

Idaho Employment

A monthly update of how Idaho's economy is doing in your area

IDAHO
DEPARTMENT OF LABOR

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IDAHO'S JOB RECOVERY TO REMAIN LOW IN 2010

The following article is an excerpt from a presentation the Idaho Department of Labor made to the Idaho Legislature's Economic Outlook and Revenue Assessment Committee Jan. 6, 2010.

What appeared 15 months ago to be an economic downturn that mirrored the national recessions of 1986 and 2001 began displaying evidence in early 2009 of having a much more severe impact.

It wasn't until the spring of 2009 that Department of Labor analysts were able to capture substantive data reflecting the extent of the job losses due to the recession, which officially began in December of 2007. It became clear that unlike those two earlier recessions, this one – which really took hold of Idaho's economy in the fourth quarter of 2008 – was going to be far worse.

IDAHO BUSINESSES

Now known as the Great Recession, the last two years have taken a toll on Idaho's businesses, especially small-to medium-sized firms – those with 50 or fewer employees – resulting in significant losses in jobs and wages.

The greatest loss occurred between the second quarters of 2008 and 2009 when the number of covered Idaho employers dropped by 2,115 to 45,580; the number of covered employees decreased by 45,907 and wages paid dropped by \$385 million. Small- to medium-sized firms experienced the greatest hit, where the number of covered employers dropped by 1,956. Average covered employment decreased by 20,683, and wages dropped by nearly \$150 million.

April 1 — National Census Day

The U.S. Census counts every resident in the United States and is required by the Constitution to take place every 10 years. The 2010 Census will affect how much communities receive of more than \$400 billion in federal funds each year for things like hospitals, job training centers, schools, senior centers, bridges, tunnels and other public works projects and emergency services. The data collected by the census also help determine the number of seats each state has in the U.S. House of Representatives. Read the article on page 8 to learn more or go to <http://2010.census.gov>.

United States
Census
2010

NONFARM JOBS, UNEMPLOYMENT AND EMPLOYMENT

Idaho lost 42,000 nonfarm jobs between the second quarters of 2008 and 2009 and a two-year total of 54,200 to date. Idaho industries hit hardest by the recession were retail trade, construction, financial services and computer and electronic products manufacturing. Nearly 50 percent of those jobs were in construction, which declined 12,339 or 28.3 percent, and manufacturing, which fell 9,491 or 21.7 percent. Retail trade accounted for 15 percent of the job loss at 6,567, professional and business services fell 14.8 percent or 6,455 and leisure and hospitality dropped 12.3 percent.

All these sectors experienced average annual wage declines ranging from 1.24 percent to 2.39 percent.

Idaho's labor pool currently stands at about 755,000. Although approximately 686,500 of these people are working, that's the lowest number since February 2002. It first dropped below 700,000 in March of this year after four years above that level.

In the western United States, where Idaho once had the lowest unemployment rate, five states had lower rates in November with Utah the lowest at 6.3 percent. Higher rates were posted in California at 12.3 percent, Nevada at 12.3 percent, Oregon at 11.1 percent and Washington at 9.2 percent. Idaho was at 9.1 percent.

The state's average unemployment rate for July 2008 to July 2009 was 6.5 percent. The rate remained at 9.1 percent in December, unchanged from November. That's up from 6.1 percent a year earlier and just 3.6 percent at the end of 2007 as the national recession began. While still below the national rate of 10 percent, December's rate is the highest state rate since April 1983. Nearly 69,000 workers were without jobs.

Twenty-one counties experienced double-digit unemployment rates in December – the largest number since November 1986. For Fiscal Year 2009, five rural counties are expected to have average double-digit rates with a high of 13.4 percent in Clearwater County to a low of 3.7 percent in Teton County.

UNEMPLOYMENT INSURANCE CLAIMS AND BENEFIT PAYOUTS

High levels of unemployment are continuing to take a toll on Idaho's unemployment insurance system. The number of people who collected unemployment insurance benefits jumped from 81,000 in 2008 to 116,750 in 2009.

Last year, unemployment insurance provided millions of dollars in relief to the thousands of Idahoans out of work and pumped more than a half billion dollars – \$643 million – into Idaho's economy, an all-time record and far exceeding 2008's previous record total of \$247 million. Broken down, \$403 million of 2009's total benefit payout was in regular benefits – those paid from the Idaho Unemployment Insurance Trust Fund – with the remaining \$240 million paid by the federal government in extended and supplemental benefits.

Moody's Economy.com estimates that every dollar paid in jobless benefits has an economic impact of \$1.63 because unemployment checks are cashed and spent – not saved – in local communities on house payments and rent, keeping the heat and the lights on, putting food on the table and buying gas to look for work.

Today, approximately 30,000 checks are being issued each week for regular benefits, following seasonal patterns and hovering at the same levels of early 2009 but still way above January of 2008. And while weekly reports show signs of a move toward more seasonal patterns for regular benefit payments, it is by no means a certain indicator that the economy is heading for a full and robust recovery.

Nearly 850 people a week are exhausting regular state benefits and are starting to receive federally funded extended benefits, which are rising stead-

ily. The number of checks issued for federal benefits jumped from 6,494 during the first week of January 2009 to nearly 26,136 the last week of December. Currently about half the workers receiving state-funded benefits exhaust before finding new jobs and move to receiving federally funded benefits.

By the end of 2010, the regular benefit payout will reach around \$265 million – \$138 million lower than what was paid in 2009.

2010 UNEMPLOYMENT INSURANCE TAX RATES

Idaho businesses are feeling the impact of last year's demand on the state trust fund that finances regular benefits. With only \$130 million in tax collections from businesses, 2009's record payout of \$403 million in regular benefits forced the state to start tapping interest-free loans from the federal government. And since regular benefit payouts in 2009 outstripped taxes paid by businesses by more than three to one – despite a 70 percent increase in tax rates – employers will continue to feel the pinch in 2010. Unemployment insurance tax rates for 2010 have doubled from 2009 levels and are expected to remain at 2010 levels into 2011 and potentially into 2012 depending on the timing and magnitude of an economic recovery. Current unemployment insurance tax law does not allow rates to exceed the 2010 levels. If the existing law did not cap base rates at 3.36 percent, the formula would be implementing base rates of almost 5 percent to bring the trust fund to a more solvent level. The 5 percent rate would have been comparable to rates under previous tax code before tax relief measures were taken in 2005. Therefore even though employers are experiencing a heavy tax burden in 2010, it is significantly lower than in previous decades. In fact legislation enacted in 2005 resulted in around \$350 million being left in the hands of business owners prior to the onset of the recession.

Idaho's unemployed will feel the pinch, too. The 2010 decrease in the maximum weekly benefit amount from \$362 to \$334 is expected to save the state more than \$18.2 million in regular unemployment insurance payouts. The benefit reduction is another result of the measure unanimously passed by the Legislature in 2005 to keep more money in the hands of business and balance the ownership of the unemployment insurance trust system between business and labor during both economic expansions and declines. This move will also reduce the average weekly benefit amount by roughly 8 percent from \$261 to \$240 – the lowest average weekly benefit amount since mid-2006.

To cope with an ever-increasing demand for benefits and because the department can earn interest on the state-managed fund, a decision was made to weather the recession by taking advantage of no-cost federal loans to pay benefits. As of mid-January, Idaho has borrowed more than \$130 million in interest-free loans. Since employer tax receipts are typically low in January, the department expects to borrow another \$80 million or more during the first four months of 2010, and if necessary, \$10 million in the first half of 2011, bringing the total amount to over \$200 million. This year's higher tax rates are expected to generate nearly \$120 million more than in 2009 – enough to pay anticipated claims and start repaying federal loans. More than half the loans should be repaid when the interest-free provision expires at the end of 2010. Loans accrued in 2011 may fall under regular federal borrowing procedures should the interest free provision not be extended past this year.

LOOKING FORWARD

It appears Idaho may have hit a statistical low point for many of its indicators and is starting to see increased signs of economic recovery, but it's still too early to tell.

