seasonal nature of agriculture, food processing, and construction dictate that some workers in those industries will be unemployed for part of the year. The limited job opportunities and lower wages that characterize most rural areas also mean some people are unable to find the quality of job or income their educational or skill level would allow them to have in a metropolitan area. The Idaho Department of Labor listed the Idaho underemployment rate for 2008 at 12.3% and the Bonneville County rate at 5.8%.

### Employment Outside the County

2008 employment of Bonneville County residents exceeded the number of jobs in the County by about 4,000; a difference that is explained by commuting. According to a 2006 report from the Idaho Department of Labor, 8.9% of Bonneville County workers commute to Idaho National Laboratory facilities in Bingham and Butte Counties. In addition, 4.5% of workers were listed as employed in Ada County and 3.8% in Jefferson County. The rather complex commuting patterns of eastern Idaho are further discussed in the section on “The Regional Context of the Bonneville County Economy.”

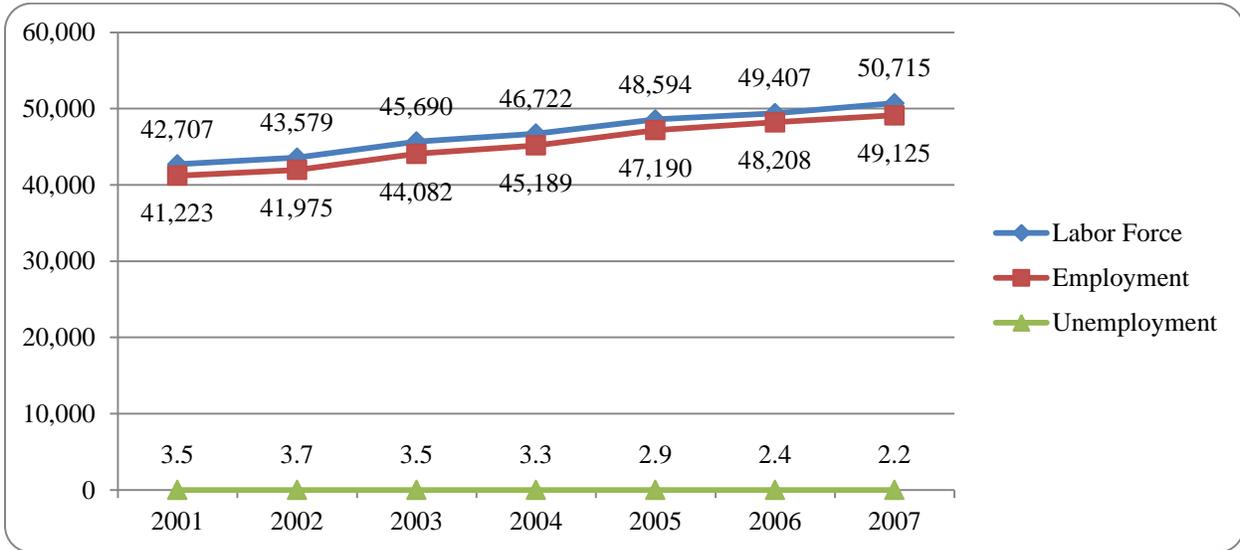
### Employment by Industry

Table 12 traces recent changes in Bonneville County employment by industry. The information presented in this table differs from labor force, employment and unemployment data because it applies to people employed in Bonneville County, not those who live there. The implications of the trends shown in the table are discussed in the section on “The Structure of the Bonneville County Economy.”

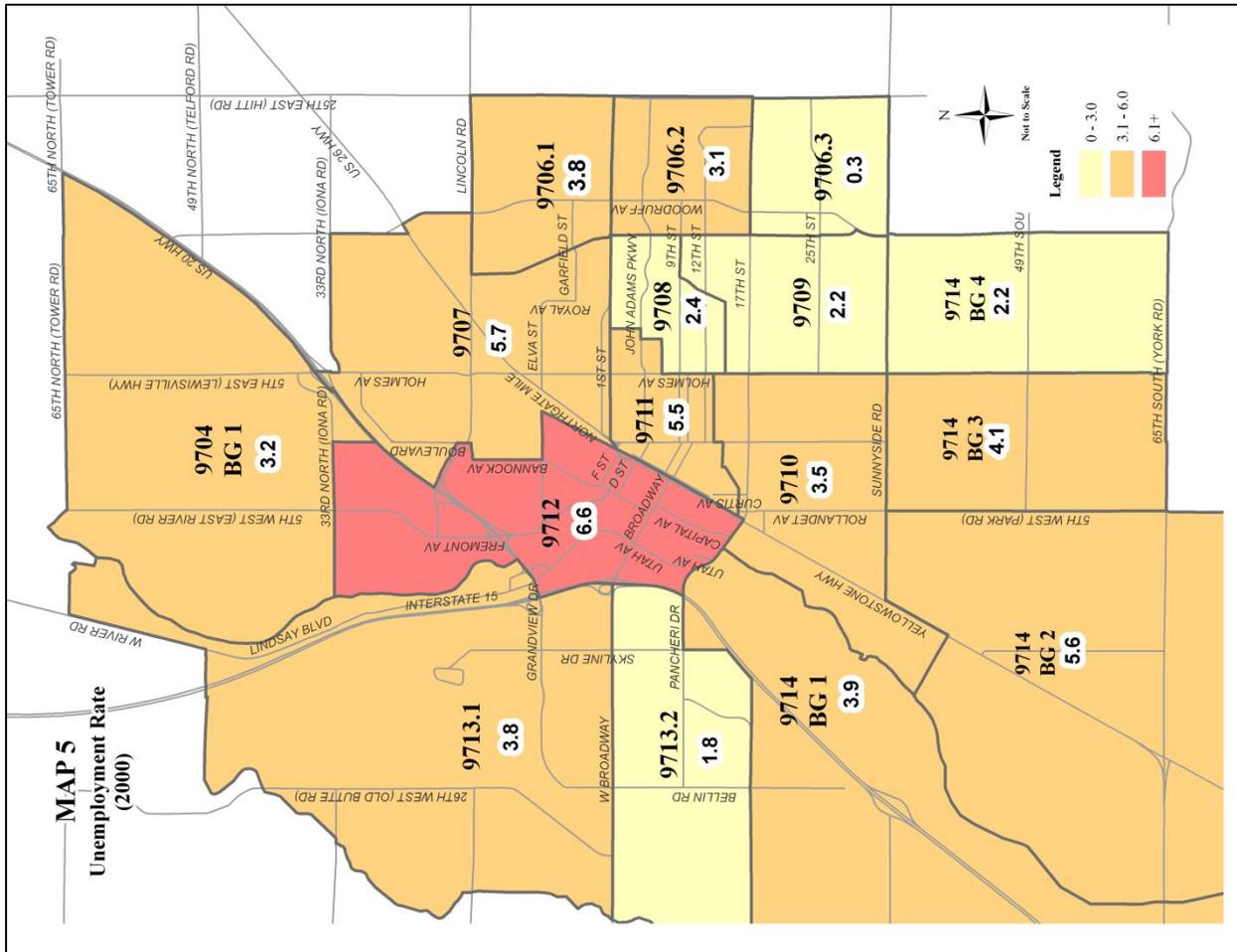
Industry	2001		2004		2007	
	Employment	Share	Employees	Share	Employees	Share
<b>Total Employment</b>	<b>54,270</b>	<b>100%</b>	<b>58,753</b>	<b>100%</b>	<b>63,447</b>	<b>100%</b>
Farm Employment	1,393	2.5%	1,378	2.3%	1,314	2.0%
Mining	*		50	0.08%	*	
Construction	4,021	7.4%	4,858	8.2%	6,426	10.1%
Manufacturing	2,547	4.6%	2,710	4.6%	2,986	4.7%
Wholesale Trade	3,571	6.5%	3,771	6.4%	3,740	5.8%
Retail Trade	7,445	13.7%	7,862	13.3%	8,799	13.8%
Information	1,031	1.8%	1,165	1.9%	1,409	2.2%
F.I.R.E.	3,366	6.2%	3,843	6.5%	5,288	8.3%
Services	9,251	17%	9,484	16.1%	7,597	11.9%
Ed. and Health Serv.	6,431	11.8%	7,573	12.8%	8,614	13.5%
Leisure and Hospitality	4,375	8.0%	4,991	8.5%	5,325	8.3%
Other Services	2,805	5.1%	3,151	5.3%	3,428	5.4%
Government	5,637	10.3%	5,640	9.6%	5,970	9.4%

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis

**Figure 3: Bonneville County Labor Force and Employment Changes 2001-2007**



SOURCE: Idaho Department of Labor



## BONNEVILLE COUNTY INCOMES

This section describes the income levels of Bonneville County residents and the major sources of the incomes generated in the County. The data used here come from two sources: the Bureau of Economic Analysis (BEA) and Sales and Marketing Management. BEA income estimates are based on administrative records, including tax and unemployment insurance records. The principal limitation on the BEA data is timeliness. The most current income estimates now available for local areas are for 2007. Sales and Marketing Management magazine makes annual estimates of effective buying income. Those estimates are more current than BEA's and presented in a format that is more useful for many purposes.

