



2017 Idaho Labor Market and Economic Report

IDAHO DEPARTMENT OF
LABOR

MELINDA S. SMYSER
DIRECTOR

2017 Idaho Labor Market and Economic Report



C.L. "Butch" Otter, Governor
Melinda S. Smyser, Director

Communications and Research
Georgia Smith, Deputy Director

Report prepared by
Esther Eke, Ph.D., Regional Economist

Acknowledgements
Janell Hyer and Craig Shaul, research analyst supervisors
Sam Wolkenhauer, Kathryn Tacke, Jan Roeser and Hope Morrow, regional economists

Report content based on data available through March 2018

Contents

- Labor Market Quick Facts 2
- Executive Summary..... 5
- Section 1: Basic Idaho Economic Indicators 6
- Section 2: Wage and Income Changes 13
- Section 3: Regional Summaries..... 16
- Section 4: Employment and Population Projections 31
- Section 5: Idaho Apprenticeships Update 40

Labor Market Quick Facts

Summary Table

Source: Idaho Department of Labor; Communications & Research Division

	2010	2016	2017
Population	1,570,912	1,680,026	1,716,943
Average Labor Force	761,056	812,856	833,462
Average Number Unemployed	68,230	30,577	26,299
Average Unemployment Rate	9.0	3.8	3.2
Average Total Employment	692,826	782,279	807,163
Average Nonfarm Employment	603,600	693,900	716,600
Average Covered Wage	\$34,903	\$39,655	\$41,312
2019 Q1 Occupation Short-Term Projections			754,932
2026 Population Projection			1,882,525

Quick Fact 1. Labor Force and Unemployment, Not Seasonally Adjusted

Idaho, Annual Data of Selected Years for the Period from 2007 to 2017

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Year	Labor Force	Unemployed	Unemployment Rate	Employed
1997	633,725	32,590	5.1	601,135
1998	649,435	33,153	5.1	616,282
1999	651,207	31,970	4.9	619,237
2000	659,824		4.7	628,844
2001	677,665	34,385	5.1	643,280
2002	684,591	38,042	5.6	646,549
2003	690,005	38,670	5.6	651,335
2004	703,062	34,621	4.9	668,441
2005	731,670	29,379	4	702,291
2006	747,377	26,031	3.5	721,346
2007	754,438	23,203	3.1	731,235
2008	755,153	38,500	5.1	716,653
2009	757,131	66,409	8.8	690,722
2010	761,056	68,230	9	692,826
2011	765,178	63,712	8.3	701,466
2012	769,256	55,552	7.2	713,704
2013	770,833	47,197	6.1	723,636
2014	779,631	38,106	4.9	741,525
2015	794,675	33,666	4.2	761,009
2016	812,856	30,577	3.8	782,279
2017	833,462	26,299	3.2	807,163

**Quick fact 2. Labor Force and Unemployment, Not Seasonally Adjusted
Idaho Metropolitan Areas, 2017**

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Metropolitan Area	Labor Force	Unemployed	Unemployment Rate	Employed
Idaho State	833,462	26,299	3.2%	807,163
Coeur D'Alene	75,457	2,900	3.8%	72,557
Lewiston WA-ID	31,527	1,032	3.3%	30,495
Boise City	345,643	10,562	3.1%	335,081
Twin Falls	53,115	1,517	2.9%	51,598
Pocatello	41,733	1,258	3.0%	40,475
Idaho Falls	67,887	1,796	2.6%	66,091
Logan UT-ID	69,763	1,902	2.7%	67,861

**Quick fact 3. Projected Industry Average Annual Growth Rates
Idaho, Short-term 2017Q1 through 2019Q1, Long-term 2014 – 2024**

Source: Idaho Department of Labor, Communications and Research

NAICS	Industry Sector	2017 to 2019	2014 to 2024
	All industries	1.3%	1.8%
11	Agriculture, forestry, fishing and hunting	1.0%	1.7%
21	Mining	-3.7%	-0.2%
22	Utilities	1.8%	0.8%
23	Construction	2.4%	2.5%
31-33	Manufacturing	0.7%	0.9%
42	Wholesale trade	1.1%	1.3%
44-45	Retail trade	1.2%	1.5%
48-49	Transportation and warehousing	1.1%	1.0%
51	Information	1.5%	1.0%
52-53	Financial activities	2.6%	2.0%
54-56	Professional and business services	1.5%	1.8%
61	Educational services (private + government)	0.9%	1.5%
62	Health care and social assistance	2.1%	2.0%
71-72	Leisure and hospitality	2.3%	2.3%
81	Other services (except public administration)	1.0%	3.9%
92	Public administration	0.2%	1.5%

Quick fact 4. Wages and Employment by Industry
Idaho, 2017 Annual Averages

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

NAICS	Industry Sector	Average Number of Firms	Average Employment	Average Annual Wage
11	Agriculture, forestry, fishing and hunting	2,288	24,660	\$35,462.26
21	Mining	164	2,172	\$71,314.87
22	Utilities	343	3,620	\$75,743.13
23	Construction	7,788	43,595	\$42,872.75
31-33	Manufacturing	2,771	66,120	\$61,475.40
42	Wholesale trade	3,409	28,667	\$58,118.78
44-45	Retail trade	6,160	86,258	\$30,310.87
48-49	Transportation and warehousing	2,239	22,525	\$41,548.87
51	Information	1,238	9,696	\$48,518.12
52	Finance and insurance	3,253	23,637	\$60,134.03
53	Real estate, rental and leasing	2,301	7,884	\$35,012.42
54	Professional, scientific and technical services	7,287	35,858	\$62,382.77
55	Management of companies and enterprises	384	5,827	\$82,851.78
56	Admin. and support and waste management services	3,573	47,252	\$33,913.61
61	Educational services (private + government)	1,581	59,759	\$34,502.29
62	Health care and social assistance	6,616	99,429	\$42,376.14
71	Arts, entertainment and recreation	1,031	12,607	\$20,534.74
72	Accommodation and food services	3,930	64,455	\$16,053.14
81	Other services (except public administration)	4,034	18,854	\$29,612.02
92	Public administration	1,132	44,469	\$48,366.41

Executive Summary

Idaho's Economy and Labor Market

Idaho's economy continues to expand today, eight years since the end of the Great Recession. Total nonfarm employment increased by 21.9 percent, or 132,100 jobs from March 2010 to March 2018. In the past year alone, total nonfarm employment increased by 3.3 percent from March 2017 through March 2018 adding 23,200 jobs to the economy. All of the major industrial groups, with the exception of the information sector, experienced employment growth during the economic expansion.

The state unemployment rate was 2.9 percent in March 2018 compared with the U.S. rate of 4.1 percent. Labor force growth in the state has averaged approximately 2.5 percent per year from March 2016 through March 2018, compared with the national average of 0.8 percent per year. The number of new unemployment claims was roughly 5,030 in March 2018, down from a peak of 30,421 in December 2008. The manufacturing and construction industries accounted for the greatest portion of workers who received unemployment benefits in 2017.

Job demand, as measured by the number of online job listings, rose steadily from 2010 through the fourth quarter of 2015. Since then, tight labor market conditions have largely restricted the growth of online job ads. According to the Conference Board, as of March 2018 there were 22,712 unique available job ads posted in the state.

Income and Wages

In 2017, Idaho's average annual wage grew by 4.2 percent – the most significant yearly change in the past decade. Idaho's average annual wage in 2017 was \$41,312. Most of the wage growth was dominated by the manufacturing industry where wages grew by 11.3 percent. Four other sectors that realized average annual wage increases above the statewide rate of 4.2 percent include utilities, transportation and warehousing, professional and business services, and other services. Per capita personal income also showed a solid increase of 2.4 percent in 2017 driven primarily by growth in earned income.

Regional Economic Development

Several economic development projects in all six Idaho regions explain the continued expansion of the Idaho economy in 2017 and may signal continued growth in 2018.

Employment and Population Projections

Total employment in Idaho is expected to grow at an average annual rate of 1.3 percent from 2017 to 2019 for an increase of about 19,400 workers. An additional 159,000 job openings are projected due to turnover resulting in 178,600 total job openings across the state over the two-year period. Personal care and service occupations are projected to grow faster than other occupational groups from 2017 to 2019.

Idaho projections estimate that the statewide population will increase by close to 200,000 to reach a total population of approximately 1,883,000 by 2026. Growth is expected to be driven by the 65-and-older population which are projected to increase by 120,700 for growth of 47.5 percent - four times the rate of the state's total population growth.

Idaho Apprenticeships

As the labor market continues to tighten, the Registered Apprenticeship program has increasingly become an attractive solution to closing the skills gap employers are finding in the workforce. The number of active Registered Apprenticeships in Idaho has grown close to 40 percent in fiscal year 2017 and the number of active programs have increased to 133 statewide. As of January 2018, 245 companies across the state have registered apprenticeship programs – more than double the number just two years prior.

Section 1: Basic Idaho Economic Indicators

This section reports key labor market indicators that track the health of Idaho’s economy. Idaho’s nonfarm employment, unemployment and online job postings data indicate an economy in a continued state of expansion. However, as jobs continue to grow across the state, other indicators point to an economy that is gradually slowing down as the labor market approaches full employment.

Nonfarm employment continues its upward trend

Figure 1-1 shows how nonfarm employment in the state has changed in both the private and public sectors over the past decade. In the years since the most recent recession of 2007 – 2009, both sectors have continued to add jobs to the state economy. Since the tail end of 2017, private sector jobs have surpassed 600,000, setting a new record for the state.

Total nonfarm employment increased by 3.3 percent over the past year – March 2017 through March 2018 - as employers throughout the state added 23,200 jobs. The private sector accounted for the majority of the jobs added, with 19,900 added to private payrolls while government added just 3,300 jobs. Local government accounted for 70 percent of the total government jobs added from March 2017 to March 2018. These local government jobs primarily stem from public education employment.

The public sector nonfarm jobs have been much more volatile. During the recession, the number of public sector jobs trended upward and descended rapidly as the economy gradually began to recover. For much of 2014 through to 2017, the public sector jobs have resumed an upward trajectory albeit at a slower rate than the private sector.

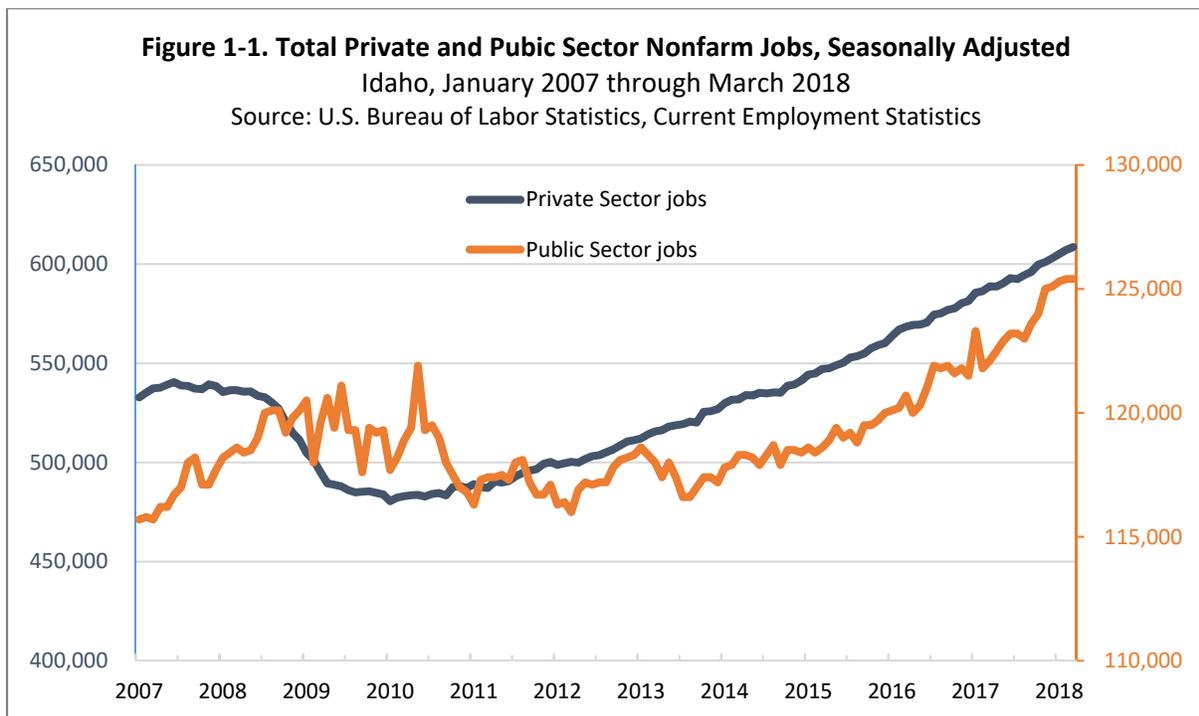
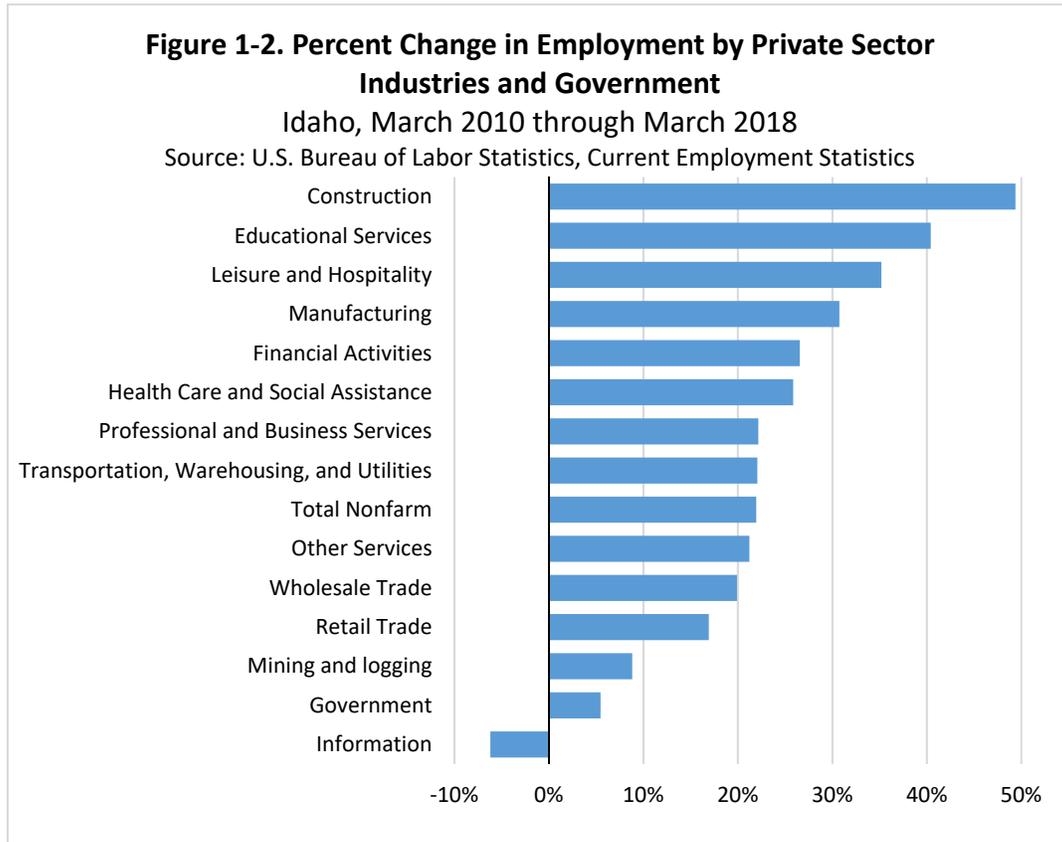


Figure 1-2 shows the percentage gain in total nonfarm employment over the past eight years, from March 2010 through March 2018. During that time, Idaho employment increased by 21.9 percent, or 132,100 jobs. Employment has increased in all of the major industrial groups with the exception of the information sector. Eight major industry sectors had employment gains above the state average. Construction, one of the sectors most affected by the Great Recession, expanded by the largest margin

at 49.4 percent. Manufacturing employment has remained strong in the state despite the challenges faced both nationwide and globally.