As a lagging indicator, Idaho's unemployment rate may continue rising slightly in the coming months, leveling off in the 8 percent to 9 percent range

by the end of the second or third quarter of 2010 before beginning a slow descent and staying in the 8 percent range through mid-2011.

Unemployment projections for 2010 identify 13 counties with double-digit unemployment rates as high as 17.2 percent in Clearwater County. Canyon County is the only urban county expected to experience double-digit unemployment. Bear Lake County is projected to have the lowest rate at 4.8 percent. For 2011 the number of counties in double-digits should fall to 10, the highest being Valley County at 16.9 percent and again with Canyon as the only urban county to remain above the 10 percent level. Bear Lake County is projected to have the lowest rate at 3.8 percent.

For the first time since September 2008 initial claims for unemployment insurance benefits are currently below previous year levels. Claims during the last half of 2009 were on average 25 percent higher than the year before, however initial claims for regular state-funded benefits during the first half of 2010 are expected to run about 20 percent lower.

Year-over-year job gains should occur in late summer or early fall. Year-over-year, Idaho's job losses went from an extreme of a 7.5 percent in August to 5.2 percent in November, three consecutive months of losses slowing — the first marked decline in losses since April of 2008. The latest figures indicate Idaho's loss of nonfarm jobs are beginning to level off and is now beginning to follow pre-recession seasonal patterns.

By industry, six sectors are projected to keep Idaho's total employment in positive territory – health care, education, administrative and support services, agriculture, the federal government and the self-employed. But with a projected annualized total employment growth rate of just 0.36 percent between mid-2009 to mid-2011, most of the new job growth forecast for this period is expected to occur in the latter half of 2010. Health care and social assistance will continue to experience steady growth although it will slow to an annualized rate of 2.8 percent from an average annual growth rate of 3.6 percent over the last decade.

Population growth will play a role although not at the record levels of the past – at least not for a while. After decades of exponential growth where housing developments sprouted in Idaho's farmlands and deserts, the burst of the housing bubble and subsequent recession have slowed the number of people moving into the state.

Since the 2000 census, Idaho's population has increased by nearly 252,000 people – almost 19.5 percent – the fifth fastest rate nationally behind Nevada, Arizona, Utah and Georgia. About 116,000 of that increase came from natural growth and the rest from people moving into Idaho from other states or countries.

As the recession wore on, Idaho's population growth slowed considerably from 1.8 percent in July 2008 to 1.2 percent in July 2009, the slowest growth rate for Idaho since 2002 following the last national recession. Still Idaho outpaced the nation, which grew at only 0.9 percent. Just over 18,000 more people lived in Idaho in July 2009 than the year before, increasing the state's total population to 1,545,801 and making Idaho the 12th fastest growing state in the country. That was down from sixth the year before.

Where Idaho saw the greatest decline was in the number of people moving into the state. In-migration slowed from nearly 15,000 in July 2008 to only 3,734 in July 2009. This slower growth pattern is expected to continue over the next couple of years until robust growth returns, projected for five to 10 years out. During the next decade demographers expect Idaho's population to grow around 13 percent while the nation is predicted to only grow around 10 percent.

In spite of record-level job losses and unemployment insurance benefit payouts at an all-time high, there are glimmers of hope on the horizon, but the overriding question remains “When will the economy turn around and begin to recover at both the state and national levels?”

On a national level, economists are mixed.

Some remain cautiously optimistic, speculating that due to continued economic uneasiness and uncertainty, the U.S. economy will get slightly worse before it gets better, due in large part to weak consumer spending. There’s speculation that growth will begin to slow to anemic levels in the coming year, but still enough to keep the momentum of economic recovery going.

Still others are encouraged by short-term increases in business orders, consumer spending, exports and personal income. And while a large portion of the growth in personal income for the last quarter is due to unemployment insurance and Social Security benefits, some see hope in a recent national drop in the number of new jobless claims, reflecting a trend that began late last summer for Idaho as well. Job losses are slowing.

For Idaho, the recovery could look much different. The state economy experienced dramatic, unprecedented growth between 2006-2007 – largely based on high technology manufacturing and construction. The earliest department analysts expect to see year-over-year employment gains is into late summer or fall 2010, and a full recovery to pre-recession employment levels could be realized near the end of 2013. For those industries hit the hardest during the recession like construction, it could be after 2025 before those sectors return to the employment levels of 2007. Idaho’s current recession has been the deepest since the 1940’s, and despite signs of economic recovery no one is ready to say it’s over.

At the same time many of the core fundamentals for job retention and economic development – quality of life, low cost of living, reasonable business costs – have corrected to levels that will make Idaho an attractive business climate for future wealth creation and economic expansion.

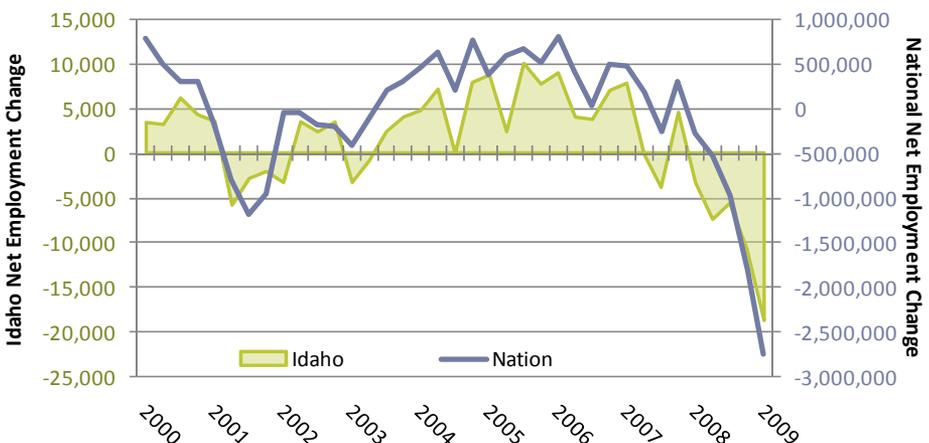
Research Bureau, Idaho Department of Labor

IDAHO’S PRIVATE SECTOR SUFFERS JOB LOSSES

Business Employment Dynamics program releases 1st quarter 2009 data

Idaho suffered a net loss of 18,746 private sector jobs during the first quarter of 2009 on a seasonally adjusted basis, evidence that the effects of the recession were still in full force. This was the fifth consecutive quarter of job loss that Idaho experienced, making it the longest streak of job losses on

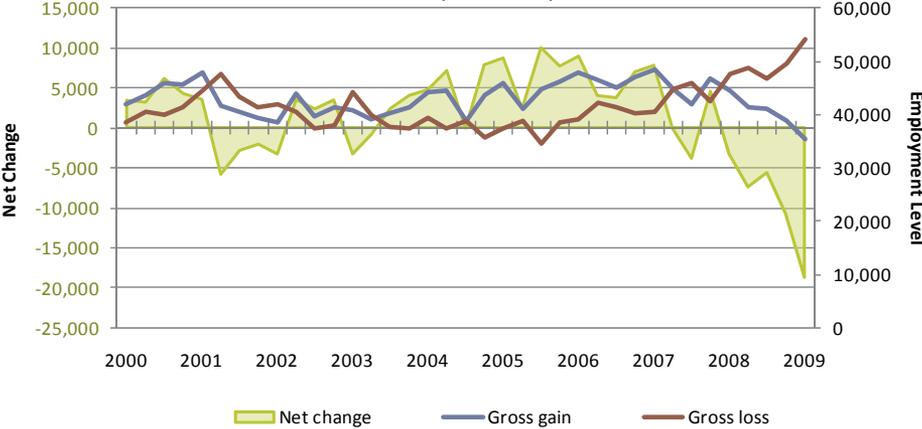
**Net Change in Employment
2000Q1-2009Q1**



record, and the number of jobs lost in first quarter alone topped the 14,000 jobs lost over the four-month-long 2001 recession, according to the Business Employment Dynamics program of the U.S. Bureau of Labor Statistics.