### Total Personal Income

Total personal income (TPI) is the simple sum of income County residents receive from all sources. As Table 13 shows, the TPI of Bonneville County residents between 2003 and 2007 stayed ahead of inflation, increasing approximately 24% in current dollars.

<b>Table 13</b>					
<b>Bonneville County Total Personal Income 2003-2007 in Thousands of Dollars</b>					
	2003	2004	2005	2006	2007
Actual	2,330,943	2,532,978	2,813,620	3,003,993	3,224,839
Inflation Adjusted	2,596,670	2,768,544	2,986,376	3,066,476	3,224,839
<b>SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis</b>					

### Per Capita Income

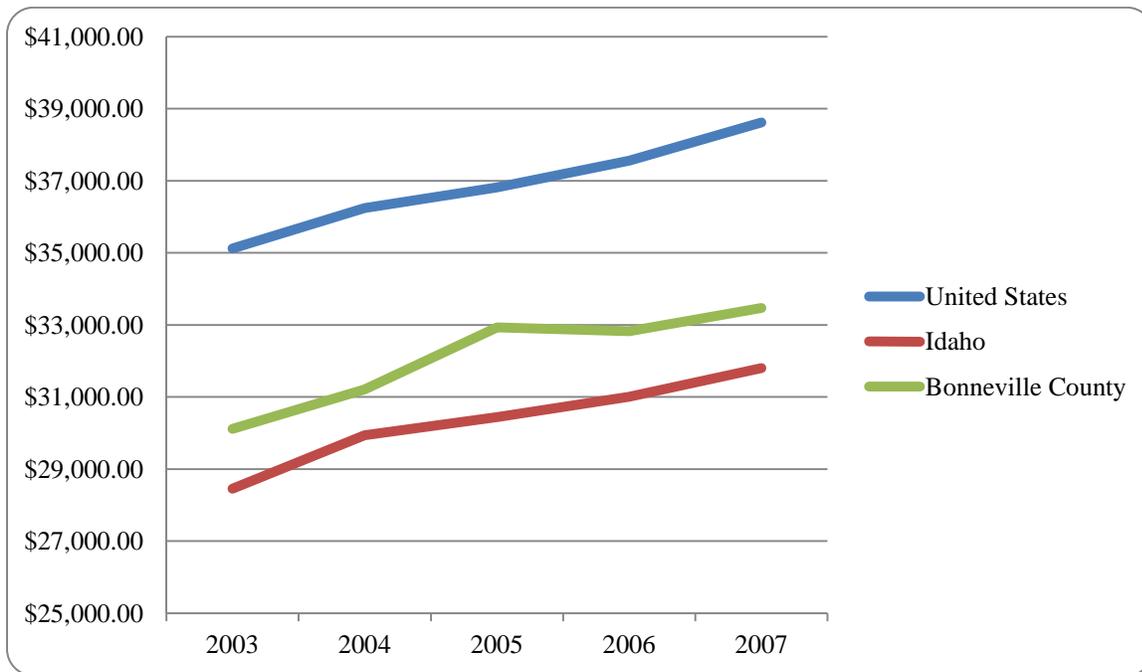
Total personal income is difficult for most people to conceptualize and of little value for comparative purposes. Per capita income (PCI) is a more understandable measure of the incomes received by Bonneville County residents. While total personal income is a simple sum of income received from all sources by County residents, PCI divides that sum by the number of County residents to show how much income was generated per resident. According to the Bureau of Economic Analysis, it is "often used as an indicator of the character of consumer markets and of the economic well-being of the residents of an area." Table 14 (pg. 23) compares Bonneville County income levels with those of Idaho and the U.S. Bonneville County PCI increased 11.1% (\$3,348) between 2003 and 2007. It also increased as a percent of the national average from 86% to 87% in 2007, although the peak for this time period was 2005 when Bonneville County PCI was 89% of the national average. For all periods Bonneville County was higher than State levels. Figure 4 (pg. 23) graphically presents this same information.

**Table 14**  
**Per Capita Income 2003-2007**

	2003	2004	2005	2006	2007
<b>Bonneville County</b>					
Actual	27,038	28,552	31,024	32,155	33,468
Inflation Adjusted	30,120	31,207	32,929	32,824	33,468
Percent of National	86%	86%	89%	87%	87%
<b>Idaho</b>					
Actual	25,543	27,389	28,681	30,374	31,804
Inflation Adjusted	28,455	29,936	30,442	31,005	31,804
Percent of National	81%	83%	83%	83%	82%
<b>U.S.</b>					
Actual	31,530	33,157	34,690	36,794	38,615
Inflation Adjusted	35,124	36,240	36,820	37,559	38,615

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis

**Figure 4: Per Capita Income Comparison**



## **Income by Industry**

Table 15 (pg. 25) shows the contributions of the major industries to the incomes generated in Bonneville County in 2001, 2004, and 2007. The data presented in this Table differ from TPI and PCI information just presented because they include incomes generated in the County, not incomes received by County residents. Bonneville County income by industry increased overall from 2001-2007. Services experienced a significant drop at 21.8%. However, it was the only industry to see any decrease. Yet even these losses were somewhat captured by significant gains in Administrative and Waste Services due to changes in reporting methods. Construction incomes increased 31%, T.I.U.<sup>1</sup> increased 37%, retail increased by about 25%, and F.I.R.E.<sup>2</sup> incomes increased 40% over 2001 levels. The implications of these and the other trends shown in the table are discussed in the section on “The Structure of the Bonneville County Economy.”

Because services make up such a large share of Bonneville County incomes, and because this industry experienced such a dramatic overall decline, further analysis is included here. New land use codes and reporting methods of the Bureau of Economic Analysis break down the service industry into specific areas. Table 16 (pg. 26) shows the income levels of these areas. The most significant finding in these numbers is that many service industries actually increased during the study period. Professional, scientific, and technical services decreased 66%; the major factor in bringing services’ overall numbers down. This decline may be explained in part through downsizing and layoffs at the Idaho National Laboratory. As mentioned above, some of the losses were due to changes in reporting and were actually a part of the increase in Administrative and Waste Services, which experienced the biggest gains at 44%. Health Care and Social Services also saw tremendous growth with a 28% increase in income generated.