Boise Metro Area Creating the Most Jobs in the State

Figures 1-3 illustrate the extent to which the Boise metro – or MSAs (Metropolitan Statistical Area) – has served as a major center for job creation during the eight-year economic expansion. Since March 2010, nonfarm employment in the Boise metro grew by 72,500 through March 2018, or by 29 percent. By contrast, the rest of the state – all other MSAs and non-metropolitan areas - have collectively added 59,600 jobs and have increased employment by 17.1 percent during the same period.

Figure 1-3: Total Nonfarm Employment Change, Seasonally Adjusted
 Idaho State, Idaho Metropolitan Areas and Balance of State, March 2010 through March 2018
 Source: U.S Bureau of Labor Statistics, Current Employment Statistics

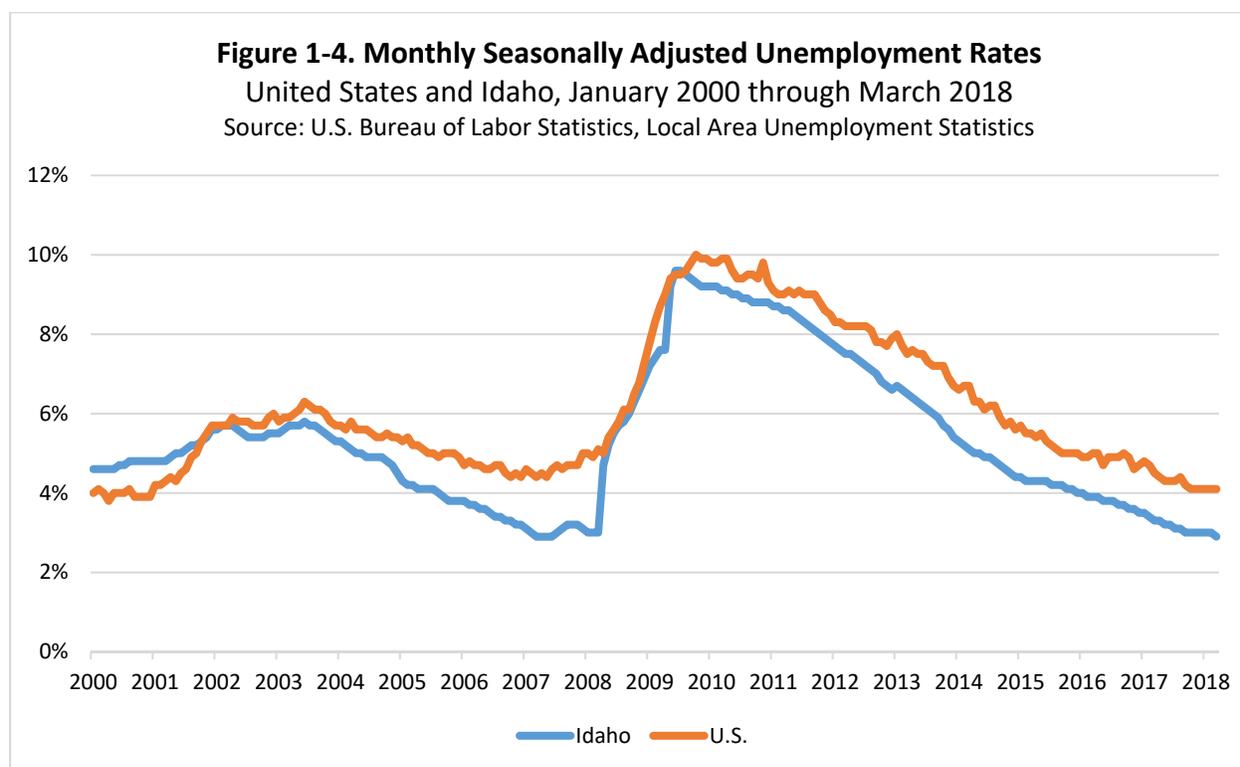
Area	Total Employment Change March 2010 through March 2018	Percent Employment Change March 2010 through March 2018
Total for State	132,100	21.9%
Boise City, ID	72,500	28.7%
Coeur d'Alene, ID	11,500	21.7%
Idaho Falls, ID	9,500	16.5%
Lewiston, ID-WA	2,700	10.2%
Pocatello, ID	4,600	13.9%
All other non-metro areas	31,300	17.9%

Unemployment at Historic Lows

The overall unemployment rate is widely used as a lagging indicator of the direction of the economy and is a ratio of the estimated number of unemployed who are seeking work, divided by the labor force. The labor force is limited to individuals who are employed or seeking work.

Idaho's unemployment rate largely tends to be lower than the national rate. As shown in *Figure 1-4*, the state unemployment rate peaked at 9.6 percent in June 2009 – at the tail end of the recession. Since then, the unemployment rate has been in steady decline, though the decline is showing the beginnings of a slowdown in the most recent months. Both the state and national unemployment rates began declining more gradually into 2015, 2016 and 2017. By March 2018, the state and national rates were at 2.9 and 4.1 percent, respectively. At 2.9 percent, the unemployment rate in the state is at a historic low.

Madison County has consistently reported a lower unemployment rate than the rest of Idaho and the nation in recent years. The 2017 annual average unemployment rate for Madison County was 1.9 percent. For comparison, the annual average for the state was 3.2 percent.



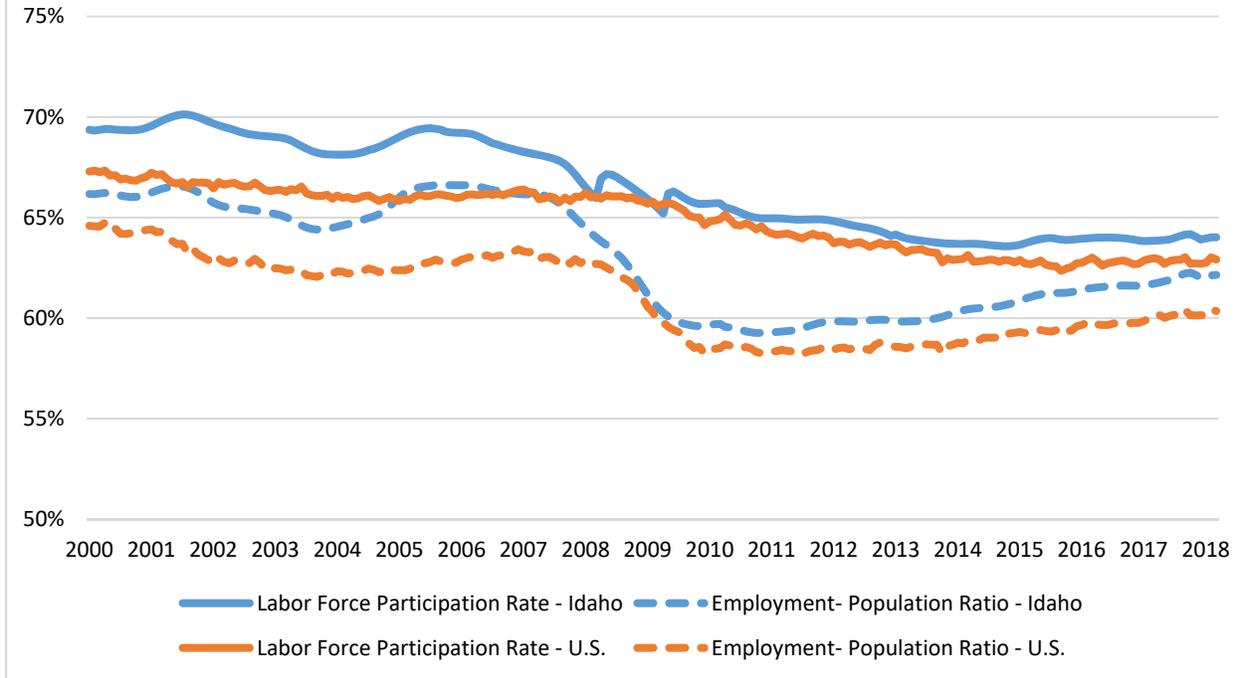
Idaho's sustained pace of job growth has been attracting more participants into the labor force to compete for the number of available jobs. The increased entry of previously discouraged workers, in addition to the observed statewide population growth, driven by in-migration, has led to an increase in the size of the state's labor force in recent years. Over the past two years, from March 2016 through March 2018, the state's labor force grew by 5 percent. The nation as a whole grew only 1.6 percent over the same period. Idaho's labor force participation rate generally rests above national rates. *Figure 1-5* shows that despite the recent increase in labor force, Idaho's labor participation rate has remained largely unchanged.

Idaho's employment-to-population ratio, on the other hand, has been on the rise since the last recession telling us that the economy is generating enough new jobs to accommodate the state's growing population.

Figure 1-5. Labor Force Participation Rate and Employment-to-Population Ratio, Seasonally Adjusted

United States and Idaho, January 2000 through March 2018

Source: Idaho Department of Labor, Communications and Research



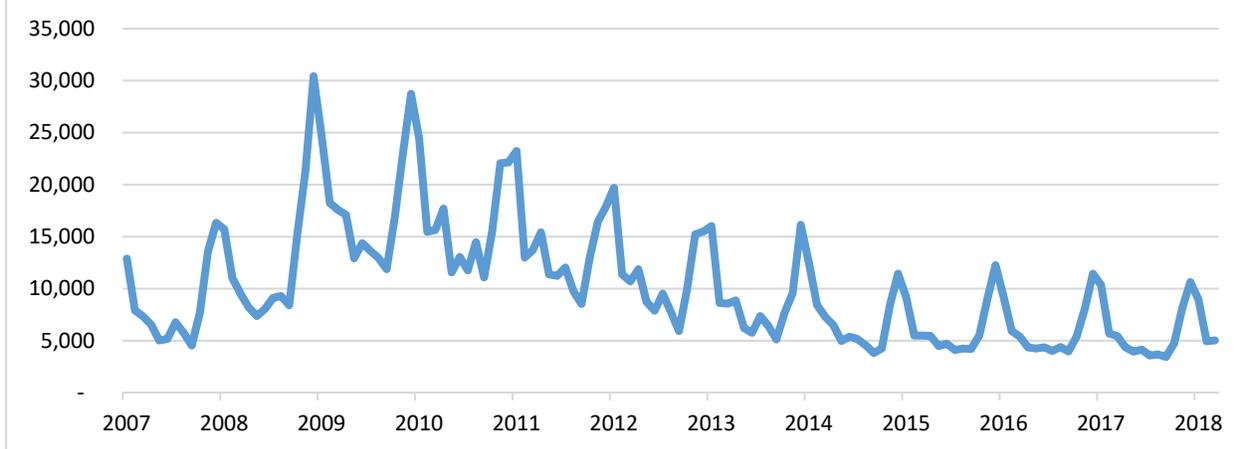
Unemployment Insurance Claims Maintain a Sustained Decline

New claims. *Figure 1-6* shows the number of new claims filed for unemployment insurance benefits has been in sustained decline since the last recession. At the height of the recession in 2009, the average monthly initial claims was 17,655. Since then, the number of new claims on average has been in decline – with a steep decline at the start of the recovery and a gradual descent in more recent years. The average monthly initial claims in 2017 was 5,680 – only 4 percent lower than the previous year. The declining number of new claims is yet another accurate indication that the state economy continues to thrive but is perhaps approaching a slowdown.

Figure 1-6. Total Monthly Initial Claims, Excluding Unemployment Compensation for Federal Workers (UCF), Unemployment Compensation for Ex-Servicemen and Extended (UCX) Benefit Claims

Idaho, January 2007 through March 2018

Source: Idaho Department of Lab



Insured Unemployment. The overall number of jobless workers receiving unemployment benefits has also been in decline. In 2017, there were an estimated 89,252 claimants – a 7 percent decline from the previous year. The number has declined steadily, by 45 percent in 2017, from more than 162,000 in 2013. The drop reflects factors including beneficiaries being able to find jobs, fewer people being laid off and needing to apply for benefits and beneficiaries exhausting all of their unemployment benefits. *Figure 1-7* shows the largest share of unemployment insurance beneficiaries in 2017 were those people employed in the construction industry at 16.9 percent. Administrative support had the second largest portion of beneficiaries at 11.4 percent while manufacturing came in a close third at 10.6 percent.

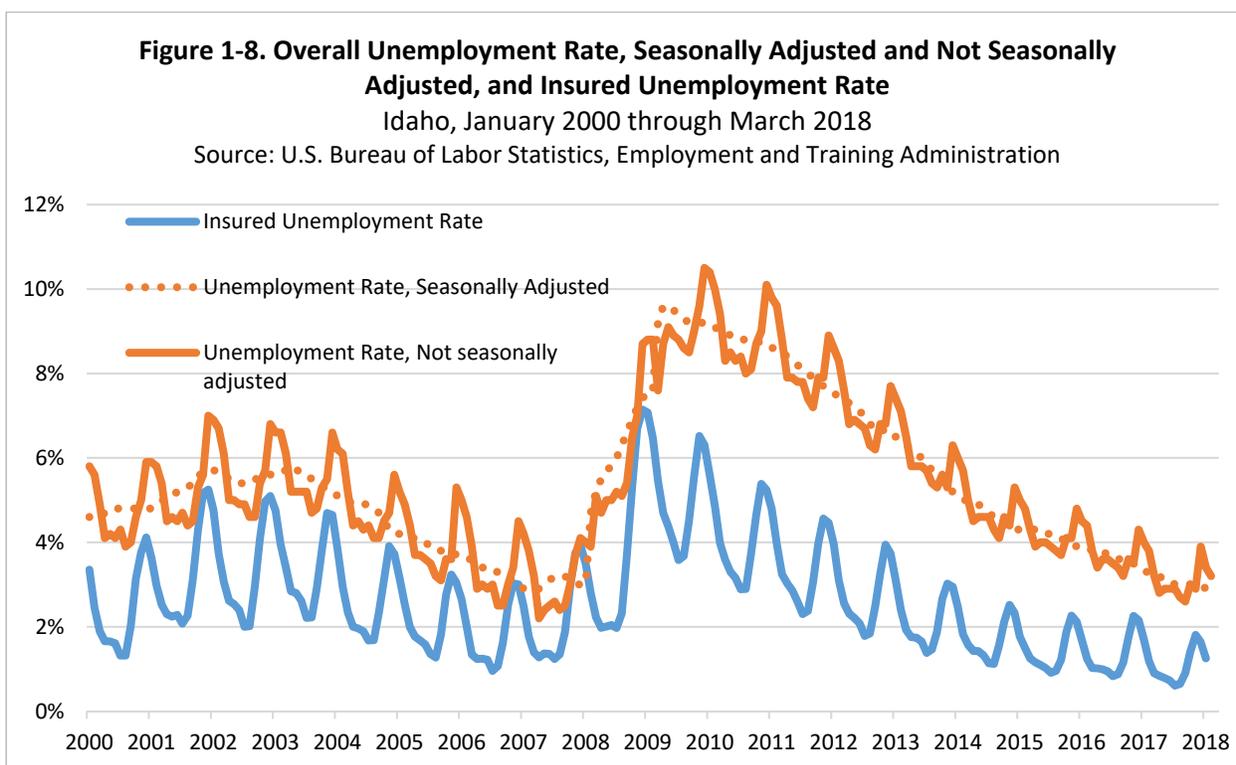
Figure 1-7: UI Claimant Characteristics by Industry, Including UCF and UCX
Idaho, 2017