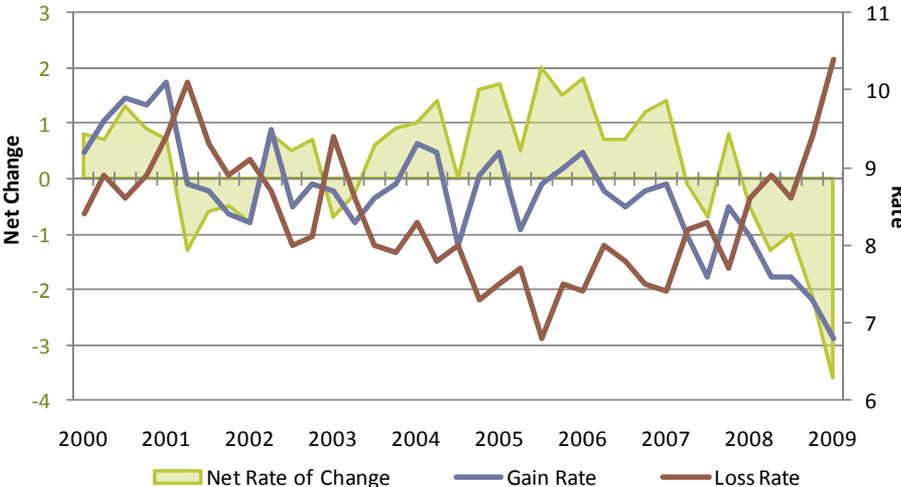
The Business Employment Dynamics program tracks information on job gains and losses from private businesses opening, expanding, closing and downsizing, providing another tool for analyzing the business cycle. From January to March 2009, Idaho’s opening and expanding businesses added just under 35,300 jobs while those closing or downsizing cut over 54,000. The net loss of more than 18,700 jobs was the largest recorded quarterly job loss, as well as the largest quarterly change in either direction, since the statistical series began in 1992.

**Idaho Private Sector Employment Dynamics Level
2000Q1-2009Q1**



Although the National Bureau of Economic Research marks the recession’s start in December 2007, Idaho’s economy began to slow during the second quarter of 2007. In the seven quarters that followed, Idaho lost jobs in all but the fourth quarter of 2007, and in spite of that quarter’s slight gain, the net number of jobs lost since the downward trend began exceeded 45,000 by the end of March 2009.

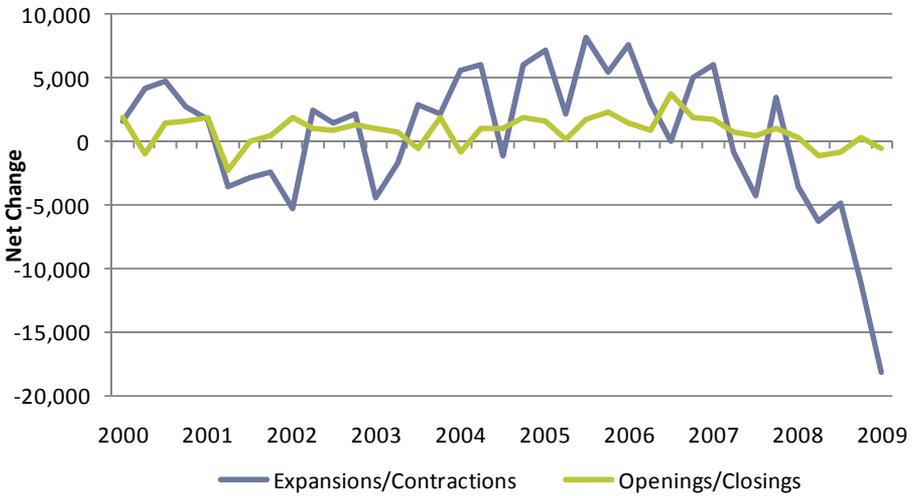
**Idaho Private Sector Employment Dynamics Rate
2000Q1-2009Q1**



The rate of job gains reached an all-time low in the first quarter of 2009 at just 6.8 percent — lower even than the fourth quarter 2008 rate of 7.3 — and that was more than offset by a 10.4 percent decline in jobs from businesses downsizing or outright closing. That was up from the 9.4 percent rate of the

fourth quarter, and the highest rate of job loss seen in Idaho since either the recession or the data series began.

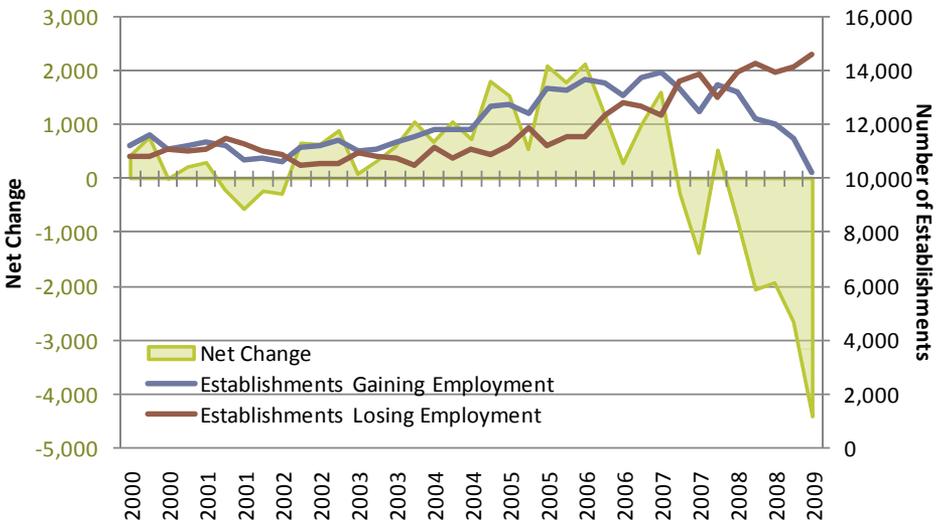
Components of Idaho's Private Sector Employment Gross Job Gains and Gross Job Losses 2000Q1-2009Q1



Contracting businesses shed over 18,000 more jobs than expanding businesses created during the first quarter of 2009, while new businesses created 600 fewer jobs than closing businesses eliminated.

Just over 10,200 of Idaho's 50,000 businesses added jobs during the first quarter of 2009 – 7,700 through expansion and 2,500 opening for the first time. But over 14,600 others eliminated jobs – 11,200 downsized and 3,400 closed altogether.

Number of Idaho Private Sector Establishments by Direction of Employment Change 2000Q1-2009Q1



U.S. DATA

Nationally, first quarter 2009 saw a net job loss of over 2.7 million stretching across all economic sectors. That exceeded the previous record loss of approximately 1.8 million jobs shed in the previous quarter by a wide margin, and brought the total net loss for the five quarters since the official beginning of

the recession up over 6.3 million jobs across the country. New and expanding businesses created 5.7 million jobs, nearly 1 million fewer than in the fourth quarter of 2008. That was more than offset by the loss of nearly 8.5 million jobs as even more businesses cut back or closed altogether.

As in fourth quarter 2008, utilities and education and health services were the only two sectors to experience a net job gain in the first quarter of 2009. Education and health services posted a net increase of only 8,000 jobs across the country during first quarter, and although the sector remained the only one to gain every quarter since the beginning of the series in 1992, first quarter's gain was much less significant than the gain of 176,000 jobs seen during fourth quarter of 2008. Meanwhile, utilities gained 2,000 jobs. These small gains were overshadowed by massive losses of 667,000 jobs in manufacturing, 558,000 in professional and business services, 432,000 in construction, 273,000 in retail trade and 213,000 in leisure and hospitality. Each of these five sectors except retail lost more jobs in first quarter 2009 than in any other quarter since the beginning of the recession. Additionally, four other sectors — wholesale trade, transportation and warehousing, financial activities, and natural resources and mining — experienced unprecedented losses of over 100,000 jobs each.