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<sup>1</sup> T.I.U. means transportation, information, and utilities. Totals for each year may be lower than actual incomes generated as numerous categories did not report information due to disclosure rules

<sup>2</sup>F.I.R.E. means finance, insurance, and real estate finance

**Table 15**  
**Bonneville County Income by Industry 2001-2007 (Thousands of Dollars)**

	2001		2004		2007	
	Amount	Share	Amount	Share	Amount	Share
<b>Agriculture</b>						
Actual	12,225	0.8%	13,529	0.8%	15,899	0.8%
Inflation Adjusted	14,132		15,424		15,899	
<b>Mining</b>						
Actual	D <sup>3</sup>	NA	567	0.03%	D	NA
Inflation Adjusted	NA		646		NA	
<b>Construction</b>						
Actual	111,009	7.6%	126,441	7.6%	183,731	10%
Inflation Adjusted	128,326		144,155		183,731	
<b>Manufacturing</b>						
Actual	73,502	5.1%	86,757	5.2%	111,153	6%
Inflation Adjusted	84,968		98,912		111,153	
<b>T.I.U. (Transportation, Information, Utilities)</b>						
Actual	73,909	5.1%	91,486	5.5%	117,867	6.4%
Inflation Adjusted	85,438		104,303		117,867	
<b>Wholesale Trade</b>						
Actual	117,587	8.1%	146,994	8.8%	176,930	9.7%
Inflation Adjusted	135,930		167,588		176,930	
<b>Retail Trade</b>						
Actual	138,698	9.6%	160,320	9.6%	221,606	12.1%
Inflation Adjusted	160,335		182,781		221,606	
<b>F.I.R.E. (Finance, Insurance, and Real Estate Finance)</b>						
Actual	50,070	3.5%	64,539	3.6%	91,032	4.9%
Inflation Adjusted	57,881		73,581		91,032	
<b>Services</b>						
Actual	622,614	43.1%	707,785	42.4%	616,914	33.7%
Inflation Adjusted	719,742		806,946		616,914	
<b>Government</b>						
Actual	227,904	15.7%	257,482	15.4%	292,743	15.9%
Inflation Adjusted	263,457		293,555		292,743	

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis

<sup>3</sup> "D" indicates that information is unavailable due to disclosure rules

**Table 16**  
**Bonneville County Incomes in the Service Industry 2001-2007 (Thousands of Dollars)**

	2001		2004		2007	
	Amount	Share	Amount	Share	Amount	Share
<b>Professional, scientific, and Technical Services</b>						
Actual	327,395	22%	335,982	20%	138,118	7.5%
Inflation Adjusted	378,468		383,053		138,118	
<b>Management of Companies</b>						
Actual	2,019	0.14%	4,040	0.24%	6,215	0.34%
Inflation Adjusted	2,333		4,606		6,215	
<b>Administrative and Waste Services</b>						
Actual	38,962	2.7%	38,622	2.3%	67,714	3.9%
Inflation Adjusted	45,040		44,032		67,714	
<b>Educational Services</b>						
Actual	2,866	0.2%	3,586	0.21%	3,414	0.19%
Inflation Adjusted	3,313		4,088		3,414	
<b>Health Care and Social Assistance</b>						
Actual	170,607	11.8%	224,382	13.4%	276,685	15.1%
Inflation Adjusted	197,221		255,817		276,685	
<b>Arts, entertainment, and recreation</b>						
Actual	6,496	0.45%	4,889	0.29%	7,027	0.38%
Inflation Adjusted	7,509		5,573		7,027	
<b>Accommodation and Food Services</b>						
Actual	38,570	2.7%	49,306	2.9%	56,575	3.1%
Inflation Adjusted	44,586		56,213		56,575	
<b>Other services</b>						
Actual	35,699	2.5%	45,179	2.7%	52,968	2.8%
Inflation Adjusted	41,268		51,508		52,968	

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis

### Effective Buying Income

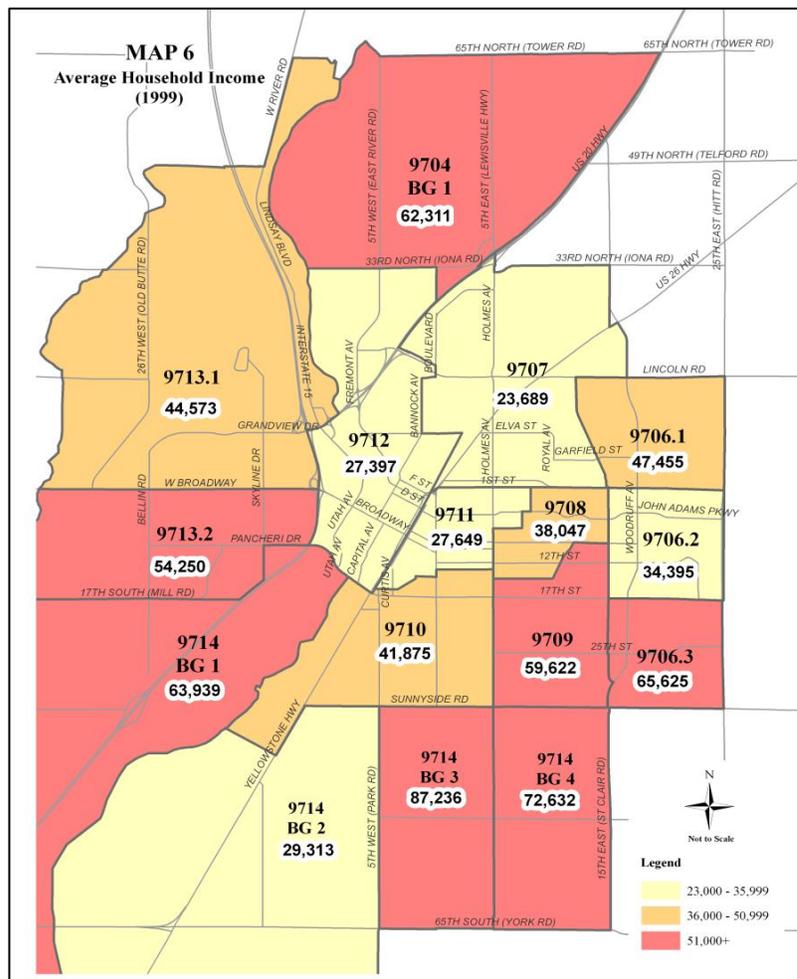
Table 17 shows the 2009 total and median effective buying income (EBI) for Bonneville County households as estimated by Sales and Marketing Management. EBI is the estimated household income minus taxes and fees paid to government agencies. Both Idaho Falls and the County were higher than State levels. The County was slightly higher than the U.S. average.

	Bonneville County	Idaho Falls	Idaho
<b>Total EBI</b>	<b>\$1,860,732,500</b>	<b>\$1,030,732,500 (55% of County)</b>	
<b>Median Household EBI</b>	<b>\$43,106</b>	<b>\$39,907</b>	<b>No data</b>
<b>% State</b>	<b>110.2%</b>	<b>102%</b>	
<b>% U.S.</b>	<b>101.8%</b>	<b>94.3%</b>	
<b>Households with EBI of:</b>			
<b>\$19,999 or less</b>	<b>17.8</b>	<b>19.8</b>	<b>19.6</b>
<b>\$20,000-\$34,999</b>	<b>21.1</b>	<b>22.7</b>	<b>23.4</b>
<b>\$35,000-\$49,999</b>	<b>21.2</b>	<b>20.8</b>	<b>22.4</b>
<b>\$50,000 plus</b>	<b>39.9</b>	<b>36.7</b>	<b>34.6</b>