Source: Idaho Department of Labor, Communication and Research

Industry of the Insured Unemployed	2017 Claimants	Percent of total
11-Agriculture, forestry, fishing and hunting	5,781	6.5%
21-Mining	829	0.9%
22-Utilities	299	0.3%
23-Construction	15,098	16.9%
31-33 Manufacturing	9,448	10.6%
42-Wholesale trade	3,629	4.1%
44-45-Retail trade	8,308	9.3%
48-49 Transportation and warehousing	4,613	5.2%
51-Information	1,219	1.4%
52-Finance and insurance	2,208	2.5%
53-Real estate, rental and leasing	845	0.9%
54-Professional, scientific and technical services	4,116	4.6%
55-Management of companies and enterprises	204	0.2%
56-Admin. And support and waste management	10,173	11.4%

61-Educational services	1,542	1.7%
62-Health care and social assistance	7,261	8.1%
71-Arts, entertainment and recreation	1,746	2.0%
72-Accommodation and food services	4,468	5.0%
81-Other Services (except public administration)	1,889	2.1%
92-Public administration	2,368	2.7%
INA*	3,208	3.6%
Total	89,252	100.0%

Idaho’s insured unemployment rate is another statistic worth mentioning in the context of unemployment insurance. It is the proportion of those currently collecting unemployment insurance compared with the total number of Idaho workers who would be eligible to receive these benefits. *Figure 1-8* compares the official unemployment rate in Idaho to the insured unemployment rate. The widened gap following the recession indicates that there were increasing number of unemployed workers not eligible for unemployment benefits. Trends show this gap to be closing in recent years.



Job Vacancies Nearly 1:1 with Labor Supply

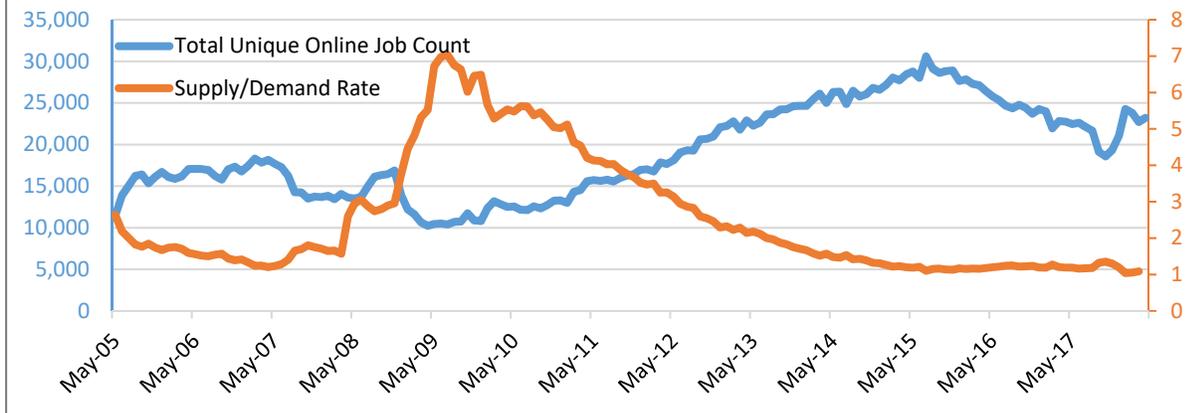
The Conference Board has been tallying monthly help wanted online reports since 2005. This data series, which pulls information from more than 1,200 job boards nationwide, is a promising indicator of economic and employment trends.

The data series (*Figure 1-9*) shows a dip in monthly job counts during the last recession. The number of job listings have risen steadily from 2010 through to the fourth quarter of 2015. Since then, tight labor market conditions have largely restricted the growth of online job ads. By March 2018, there were 22,712 unique available job ads posted in the state. The number of unemployed persons in March 2018 was 24,674. Thus, there were about 1.09 people – less than two – available for each job posting.

Figure 1-9. Unique Available Monthly Job Ad Count and the Supply-Demand Rate, Seasonally Adjusted

Idaho, May 2005 through March 2018

Source: U.S Bureau of Labor Statistics, Local Area Unemployment Statistics; The Conference Board

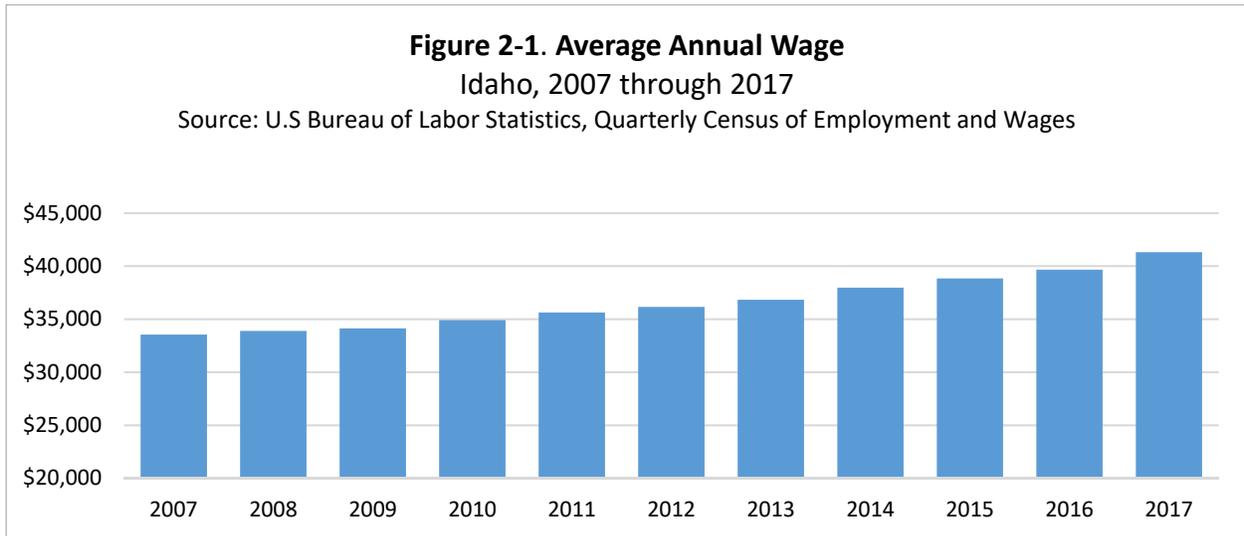


By volume, truck drivers, registered nurses and retail sales persons occupy the top three available job positions in March 2018. More than 4,600 of these positions are considered hard to fill having being posted continuously for 90 days or more. Registered nurses occupy the No. 1 spot for hard-to-fill job openings.

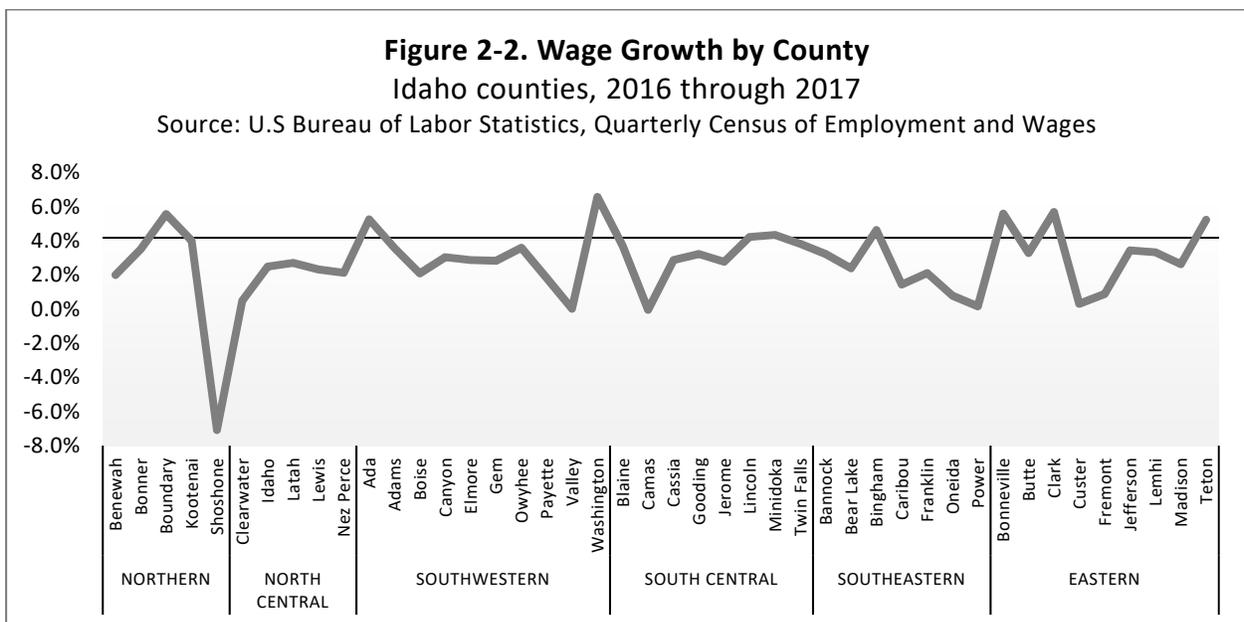
Section 2: Wage and Income Changes

Idaho Wages are on the Rise

In 2017, a tightening labor market pushed wages up across the board in Idaho. The annual growth in wages for the state is shown in *Figure 2-1*. The wages are expressed in nominal terms, unadjusted for inflation. *Figure 2-1* shows that in the past year alone, the average annual wage grew by 4.2 percent – the most significant yearly change in the past decade.



Wage growth was generally spread across the state. However, the large 2017 wage growth was driven by the wage growth in Idaho’s largest county. Ada County - the most populated county in the state where a large share of the state employment is concentrated - saw a 5.3 percent wage growth. Other large counties in the state with wage growth higher than the statewide average include Bonneville and Bingham counties. *Figure 2-2* shows the wage growth by county.



Manufacturing Drives Wage Growth

Most of the wage growth in the past year was dominated by the manufacturing industry (*Figure 2-3*). The average annual wage in manufacturing climbed from \$55,247 in 2016 to \$61,475 in 2017 – an 11.3 percent growth. Four other sectors realized average annual wage increases above the statewide rate of 4.2 percent. These include utilities, transportation and warehousing, professional and business services, and other services. These four sectors plus manufacturing encompassed 32.1 percent of Idaho’s covered employment.

Figure 2-3: Annual Average Wage Growth by Industry

Idaho, 2016 through 2017

Source: U.S Bureau of Labor Statistics, Quarterly Census for Employment and Wages

Industry Sectors	2017 Employment Share	2017 Average Wage	Average Wage Growth
All Industries	100.0%	\$41,312	4.2%
Total Private	83.4%	\$41,286	4.4%
Agriculture, forestry, fishing and hunting	3.5%	\$35,463	4.2%
Mining	0.3%	\$71,323	-0.5%
Utilities	0.4%	\$84,165	5.4%
Construction	6.0%	\$42,803	2.9%
Manufacturing	9.3%	\$61,475	11.3%
Wholesale trade	4.1%	\$58,119	3.2%
Retail trade	12.1%	\$30,369	2.6%
Transportation and warehousing	2.8%	\$40,609	4.4%
Information	1.3%	\$50,921	3.5%
Financial activities	4.4%	\$53,873	2.7%
Professional and business services	12.5%	\$48,584	5.9%
Educational services	1.0%	\$38,045	3.4%
Health care and social assistance	12.6%	\$41,125	0.1%
Leisure and hospitality	10.6%	\$16,372	3.5%
Other services (except public administration)	2.5%	\$30,083	5.3%
Total government	16.6%	\$41,445	3.1%

Per Capita Personal Income Growth at 2.4 Percent

Personal income is the sum of earned income (from owning a business or holding a job), investment income and transfer payments chiefly from government programs such as Social Security, Medicare and Medicaid, food stamps, Supplemental Security Income (SSI) and unemployment benefits. Per capita personal income is the total personal income of an area divided by the population of the area.

Per capita income, as shown in *Figure 2-4*, dropped sharply in 2009, and then started to recover in 2010. Estimates showed a solid increase of 2.4 percent in 2017 – larger than the growth of the previous year but well below the gains recorded in 2011 through 2015. Changes in income over the past few years can be clarified by disaggregating income into its three major components (*Figure 2-4*).

Figure 2-4: Per Capita Personal Income, Not Adjusted for Inflation
 Idaho, 2010 through 2017
 Source: U.S Bureau of Economic Analysis

	Per Capita Personal Income	Net Earnings	Dividends, Interest and Rent	Transfer Receipts
2007	\$32,580	\$20,928	\$6,818	\$4,835
2008	\$33,031	\$20,729	\$6,777	\$5,525
2009	\$31,436	\$19,548	\$5,894	\$5,994
2010	\$31,728	\$19,472	\$5,737	\$6,519
2011	\$33,316	\$20,283	\$6,529	\$6,504
2012	\$34,722	\$20,846	\$7,329	\$6,547
2013	\$35,761	\$21,765	\$7,304	\$6,692
2014	\$37,258	\$22,585	\$7,787	\$6,885
2015	\$38,931	\$23,406	\$8,347	\$7,177
2016	\$39,543	\$23,960	\$8,291	\$7,292
2017	\$40,507	\$24,696	\$8,387	\$7,424

Per capita net earned income, rose by 3.1 percent in 2017, and served as the primary driver for increased incomes that year. Earned income comprised 61 percent of total personal income in 2017 – a decline from the share of 64.2 percent in 2007. Investment income generally rises and falls with changes in the stock market. Transfer payments, chiefly from government programs, grew during the recession accounting for as high as 20.5 percent of total personal income in 2010. Since then transfer payments have remained high with an income share relatively steady at around 18.4 percent since 2014.

Section 3: Regional Summaries

This section provides specific highlights of economic development within each of the six Idaho regions.

Northern Idaho

The year 2017 was another period of growth and positive development for northern Idaho. The attributes of the area continued to draw in new residents and businesses, as the region's population and labor market continued to expand.

The center of economic activity in this region is Kootenai County, which is home to just over two-thirds of the region's population. Kootenai County is one of the fastest-growing counties in Idaho, and its population expanded by 3 percent in 2017. To accommodate this rapid growth, the county experienced a banner year for building permits as single-family subdivisions and multifamily projects went up around the county. Inventories of existing housing have been mostly exhausted as the market has churned through real estate transactions at a frenetic pace. The influx of new residents fueled growth across a variety of service sectors. Kootenai Health – the region's largest health care provider – took on a significant remodel and expansion to add capacity, while new medical buildings were constructed in Coeur d'Alene's Riverstone development. In addition, dozens of new restaurants and retail establishments opened around the county.