Alaska remained the state with the highest gross job gain at 9.7 percent followed by Wyoming's 8.1 percent. Montana had the third highest job gain at 6.9, and Idaho followed with a posted gross job gain rate of 6.8, ranking fourth nationally. All four states' gain rates, however, were offset by posting the nation's highest job loss rates — 11.9 percent loss in Wyoming, a 10.7 percent loss rate in Alaska, 10.4 percent in Idaho and 10.3 percent in Montana.

Overall, Idaho's increasingly higher rate of job loss, lower rate of job gain and a record number of jobs lost at both the state and national levels in first quarter of 2010 indicated that it would be some months yet until the recession would begin to loosen its grip on the economy.

**The Business Employment Dynamics data series includes job gains and losses at private sector establishments. The data represent the change in the number of jobs over time, which is the net result of increases and decreases in employment that occur at all businesses in the economy. More information on Business Employment Dynamics series is on the Web at www.bls.gov/bdm/.*

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IS THE 2010 CENSUS SAFE AND CONFIDENTIAL?

Many people are concerned about the confidentiality and security of the census. They ask, "How do I know if the person knocking on my door is truly a census enumerator?" and "How is my information going to be used?" The following is some information that should help ease such concerns:



CONFIDENTIALITY

- Every person working for the Census Bureau from the director to the enumerators must take an oath of confidentiality which prohibits them from revealing any information they learn in the course of their work for the rest of their life. The penalty for unlawful disclosure is a fine of up to \$250,000 or imprisonment of up to five years, or both.
- You will not be asked for your social security number by any census worker or on the official form.
- Census forms CANNOT be completed by telephone or on the Internet.

An example of the strict adherence to confidentiality occurred in 1980. FBI agents entered the census bureau's Colorado Springs office with warrants to

seize census documents, but were forced to leave with nothing. Courts upheld that no agency, including the FBI, has access to census data.

CENSUS WORKERS

- Will carry official identification cards and may have a sign in their vehicle's window stating U.S. Census Official Business. If you have any questions, you can call the census bureau to verify that they are a census worker.
- Have had to pass a federal background check.
- Are Idaho residents and most often reside in your community.
- Will not ask for your social security number or any other private information.

CENSUS FORMS

- An advance letter will be mailed to every street addresses between March 8 and 10.
- The census form will be mailed between March 15 and 17.
- A reminder postcard will be mailed between March 22 and 24.
- Mail your census form in when you receive it.
- Replacement forms will be mailed to non-responders between April 1 and 10.
- Census workers will begin visiting homes that did not respond to the census or could not receive the form because they do not receive mail at their home.
- Census forms CANNOT be completed by telephone or on the Internet.

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NORTHERN IDAHO DIVERSIFIED SINCE LAST MAJOR RECESSION

The Panhandle and north central Idaho have endured economic hard times before but eventually emerged stronger for the experience. Before the current economic downturn, or the Great Recession as it's been dubbed by some economists, the worst recession since the Great Depression was in 1981-1983 and lasted 16 months. A milder recession in the 1970s lasted 20 months. While the start of the current recession was called in December 2007 and an official end date has not been officially declared, some economists — including Robert Hall of the National Bureau of Economic Research in December — estimated it ended sometime in the third quarter of 2009, lasting at least 20 months, which is twice as long as the average post-war recession.

Northern Idaho's diversification since the 1980s has helped reduce its vulnerability to recessions. The area's incredible reliance on volatile timber and mining jobs during the early 1980s — when they made up one in five of non-farm jobs — is a major reason why northern Idaho suffered so much in the recession of the early 1980s. Today, timber and mining jobs make up less than one in 20 of the region's nonfarm jobs.

The region was just beginning to recover from the 1981-1983 recession when another recession caused more job losses and business closures between 1984 and 1986. When a new recession cuts off the recovery of another, economists refer to them jointly as a double dip.

THE PANHANDLE IN THE EARLY 1980s

As bad as times are now, they pale in comparison to what the Panhandle experienced in the early 1980s.

In late 1981, the Bunker Hill smelter, at that time Idaho's largest manufacturing operation at a single site, closed. Several other mines closed or laid off

workers. Shoshone County lost 2,540 of its 4,200 mine and smelter jobs. Its unemployment rate peaked at 38.3 percent in September 1982 and remained above 10 percent for the next seven years. A population exodus began that drained the county of 28 percent of its population in the 1980s.

While the mining industry was collapsing, exorbitant interest rates – the prime rate exceeded 20 percent in late 1981 – forced U.S. housing starts to extremely low levels, and many mills closed, shut down or laid off workers. The mill's problems led to the loss of logging and transportation jobs. The net result was the permanent loss of more than 1,500 timber industry jobs while hundreds of other timber workers experienced long periods of unemployment. Timber-dependent Benewah County's unemployment rate peaked at 27.8 percent in October 1982.

Many other industries suffered huge job losses. High interest rates and significant population losses in most of the Panhandle brought construction and real estate to a near halt. The loss of so many high-paying timber and mining jobs led to sharp reductions in retail and service employment. Lower incomes, declining populations and large declines in property values, especially in Shoshone County, resulted in the loss of government jobs. The region's unemployment rate peaked at 19.4 percent in October 1982.

NORTH CENTRAL IDAHO IN THE EARLY 1980s

North central Idaho also experienced even more pain in the early 1980s than it has in the last two years.

The region's employment in logging and wood products manufacturing fell from 4,458 in 1981 to 3,386 in 1982. Timber-dependent Clearwater and Idaho counties saw their unemployment rates shoot up to 33.8 percent and 20.1 percent respectively in the fourth quarter of 2008.

High interest rates and declining demand for agricultural products because of the national recession caused tremendous problems for farmers. Many farmers lost their farms and others came close. The decline in agricultural income, combined with the effects of high interest rates on the purchases of motor vehicles and farm equipment, led to a large reduction in spending especially in Idaho, Latah and Lewis counties.

The tables on pages 11-15 compare the two most severe post-war recessions – the current one and the 1981-1983 recessions – from the month before the recession began and two years later, by region and county.

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CANADIAN VISITORS DRAWN BY EXCHANGE RATE

The Idaho Panhandle's neighbors to the north are always welcome, but during this recession they've been especially welcome.

The U.S. – Canadian currency exchange rate significantly affects the number of Canadians who visit the Idaho Panhandle to shop and play because their money buys more. When the Canadian dollar, called the "loonie" for the picture of the loon on the coin, rises in value relative to the U.S. dollar, Canadians have greater spending power in the U.S., so they are more likely to vacation in the U.S. or make shopping trips south of the border.

While the entire Panhandle sees more Canadian visitors when the loonie increases in value, Boundary, Bonner and Kootenai counties are most affected by the surge in visitors.



Continued on page 16.

Labor Force and Nonfarm Jobs in Northern Idaho, Two Recessions Compared

Region 1	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	108,770	103,920	4.7%	52,670	50,020	5.3%
Unemployed Residents	13,050	4,402	196.5%	7,300	5,360	36.2%
Percent of Labor Force Unemployed	12.0%	4.2%		13.9%	10.7%	
Employed Residents	95,720	99,518	-3.8%	45,370	44,660	1.6%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	79,120	84,450	-6.3%	35,290	37,800	-6.6%
Manufacturing	7,530	8,370	-10.0%	7,190	8,250	-12.8%
Benewah County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	4,130	3,926	5.2%	3,860	3,590	7.5%
Unemployed Residents	710	276	157.4%	560	430	30.2%
Percent of Labor Force Unemployed	17.3%	7.0%		14.5%	12.0%	
Employed Residents	3,420	3,650	-6.3%	3,300	3,160	4.4%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	3,410	3,670	-7.1%	2,840	2,830	0.4%
Manufacturing	520	630	-17.5%	1,300	1,170	11.1%
Bonner County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	21,020	20,536	2.4%	11,180	10,190	9.7%
Unemployed Residents	2,570	793	224.2%	1,390	1,390	0.0%
Percent of Labor Force Unemployed	12.2%	3.9%		12.4%	13.6%	
Employed Residents	18,450	19,744	-6.6%	9,790	8,800	11.3%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	13,340	15,140	-11.9%	6,970	6,780	2.8%
Manufacturing	2,020	2,310	-12.6%	1,840	1,570	17.2%

Continued on next page.