SOURCE: Sales and Marketing Management

### Average Household Income

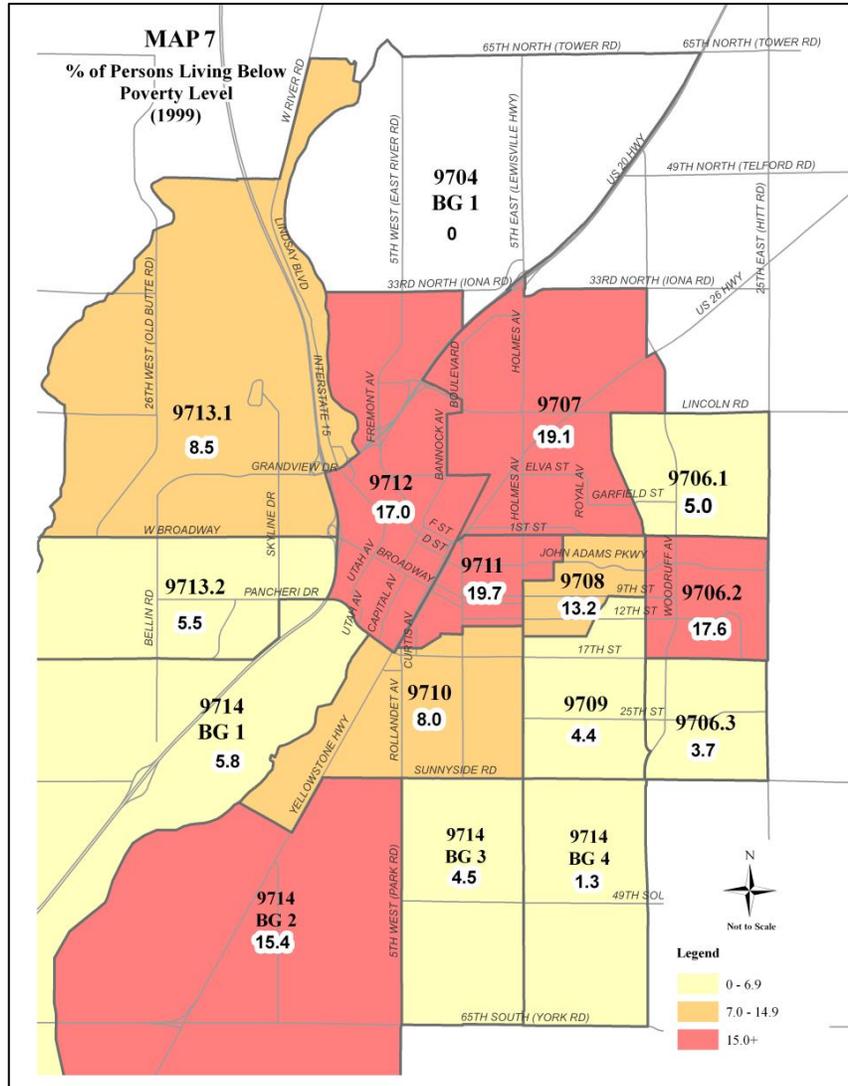
This section deals specifically with Idaho Falls' households rather than County per capita figures. Citywide, the average 1999 household income was \$40,512. This is a 13.3% increase from 1989, or 1.33% per year. The State of Idaho's median household income was \$37,752. According to data shown in Map 7 average household incomes in Idaho Falls were highest in the north and southeast areas of the City. The lowest average incomes are found in the central portion of the City.



## Poverty

Poverty is, in a general sense, the lack of an adequate income. The definition of poverty used by Federal agencies is based on an economy food budget planned by the U.S. Department of Agriculture. Persons in households with an income no more than three times the inflation-adjusted cost of that meal plan are counted as being in poverty. The 2000 percentage of persons with incomes below the poverty level in Bonneville County and its cities is shown in Table 18. The poverty level is slightly higher in Idaho Falls than in the County as a whole. Rural areas were also high.

Map 6 shows the percentages of people below the poverty level for Idaho Falls. Areas in the central portion of the City had the highest levels of poverty, climbing as high 19.7% of residents. These areas are the same as those with high concentrations of poverty in the 1990 census.



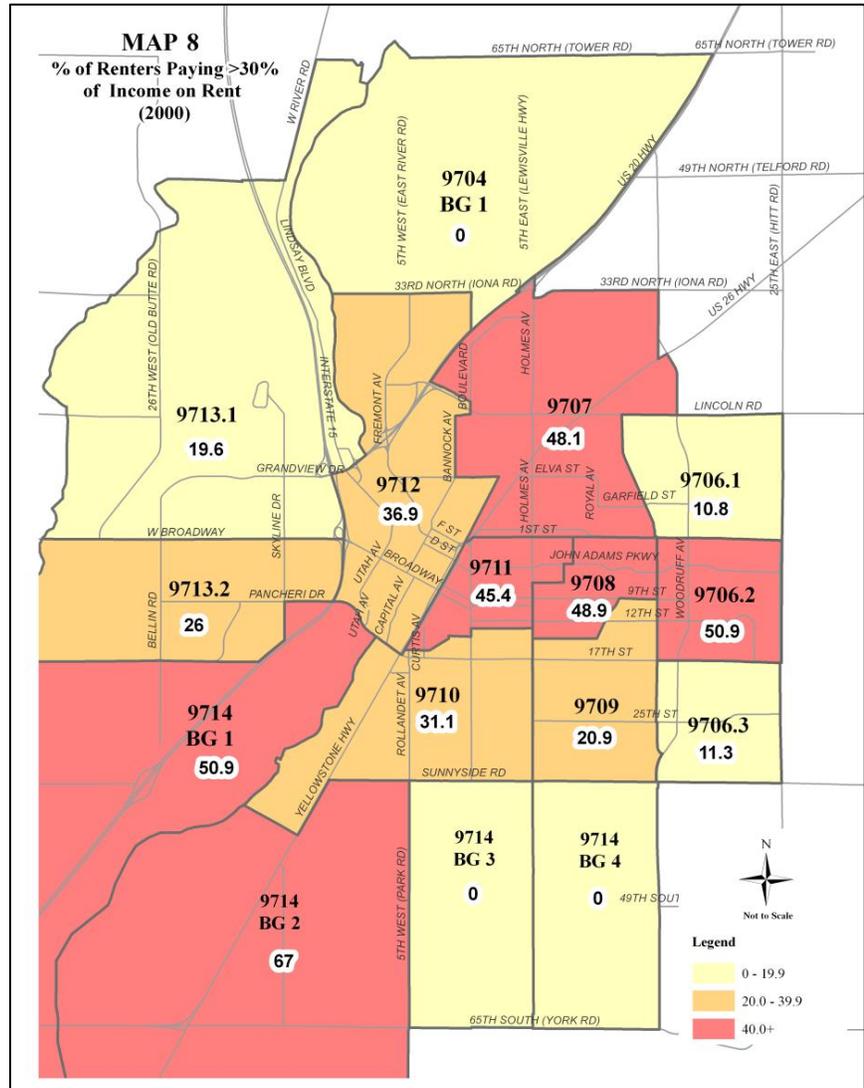
**Table 18**  
**2000 Percent of Persons with Income Below the Poverty Level**

Geographic Area	Percent of Individuals with Incomes Below Poverty Level
United States	12.4
Idaho	11.8
Bonneville County	10.1
Idaho Falls	10.9
Ammon	5.6
Iona	7.6
Swan Valley	9.2
Irwin	9.7