Local governments and developers have worked to channel Kootenai County's ongoing growth. In northern Kootenai County – including Post Falls, Hayden and Rathdrum – there is ample space for new developments and “horizontal” growth. The city of Rathdrum, for example, announced plans to form an urban renewal agency to resolve the future of Rathdrum's substantial spaces currently zoned for light industrial use, while in Post Falls, developers revealed plans for a 233-acre technology park. The city of Coeur d'Alene, in contrast, is locked in by the lake and has little room for new development. Accordingly, growth in Coeur d'Alene has led to an increase in the density of activity, including the construction of a large new parking facility, new multi-family housing developments and commercial buildings. Coeur d'Alene also commissioned a feasibility study for the construction of a new performing arts center. In Athol – in northern Kootenai County – a new commercial complex is under construction, including retail establishments, a new hotel and light industrial space.

Employers across Kootenai County expanded operations in 2017 in sectors ranging from health care to manufacturing to business services. Manufacturers like SmaK Plastics and West Star Industries expanded their employment and acquired larger facilities. Alliance Data ramped up its card services operations, adding more than 140 employees, while a new call center operated by SPi CRM opened in Coeur d'Alene employing 200.

Outside Kootenai County, the economy in northern Idaho delivered mixed results. Counties like Shoshone and Benewah remain highly dependent on natural resources: mining in the case of Shoshone County and logging in Benewah County. Employment in three of the region's rural counties (Benewah, Boundary and Shoshone) changed by less than 1 percent in 2017. In Bonner County, Thorne Research – one of the largest manufacturing employers in the county – announced it was moving its operations to South Carolina, but the resulting layoffs have been outnumbered and offset by other employment growth. Bonner County has enjoyed growth in services and in manufacturing as new residents flock to Sandpoint and its environs.

The year 2018 will present new challenges for northern Idaho. With unemployment at historically low levels, employers in Kootenai County are struggling to find skilled workers in a variety of fields, from construction trades like framers, electricians and plumbers, to skilled manufacturing machinists to

health care specialists and technologists. At the same time, however, Kootenai County’s highly desirable quality of life continues to attract new residents, who will drive demand for housing and amenities. In rural northern Idaho, smaller labor markets remain vulnerable to the trends and fortunes of the natural resources that their economies rely on, but the beautiful environment and smaller communities still offer an attractive lifestyle to current and prospective residents. Only time will tell, but there are ample reasons to believe that 2018, like 2017, will be a year of growth for northern Idaho.

Northern Idaho Employment							
Benewah, Bonner, Boundary, Kootenai, Shoshone Counties							
Industrial Classification	2007	2012	2017	2012-2017		2007-2017	
	Avg Emp	Avg Emp	Avg Emp	Numeric	Percent	Numeric	Percent
Total Covered Employment & Wages	83,122	74,870	85,419	10,549	14.1%	2,297	2.8%
Agriculture, forestry, fishing and hunting	1,539	820	1,065	244	29.8%	-475	-30.8%
Mining	933	1,063	742	-321	-30.2%	-191	-20.4%
Utilities	451	426	458	33	7.7%	7	1.6%
Construction	8,025	4,035	5,845	1,809	44.8%	-2,180	-27.2%
Manufacturing	8,250	7,324	8,158	834	11.4%	-93	-1.1%
Wholesale trade	1,918	1,719	1,944	225	13.1%	26	1.3%
Retail trade	12,787	11,783	12,636	853	7.2%	-151	-1.2%
Transportation and warehousing	1,530	1,333	1,289	-45	-3.3%	-241	-15.7%
Information	1,256	810	881	71	8.8%	-375	-29.8%
Finance and insurance	2,566	2,543	2,833	290	11.4%	267	10.4%
Real estate, rental and leasing	1,243	911	1,034	123	13.5%	-209	-16.8%
Professional, scientific and technical services	3,248	2,718	2,875	157	5.8%	-373	-11.5%
Management of companies and enterprises	463	385	359	-26	-6.6%	-104	-22.5%
Admin. and support and waste management and remediation services	3,883	3,684	4,283	599	16.3%	400	10.3%
Educational services	480	527	616	89	16.9%	135	28.2%
Health care and social assistance	7,084	8,074	9,813	1,739	21.5%	2,729	38.5%
Arts, entertainment and recreation	2,146	2,062	2,389	328	15.9%	244	11.4%
Accommodation and food services	8,337	7,565	9,329	1,764	23.3%	992	11.9%
Other services (except public administration)	1,951	1,753	2,171	418	23.8%	220	11.3%
Federal government	1,074	1,041	1,072	30	2.9%	-2	-0.2%
State government	1,359	1,254	1,305	51	4.0%	-54	-4.0%
Local government	12,601	13,041	14,323	1,283	9.8%	1,723	13.7%

Northern Idaho Wages							
Benewah, Bonner, Boundary, Kootenai, Shoshone Counties							
Industrial Classification	2007	2012	2017	2012-2017		2007-2017	
	Avg Wage	Avg Wage	Avg Wage	Numeric	Percent	Numeric	Percent
Total Covered Employment & Wages	\$30,915	\$33,192	\$37,558	\$4,366	13.2%	\$6,643	21.5%
Agriculture, forestry, fishing and hunting	\$34,801	\$35,726	\$39,769	\$4,042	11.3%	\$4,968	14.3%
Mining	\$67,391	\$76,504	\$93,524	\$17,020	22.2%	\$26,133	38.8%
Utilities	\$58,309	\$64,149	\$73,856	\$9,707	15.1%	\$15,547	26.7%
Construction	\$34,058	\$34,527	\$40,364	\$5,837	16.9%	\$6,306	18.5%
Manufacturing	\$35,958	\$39,112	\$45,359	\$6,247	16.0%	\$9,401	26.1%
Wholesale trade	\$43,188	\$48,611	\$59,184	\$10,572	21.7%	\$15,995	37.0%
Retail trade	\$27,441	\$27,951	\$30,638	\$2,686	9.6%	\$3,197	11.6%
Transportation and warehousing	\$30,992	\$34,396	\$43,773	\$9,376	27.3%	\$12,781	41.2%
Information	\$36,911	\$48,814	\$58,865	\$10,051	20.6%	\$21,953	59.5%
Finance and insurance	\$44,902	\$44,797	\$56,983	\$12,186	27.2%	\$12,082	26.9%
Real estate, rental and leasing	\$30,609	\$31,391	\$33,128	\$1,737	5.5%	\$2,519	8.2%
Professional, scientific and technical services	\$41,094	\$45,685	\$52,600	\$6,916	15.1%	\$11,506	28.0%
Management of companies and enterprises	\$69,426	\$90,485	\$53,250	-\$37,235	-41.2%	-\$16,176	-23.3%
Admin. and support and waste management and remediation services	\$23,200	\$25,232	\$28,913	\$3,681	14.6%	\$5,712	24.6%
Educational services	\$24,224	\$22,837	\$22,973	\$136	0.6%	-\$1,251	-5.2%
Health care and social assistance	\$30,288	\$29,855	\$36,244	\$6,388	21.4%	\$5,955	19.7%
Arts, entertainment and recreation	\$17,222	\$18,472	\$20,680	\$2,208	12.0%	\$3,457	20.1%
Accommodation and food services	\$13,140	\$13,977	\$16,501	\$2,524	18.1%	\$3,361	25.6%
Other services (except public administration)	\$21,596	\$23,669	\$29,128	\$5,459	23.1%	\$7,532	34.9%
Federal government	\$53,610	\$60,813	\$67,822	\$7,009	11.5%	\$14,212	26.5%
State government	\$36,300	\$39,656	\$44,403	\$4,747	12.0%	\$8,102	22.3%
Local government	\$31,652	\$36,591	\$41,142	\$4,551	12.4%	\$9,490	30.0%

North Central Idaho

North central Idaho's economy grew in 2017, but not by much. Nonfarm payroll jobs grew by less than 1 percent, from 46,136 in 2016 to an estimated 46,306 in 2017. Clearwater and Lewis counties lost a few jobs, while the other counties added a few. The two counties that lost jobs are still trying to recover from the closure of sawmills in 2016.

Manufacturing, which has generated much of the region's growth in recent years, lost jobs in 2017. Ammunition manufacturing, which had added hundreds of jobs in 2015 and 2016, lost about 400 jobs in the "Trump Slump" — the tremendous drop-off in demand for ammunition and guns that occurred after the 2016 presidential election. The expansion of Schweitzer Engineering Laboratories in Lewiston added about 150 jobs, offsetting some of the job loss in ammunition. Other manufacturers expanded slightly. The region's two largest manufacturers, Clearwater Paper and Vista Outdoor in Lewiston, finished major construction projects that will allow them to increase production.

Almost all major industrial sectors grew a little. Construction jobs increased at a fairly strong clip. Tourism picked up a little in 2017, but it did not add many jobs. The University of Idaho and Lewis-Clark State College added about 100 jobs. The health care sector added about 120 jobs.

The region's population grew 0.9 percent between 2016 and 2017, slightly faster than the nation's 0.7 percent, but much slower than the state's 2.2 percent. About 800 more people moved into the region than moved out. In all five counties, more people moved in than moved out. Another 200 were added by net natural increase — births minus deaths. But deaths exceeded births so much in Clearwater County that its population fell 0.1 percent. The net result was the region's population grew from 107,514 to 108,520 in 2017.

Unemployment rates fell to historic lows in north central Idaho in 2017, and many employers found it difficult to recruit and keep workers. The Idaho Department of Labor, Clearwater Economic Development Association, Lewis-Clark State College and the University of Idaho are working on many workforce development projects to ensure employers will find workers with the skills they require in the future.

North Central Idaho Employment							
Clearwater, Idaho, Latah, Lewis, Nez Perce Counties							
Industrial Classification	2007	2012	2017	2012-2017		2007-2017	
	Avg Emp	Avg Emp	Avg Emp	Numeric	Percent	Numeric	Percent
Total Covered Employment & Wages	44,161	41,453	43,646	2,193	5.3%	-515	-1.2%
Agriculture, forestry, fishing and hunting	1,072	961	985	24	2.5%	-86	-8.1%
Mining	216	179	190	12	6.5%	-26	-11.9%
Utilities	109	115	110	-5	-4.2%	1	0.5%
Construction	2,050	1,431	1,811	379	26.5%	-240	-11.7%
Manufacturing	4,061	4,026	5,072	1,046	26.0%	1,011	24.9%
Wholesale trade	1,052	1,168	1,220	51	4.4%	168	15.9%
Retail trade	5,914	5,177	5,334	157	3.0%	-580	-9.8%
Transportation and warehousing	1,414	1,008	968	-39	-3.9%	-445	-31.5%
Information	730	595	536	-59	-9.9%	-194	-26.6%
Finance and insurance	1,850	1,724	1,572	-152	-8.8%	-278	-15.0%
Real estate, rental and leasing	426	325	340	16	4.9%	-86	-20.1%
Professional, scientific and technical services	960	989	1,118	129	13.0%	158	16.5%
Management of companies and enterprises	451	348	157	-191	-54.8%	-293	-65.1%
Admin. and support and waste management and remediation services	792	746	884	138	18.4%	92	11.5%
Educational services	155	198	207	9	4.7%	52	33.7%
Health care and social assistance	5,712	6,081	6,167	86	1.4%	455	8.0%
Arts, entertainment and recreation	455	357	506	149	41.6%	50	11.1%
Accommodation and food services	3,925	3,760	4,044	284	7.6%	119	3.0%
Other services (except public administration)	1,019	870	996	126	14.5%	-23	-2.3%
Federal government	1,013	961	879	-82	-8.5%	-133	-13.2%
State government	5,382	5,067	5,034	-33	-0.6%	-349	-6.5%
Local government	5,403	5,370	5,519	148	2.8%	115	2.1%

North Central Idaho Wages Clearwater, Idaho, Latah, Lewis, Nez Perce Counties		2007	2012	2017	2012-2017		2007-2017	
Industrial Classification	Avg Wage	Avg Wage	Avg Wage	Numeric	Percent	Numeric	Percent	
Total Covered Employment & Wages	\$30,468	\$33,848	\$37,947	\$4,099	12.1%	\$7,479	24.5%	
Agriculture, forestry, fishing and hunting	\$37,276	\$40,279	\$47,213	\$6,934	17.2%	\$9,937	26.7%	
Mining	\$42,399	\$52,688	\$56,309	\$3,620	6.9%	\$13,910	32.8%	
Utilities	\$57,248	\$65,225	\$78,223	\$12,998	19.9%	\$20,975	36.6%	
Construction	\$32,458	\$33,644	\$38,995	\$5,352	15.9%	\$6,537	20.1%	
Manufacturing	\$41,672	\$44,752	\$53,021	\$8,269	18.5%	\$11,349	27.2%	
Wholesale trade	\$34,124	\$41,874	\$45,347	\$3,473	8.3%	\$11,223	32.9%	
Retail trade	\$23,672	\$24,552	\$27,077	\$2,525	10.3%	\$3,405	14.4%	
Transportation and warehousing	\$34,385	\$36,439	\$42,957	\$6,518	17.9%	\$8,573	24.9%	
Information	\$29,515	\$31,104	\$34,932	\$3,828	12.3%	\$5,417	18.4%	
Finance and insurance	\$35,679	\$41,199	\$52,107	\$10,908	26.5%	\$16,427	46.0%	
Real estate, rental and leasing	\$22,587	\$27,263	\$33,559	\$6,296	23.1%	\$10,972	48.6%	
Professional, scientific and technical services	\$37,270	\$41,799	\$43,644	\$1,845	4.4%	\$6,374	17.1%	
Management of companies and enterprises	\$87,517	\$105,341	\$70,473	-\$34,868	-33.1%	-\$17,044	-19.5%	
Admin. and support and waste management and remediation services	\$21,133	\$25,493	\$25,487	-\$7	0.0%	\$4,353	20.6%	
Educational services	\$14,079	\$20,086	\$20,152	\$66	0.3%	\$6,074	43.1%	
Health care and social assistance	\$28,851	\$32,381	\$36,769	\$4,388	13.6%	\$7,918	27.4%	
Arts, entertainment and recreation	\$13,495	\$11,373	\$13,908	\$2,535	22.3%	\$413	3.1%	
Accommodation and food services	\$10,510	\$12,358	\$14,182	\$1,824	14.8%	\$3,672	34.9%	
Other services (except public administration)	\$20,214	\$22,996	\$25,671	\$2,675	11.6%	\$5,457	27.0%	
Federal government	\$51,947	\$59,379	\$63,025	\$3,646	6.1%	\$11,078	21.3%	
State government	\$36,534	\$41,568	\$48,016	\$6,448	15.5%	\$11,482	31.4%	
Local government	\$28,967	\$32,029	\$35,733	\$3,704	11.6%	\$6,766	23.4%	

Southwestern Idaho

Southwestern Idaho experienced its strongest population growth since 2007, up 2.7 percent. The 10 counties comprising the region account for 46 percent of the state's population.

As the region's population grew the demand for housing, health care services, food and drinking services and other service-producing activities increased.

Construction employment has grown steadily over the past six years following a dramatic drop in 2008. Although employment has reached the peak levels of 2007, employment was nearly 88 percent of that level. The growth is in all sectors – commercial and residential — and special trade contractors, which encompasses all areas of construction. Single-family homes, condominiums and apartments are being built in almost every community in the region. The price for these new home vary from low income housing to high end.