Boundary County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	4,290	3,934	9.1%	3,480	3,220	8.1%
Unemployed Residents	700	300	133.2%	370	360	2.8%
Percent of Labor Force Unemployed	16.2%	7.6%		10.6%	11.2%	
Employed Residents	3,590	3,633	-1.2%	3,110	2,860	8.7%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	3,190	3,300	-3.3%	1,990	1,990	0.0%
Manufacturing	290	280	3.6%	480	550	-12.7%
Kootenai County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	73,020	70,350	3.8%	27,650	25,260	9.5%
Unemployed Residents	8,010	2,120	277.8%	3,510	2,740	28.1%
Percent of Labor Force Unemployed	11.0%	3.0%		12.7%	10.8%	
Employed Residents	65,010	68,230	-4.7%	24,140	22,520	7.2%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	54,670	57,450	-4.8%	18,110	17,690	2.4%
Manufacturing	4,490	4,900	-8.4%	3,250	3,190	1.9%
Shoshone County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	6,300	5,903	6.7%	6,500	7,750	-16.1%
Unemployed Residents	1,060	345	207.5%	1,470	440	234.1%
Percent of Labor Force Unemployed	16.8%	5.8%		22.6%	5.7%	
Employed Residents	5,240	5,559	-5.7%	5,030	7,310	-31.2%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	4,510	4,890	-7.8%	5,380	8,500	-36.7%
Manufacturing	210	250	-16.0%	320	1,770	-81.9%

Continued on next page.

Region 2	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	50,360	47,838	5.3%	42,850	42,030	2.0%
Unemployed Residents	4,310	1,894	127.6%	4,000	3,930	1.8%
Percent of Labor Force Unemployed	8.6%	4.0%		9.3%	9.4%	
Employed Residents	46,050	45,944	0.2%	38,850	38,100	2.0%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	46,870	49,790	-5.9%	32,430	33,850	-4.2%
Manufacturing	3,580	4,110	-12.9%	6,900	7,590	-9.1%
Clearwater County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	3,290	3,070	7.2%	4,780	4,980	-4.0%
Unemployed Residents	600	265	126.7%	790	880	-10.2%
Percent of Labor Force Unemployed	18.4%	8.6%		16.5%	17.7%	
Employed Residents	2,690	2,805	-4.1%	3,990	4,100	-2.7%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	2,880	3,040	-5.3%	3,260	3,590	-9.2%
Manufacturing	210	200	5.0%	1,190	1,480	-19.6%
Idaho County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	7,150	6,810	5.0%	6,370	6,480	-1.7%
Unemployed Residents	940	464	102.7%	850	870	-2.3%
Percent of Labor Force Unemployed	13.1%	6.8%		13.3%	13.4%	
Employed Residents	6,210	6,347	-2.2%	5,520	5,610	-1.6%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	4,340	4,740	-8.4%	3,440	3,770	-8.8%
Manufacturing	330	500	-34.0%	680	1,030	-34.0%

Continued on next page.

Latah County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	18,060	16,865	7.1%	13,410	13,410	0.0%
Unemployed Residents	1,320	487	171.0%	930	690	34.8%
Percent of Labor Force Unemployed	7.3%	2.9%		6.9%	5.1%	
Employed Residents	16,740	16,378	2.2%	12,480	12,720	-1.9%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	15,460	16,290	-5.1%	1,080	10,410	-89.6%
Manufacturing	330	430	-23.3%	300	850	-64.7%
Lewis County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	1,680	1,612	4.2%	2,250	1,990	13.1%
Unemployed Residents	140	42	229.5%	190	200	-5.0%
Percent of Labor Force Unemployed	8.5%	2.6%		8.4%	10.1%	
Employed Residents	1,540	1,570	-1.9%	2,060	1,790	15.1%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	1,410	1,470	-4.1%	9,600	940	921.3%
Manufacturing	150	150	0.0%	740	120	516.7%
Nez Perce County	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	20,180	19,480	3.6%	16,030	15,180	5.6%
Unemployed Residents	1,310	636	106.0%	1,240	1,300	-4.6%
Percent of Labor Force Unemployed	6.5%	3.3%		7.7%	8.6%	
Employed Residents	18,870	18,844	0.1%	14,790	13,880	6.6%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	22,780	24,250	-6.1%	15,050	15,150	-0.7%

Continued on next page.

State of Idaho	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	755,360	736,900	2.5%	443,900	434,900	2.1%
Unemployed Residents	68,800	20,200	240.6%	47,500	32,200	47.5%
Percent of Labor Force Unemployed	9.1%	2.7%		10.7%	7.4%	
Employed Residents	686,560	716,700	-4.2%	396,400	402,700	-1.6%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	607,100	661,300	-8.2%	323,600	331,800	-2.5%
Manufacturing	54,900	65,600	-16.3%	53,000	54,500	-2.8%
United States (in thousands)	Nov 2009	Nov. 2007	Change	June 1983	June 1981	Change
<i>Individuals by Place of Residence</i>						
Civilian Labor Force	153,877	153,877	0.0%	100,633	100,298	0.3%
Unemployed Residents	15,375	7,212	113.2%	11,246	8,098	38.9%
Percent of Labor Force Unemployed	10.0%	4.7%		10.1%	7.5%	
Employed Residents	138,502	146,665	-5.6%	89,387	92,200	-3.1%
<i>Jobs by Place of Work</i>						
Nonfarm Payroll Jobs	132,223	139,090	-4.9%	90,829	92,288	-1.6%
Manufacturing	11,737	13,795	-14.9%	17,078	18,890	-9.6%

Retail outlets – from grocery stores in Bonners Ferry and Sandpoint, Wal-Mart and the mall in Ponderay to Coeur d’Alene’s Silver Lake Mall, the Post Falls factory outlets and the big box stores – see many more Canadian license plates in their parking lots when the loonie’s value is high.

Gasoline, which is higher-priced in Canada to begin with, is especially appealing to Canadians during such times, prompting some residents to make a special trip to Porthill. But most popular seems to be shopping and hitting the casino in Bonners Ferry. A surge in Canadian visitors to the Kootenai River Inn Casino and Spa and Silverwood Theme Park is common. Restaurants and other local hotels also benefit from the heightened interest in the U.S.

At the same time, the exchange rate makes the U.S. dollar weaker in Canada, encouraging locals to stay close to home, keeping their entertainment and shopping dollars in the area.

A rise in the value of the loonie also benefits Idaho’s timber industry. When the loonie value rises, Canadian lumber and other wood products become more expensive, reducing the flow of Canadian lumber into the U.S.

In the last few years, the loonie has risen considerably in value. It had fallen to a low 71 cents in early 1986 then rose gradually until it reached parity – a 1 to 1 exchange rate – in late 2007. The loonie hadn’t been at parity with the U.S. dollar since the late 1970s.

Since late 2007 the exchange rate, which normally moves up or down slowly, has been on a rollercoaster ride. The loonie plummeted to 79 cents by May 2009. Since then, it has risen back to 94 cents. The graph below shows how the value of the Canadian loonie in U.S. currency has changed from January 1983 to December 2009.

Over the last 20 years, the loonie has averaged 78 cents on the U.S. dollar. So, today’s 94 cents buys 21 percent more than the loonie normally has.