SOURCE: U.S. Department of Commerce, Bureau of the Census

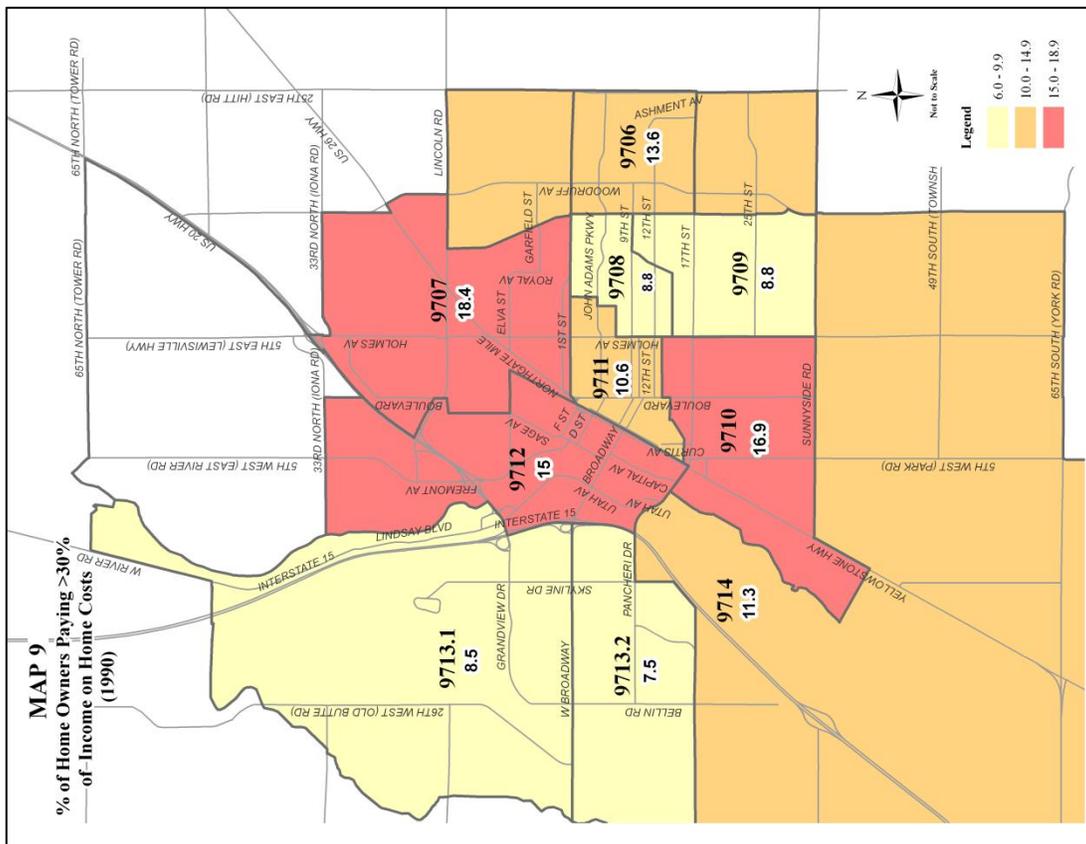
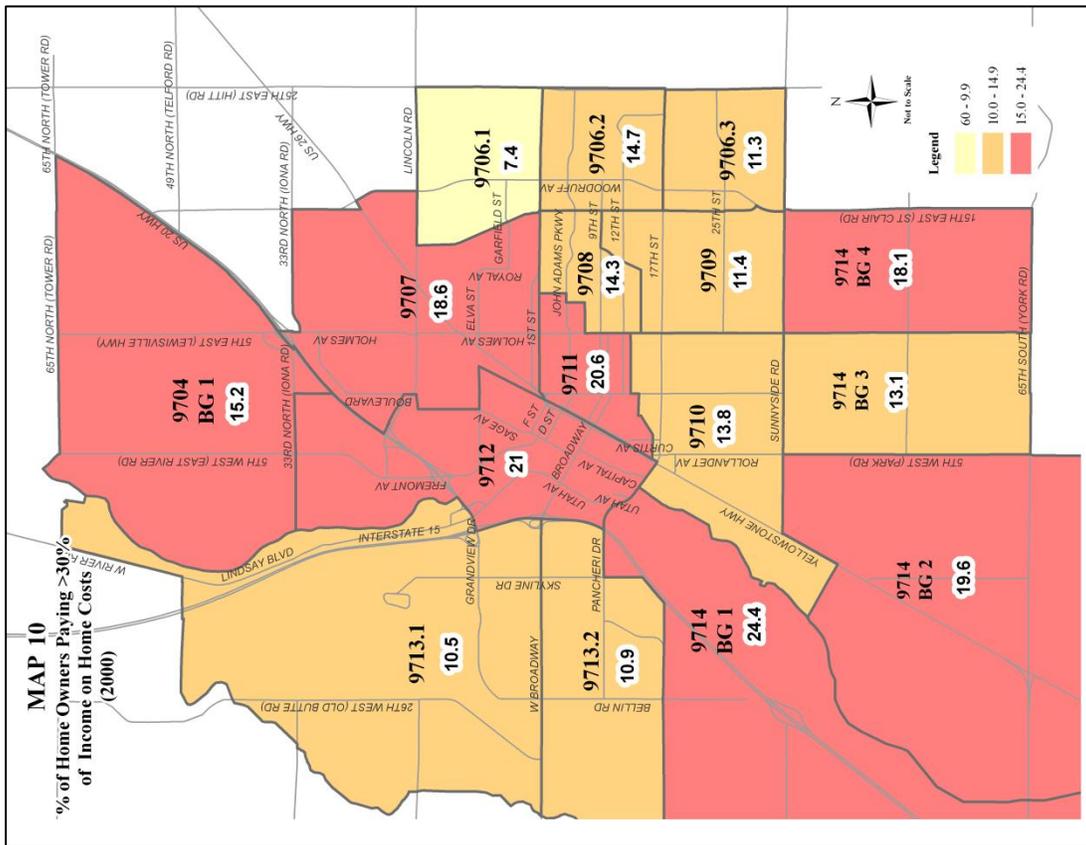
## Cost of Housing

Lending institutions and the federal government use 28-30% of gross income for mortgage payments or rent as “not to exceed standards.” The 2000 Census data provided information on households who paid more than 30% for housing costs. Over all in Idaho Falls 15.7% of homeowners paid more than 30% of their gross income on home costs and 39.1% of renters paid more than thirty percent of their gross income on rent. Both of these percentages are significant increases from 1990. At that time, 12.3% of homeowners paid more than 30% of income on housing costs and 32% of renters paid more than 30% of income on rent. This represents increases of 27.6% and 22.1%, respectively. Maps 8-10 on the following pages outline percentage of homeowners and renters, respectively paying more than 30% of income on housing costs and rent.



*Owner-occupied Housing.* The Census tract (9712) with the highest percentage of homeowners paying more than 30% of their gross income on housing costs is the same tract with the second lowest average home values. It is located in the central area of the City. What is most striking about the 2000 data, however, is the general increase of the percent of homeowners above the 30% standard. In 1990 (see Map 8), the highest percentage was 18.4 and out of 9 tracts, 6 had percentages below 10%. By 2000, the City had been divided into all or portions of 17 tracts. Only 1 had fewer than 10% of homeowners paying less than 30% on housing costs. Further, the highest percentage area showed 24.4% of homeowners above the “not to exceed” limit. Four tracts had figures greater than 20%. Comparing Map 9 with Map 3 (pg. 17) showing median home values is also insightful. Not all homeowners exceeding the 30% standard live in areas with lower property values.

*Renter-occupied housing.* Citywide, nearly 40% of renters pay more than 30% of their gross income on rent. Block Group 2 of Tract 9714 shows 67% of renters exceed this standard. Similar to the pattern described above in owner-occupied housing, the percentage of renters paying more than the 30% limit has increased substantially. However, in the north and south portions of the City, three Census tracts had zero percent of renters in this category. This may be based on reporting methods, but it is a positive change from 1990.



## THE STRUCTURE OF THE BONNEVILLE COUNTY ECONOMY

This section analyzes the structure of the Bonneville County economy. It begins by making a distinction between basic and nonbasic industries (or sectors) of the economy, then discusses the role and current performance of each sector in the County's economy. The sectoral sketches are not meant to be complete. Their purpose is to help identify important aspects of the County's economy and suggest appropriate planning strategies.

Much of this analysis is based on the population, employment, and income data presented in previous sections of the profile. It is subject to the limitations on that data. Some information from new sources, such as the Census of Agriculture, the Bureau of the Census' County Business Patterns, and Bureau of Economic Analysis, is also used. All references to incomes, sales, and other dollar amounts are in current dollars adjusted for inflation.

### Basic Economic Activity

The driving force of any local economy is the exchange of goods and services with other locales. Bonneville County "exports" fresh potatoes to other areas, while it "imports" diesel fuel, tractor tires, and most of the other inputs required to raise those potatoes. An industry that exports goods or services is considered to be basic because it generates the earnings needed to buy goods and services produced in other places. The identification of basic industries can be complicated, but local knowledge and the analysis explained in Appendix A indicate that the basic sectors of the Bonneville County economy in 2007 were:

#### Agriculture

The principal commodities produced by Bonneville County farmers and ranchers in 2007 were potatoes, wheat, barley, and cattle. Oilseed production is also increasing in the area as demand for canola oil grows. 2007 sales of agricultural products from the county's 926 farms were about \$189,277,000 (3.2% of Idaho's total). 2007 agricultural employment in Bonneville County was 1,314, down 5.6% from 2001. Potatoes had long been the leading product in sales for the County, but in 2007 was surpassed by cattle sales. Agricultural income in 2007 was \$19,441,000: 3.8% less than 2001. Farm income varies considerably from year to year, depending on weather conditions and commodity markets.

#### Construction

Construction in Bonneville County is considered an export sector based on 2007 data. Construction activity tends to reflect the health of other industries and can be highly variable. This section may change dramatically as newer data is released, reflecting the global recession and slow down in construction. \$225,228,000 of income for Bonneville County residents was generated by the construction sector in 2007, up 43% from 2001. 2007 construction employment in Bonneville County was 6,426; a 59.8% increase from 2001. While this is a strong increase, as mentioned construction is much more susceptible to fluctuations in the economy. A slowdown in construction will affect not only buildings, but also a variety of other occupations including plumbers, electricians, painters, and others.