The health care industry continues to grow in the region. St. Luke's is expanding its facilities in Boise and both St. Luke's Health Systems and Saint Alphonsus Health System opened new hospitals in Nampa in an effort to meet the growing demands of the community. A number of skilled nursing and assisted living

facilities have opened or expanded during the past 12 months, again due to the growing demand of the aging of the population and the need for these facilities. Idaho's first medical school, Idaho College Osteopathic Medicine, began construction in May 2017. The college will enroll 150 students when it opens in August 2018.

At least six new hotels opened in the region during 2017. Three hotels in Boise included the Inn at 500 Capital, Hyatt Place and Residence Inn with a fourth hotel, Hilton Garden Inn, under construction and opening this year. Nampa had two new ones open - Holiday Inn and Best Western Plus - Peppertree Inn Hampton Inn & Suites announced plans to expand while Candlewood Suites and La Quinta Inn & Suites announced plans to build in Nampa. My Place Hotel opened in Meridian. Caldwell is "in negotiations" with developers to build at least one hotel in the city.

Boise company Guerdon Industry is building modular units for hotels, catering to a new trend in hotel construction. The modular units have been built for Marriott, Hilton and Holiday Inn Express. The units are built in Boise and assembled onsite at the building locations out of state.

Frontier Airlines returned to Boise in 2017 after being gone for eight years. Frontier joins Alaska, Allegiant, American, Delta, Gem, Southwest, United and United Express in providing airline service to and from the region.

Employment in the food services and drinking places subsector has grown 25 percent in the past 10 years. The establishments range from chain restaurants to local eateries. In 2017 there were more than 26,000 employees in 1,440 establishments. Nineteen establishments employed 2,700 workers. More than 11,100 workers were employed by 380 employers. The number of workers per establishment ranged from 20-49. Many of the small establishments are fast food.

Other major happenings in 2017 include funding approval for the Interstate 84 expansion between Nampa and Caldwell. The highway will be expanded to three lanes both directions. Freeway interchanges are also going to be improved and expanded. Although it will take several years to complete, commuters had reason to celebrate because it has taken years to resolve the funding issues. CS Beef Packers opened in Kuna in June. The plant will harvest and process cattle and is expected to employ about 700 workers. After two years for construction, Micron Technology's \$200 million expansion that doubled the size of the research and development operation was completed. The University of Idaho Law School opened in Boise.

Southwestern Idaho Employment Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley, Washington Counties	2007	2012	2017	2012-2017		2007-2017	
	Avg Emp	Avg Emp	Avg Emp	Numeric	Percent	Numeric	Percent
Total Covered Employment & Wages	299,795	287,387	327,895	40,508	14.1%	28,100	9.4%
Agriculture, forestry, fishing and hunting	5,970	6,378	6,845	467	7.3%	875	14.7%
Mining	275	231	229	-2	-0.7%	-46	-16.9%
Utilities	734	1,253	1,379	126	10.0%	645	88.0%
Construction	24,639	15,555	21,586	6,031	38.8%	-3,053	-12.4%
Manufacturing	33,343	26,429	29,841	3,412	12.9%	-3,502	-10.5%
Wholesale trade	13,125	13,043	14,261	1,218	9.3%	1,137	8.7%
Retail trade	36,482	34,386	38,233	3,848	11.2%	1,752	4.8%
Transportation and warehousing	7,521	7,271	9,102	1,831	25.2%	1,581	21.0%
Information	5,033	4,833	4,516	-317	-6.6%	-517	-10.3%

Finance and insurance	10,617	10,505	12,235	1,731	16.5%	1,619	15.2%
Real estate, rental and leasing	4,490	3,358	3,900	542	16.1%	-591	-13.2%
Professional, scientific and technical services	13,033	12,623	16,102	3,479	27.6%	3,069	23.5%
Management of companies and enterprises	5,980	4,110	3,885	-225	-5.5%	-2,095	-35.0%
Admin. and support and waste management and remediation services	23,024	22,720	25,808	3,088	13.6%	2,784	12.1%
Educational services	2,367	2,793	2,954	161	5.7%	587	24.8%
Health care and social assistance	31,854	39,757	44,242	4,485	11.3%	12,389	38.9%
Arts, entertainment and recreation	3,971	4,263	5,046	783	18.4%	1,075	27.1%
Accommodation and food services	23,862	23,772	29,400	5,628	23.7%	5,538	23.2%
Other services (except public administration)	7,769	7,537	8,843	1,306	17.3%	1,074	13.8%
Federal government	7,220	7,214	7,633	419	5.8%	413	5.7%
State government	12,585	12,423	13,334	912	7.3%	750	6.0%
Local government	25,904	26,934	28,521	1,587	5.9%	2,617	10.1%

Southwestern Idaho Wages Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley, Washington Counties	2007	2012	2017	2012-2017		2007-2017	
	Avg Wage	Avg Wage	Avg Wage	Numeric	Percent	Numeric	Percent
Total Covered Employment & Wages	\$36,796	\$39,664	\$44,623	\$4,959	12.5%	\$7,827	21.3%
Agriculture, forestry, fishing and hunting	\$24,997	\$27,915	\$33,685	\$5,770	20.7%	\$8,688	34.8%
Mining	\$45,799	\$75,389	\$72,823	-\$2,566	-3.4%	\$27,024	59.0%
Utilities	\$61,154	\$85,198	\$94,141	\$8,944	10.5%	\$32,988	53.9%
Construction	\$42,293	\$42,063	\$44,801	\$2,739	6.5%	\$2,509	5.9%
Manufacturing	\$53,673	\$64,480	\$76,750	\$12,270	19.0%	\$23,077	43.0%
Wholesale trade	\$51,493	\$54,742	\$63,010	\$8,268	15.1%	\$11,517	22.4%
Retail trade	\$25,630	\$28,016	\$32,486	\$4,470	16.0%	\$6,856	26.8%
Transportation and warehousing	\$34,197	\$39,267	\$41,695	\$2,428	6.2%	\$7,498	21.9%
Information	\$44,488	\$49,382	\$53,186	\$3,804	7.7%	\$8,699	19.6%
Finance and insurance	\$50,367	\$57,075	\$64,992	\$7,918	13.9%	\$14,626	29.0%
Real estate, rental and leasing	\$31,282	\$33,587	\$38,222	\$4,634	13.8%	\$6,939	22.2%
Professional, scientific and technical services	\$47,031	\$51,010	\$58,077	\$7,068	13.9%	\$11,046	23.5%
Management of companies and enterprises	\$85,069	\$89,562	\$94,759	\$5,196	5.8%	\$9,690	11.4%
Admin. and support and waste management and remediation services	\$25,454	\$27,202	\$31,757	\$4,555	16.7%	\$6,303	24.8%
Educational services	\$29,041	\$32,630	\$36,111	\$3,480	10.7%	\$7,070	24.3%
Health care and social assistance	\$37,468	\$40,978	\$45,443	\$4,465	10.9%	\$7,975	21.3%
Arts, entertainment and recreation	\$17,712	\$16,320	\$18,271	\$1,951	12.0%	\$559	3.2%
Accommodation and food services	\$12,942	\$14,291	\$16,676	\$2,386	16.7%	\$3,735	28.9%
Other services (except public administration)	\$24,160	\$25,694	\$30,293	\$4,599	17.9%	\$6,133	25.4%
Federal government	\$58,703	\$63,923	\$68,752	\$4,829	7.6%	\$10,049	17.1%
State government	\$37,175	\$41,921	\$46,006	\$4,085	9.7%	\$8,831	23.8%
Local government	\$30,782	\$33,021	\$37,306	\$4,285	13.0%	\$6,524	21.2%

South Central Idaho

Disruption was the theme for 2017 in the retail sector across most of the nation and in the city of Twin Falls. It is the retail hub of south central Idaho servicing a consumer base in excess of 250,000.

HomeGoods, Hobby Lobby and Magic Valley Cinema's expansion nimbly replaced the loss of long-standing retailers such as Old Navy, Macy's, J.C. Penney and Sears. King's Variety Stores closed its corporate office and distribution center in Burley along with six retail stores in the region: Twin Falls, Buhl, Gooding, Hailey, Burley and Rupert. A myriad of new eateries and drinking establishments including a brewery, a speak-easy and new coffee shop have defined both the downtown and clusters established near both the Perrine Bridge and St. Luke's Magic Valley Medical Center.

The unusual snowfall in 2017 that resulted in melting snowpack affected the region causing damage to homes and roads. Flooding from north to south in the region was a big part of the news in the spring. Blaine County homes along the Big Wood River and Warm Springs were underwater with some residents still boating to their homes in Hailey at the end of June. One subdivision was without power for seven weeks. Five counties in south central Idaho declared a state of emergency due to flooding and Gov. C.L. "Butch" Otter signed and passed on the request to President Trump for FEMA (Federal Emergency and Management Agency) review and approval. Shoshone Falls had a big visitor count with traffic backed up to see the tremendous spill over — not record breaking but at 19,000 cubic feet per second, it was five times greater than an average water year.

Manufacturing expansions were in the news throughout 2017. McCain Foods announced its \$200 million, 180-worker expansion to its potato processing operation in Burley. Fabri-Kal is expanding, adding the greenware line in Burley with an estimated 50 new workers. Commercial Creamery will add a line and a handful of workers to its cheese powder manufacturing plant in Jerome. Jayco is adding almost a quarter of million square feet to its existing operation requiring an additional 300 workers in Twin Falls. Chobani started construction on its Innovation and Community Center that will house its administrative staff, its R&D department along with providing an incubator/makerspace/commercial kitchen for those entrepreneurs starting a small food business. The new building will also house meeting and event space, an employee fitness center and a well mother space. Dow Chemical started construction on a plant in Burley to manufacture Styrofoam insulation, hiring an estimated 21 full-time workers. Standridge Color Corp. also chose Burley for its new dye plant that infuses plastic resins with color. It will hire about 30 workers when ramped up.

New hotels opened in Blaine County. Limelight Hotel is the first new hotel construction to open in Ketchum in the past 40 years. Sun Valley Inn remodeled its facility changing up the restaurant and updating rooms. Silver Creek Inn opened in Bellevue catering to anglers. MyPlace Hotel, a longer-term residence property opened near St. Luke's Magic Valley. It is catering to the needs of visitors with ill family members in the hospital. Other hotels are in the design and planning stages regionally: two in Blaine County, three in the Mini-Cassia area and two in Twin Falls. The total solar eclipse added padding to the occupancy rates for hotels, property rental companies and campgrounds in August. The crowds were heavier than usual but manageable.

Recreation is always of interest in south central Idaho with Valley Club refurbishing its golf course in Ketchum and adding domed tennis courts for winter use. Gemstone Climbing Center, a multi-million dollar climbing gym was constructed in downtown Twin Falls while Putters Mini Golf and Hawaiian Shaved Ice opened its doors for customers and as a party venue.

Two new elementary schools and a new middle school were built and opened in Twin Falls. The Community School in Ketchum remodeled the former Smith Sports Optics for its private education and residential amenity for those training for ski racing. Burley also built and opened a new elementary

school in 2017. There were many remodels of existing schools throughout the year based on voter approval of school bonds.

A handful of new financial branches are scattered across the Magic Valley, both banks and credit unions, including a new D.L. Evans bank branch in Hailey. CapED built its first branch in Twin Falls while Wells Fargo closed its iconic downtown Twin Falls branch built circa 1900.

The Department of the Interior paid the eight south central Idaho counties an aggregated \$8.5 million in PILT payments—‘payments in lieu of taxes.’ The local government receives these monies because of the untaxable share of land in the county. This is an increase of 3.3 percent from the previous fiscal year.

The College of Southern Idaho struggles to fill seats during eras of economic expansion when jobs are bountiful. The institution is getting by with less, helping its neighbors start community colleges such as the newly established College of Eastern Idaho, working with employers to custom design programs and apprenticeships, as well as managing its growing dual enrollment program.

South Central Idaho Employment Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka, Twin Falls Counties	2007	2012	2017	2012-2017		2007-2017	
	Avg Emp	Avg Emp	Avg Emp	Numeric	Percent	Numeric	Percent
Industrial Classification							
Total Covered Employment & Wages	81,763	78,797	88,334	9,537	12.1%	6,571	8.0%
Agriculture, forestry, fishing and hunting	9,040	9,490	10,598	1,108	11.7%	1,558	17.2%
Mining	230	146	172	26	17.8%	-58	-25.1%
Utilities	345	470	466	-4	-0.8%	121	35.2%
Construction	6,192	3,723	4,548	825	22.2%	-1,644	-26.6%
Manufacturing	8,175	8,409	10,131	1,722	20.5%	1,957	23.9%
Wholesale trade	3,332	3,186	3,527	341	10.7%	195	5.9%
Retail trade	10,075	9,393	10,032	639	6.8%	-43	-0.4%
Transportation and warehousing	3,362	3,620	3,809	189	5.2%	447	13.3%
Information	1,241	1,105	889	-216	-19.5%	-352	-28.3%
Finance and insurance	2,047	1,656	1,853	197	11.9%	-194	-9.5%
Real estate, rental and leasing	959	804	819	15	1.8%	-140	-14.6%
Professional, scientific and technical services	2,692	2,718	2,573	-145	-5.3%	-119	-4.4%
Management of companies and enterprises	336	196	287	91	46.6%	-49	-14.6%
Admin. and support and waste management and remediation services	4,404	3,669	4,990	1,321	36.0%	586	13.3%
Educational services	284	381	380	-1	-0.3%	97	34.0%
Health care and social assistance	7,831	8,398	9,548	1,150	13.7%	1,717	21.9%
Arts, entertainment and recreation	915	906	1,018	112	12.4%	103	11.2%
Accommodation and food services	6,703	6,882	8,142	1,260	18.3%	1,439	21.5%
Other services (except public administration)	2,123	2,021	2,420	399	19.7%	297	14.0%
Federal government	1,022	945	895	-50	-5.3%	-127	-12.4%
State government	1,074	880	821	-59	-6.7%	-253	-23.6%
Local government	9,382	9,797	10,416	619	6.3%	1,034	11.0%

South Central Idaho Wages							
Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka, Twin Falls Counties							
Industrial Classification	2007	2012	2017	2012-2017		2007-2017	
	Avg Wage	Avg Wage	Avg Wage	Numeric	Percent	Numeric	Percent
Total Covered Employment & Wages	\$28,844	\$31,904	\$36,385	\$4,481	14.0%	\$7,540	26.1%
Agriculture, forestry, fishing and hunting	\$25,415	\$29,392	\$35,821	\$6,429	21.9%	\$10,406	40.9%
Mining	\$32,357	\$31,476	\$37,845	\$6,369	20.2%	\$5,488	17.0%
Utilities	\$42,498	\$65,605	\$74,560	\$8,955	13.6%	\$32,062	75.4%
Construction	\$33,211	\$38,415	\$41,164	\$2,750	7.2%	\$7,954	23.9%
Manufacturing	\$35,718	\$42,097	\$47,567	\$5,470	13.0%	\$11,849	33.2%
Wholesale trade	\$36,635	\$46,072	\$52,278	\$6,206	13.5%	\$15,643	42.7%
Retail trade	\$24,224	\$24,692	\$28,208	\$3,516	14.2%	\$3,984	16.4%
Transportation and warehousing	\$31,832	\$34,442	\$40,180	\$5,739	16.7%	\$8,348	26.2%
Information	\$32,580	\$36,981	\$43,411	\$6,430	17.4%	\$10,831	33.2%
Finance and insurance	\$47,283	\$45,623	\$53,453	\$7,830	17.2%	\$6,170	13.0%
Real estate, rental and leasing	\$27,324	\$25,593	\$31,779	\$6,185	24.2%	\$4,454	16.3%
Professional, scientific and technical services	\$44,646	\$45,447	\$58,850	\$13,403	29.5%	\$14,204	31.8%
Management of companies and enterprises	\$64,463	\$63,646	\$59,216	-\$4,430	-7.0%	-\$5,247	-8.1%
Admin. and support and waste management and remediation services	\$19,642	\$21,134	\$25,697	\$4,563	21.6%	\$6,055	30.8%
Educational services	\$26,645	\$32,669	\$31,675	-\$994	-3.0%	\$5,029	18.9%
Health care and social assistance	\$29,617	\$34,709	\$38,695	\$3,986	11.5%	\$9,078	30.7%
Arts, entertainment and recreation	\$18,800	\$17,753	\$22,460	\$4,706	26.5%	\$3,659	19.5%
Accommodation and food services	\$13,646	\$15,399	\$16,811	\$1,412	9.2%	\$3,165	23.2%
Other services (except public administration)	\$23,748	\$27,260	\$33,074	\$5,814	21.3%	\$9,326	39.3%
Federal government	\$51,321	\$56,056	\$60,072	\$4,016	7.2%	\$8,751	17.1%
State government	\$37,168	\$40,213	\$42,298	\$2,085	5.2%	\$5,130	13.8%
Local government	\$26,974	\$28,490	\$32,020	\$3,529	12.4%	\$5,046	18.7%

Southeastern Idaho

The year 2017 saw an annually averaged unemployment rate of 3 percent in southeastern Idaho and a record low unemployment rate of 2.4 percent in August. Needless to say, labor shortage concerns were forefront on the minds of employers across the region that year.