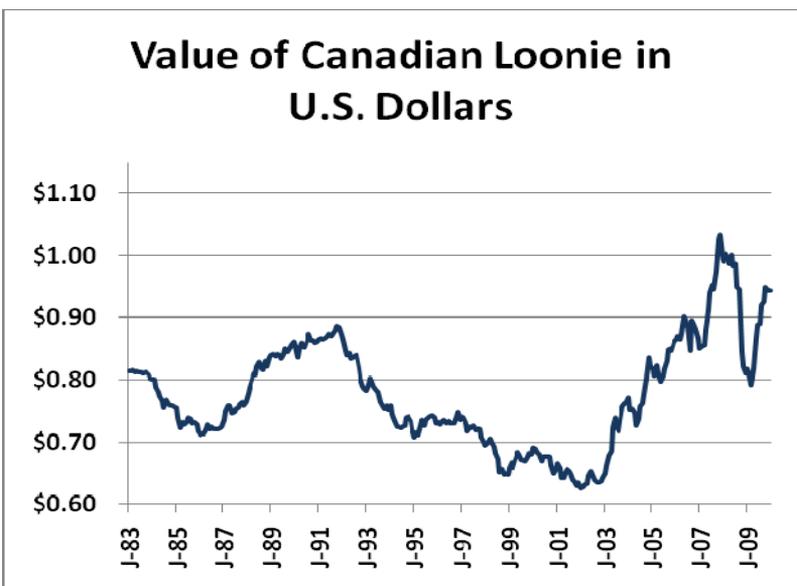
The loonie’s high value has helped Panhandle retail stores, restaurants and tourist operations from experiencing as severe losses as they otherwise would have as Americans reduced their spending.

Canadians were much less affected by the global recession so their ability and willingness to spend has been stronger than that of U.S. residents.

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POPULATION CHARACTERISTICS INFLUENCE PANHANDLE GROWTH

The composition of a population plays a significant part of determining not only which industries to attract to a region but, more importantly, which industries to retain.

The median age for Idaho is 34.4; the median age in the Panhandle region is 40. Bonner County holds the highest median age, which was 43.3 in 2000; Shoshone and Benewah counties are close behind. Kootenai County retains the lowest median age of 37.6, higher than the state median. And approximately 12 to 13 percent of each of the county's population base is comprised of individuals 65 years and over.

Coincidentally, the three highest median-aged counties share similar industries - mining and logging as well as wood product manufacturing. With current safety laws in place such industries typically have a higher average age.

An aging population means a slow-growing labor force. This has been the case in Benewah, Bonner and Shoshone counties year-over-year. With construction and the value of the dollar both being down, the economic downturn definitely plays a toll on the industries as well. Both industries have seen an overall average decline in the past decade, dislocating some of these workers. Such an expertise and specific skill set makes it difficult for these workers to find similar skilled jobs in the area. And due to the economic downturn, baby boomers are forced to stay in the work force longer, therefore, slowing the growth even further.

The Panhandle's median age group of 40-44 years is expected to increase at a much slower rate than the surrounding age groups - only 4.8 percent over the next decade, making up only 6.1 percent of the total population, according to Economic Modeling Specialists Inc. The data indicate that the aging populations living today in the Panhandle are expected to stay in the region. However, the 30-something population group is expected to grow roughly 53 percent during the same period of time, nearly 15 percent of the total population.

Although the number of residents 65 years and older are more likely to outnumber the 30 somethings, an established younger population provides public funds that also benefit the older population. Retaining the younger and elder population bases balance out - both feed into the economy in different ways. The young pay for the public funds the seniors soak up and the seniors spend, creating a cyclical pattern for the generations to come.

To retain a vibrant community, local educational establishments working with local work force efforts will need to continue to create curriculums that will support the existing and emerging industries while in turn, retaining the younger population base and supporting higher wage jobs.

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LUMBER INDUSTRY SHIFTS GEARS IN UNSTABLE ECONOMY

With the economic downturn and the decline in the lumber industry, mills are looking for new ways to expand and diversify. A growing export market could help with that goal.

NEW PRODUCT

Idaho Forest Group's mill in Chilco has started producing 45mm thick boards of varying widths for a Japanese buyer. The mill typically produces 2x4, 2x6, 2x8, 2x10 and 2x12 boards at a speed of approximately 1 million board feet per day. Historically, the Forest Group had enough business in the domestic market but the economic downturn has forced the mill to diversify making production of export grade lumber more viable.

China has emerged as another promising market. New building codes require contractors in China to use high grade cement, steel and wood, and the contractors prefer Douglas fir, which is only native to three places in the world – the Pacific Northwest, New Zealand and France. Mill production of the Douglas fir requires more precision and skill and more handling of the stock.

Recently, the Grangeville mill has produced and exported 30 containers for China. The customer is a large furniture manufacturer.

TECHNOLOGY

Technological advancements have given mills like the Forest Group a competitive advantage for new markets, like its ability to feed, scan, adjust saws and manufacture lumber simultaneously. New technology requires a highly skilled work force who earns wages reflecting their expertise, ranging from \$16 to \$26 an hour for some mills in Idaho. Scanners and computers translate an ordinary looking log into 39,000 geometric data points that drive the manufacturing process, maximizing every piece of the log.

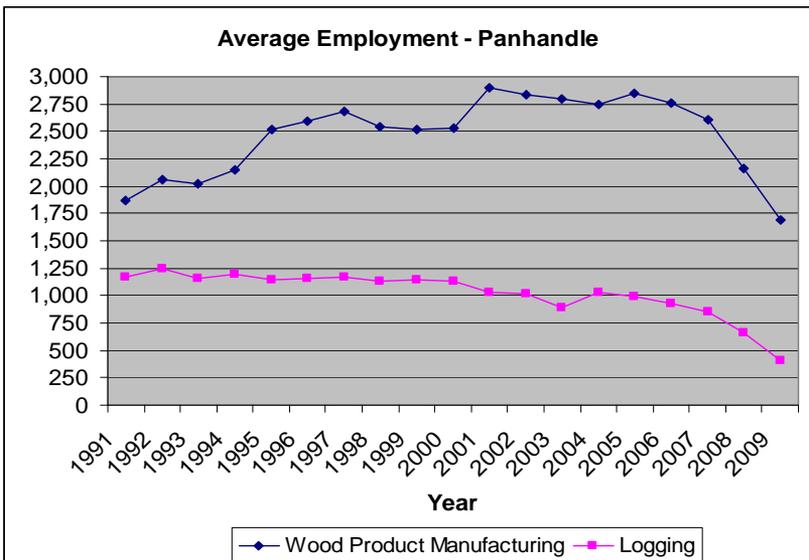
The Forest Group uses Lineal High Grade, an application that assures quality through a precise look at each board while increasing production at a much higher rate of 3,000 lineal feet per minute, or approximately 30 miles per hour.

INDIRECT INDUSTRIES

To keep up with this changing industry, the supply chain has to do so as well. From trucking to logging companies, every aspect of the supply chain is crucial in this industry and to the Panhandle. Loggers who keep up with new environmental policies and laws will find themselves more competitive in the market. Accessibility to the transportation network helps mill products available to the global economy.

HISTORY OF LUMBER INDUSTRY

- The lumber industry has played a large role in Idaho’s Panhandle dating back to the early 1900s. While residents have seen a lot of ups and downs, most recent history shows dramatic declines in wood manufacturing and logging. From 1991 to 2000, wood manufacturing increased 51 percent in the Panhandle counties, while logging increased a mere 6 percent. The lumber industry in the following decade saw much harder times, with wood products manufacturing declining nearly 37 percent; logging fell substantially by 58 percent. However, looking over the entire 20 year pe-



riod, wood manufacturing only declined 9 percent, an average annual rate of 0.45 percent. Logging decreased 57 percent during the same period of time or at an annual declining rate of 2.8 percent. Wood manufacturing peaked in 2001, while logging dropped by 9.29 percent from 2000 to 2001. The chart on page 13 shows the patterns of the lumber industry in the Panhandle as a whole.

- Riley Creek Lumber and Bennett Forest Industries merged in September 2008 to form Idaho Forest Group. The company has four locations employing 485 employees, three the Panhandle: Chilco, Laclede, and Moyie Springs; and one in north central Idaho, Grangeville. The Chilco mill employs 220.