#### Wholesale Trade

According to the 2002 Economic Census, fresh fruit and vegetables remain the largest single item in wholesale trade in Bonneville County. Although reporting in this census has changed from previous editions, potatoes were still confirmed as the largest item, with grains, beans, oilseeds, and livestock still strong. Other significant wholesale industries include motor vehicles, electrical goods, machinery equipment and supplies, and petroleum products. The wholesale industry employed 3,740 people in Bonneville County in 2007, a 4.7% increase from 2002. Wholesaling generated \$213,816,000 in personal income in 2007, 30.1% more than in 2001.

## Manufacturing

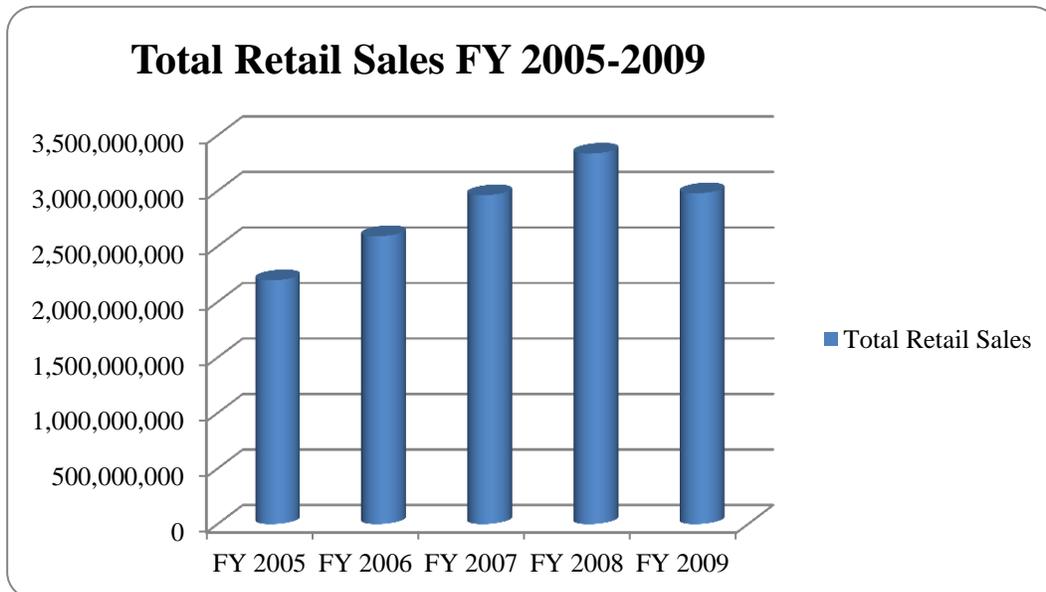
Manufacturing is a growing sector in Bonneville County. According to location quotient analysis explained in Appendix A, manufacturing does not qualify as an “export” industry. Local knowledge, however, shows many products manufactured in Bonneville County are consumed or used in other communities. Products exported from Bonneville County include: food products such as dehydrated potatoes and malt, newspapers and other printing, wood products, and toiletries. Manufacturing employment in Bonneville County in 2007 was 2,986, a 17% increase from 2001. Manufacturing generated \$116,674,000 in personal income in 2007, 30.8% more than in 2001.

## Retail Trade

Idaho Falls is the regional shopping center for eastern Idaho and neighboring areas in Montana and Wyoming. Retail trade has been one of Bonneville County’s fastest growing industries for over 20 years. Changes in employment categorization by reporting agencies make it difficult to compare figures from 2007 with years previous to 2001.

For example, retail trade employment in 2000 was 10,616 and dropped to 7,455 the next year. Adjusted data, however, shows the number swells to 11,820, an 11% increase from 2000. From 2001 to 2007 employment in retail trade increased by 19% to 14,124 assuming the same adjustments. Perhaps a more accurate account of the increase in retail trade can be taken from taxable sales figures. Although there are some limitations to this method because of sales tax reporting in Idaho, it still provides a good sense of the strength of retail trade in Bonneville County. Figure 5 above shows changes in taxable sales from 2005 to 2008. Sales increased each year from 2005-2008 and experienced a slight drop in 2009. A third indicator of Bonneville County’s strength in retail trade is comparison of purchases to sales ratios. A report from the Regional Development Alliance with data for the Idaho Falls Metropolitan Statistical Area (MSA), which includes both Bonneville and Jefferson Counties, shows households in the study area spent \$1,760,200,000 on commodity purchases in 2006. Industries in the MSA received \$4,275,300,000 in commodity sales in the same year; a difference of \$2,515,100,000. This clearly demonstrates many retail sales dollars are received from outside Bonneville and Jefferson Counties.

**Figure 5**



SOURCE: Service Corps of Retired Executives

## Services

Bonneville County exports two main kinds of services: health care and research. This is an advantage to the County because these industries are less susceptible to the natural ebbs and flows of an economy than sectors such as construction and retail sales.

### *Health Care*

The two hospitals in Bonneville County as well as the large number of local physicians and specialists serve as the health care hub for the surrounding region. In 2007 the Bureau of Economic Analysis found 8,614 employees in the health care and social services industry. This is a 34.9% increase in employment from 2001 and represents nearly 14% of all County workers. Personal income received from health care amounted to \$315,546,000 in 2007, up 40.2% from 2002.

### *Professional Services*

The Idaho National Laboratory (INL) is operated by private contractors for the U.S. Department of Energy. INL employed nearly 8,500 people in 2006, nearly all of whom are classified as either professional services or waste and administrative services. Though the workforce at INL is smaller than 10 years ago due to layoffs, it remains the third largest employer in the State of Idaho. Overall, professional services and administrative and waste services accounted for 7,597 jobs in Bonneville County in 2007, down 18% from 2001. Some of this decrease has to do with layoffs at the INL and some is due to changes in reporting methods. On the other hand, INL has been a major beneficiary of federal stimulus money which should lead to an expansion of facilities and jobs. Furthermore, Areva, a French company which enriches uranium announced plans to build a new plant in Bonneville County which will increase the employment and income in this sector.

## Tourism

Idaho Falls is the largest city on the western approach to Yellowstone National Park, and Bonneville County offers outstanding scenic and recreational attractions of its own, including the South Fork of the Snake River. The role of tourism in a local economy is difficult to evaluate because state and federal agencies do not treat it as a separate sector when collecting employment and income data. Location quotient analyses of tourism-related enterprises such as accommodation and food services show that as a percentage of employment, Bonneville County is slightly higher than the United States average. Also, sales in these areas have increased since 2005 as shown in Table 19. Tourism clearly does function as an export industry in parts of Idaho Falls' trade area (see the REGIONAL CONTEXT section), making it an indirect contributor to the local construction, wholesale trade, retail trade, and services sectors.

	2005	2006	2007	2008	2009
<b>Industry</b>					
<b>Eating/Drinking Establishments</b>	83,111,020	87,101,070	98,619,410	110,005,230	106,553,775
<b>Lodging</b>	24,355,950	27,396,780	26,551,620	30,846,120	29,178,356
<b>Amusements and Recreational Facilities</b>	7,410,073	8,584,457	12,130,560	14,424,480	13,712,676
<b>Service Stations</b>	65,265,100	77,681,135	81,667,240	87,987,330	83,767,662

SOURCE: Service Corps of Retired Executives

## Structural Change

Table 20 provides a summary of the employment and income trends discussed in this section. This table, along with the material presented in Tables 12 and 15 and Appendix A, suggests the structure of the Bonneville County economy has been relatively stable. The largest shifts in the local economy have been the decrease in employment in professional services, due mostly from layoffs at the Idaho National Laboratory and changes in reporting methods, a continued increase in health care and retail trade, and solid increase in tourism related industries. Also positive was the increase in manufacturing employment and income.