Construction was one of the many industries in the region to feel the worker supply crunch. While total employment across all industries in southeastern Idaho grew by 1.2 percent, from 61,025 in 2016 to 61,780 in 2017, construction grew by 4.8 percent in the same timeframe – four times faster. The industry, which accounts for roughly 5 percent of total employment, has been one of the fastest growing since the last recession. This growth can be attributed to a number of ongoing and recently completed construction projects throughout the region. Notable projects include the recently completed Fairfield Marriot Hotel in Pocatello and Cobblestone Inn and Suites in Soda Springs, the Great Western Malting plant expansion completed this year in Pocatello and the ongoing FBI data center expansion in Pocatello. Growth in construction jobs is expected to continue in 2018 with a number of large-scale projects on the horizon including the Idaho Central Credit Union headquarters expansion in Pocatello planned to open in 2019, the Franklin County Medical Center expansion, the new intermediate school for the American

Falls School District, a new elementary school for Grace School District and a massive Northgate district project in Pocatello. In addition, a number of new housing subdivisions are in the works for Bingham County - three subdivisions with a combined 139 homes in Blackfoot, and more than 100 new homes in at least two subdivisions are planned for the city of Shelly.

Bingham County has more in store for it than new homes in 2018. A Canadian mine development company, eCobalt Solutions Inc., announced plans to proceed with development of a hydrometallurgical refining facility outside Blackfoot’s city limits with the promise of bringing in 60 to 90 new high-paying mining jobs to the area and a much-needed diversity to the county’s economic portfolio.

The tightening labor market in the region was evident in the rising wages. Wages rose by 3.2 percent in 2017 with some of the fastest wage gains occurring in construction - 4.7 percent - and manufacturing – 4.5 percent. Retail trade and health care, the largest industry sectors in the region, saw modest wage gains in 2017 at 3 percent and 3.4 percent, respectively. Retail trade saw little employment growth in 2017 – less than 1 percent – in large part due to the “retail apocalypse” felt nationwide, which led to the closure of a number of stores across the region.

In terms of economic impact, the proposed Northgate Development in Pocatello is one that holds the most promise to change the economic landscape of region. The development is expected to bring 10,000 residential units, a retail and shopping district and an IT park to support 6,000 high paying IT jobs. The project was announced in 2017. As of March 2018, 298 acres of land has been annexed for the project, a medical campus has been announced for the project, funding of the connecting Northgate interchange has been approved by the Idaho Transportation Department and connecting roads to the interchange are under construction. This development will do much to expand the region’s professional and business services sector that saw little growth - 0.1 percent growth - in 2017. The ongoing FBI expansion project in Pocatello is also expected to bring in an additional 350 IT jobs once completed in addition to the jobs brought in by supporting services companies like the cybersecurity company Buchanan & Edwards that moved into the area in 2017.

Projects like the Northgate and the FBI data center have the potential to bring in high-paying jobs necessary to attract and retain talent in the region. Given that southeastern Idaho population’s was one of the slower growing of all six regions in the state at 1.2 percent in 2017, and given that the region is the only one projected to decline by 2026, talent attraction and retention is very much needed.

Southeastern Idaho Employment Bannock, Bear Lake, Bingham, Caribou Franklin, Oneida, Power Counties	2007 Avg Emp	2012 Avg Emp	2017 Avg Emp	2012-2017		2007-2017		
				Industrial Classification	Numeric	Percent	Numeric	Percent
					Total Covered Employment & Wages	62,374	57,548	61,780
Agriculture, forestry, fishing and hunting	2,254	2,471	2,687	216	8.7%	433	19.2%	
Mining	610	530	739	209	39.5%	129	21.1%	
Utilities	218	290	284	-6	-2.1%	66	30.0%	
Construction	3,940	2,708	3,155	447	16.5%	-785	-19.9%	
Manufacturing	6,968	6,279	6,847	568	9.0%	-122	-1.7%	
Wholesale trade	2,808	2,734	2,603	-131	-4.8%	-205	-7.3%	
Retail trade	7,287	6,643	6,973	330	5.0%	-315	-4.3%	
Transportation and warehousing	1,344	1,304	1,432	128	9.8%	88	6.6%	
Information	990	535	504	-32	-5.9%	-486	-49.1%	

Finance and insurance	2,045	2,031	2,158	127	6.3%	112	5.5%
Real estate, rental and leasing	567	416	404	-12	-2.9%	-163	-28.8%
Professional, scientific and technical services	1,638	1,448	1,653	205	14.2%	16	1.0%
Management of companies and enterprises	338	269	741	472	175.5%	403	119.1%
Admin. and support and waste management and remediation services	4,454	2,576	2,358	-217	-8.4%	-2,095	-47.0%
Educational services	221	294	322	28	9.7%	101	45.9%
Health care and social assistance	4,534	6,971	7,708	738	10.6%	3,175	70.0%
Arts, entertainment and recreation	509	507	563	56	11.0%	54	10.5%
Accommodation and food services	4,749	4,311	4,814	503	11.7%	65	1.4%
Other services (except public administration)	1,301	1,215	1,215	0	0.0%	-86	-6.6%
Federal government	990	970	918	-52	-5.4%	-72	-7.2%
State government	4,028	3,693	3,802	109	3.0%	-226	-5.6%
Local Government	10,581	9,354	9,901	547	5.8%	-680	-6.4%

Southeastern Idaho Wages							
Bannock, Bear Lake, Bingham, Caribou Franklin, Oneida, Power Counties							
Industrial Classification	2007	2012	2017	2012-2017		2007-2017	
	Avg Wage	Avg Wage	Avg Wage	Numeric	Percent	Numeric	Percent
Total Covered Employment & Wages	\$29,019	\$32,794	\$36,070	\$3,276	10.0%	\$7,051	24.3%
Agriculture, forestry, fishing and hunting	\$24,774	\$29,952	\$33,707	\$3,755	12.5%	\$8,933	36.1%
Mining	\$43,876	\$58,724	\$59,788	\$1,064	1.8%	\$15,913	36.3%
Utilities	\$59,579	\$72,117	\$82,106	\$9,989	13.9%	\$22,527	37.8%
Construction	\$30,252	\$38,063	\$41,516	\$3,453	9.1%	\$11,265	37.2%
Manufacturing	\$46,724	\$50,146	\$53,902	\$3,756	7.5%	\$7,178	15.4%
Wholesale trade	\$34,799	\$40,982	\$46,029	\$5,046	12.3%	\$11,230	32.3%
Retail trade	\$20,435	\$21,752	\$25,105	\$3,353	15.4%	\$4,669	22.8%
Transportation and warehousing	\$27,202	\$32,290	\$37,130	\$4,840	15.0%	\$9,928	36.5%
Information	\$27,798	\$28,241	\$34,743	\$6,501	23.0%	\$6,944	25.0%
Finance and insurance	\$39,253	\$41,281	\$45,349	\$4,068	9.9%	\$6,096	15.5%
Real estate, rental and leasing	\$21,707	\$27,911	\$29,590	\$1,679	6.0%	\$7,883	36.3%
Professional, scientific and technical services	\$32,082	\$42,295	\$41,309	-\$986	-2.3%	\$9,228	28.8%
Management of companies and enterprises	\$58,037	\$59,632	\$53,442	-\$6,190	-10.4%	-\$4,595	-7.9%
Admin. and support and waste management and remediation services	\$18,849	\$27,287	\$23,781	-\$3,506	-12.8%	\$4,932	26.2%
Educational services	\$20,663	\$24,483	\$24,391	-\$91	-0.4%	\$3,728	18.0%
Health care and social assistance	\$27,743	\$32,542	\$36,309	\$3,767	11.6%	\$8,566	30.9%
Arts, entertainment and recreation	\$9,243	\$9,852	\$11,065	\$1,214	12.3%	\$1,822	19.7%
Accommodation and food services	\$9,779	\$11,844	\$13,429	\$1,584	13.4%	\$3,650	37.3%
Other services (except public administration)	\$22,642	\$25,146	\$28,952	\$3,806	15.1%	\$6,310	27.9%
Federal government	\$51,373	\$57,784	\$65,567	\$7,782	13.5%	\$14,194	27.6%
State government	\$35,697	\$39,560	\$44,226	\$4,667	11.8%	\$8,530	23.9%
Local government	\$28,794	\$28,191	\$31,201	\$3,010	10.7%	\$2,407	8.4%

Eastern Idaho

The year 2017 was a busy year for eastern Idaho. Many new regional projects came online last year, as well as swift progress on the ventures that had already begun. In the spirit of its diversely growing economy, eastern Idaho is seeing growth across many industries.

Energy is one of the region's most well-known industries and 2017 has proven this trend will continue. Idaho National Laboratory's Transient Reactor Test Facility (TREAT) is now operational for the first time since 1994. TREAT allows researchers to test nuclear fuels in extreme conditions. NuScale Power's small modular nuclear reactor design application was accepted by federal regulators in 2017. The reactor is slated for construction at the U.S. Department of Energy's (DOE) Idaho desert site with a completion goal of 2026. Oregon-based NuScale Power officials have applied for the second part of their loan guarantee application with the U.S. Department of Energy as licensing for the company's first-of-its-kind small modular reactor continues. The first small modular reactor is expected to begin operation at DOE's desert site west of Idaho Falls by 2026. A Japanese metal pipe-casting company opened its first U.S. office in downtown Idaho Falls. Establishing an eastern Idaho presence, Tokyo-based Sakae Casting will create international partnerships and one-of-a-kind supply chain needs to the region. A \$90 million resolution, in state bonds, is to be issued to construct two new Idaho National Laboratory buildings near University Place. The Cybercore Integration Center will serve as a research, education and training facility for cybersecurity work, which INL leaders see as an area with major future growth opportunities. The Collaborative Computing Center will house a new supercomputer for scientific simulation and modeling, research and education. The buildings are expected to create 500 high-paying tech jobs in Idaho Falls along with about 1,000 temporary construction jobs. Nuclear energy isn't eastern Idaho's only energy focus, however. Cobalt has come back onto the radar this year. Vancouver, British Columbia-based eCobalt announced plans to develop a cobalt mining operation in Salmon and hydrometallurgical refinery on a railhead in neighboring Blackfoot. The Salmon mine is the only environmentally permitted primary cobalt project in the United States. Approximately 125 jobs will be created at the Salmon mine. The vertically integrated Idaho Cobalt Project is designed to produce cobalt for the rechargeable batteries market.

Eastern Idaho made great strides in the medical field during 2017. Mountain View Hospital, an 88-bed facility, broke ground this year and is anticipating opening before the year is out. The 25,000-square-foot Cardio Renal Centers of America office in Idaho Falls broke ground last year. It is expected to include physician offices for outpatient clinic visits for cardiology, nephrology, interventional radiology and interventional pain management, along with offering peritoneal dialysis. Last year the new Idaho Falls Community Family Clinic opened to the public, geared toward low-income individuals with a heavy emphasis on bilingual staffing. In Arco, the medical center began building an extensive surgical services suite thanks to a partnership with Bingham Memorial Hospital. The surgical center will offer services to residents of rural areas in Butte and Custer counties who otherwise would have to travel long distances to be treated. Lastly, Eastern Idaho Regional Medical Center's parent company, the Hospital Corporation of America, gave final approval for establishing a residency program in Idaho Falls. The program will start in July with 10 internal medical residents.

Last May, more than 71 percent of the 14,299 Bonneville County residents who participated in the election, 10,213 in total, voted to create a community college. The College of Eastern Idaho retains the low tuition costs and technical programs of Eastern Idaho Technical College while adding general education courses and two-year associate degrees transferable to four-year universities.

Other ventures are also being sought. The Idaho Falls City Council voted to create an urban renewal district for the Jackson Hole Junction site off Sunnyside Road near Interstate 15. The 42-acre shopping center, being developed by Morgan Construction, is slated to be bordered by Teton Toyota, Sunnyside

Road, I-15 and Pioneer Drive. The Jackson Hole Junction renewal district has a \$4 million improvement cap over a 13-year span. The city of Idaho Falls and the Bonneville County Commission struck a deal that will result in the expansion of the Idaho Falls Zoo at Tautphaus Park. The Idaho Falls City Council approved the purchase of the Bonneville County 4-H Fairgrounds from the county. The property, located adjacent to the zoo, was sold for \$695,000 following an independent appraisal.