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IDAHO FALLS EARNS ATTENTION AS GOOD PLACE TO LIVE

Idaho Falls was named as Idaho's Best Place to Raise Your Kids for 2010 by BusinessWeek. One city was selected from each state, and Meridian and Pocatello were runners up. Cities were ranked based on school performance, number of schools, household expenditures, crime rates, air quality, job growth, family income, museums, parks, theaters, other amenities, and diversity, with affordability, safety and school test scores given the greatest weight.

Near the same time, the Idaho Falls Post Register and the Idaho Statesman released survey results from a Community Insight Best Places to Live Program. The Community Insight Best Places to Live Program is a subscription-based service from POPULUS, a survey research organization, offered to community newspapers to determine what local citizens want in their communities and how to communicate, monitor and deliver it.

Regarding city satisfaction, 88 percent of Idaho Falls respondents said they were either satisfied or very satisfied with the city. Respondents also stated that schools/education was the most important issue and crime was second most important. Respondents felt that the top five strengths for the city are available housing close to work; preservation of and access to natural areas and open space; shopping opportunities; quality of air and proximity of city parks in relation to housing. Respondents gave high marks to predicting they would stay in the city for at least the next five years and recommending the city to close friends and family as a good place to live. Favored aspects of the city were overall quality of life at 67 percent followed by location and cost of living. Least favored included weather and career opportunities. Over 80 percent of respondents said that quality of life in the region is either excellent or above average. Respondents were fairly satisfied with the quality of healthcare received but felt that associated costs could be lower. Not many agreed with mandatory health insurance and no one was in favor of borrowing money to finance health care.

While the Idaho Falls and Boise areas had good results for a first-time survey, coordinators hope participation will increase in time so that the survey will provide more statistically accurate information. The survey respondents were older, wealthier and better educated than the general population, and the challenge of getting a broader representation of respondents in future surveys is being evaluated. The survey results are available at www.postregister.com under the Community Insight – POPULUS bar at the top.

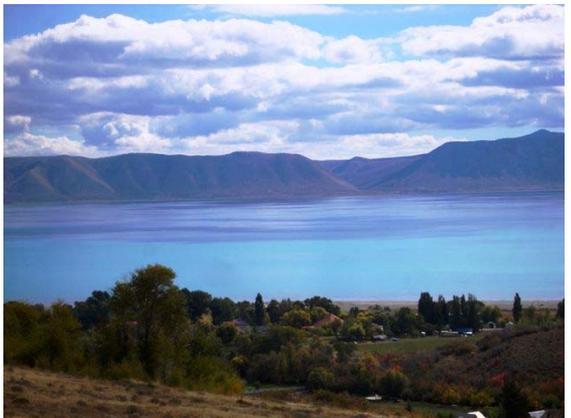
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BEAR LAKE: MORE THAN WATER SHARED BY IDAHO AND UTAH

Bear Lake County lies at the southeastern corner of Idaho, shares borders with Utah and Wyoming with a 2008 population of 5,798. Rich County, Utah, lies at the northeastern border of Utah with a 2008 population of 2,205. Both counties share Bear Lake, the second largest natural freshwater lake in Utah often referred to as the Caribbean of the Rockies due to its suspended limestone deposits in the water that give it a unique turquoise-blue color. The lake is over 18 miles long and just over seven miles wide, boasting all types of water sports, fishing with a few unique species that have evolved and live naturally in the water, and beautiful sandy beaches. While Bear Lake Valley was once a pass-through for travelers on their way to Salt Lake City, Jackson Hole and Yellowstone National Park, in the past few years it has become a destination – between 500,000 to 700,000 people travel Highway 89 per year.

The valley was once covered with raspberry plants along with fruit stands up and down the valley. About a decade ago, many of the plants were wiped out from disease, though some patches were saved and nurtured by individuals. Most commercial raspberry stands are now in Laketown and Garden City, both in Utah. Garden City is the site of the annual Bear Lake Raspberry Festival established in 1984. This year's event, Aug. 5-7, will include crafts, a parade, dancing, live entertainment, rodeos and more. Up to 40,000 people attend the festival.

Besides the area's typical summer events and attractions, the Bear Lake Convention and Visitors Bureau also promotes off-season activities. The valley has 350 miles of groomed trails for snowmobiling between the two states. Two ski resorts lie within a 50-mile radius of Garden City, Utah, and Montpelier, Idaho. Cross-country skiing, ice fishing and hunting are also popular. Montpelier Parks & Recreation started a sports league program that has been enthusiastically embraced. The National Oregon/California Trail Center located in Montpelier is also a big boost to the valley's economy and unity. The center offers a unique experience where families and individuals become members of a wagon train headed west, guided by a live cast of pioneers whose dialogue and stories make the adventure come alive. The center also hosts traveling exhibits – a Smithsonian Institute exhibit is scheduled this summer from July to August.



Bear Lake, known for its unique turquoise-blue color, offers recreation both summer and winter. *Photos: Bear Lake Convention and Visitors Bureau.*



The coordination and cooperation between the cities and counties that share Bear Lake has been invaluable. The area is marketed in the Wasatch Front as a close and affordable family-friendly vacation destination with scenic byway stops along the way. Shuttle busses run regularly during the summer

months of heavy tourism between the two states for employees and tourists. The Idaho side is seeing increased interest in investors of second homes, while the Utah side has two large developments underway that will include private and public beach front, beach houses and water sport rentals. The majority of the facilities and beaches are currently located on the Utah side. The valley also is rich in camp sites and has two state parks each named Bear Lake State Park with one in Utah and one in Idaho. The Bear Lake Convention and Visitors Bureau serves the entire valley and maintains an up-to-date calendar of events and activities designed for travelers and area residents. Their Web site is www.bearlake.org with links to other areas of interest.

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SOUTHWESTERN IDAHO CONTINUES SHEDDING JOBS

The seasonally adjusted unemployment rate for the Boise-Nampa Metropolitan Area was 9.2 percent in December, a decrease of three-tenths of a point from November and nearly a percentage point below the record high 10.1 percent experienced in July. The current rate is three full percentage points above the 6.2 percent in December 2008 and nearly six percentage points above the 3.4 percent in December 2007 when the current recession began. The increase in the unemployment rate underscores the dramatic impact the current recession has had on the region. Since December 2007, 26,300 fewer people were employed and 16,700 more workers were without jobs.

The other five southwestern counties outside the metro area have been hit hard as well. During December the 10-county region had the highest and the lowest county unemployment rates in the state. Adams County had the highest rate at 24.3 percent followed by Valley County at 19.3 percent. Owyhee County had the lowest rate at 4.1 percent. Of the 10 counties, seven had double-digit rates.

The graphs on page 17 show the impact of the recession on the labor force in southwestern Idaho.

Nonfarm jobs in the Boise-Nampa area decreased by 780 in December to 248,700, a 0.3 percent drop from November. Over the year, nonfarm jobs in the metro area fell dramatically by 5.6 percent, or 14,470. This is the lowest level since March 2005.

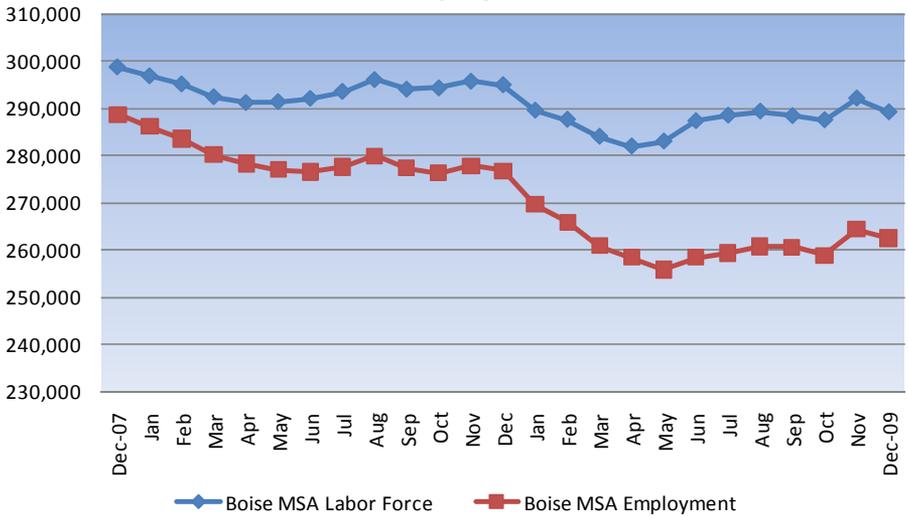
Goods-producing industries reported the majority of the job loss, dropping 490 from November and 6,020 from December 2008. The majority of the month-over-month job loss was felt in construction. The jobs lost from December 2008 were evenly split between construction and manufacturing durable goods, each with a loss of 3,100. While a third of the job loss was concentrated in computer and electronic products manufacturing, every major sector has experienced a job loss in the past year as the economy tumbled to its lowest level in many years.