		Bonneville County	Idaho	United States
<b>Agriculture</b>	<b>Change in Employment</b>	<b>-5.6%</b>	<b>-9.0%</b>	<b>-12.9%</b>
	<b>Change in Income</b>	<b>+12.5%</b>	<b>+23.0%</b>	<b>-3.8%</b>
<b>Construction</b>	<b>Change in Employment</b>	<b>+59.8%</b>	<b>+39.9%</b>	<b>+16.7%</b>
	<b>Change in Income</b>	<b>+43.1%</b>	<b>+41.6%</b>	<b>+16.0%</b>
<b>Manufacturing</b>	<b>Change in Employment</b>	<b>+17%</b>	<b>-1.3%</b>	<b>-14.4%</b>
	<b>Change in Income</b>	<b>+30.8%</b>	<b>+4.9%</b>	<b>-7.4%</b>
<b>Wholesale Trade</b>	<b>Change in Employment</b>	<b>+4.7%</b>	<b>+10.3%</b>	<b>+5.5%</b>
	<b>Change in Income</b>	<b>+30.1%</b>	<b>+22.2%</b>	<b>+11.3%</b>
<b>Retail Trade</b>	<b>Change in Employment</b>	<b>+18.1%</b>	<b>+16.4%</b>	<b>+4.2%</b>
	<b>Change in Income</b>	<b>+38.2%</b>	<b>+24.8%</b>	<b>+4.2%</b>
<b>Health Care</b>	<b>Change in Employment</b>	<b>+34.9%</b>	<b>+27.0%</b>	<b>+18.1%</b>
	<b>Change in Income</b>	<b>+40.2%</b>	<b>+37.8%</b>	<b>+26.7%</b>
<b>Professional Services</b>	<b>Change in Employment</b>	<b>-18%</b>	<b>+28.0%</b>	<b>+15.8%</b>
	<b>Change in Income</b>	<b>-51.3%</b>	<b>+30.1%</b>	<b>+17.3%</b>
<b>Tourism</b>	<b>Change in Employment</b>	<b>+21.7%</b>	<b>+20.0%</b>	<b>+14.3%</b>
	<b>Change in Income</b>	<b>+22.0%</b>	<b>+22.9%</b>	<b>+16.1%</b>

## REGIONAL CONTEXT

No community can be understood in isolation. This section briefly discusses the economic connections between Bonneville County and its neighbors.

### Commuting

The 2000 Census reported that 10.0% of all Bonneville County workers commuted to jobs outside the County. Table 21 compares commuting rates in Bonneville County with other counties in the region. The regional average is 26.8%.

County	% of Workers Commuting to Another County	County	% of Workers Commuting to Another County
<b>Bingham</b>	<b>32.5</b>	<b>Bonneville</b>	<b>10.0</b>
<b>Butte</b>	<b>19.7</b>	<b>Clark</b>	<b>20.9</b>
<b>Custer</b>	<b>16.2</b>	<b>Fremont</b>	<b>47.5</b>
<b>Jefferson</b>	<b>52.7</b>	<b>Lemhi</b>	<b>3.1</b>
<b>Madison</b>	<b>18.5</b>	<b>Teton</b>	<b>40.7</b>

SOURCE: U.S. Department of Commerce, Bureau of the Census

### Idaho Falls Trade Area

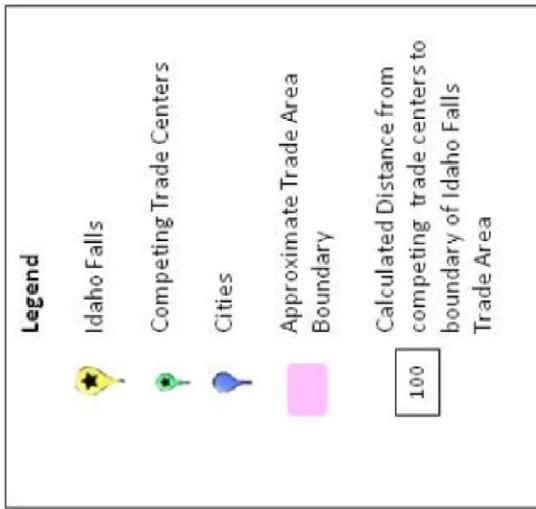
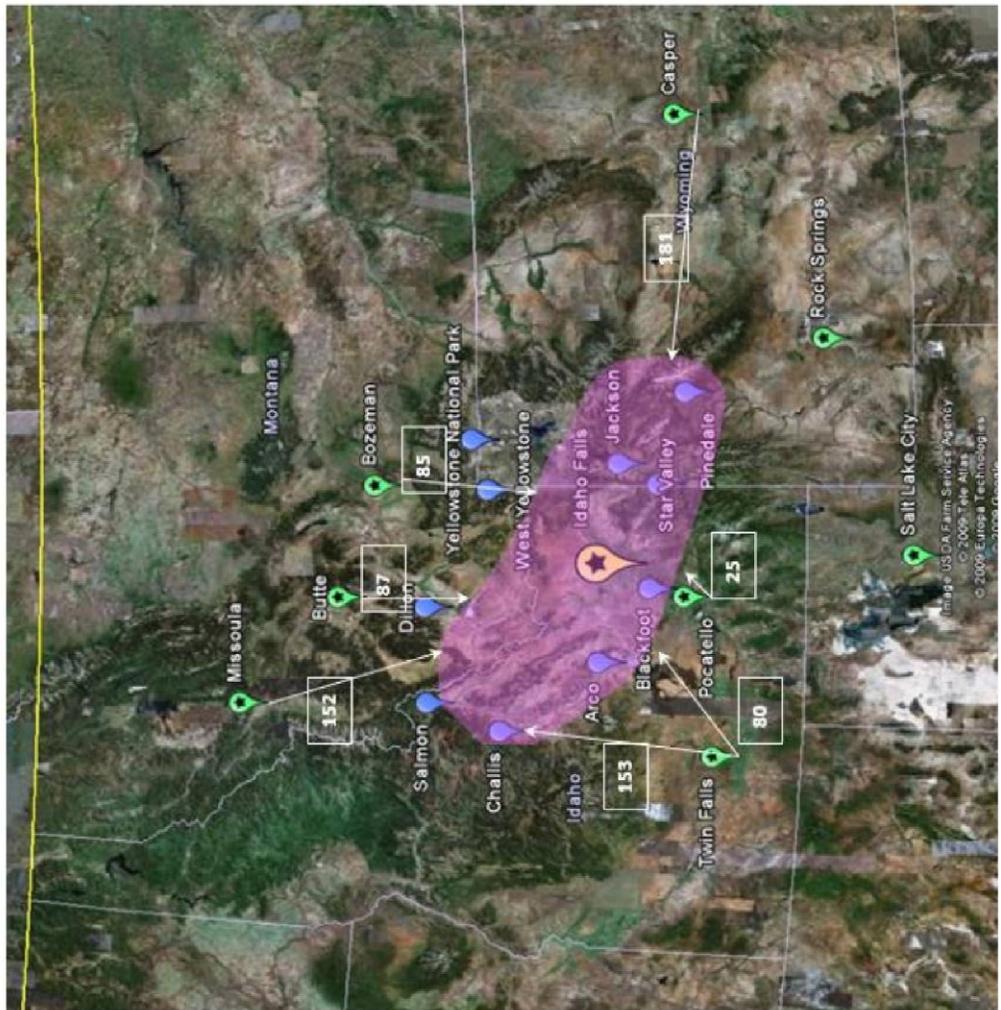
Residents of eastern Idaho's smaller cities and rural areas often find the goods and services they need in Idaho Falls, which is the commercial and health care center of the approximately 26,000 square mile area outlined on Map 11. The trade area boundaries shown on that map are based on the method explained in Appendix B. The 2002<sup>4</sup> population of the Idaho Falls trade area, including Bonneville County, was approximately 241,978. This does not reflect the total population of all counties within the trade area; rather, for those counties who fall only partly into the trade area methods were used to calculate the population within the trade area.

### Interdependence

Flows of commuters, shoppers, and goods and services bind the communities of eastern Idaho together, and Bonneville County's economic health will reflect, to at least some degree, the fortunes of its neighbors. Bonneville County continues to be the regional center for retail trade and health services. According to data from the 2002 Economic Census, Bonneville County captured approximately 48% of potential retail sales for the entire trade area. This is significant considering that in the State of Idaho on average 30-40 percent of all retail sales reported to the Idaho Tax Commission cannot be attributed to a specific county. Given the regional draw of Bonneville County it is realistic to assume they captured an even greater amount of retail sales from the trade area than the 48% calculated here. Data provided in Appendix A shows health care is also a strong "export" sector in Bonneville County, drawing customers from outside its boundaries. Unfortunately, the 2002 Economic Census did not report financial figures for health care services in Bonneville County.

<sup>4</sup> 2002 population estimates were used in order to coincide with the Economic Census, which is conducted every 5 years. The most recent Economic Census data available is from 2002.