Eastern Idaho Employment Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison, Teton Counties	2007	2012	2017	2012-2017		2007-2017	
	Avg Emp	Avg Emp	Avg Emp	Numeric	Percent	Numeric	Percent
Industrial Classification							
Total Covered Employment & Wages	85,173	79,085	90,095	11,010	13.9%	4,923	5.8%
Agriculture, forestry, fishing and hunting	2,190	2,178	2,373	195	9.0%	183	8.4%
Mining	349	442	81	-361	-81.6%	-268	-76.7%
Utilities	210	242	257	15	6.4%	47	22.5%
Construction	6,974	3,669	5,182	1,513	41.2%	-1,792	-25.7%
Manufacturing	5,145	4,413	5,364	952	21.6%	220	4.3%
Wholesale trade	5,265	5,460	4,060	-1,400	-25.6%	-1,205	-22.9%
Retail trade	10,754	9,887	11,673	1,786	18.1%	919	8.5%
Transportation and warehousing	2,259	2,351	2,612	261	11.1%	353	15.6%
Information	1,524	1,229	1,062	-167	-13.6%	-462	-30.3%
Finance and insurance	2,050	1,807	2,004	197	10.9%	-46	-2.2%
Real estate, rental and leasing	1,047	866	996	130	14.9%	-51	-4.8%
Professional, scientific and technical services	11,095	9,758	9,145	-614	-6.3%	-1,951	-17.6%
Management of companies and enterprises	173	208	223	15	7.0%	50	28.7%
Admin. and support and waste management and remediation services	4,589	3,823	7,086	3,262	85.3%	2,496	54.4%
Educational services	1,528	1,754	2,221	468	26.7%	693	45.4%
Health care and social assistance	8,657	9,351	11,552	2,201	23.5%	2,895	33.4%
Arts, entertainment and recreation	1,009	1,097	1,307	210	19.2%	298	29.5%
Accommodation and food services	6,441	6,500	7,997	1,498	23.0%	1,556	24.2%
Other services (except public administration)	1,827	1,708	1,958	250	14.7%	132	7.2%
Federal government	1,528	1,492	1,434	-58	-3.9%	-94	-6.2%
State government	1,399	1,369	1,431	62	4.6%	32	2.3%
Local government	9,159	9,481	10,077	595	6.3%	917	10.0%

Eastern Idaho Wages Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison, Teton Counties	2007	2012	2017	2012-2017		2007-2017	
	Avg Wage	Avg Wage	Avg Wage	Numeric	Percent	Numeric	Percent
	Industrial Classification						
Total Covered Employment & Wages	\$32,871	\$36,319	\$39,794	\$3,475	9.6%	\$6,924	21.1%
Agriculture, forestry, fishing and hunting	\$24,473	\$27,278	\$33,335	\$6,057	22.2%	\$8,861	36.2%
Mining	\$74,263	\$85,124	\$74,244	-\$10,880	-12.8%	-\$19	0.0%
Utilities	\$62,125	\$70,516	\$74,799	\$4,283	6.1%	\$12,674	20.4%
Construction	\$32,567	\$37,031	\$39,928	\$2,897	7.8%	\$7,361	22.6%
Manufacturing	\$30,578	\$38,097	\$40,107	\$2,010	5.3%	\$9,528	31.2%
Wholesale trade	\$34,598	\$40,453	\$47,535	\$7,082	17.5%	\$12,937	37.4%
Retail trade	\$22,638	\$23,196	\$27,190	\$3,994	17.2%	\$4,553	20.1%
Transportation and warehousing	\$29,601	\$32,320	\$35,095	\$2,775	8.6%	\$5,494	18.6%
Information	\$33,915	\$35,496	\$39,368	\$3,871	10.9%	\$5,453	16.1%
Finance and insurance	\$39,705	\$45,838	\$54,818	\$8,980	19.6%	\$15,113	38.1%
Real estate, rental and leasing	\$21,197	\$20,655	\$28,342	\$7,686	37.2%	\$7,144	33.7%
Professional, scientific and technical services	\$59,672	\$69,497	\$75,706	\$6,208	8.9%	\$16,034	26.9%
Management of companies and enterprises	\$59,608	\$63,164	\$59,577	-\$3,587	-5.7%	-\$31	-0.1%
Admin. and support and waste management and remediation services	\$31,816	\$35,532	\$53,385	\$17,853	50.2%	\$21,569	67.8%
Educational services	\$45,910	\$51,816	\$48,180	-\$3,635	-7.0%	\$2,270	4.9%
Health care and social assistance	\$30,920	\$32,496	\$35,585	\$3,089	9.5%	\$4,665	15.1%
Arts, entertainment and recreation	\$14,205	\$13,338	\$15,240	\$1,902	14.3%	\$1,035	7.3%
Accommodation and food services	\$10,787	\$12,418	\$14,313	\$1,894	15.3%	\$3,525	32.7%
Other services (except public administration)	\$22,999	\$24,018	\$28,350	\$4,332	18.0%	\$5,351	23.3%
Federal government	\$59,490	\$64,259	\$69,693	\$5,434	8.5%	\$10,203	17.2%
State government	\$36,504	\$38,437	\$43,768	\$5,331	13.9%	\$7,264	19.9%
Local government	\$27,392	\$29,204	\$32,005	\$2,800	9.6%	\$4,612	16.8%

Section 4: Employment and Population Projections

This section provides information on the Idaho Department of Labor's short-term industry and occupational employment projections and long-term (10-year) population projections. These projections provide a general outlook for the state of Idaho. They are used by policymakers, job seekers, training providers, economic analysts and others.

Annually, the Idaho Department of Labor produces industry forecasts for two- and 10-year time periods. The occupational staffing pattern for each industry is used to convert industry projections into occupational projections. Occupational projections show how many job openings are expected due to overall growth as well as replacement or turnover. While total openings from occupational projections do not represent total demand, they can be used as an indicator of demand. The base period for short-term projections is first quarter 2017 and the base period for long-term projections is 2016. As at the production of this report, long-term projections (2016 - 2026) have yet to be published.

The department also produces a 10-year population forecast with a high degree of geographic and demographic detail. The forecast includes an individual population projection for each of Idaho's counties. Within each county, the forecast includes projections for five-year age blocks (20- to 24-year-olds, 25- to 29-year-olds, etc.) These age blocks are the base unit for the forecast. Initial population estimates are provided by the U.S. Census Bureau and individual age groups are progressed forward using four components of population change: death, birth, aging and migration.

Note on Population Data. The Census Bureau maintains multiple programs for estimating the population of the nation's states, counties and cities. These programs include the Census July Population Estimates and population numbers generated from the Census Bureau's American Community Survey. Because these estimates come from different programs and methodologies, they often differ slightly. In the interest of updating our population projections in a timely manner, we base our estimates on the American Community Survey's estimates. As a result, the data in our forecast may differ slightly from other estimates that are published.

Short-term Projections Estimate a 1.3 Percent Annual Job Growth Rate

Job growth is expected to continue as Idaho's employment is projected to grow by 19,400 jobs by 2019. This translates to a 2.6 percent total growth – an annual growth rate of 1.3 percent. *Figure 4.1* shows the projected growth rates for the state by industry. As the figure indicates, growth will come from a broad range of Idaho's industry sectors. Construction and financial activities were projected to be one of the fastest growing sectors with residential building construction growth estimated at 5 percent annually. In terms of numerical job growth, the health care and social assistance sector as well as the leisure and hospitality sector are projected to bring the most jobs into the state. Collectively, these two sectors account for roughly 38 percent of the total job growth.

Projections anticipate declines for just one sector – mining by - 3.7 percent.

Figure 4-1: Employment Projections by Industry

Idaho, 2017 Q1 through 2019 Q1

Source: Idaho Department of Labor, Communications & Research

NAICS Title	2017 Q1	2019 Q1	Net Change	Annualized percent change
Total Employment, All Jobs	735,560	754,932	19372	1.3%
Agriculture, forestry, fishing and hunting	20,887	21,299	412	1.0%
Mining	2,132	1,977	-155	-3.7%
Utilities	3,034	3,144	110	1.8%
Construction	38,763	40,655	1892	2.4%
Manufacturing	64,430	65,385	955	0.7%
Wholesale trade	28,178	28,799	621	1.1%
Retail trade	83,934	85,899	1965	1.2%
Transportation and warehousing	19,481	19,899	418	1.1%
Information	9,726	10,011	285	1.5%
Financial activities	31,160	32,824	1664	2.6%
Professional and business services	85,347	87,873	2526	1.5%
Education and health services	157,290	162,395	5105	1.6%
Educational services (private + state + local)	60,627	61,728	1101	0.9%
<i>State education Employment</i>	<i>9,994</i>	<i>10,181</i>	<i>187</i>	<i>0.9%</i>
<i>Local education employment</i>	<i>43,620</i>	<i>44,176</i>	<i>556</i>	<i>0.6%</i>
<i>Private education employment</i>	<i>7,013</i>	<i>7,371</i>	<i>358</i>	<i>2.5%</i>
Health care and social assistance	96,663	100,667	4004	2.1%
Leisure and hospitality	72,350	75,661	3311	2.3%
Other services (except public administration)	16,793	17,140	347	1.0%
Public administration	46,994	47,141	147	0.2%
<i>Total federal government employment (excluding hospitals)</i>	<i>12,006</i>	<i>12,105</i>	<i>99</i>	<i>0.4%</i>
<i>State government, excluding education and hospitals</i>	<i>12,539</i>	<i>12,165</i>	<i>-374</i>	<i>-1.5%</i>
<i>Local government, excluding education and hospitals</i>	<i>22,449</i>	<i>22,871</i>	<i>422</i>	<i>0.9%</i>

Personal Care and Service Occupations Projected to Grow the Fastest

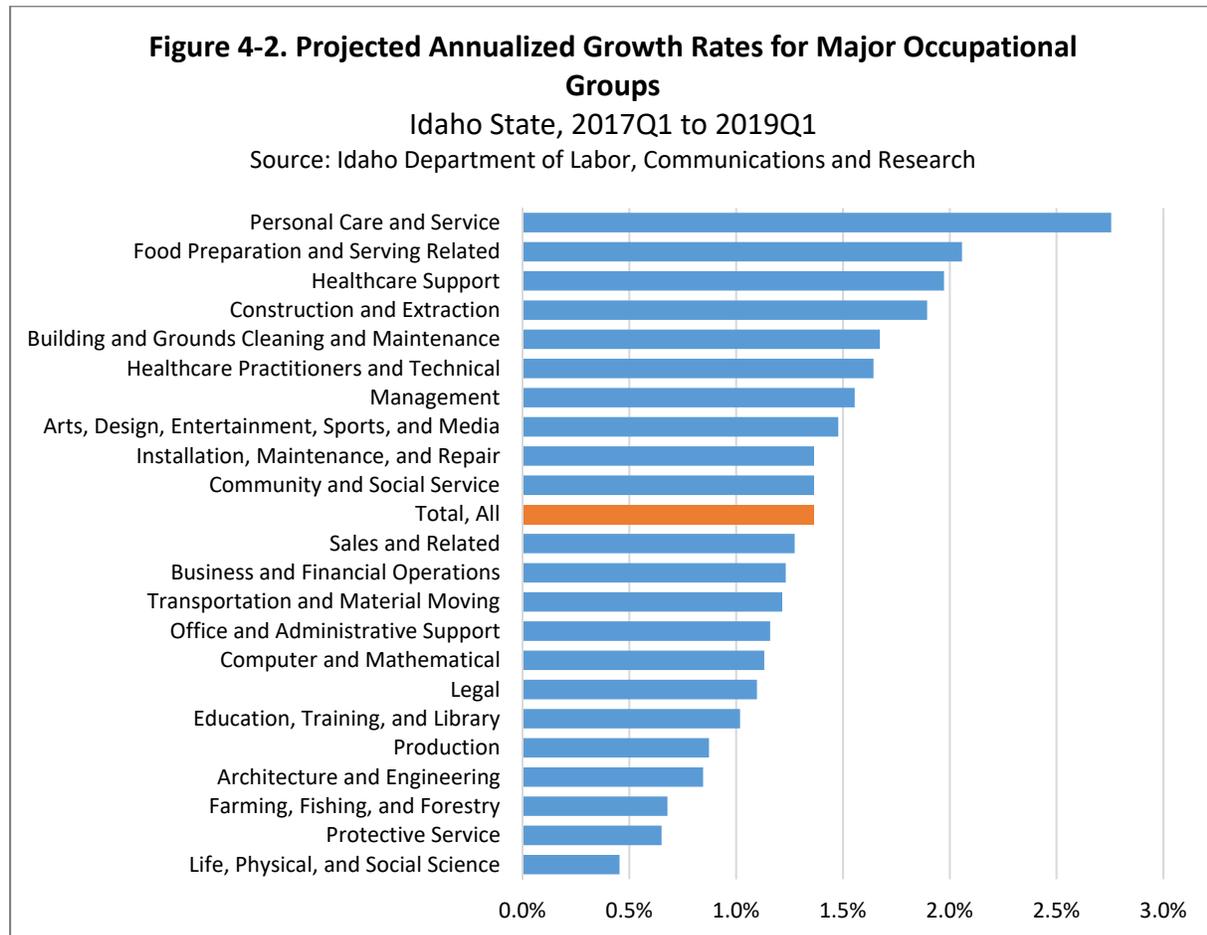
As of first quarter 2017, the top three state occupational groups for shares of employment were estimated to be:

1. Office and administrative support occupations (15.6 percent).
2. Sales and related occupations (9.3 percent).
3. Food preparation and serving-related occupations (7.4 percent).

These three major groups are projected to represent more than 30 percent of total employment shares for the state. Two years down the road – by first quarter 2019- occupational employment shares are not expected to change significantly

The projected average annual growth rates for the major occupational groups in Idaho are presented in *Figure 4-2*. Personal care and service occupations (2.8 percent), food preparation and serving-related

occupations (2.1 percent) and health care support occupations (2 percent) are projected to grow faster than other occupational groups from 2017 to 2019. This is, in part, a reflection of the rapidly growing share of the state’s aging population. Occupation groups projected to fall below a 1 percent annualized growth rate include life, physical and social sciences (0.5 percent), protective services (0.7 percent) farming, fishing and forestry (0.7 percent), architecture and engineering (0.8 percent) and production occupations (0.9 percent).

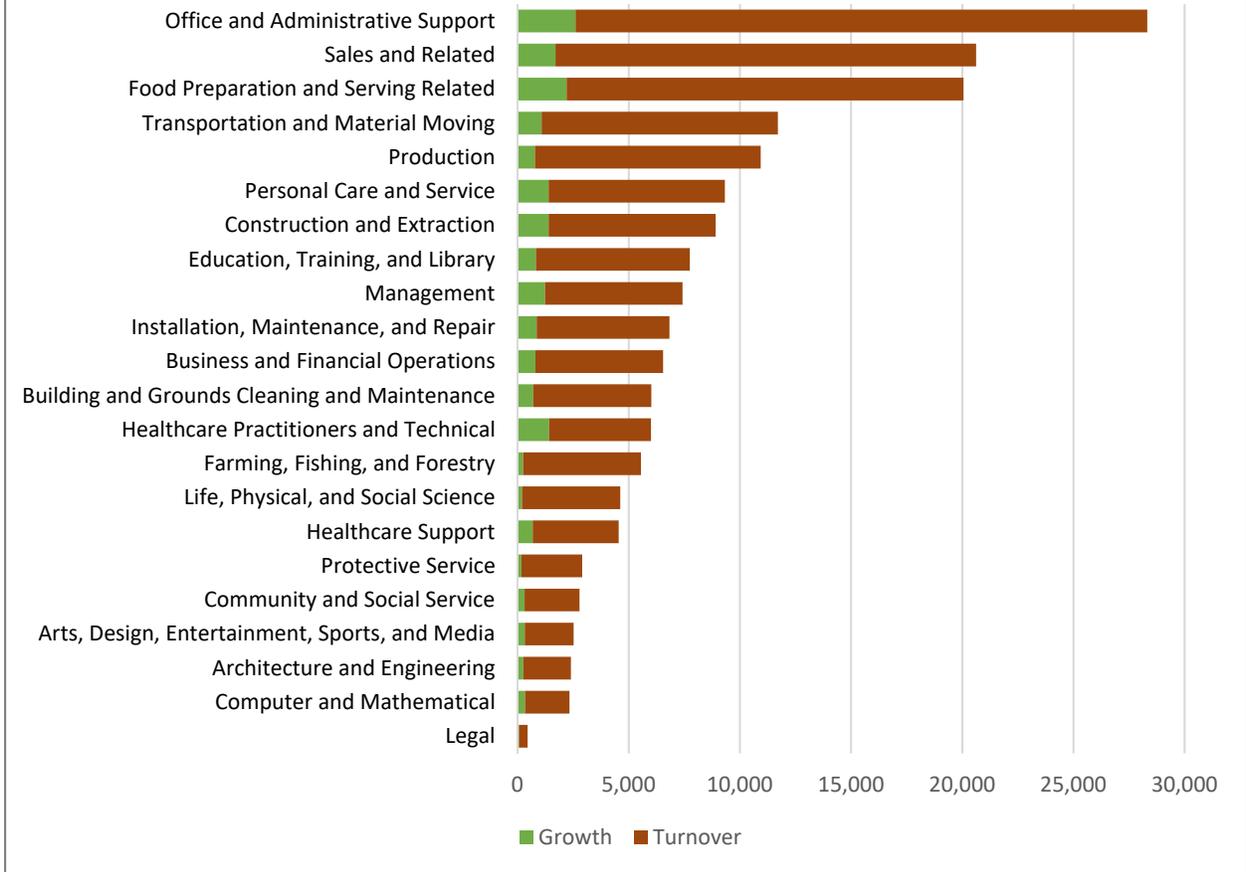


Projected Openings Due to Turnover are Eight Times Greater than Growth Openings

Idaho’s employment projections estimate more than 19,000 jobs would be created by industry growth from 2017 to 2019. An additional 159,000 job openings is projected due to turnover, resulting in 178,600 total job openings across the state over the two-year period. On average, total turnover openings are eight times greater than growth openings or to put in a different way, 89 percent of the total projected job openings from 2017 through 2019 will be due to turnover. *Figure 4-3* shows the projected job openings due to growth and turnover for the major occupation groups. Office and administrative support occupations have both the largest number of jobs due to growth (2,600 jobs) and replacements because of turnover (28,300 jobs). Some occupation groups have higher turnover than others do. For instance, sales-related occupations are projected to have 92 percent of future openings due to turnover. On the other hand, highly specialized occupations such as health care practitioners tend to have a much lower turnover share at 76 percent.

**Figure 4-3. Projected Job Openings Due to Growth and Turnover
Idaho, 2017Q1 to 2019Q1**

Source: Idaho Department of Labor, Communications and Research



Top Five Occupations Ranked by Projected Job Openings

The following tables show specific occupations (six-digit SOC – standard occupational codes) ranked by total openings. *Figures 4-4 to 4-7* show the top five occupations sorted by educational requirement. The average of the annual median wages demonstrates the link between educational attainment level and monetary compensation by occupation. The average median wage for the top five occupations requiring a high school education or less is \$23,000 per year, while for master’s or doctoral degrees the average median wage is \$73,000.

The average annual wage for the top five STEM (science, technology, engineering and math) occupations expected to have the largest job opportunities have an average median of \$53,174 (*Figure 4-8*).

Figure 4-4: Top Five Occupations Typically Requiring High School Education or Less for Entry
Idaho, 2017 Q1 through 2019 Q1

Source: Idaho Department of Labor, Communications & Research

Title	Growth Openings	Turnover Openings	Total Projected Openings	Annual Median Wage
Retail salespersons	500	6596	7096	\$22,840
Customer service representatives	902	5982	6884	\$29,730
Combined food preparation and serving workers, including fast food	714	6049	6763	\$18,440
Cashiers	349	6269	6618	\$19,670
Personal care aides	843	2979	3822	\$21,670
Average Annual Wage				\$23,102

Figure 4-5: Top Five Occupations Typically Requiring Associate Degree for Entry

Idaho, 2017 Q1 through 2019 Q1

Source: Idaho Department of Labor, Communications & Research

Title	Growth Openings	Turnover Openings	Total Projected Openings	Annual Median Wage
Forest and conservation technicians	40	2076	2116	\$32,860
Life, physical and social science technicians, all other	10	190	200	\$36,620
Preschool teachers, except special education	23	161	184	\$22,350
Agricultural and food science technicians	28	151	179	\$35,880
Radiologic technologists	32	118	150	\$54,960
Average Annual Wage				\$34,617

Figure 4-6: Top Five Occupations Typically Requiring Bachelor's Degree for Entry

Idaho, 2017 Q1 through 2019 Q1

Source: Idaho Department of Labor, Communications & Research

Title	Growth Openings	Turnover Openings	Total Projected Openings	Annual Median Wage
Registered nurses	552	1749	2301	\$64,030
General and operations managers	375	1864	2239	\$64,850
Substitute teachers	113	1149	1262	\$19,990
Elementary school teachers, except special ed.	121	973	1094	\$44,740
Business operations specialists, all other	78	984	1062	\$64,210
Average Annual Wage				\$56,337

Figure 4-7: Top Five Occupations Typically Requiring Master’s Degree or Greater for Entry
Idaho, 2017 Q1 through 2019 Q1

Source: Idaho Department of Labor, Communications & Research

Title	Growth Openings	Turnover Openings	Total Projected Openings	Annual Median Wage
Rehabilitation counselors	22	301	323	\$38,520
Educational, guidance, school and vocational counselors	34	286	320	\$39,760
Education administrators, postsecondary	30	197	227	\$76,620
Health specialties teachers, postsecondary	55	160	215	\$73,700
Pharmacists	43	158	201	\$121,510
Average Annual Wage				\$72,844

Figure 4-8: Top Five STEM Occupations, Regardless of Entry Requirements

Idaho, 2017 Q1 through 2019 Q1

Source: Idaho Department of Labor, Communications & Research

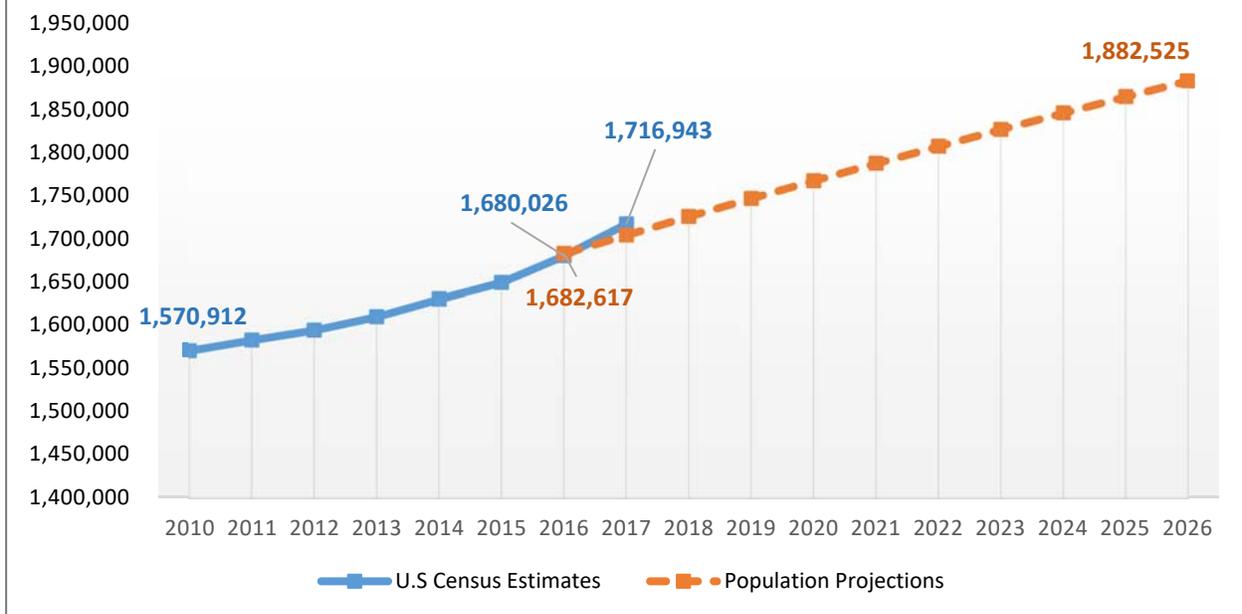
Title	Growth Openings	Turnover Openings	Total Projected Openings	Annual Median Wage
Registered nurses	552	1,749	2,301	\$64,030
Forest and conservation technicians	40	2,076	2,116	\$32,860
Computer user support specialists	80	437	517	\$40,670
Licensed practical and licensed vocational nurses	80	412	492	\$41,290
Medical and health services managers	92	361	453	\$83,190
Average Annual Wage				\$53,174

Idaho Population Projected to Increase 11.9 Percent by 2026

Updated Idaho Department of Labor projections estimate the statewide population will increase by close to 200,000, reaching total population of approximately 1,883,000 by 2026. This population growth amounts to a total percentage increase of 11.9 percent – 1.1 percent annually - from 2016 to 2026 (Figure 4-9).

**Figure 4-9. Historical and Projected Population Estimates
Idaho, 2010 through 2026**

Source: US Census Bureau; Idaho Department of Labor



Idaho expects to see a continuation of current in-migration patterns, which predominantly will be retirees moving into the state. The majority of Idaho’s overall population growth is projected to occur in the 65-and-older population increasing by 120,700, or 47.5 percent - four times the rate of the state’s total population growth. The over-65 population currently accounts for only 15 percent of Idaho’s population; this population share is projected to increase to 20 percent by 2026.

In contrast, the youth population is projected to grow more slowly due to declining birth rates and the relatively low in-migration of families with children. The under-15 population in Idaho is projected to grow by only 2,700 people, or 0.7 percent by 2026. The under-15 population share is projected to decline from 21.6 percent to 19.4 percent.

The geographic dynamics of Idaho’s population growth imply a continued trend of urbanization. The majority of population growth is forecasted to occur in the state’s major urban areas. *Figure 4-10* shows the population projections for all of Idaho’s 44 counties. Northern and southwestern Idaho are both projected to grow at a rate faster than the statewide projected growth rate. Southeastern Idaho is the only region projected to decline by 2026. Bannock County is the only county in Idaho with a population above 50,000 that is projected to decline.

Figure 4-10: 10-year Population Projections by Region and County
 Idaho Regions and Counties, 2016 through 2026

Source: Idaho Department of Labor, Communications & Research

Area	Population Estimates		Net Growth	Total Growth %	Annual Growth %
	2016	2026			
Northern Idaho	230,072	274,972	44,900	19.5%	1.8%
Benewah	9,092	9,184	92	1.0%	0.1%
Bonner	42,536	47,074	4,538	10.7%	1.0%
Boundary	11,681	12,968	1,287	11.0%	1.1%
Kootenai	154,311	192,076	37,765	24.5%	2.2%
Shoshone	12,452	13,670	1,218	9.8%	0.9%
North Central Idaho	108,071	114,340	6,269	5.8%	0.6%
Clearwater	8,497	8,472	-25	-0.3%	0.0%
Idaho	16,156	16,129	-27	-0.2%	0.0%
Latah	39,196	42,948	3,752	9.6%	0.9%
Lewis	3,853	4,553	700	18.2%	1.7%
Nez Perce	40,369	42,237	1,868	4.6%	0.5%
Southwestern Idaho	765,035	891,361	126,326	16.5%	1.5%
Ada	444,028	533,734	89,706	20.2%	1.9%
Adams	3,900	3,794	-106	-2.7%	-0.3%
Boise	7,124	7,288	164	2.3%	0.2%
Canyon	211,698	248,905	37,207	17.6%	1.6%
Elmore	26,018	23,618	-2,400	-9.2%	-1.0%
Gem	17,184	17,917	733	4.3%	0.4%
Owyhee	11,389	11,118	-271	-2.4%	-0.2%
Payette	23,026	23,465	439	1.9%	0.2%
Valley	10,496	11,502	1,006	9.6%	0.9%
Washington	10,172	10,019	-153	-1.5%	-0.2%
South Central Idaho	193,947	206,192	12,245	6.3%	0.6%
Blaine	21,791	22,176	385	1.8%	0.2%
Camas	1,072	974	-98	-9.2%	-1.0%
Cassia	23,504	24,177	673	2.9%	0.3%
Gooding	15,185	14,562	-623	-4.1%	-0.4%
Jerome	22,994	23,790	796	3.5%	0.3%
Lincoln	5,271	5,333	62	1.2%	0.1%
Minidoka	20,616	21,595	979	4.7%	0.5%
Twin Falls	83,514	93,586	10,072	12.1%	1.1%
Southeastern Idaho	167,290	161,757	-5,533	-3.3%	-0.3%
Bannock	83,857	77,897	-5,959	-7.1%	-0.7%
Bear Lake	5,945	6,538	593	10.0%	1.0%
Bingham	45,201	45,042	-159	-0.4%	0.0%
Caribou	6,887	6,250	-637	-9.2%	-1.0%

Franklin	13,406	14,488	1,082	8.1%	0.8%
Oneida	4,340	4,186	-154	-3.5%	-0.4%
Power	7,654	7,356	-298	-3.9%	-0.4%
Eastern Idaho	218,202	233,904	15,702	7.2%	0.7%
Bonneville	112,232	124,773	12,541	11.2%	1.1%
Butte	2,501	1,998	-503	-20.1%	-2.2%
Clark	860	676	-184	-21.4%	-2.4%
Custer	4,096	3,612	-484	-11.8%	-1.3%
Fremont	12,943	12,392	-551	-4.3%	-0.4%
Jefferson	27,839	30,580	2,741	9.8%	0.9%
Lemhi	7,723	7,314	-409	-5.3%	-0.5%
Madison	39,048	40,534	1,486	3.8%	0.4%
Teton	10,960	12,026	1,066	9.7%	0.9%

Counties highlighted in red are urban counties with resident population above 50,000

Section 5: Idaho Apprenticeships Update

As a means of developing workers' skills and talents on the job, registered apprenticeships are a proven solution for businesses to recruit, train and retain highly skilled workers. They have evolved from more traditional trade programs to include diverse industries in the U.S. and Idaho, ranging from financial to cybersecurity to health care and specialty crafts.

According to the U.S. Department of Labor, the number of registered apprentices have grown 42 percent since 2013 to 533,607 active apprentices nationwide in fiscal year 2017. More than 190,000 individuals nationwide entered the apprenticeship system in FY 2017, 64,000 participants graduated from the apprenticeship system and 2,369 new apprenticeship programs were established nationwide.

Apprenticeships in Idaho on the Rise

The number of active registered apprenticeships in Idaho has grown close to 40 percent over the past year and the number of active programs has increased to 133 statewide (*Figure 5-1*). As of January 2018, there were 1,434 registered apprentices across the state and 47 new programs created. Interest in apprenticeship programs among Idaho employers has been on the rise. As of January 2018, 245 companies across the state have registered apprenticeship programs – more than double the number just two years prior.

Figure 5-1: Registered Apprenticeship Results

Idaho, FY 2011 through 2017

Source: U.S Department of Labor, Employment and Training Administration

Fiscal Year	Active Apprentices	New Apprentices	Completers	Active Programs	New Programs
2011	770	265		185	13
2012		292	190		9
2013		399	141		9
2014	748	256	131	121	6
2015	779	363	136	121	15
2016	861	481	155	93	8
2017	1,196	467	161	133	31

Trends have shown that employees who complete a registered apprenticeship have higher job retention rates of up to 91 percent, and for every dollar a business invests in registered apprenticeships, they see an average of \$1.47 back in increased productivity, according to the U.S. Department of Labor.