## Idaho Falls Retail Trade Area



# Appendices

## APPENEDIX A THE ANALYSIS OF ECONOMIC SECTORS

The purpose of this Appendix is to explain the method used to determine which sectors of the Bonneville County economy are basic. A basic sector is, to repeat the main text, one that brings money into an area by exporting goods or services to other locales. The basic sectors are not the same in all local economies. In rural communities, for example, retail trade usually relies on incomes generated by agriculture, mining, or other industries that sell products outside the area. Stores in larger cities, like Idaho Falls, often draw enough shoppers from surrounding rural areas to support some retailing with “exports.” Sectors may, as in the case of retailing, be partially basic, to some extent serving local needs and to some extent bringing dollars in from outside the community. Basic sectors may also change, indicating shifts in the structure of a local economy, but there has been little change in the fundamental structure of the Bonneville County economy in recent years.

### **Methods**

The basic sectors of the Bonneville County economy were identified using two methods. The first is location quotient analysis, which compares sectors on the basis of their shares of local and national employment or income. If the local share is greater than the national, it is assumed that sector is “exporting” goods or services rather than satisfying local needs. In Bonneville County, for example, retail trade accounted for 17.89% of all 2008 employment, while in the U.S. it accounted for only 13.52% of all employment. Analyzing comparative incomes from retail trade leads to similar results: it provided 12.1% of the incomes generated in Bonneville County in 2007, but only 4.7% of total personal income in the U.S.

Location quotient analysis is not entirely reliable when used without the second method of identifying basic sectors, which is local knowledge. Local knowledge confirms the location quotient analysis of in Bonneville County. For example, most local farm products are exported for consumption in other areas. As Table A-1 shows, location quotient analysis does not identify manufacturing as a basic industry in Bonneville County. Local knowledge suggests, however, that much of what is manufactured in the County is, in fact, exported for consumption or use in other areas.

### **Results**

The Bureau of Labor Statistics (BLS) now provides location quotient analyses on their website. Table A-1 shows the results of an analysis of the Bonneville County economy provided by the BLS. It includes changes in employment and location quotients for both Bonneville County and the United States. Basic sectors are highlighted in yellow. The reader will note that not all highlighted sectors have a location quotient greater than one. This is because local knowledge was considered when determining which sectors are basic. In evaluating the information presented in Table A-1 it is important to recall that the location quotient method is a rough, “rule of thumb” approach. An input-output study might reveal different results.

Table A-1  
Employment and Location Quotient (LQ) Changes

Industry	2001		2008		LQ		Basic
	U.S.%	Bonneville County %	U.S.%	Bonneville County%	2001	2008	
Agriculture	1.07	1.85	1.03	ND	1.73	ND	Yes
Mining	0.49	0.07	0.63	ND	0.15	ND	No
Utilities	0.55	ND	0.49	0.10	ND	0.19	No
Construction	6.20	7.59	6.29	8.99	1.23	1.43	Yes
Manufacturing	14.99	6.35	11.82	6.18	0.42	0.52	Yes
Wholesale Trade	5.24	9.15	5.26	8.48	1.75	1.61	Yes
Retail Trade	13.89	16.57	13.52	17.89	1.19	1.32	Yes
Transportation/Warehousing	3.79	ND	3.77	3.81	ND	1.01	No
Information	3.29	2.52	2.64	3.49	0.77	1.32	Yes
Educational Serv.	1.72	0.21	2.09	0.39	0.12	0.18	No
Health Care	11.86	13.61	13.77	17.36	1.15	1.26	Yes
Arts/Entertainment/Recreation	1.63	0.89	1.75	1.07	0.55	0.61	No
Finance/Insurance	5.16	3.19	5.17	3.39	0.62	0.66	No
Real Estate/Rental/Leasing	1.86	1.23	1.86	1.53	0.66	0.82	No
Professional/Technical Services	6.29	13.28	6.90	6.09	2.11	0.88	Yes
Management of Companies	1.57	0.15	1.67	0.14	0.10	0.08	No
Administrative/Waste Services	7.08	6.36	7.06	5.95	0.90	0.84	Yes
Accommodation/Food Services	9.24	9.78	10.09	10.36	1.06	1.03	Yes
Other services	3.85	3.67	3.96	3.38	0.95	0.85	No
Unclassified	0.23	NC	0.19	NC	NC	NC	No

**SOURCE: U.S. Department of Labor, Bureau of Statistics**

## APPENDIX B ESTIMATING RETAIL TRADE CAPTURE

The retail trade “capture” of Bonneville County was estimated using trade area capture analysis, a technique that is further explained in Community Economic Analysis: A How to Manual by Hustedde, Shaffer, and Pulver. It is expressed in this formula:

$$\text{Trade area capture} = \frac{\text{Total Retail Sales in the Community}}{\text{State per Capita Sales} \times \text{Income Factor}}$$

Where: 
$$\text{State per Capita Sales} = \frac{\text{Total State Sales}}{\text{State Population}}$$

$$\text{Income Factor} = \frac{\text{Community per Capita Income}}{\text{State per Capita Income}}$$

As the formulas indicate, trade area capture analysis estimates retail trade capture (or leakage) by converting the State’s total retail sales into per capita sales, adjusting that figure for any difference in income between the State and community being analyzed, then calculating “customer equivalents” by dividing total sales in the community by the adjusted State per capita sales figure. If the number of customer equivalents is greater than the community’s population, it is capturing enough sales from other places to cancel its own, inevitable leakage. Dividing the community’s population by the number of customer equivalents yields a “pull factor.” That factor will be greater than 1.0 for places, like Bonneville County, that are capturing sales from other areas and less than 1.0 where there is net leakage. Trade area capture analysis can be carried over time to show how the strength of a community’s retail sector is changing. In fact, the numbers presented in this section should only be viewed in conjunction with data from previous years. There is really no way to determine what is a “good” or “bad” pull factor. It is only useful to see if that factor is increasing or decreasing over time.

### Results

The application of trade area capture analysis to Bonneville County confirms the status of Idaho Falls as a regional trade center and suggests that the strength of its retail sector is growing. The County’s FY 2002 pull factor was 1.37. By FY 2007, it had increased to approximately 2.25.

### Limitations

Trade area capture analysis does not directly measure the flow of retail trade between communities. It is an estimation technique and the results it produces should be clearly identified as estimates. It also has unique limitations for an area like Bonneville County and Idaho Falls which draw consumers from other states. The formula assumes a community is attracting customers from within state boundaries.

### Limitations in Idaho

Trade area capture analysis requires very little data: populations, per capita incomes, and retail sales. Unfortunately, the State of Idaho does not require that sales tax collections be reported by location. Retail enterprises with more than one store report their total sales in the State, not for each city. This means that a large (40% in FY 2007) share of the sales made in Idaho cannot be traced to a specific community. The Idaho Department of Revenue and Taxation sales data used for the calculations described here do report the total sales that are not specifically attributed to a location. In order to make this analysis possible, it was assumed that a county’s share of those non-attributed sales was directly proportional to its share of the sales that can be traced to a location. Using this assumption produces reasonable results, but may overestimate sales in smaller counties where there are few, if any, chain stores.

## Appendix C: Bibliography

Note: A bibliography for this type of work is challenging. First, most of the data sources, such as the U.S. Census of Population, formerly published in printed volumes are now available nearly exclusively on the Internet. Many of the sources consulted for this work are web based. Also, as websites for data producing agencies become more sophisticated, they include interactive tables and charts allowing the user to compare data from multiple years. Many such tables were used for this profile. Styles for citing these types of references are not entirely clear. For interactive tables used multiple times (such as the location quotient calculator from the Bureau of Labor Statistics), one citation is mentioned for the calculator. Data can be entered in a number of ways for a variety of geographies. The citation of only the calculator seems appropriate. Further, in some cases, tables for specific block groups, income levels, races, etc., were utilized while in others compilations and summaries from the Census Bureau were used. Citing each table for each block group is both onerous and unnecessary. Instead, the entire Census is cited. The compilations and summaries, however, were viewed as specific publications and are cited individually.

The authors have attempted to be as complete and thorough as possible in creating this bibliography. Because of the large number of sources consulted, often from the same agency, the bibliography is divided into two parts: published sources and web-based sources.

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