The dramatic loss in construction – 310 from November and 3,100 for the 12-month period – continued to be a direct result of the national housing and financial crisis.

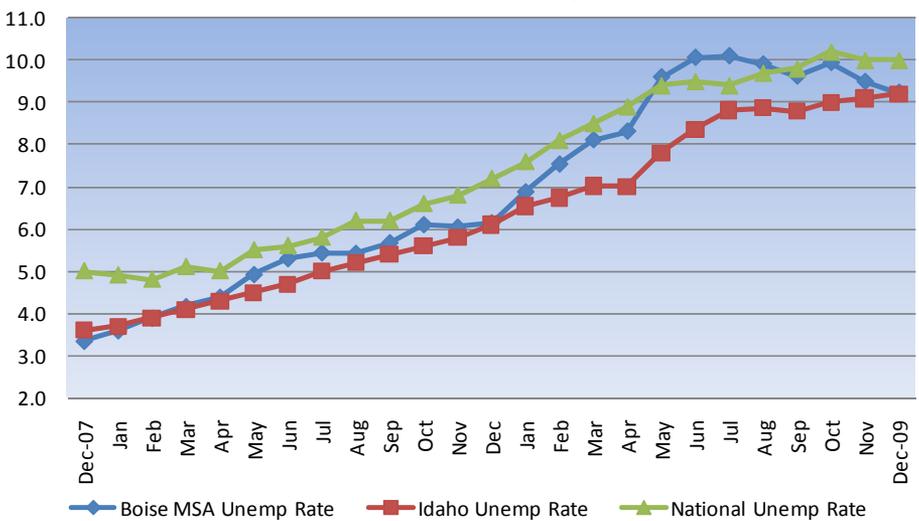
The effect of these layoffs is rippling through retail trade, health care and restaurants.

Since December 2008 retail trade lost 2,770 jobs, and hiring for the holiday shopping season was minimal. Most of the hiring is done in November. This year the October-to-November hiring was at about the same level as 2008, around 700, which was half the increase in 2007. The November-to-

Boise MSA LF & Employment, 2008-2009



Boise MSA, Idaho & National Unemp Rates, 2008-2009



December hiring was around 300 which is been typical over the past few years. Consumers' reluctance to spend money continued into 2009 and as a result hiring continued to be down.

As the region moves into the new year, the job loss will continue in all major sectors. Both public and private employers are trying to keep their heads above water. The impact of the stimulus dollars on state and local economies will be critical.

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Area and County Developments

PANHANDLE

Benewah, Bonner, Boundary, Kootenai & Shoshone counties



Meet Alivia Body, the new regional economist for the five-county Idaho Panhandle, based in Coeur d'Alene. She holds an economics degree from the University of Michigan and an associate degree in business administration from Oakland Community College. Alivia worked as an economic and environmental planner for HDR Inc. in Spokane prior to joining the Idaho Department of Labor. To contact Alivia, call (208) 769-1558 ext. 3486 or e-mail her at alivia.body@labor.idaho.gov.

2009: THE YEAR IN REVIEW

IDAHO PANHANDLE

The last two years were the third period that Panhandle residents have endured the greatest economic turmoil of this century. Although the relative suffering now is less than in the early of 1980s or the Great Depression, the region's enormous population growth in recent decades means that even though the unemployment rates are lower, the number of unemployed hit record numbers by late 2009. In November, more than 13,000 Panhandle residents were unemployed and actively seeking work. The previous high had been in October 1982, when about 10,000 Panhandle residents were unemployed.

The 2009 labor force statistics — including unemployment rate — used in this report are preliminary numbers, while the 2009 payroll job statistics are estimates — using the actual data for the first half of the year and then estimating the second half of the year based on a sample of employers and known openings, closings, expansions and reductions in force.

BENEWAH COUNTY YEAR IN REVIEW

2009 brought more economic trouble to Benewah County. Its nonfarm jobs plummeted 6 percent from 3,575 to 3,370, after falling 2 percent from 3,656 the year before. The county's rate peaked at 19.6 percent in October, its highest level since August 1996. It decreased to 17.5 percent in November. During the year, about 200 people left the county's labor force — some moved out of the county to find jobs elsewhere and some discouraged workers gave up looking for work. The county's population probably fell from 9,352 in 2008 to 9,250 in 2009.

The county's most important industrial sector, wood products manufacturing, fell 17 percent from 464 jobs to 385 jobs in 2009. Two years before, the industry employed 541 people. The first few months of 2009 were especially hard, but toward the end of the year the sector was showing some improvement partly because the price of framing lumber rose from \$192 per thousand board feet — its lowest level in 26 years — to \$250. Early in 2009, the county's largest manufacturer, the Potlatch lumber and plywood complex in St. Maries, laid off 33 workers and reduced its workers to only three days a week for several weeks. In early May, the complex started operating at full capacity for the first time in over a year and recalled some workers who had been laid off. The

plywood plant, which has been making industrial-grade plywood in recent years, returned to making construction-grade sheathing. The complex employs more than 250 people.

2009 marked the end of an era. Potlatch closed the Clarkia landing, where it sorted, stored and shipped logs to area mills for many decades, and the company's St. Maries River Railroad quit running between Clarkia and St. Maries.

The troubles in the wood products industry led to the loss of another 40 logging jobs, after losing 50 jobs in 2008. The trucking industry managed to hold its own, despite the reduced industrial activity throughout the region.

Other manufacturing jobs rose from 81 in 2007 to 112 in 2008 and then to 122 in 2009. Berg Integrated Systems in Plummer, whose majority owner is the Coeur d'Alene Tribe, was responsible for the sector's growth. Now, the company employs about 90, Berg fabricates giant fuel bladders and customized flexible containers that transform into offices, medical clinics and other facilities for military and humanitarian missions. Employment at the county's next largest non-wood manufacturer, Peet Shoe Dryers in St. Maries, is down slightly because their electric and propane shoe dryers are used most by loggers and construction workers, two of the occupations most affected by the recession.

Mining employment fell from 59 in 2008 to 33 in 2009. Emerald Creek Garnet near Fernwood, which normally employs more than 40, shut down for more than three months in early 2009 because of record snowfall last winter and lower grades of garnet. When it reopened, mining moved to an area with higher grades. The mine is the nation's largest producer of industrial garnets used in filtration, sandblasting and abrasives. A new mining operation, Plummer Rock Products, opened this summer. It provides crushed rock, boulders, topsoil and fill dirt.

Leisure and hospitality jobs declined slightly from 150 jobs to 140 jobs, mostly because fewer people are frequenting restaurants during these harsh economic times. Hotel-motel receipts were 40 percent higher at \$608,030 in the first 10 months of 2009 than the same months of 2008 because of the addition of a few small lodging places and the growing reputation of the Trail of the Coeur d'Alenes, the 79-mile bicycle trail on a former railroad bed that stretches from Mullan to Plummer. Despite the rise, the county's hotel-motel receipts made up only 1 percent of total hotel-motel receipts in the Panhandle region.

The Coeur d'Alene Tribe continues to be the county's economic powerhouse. It has been the largest source of new jobs in the county throughout the last two decades. In 2009, employment at its medical clinic, school, farm, retail operations, tribal headquarters and other enterprises in Benewah County rose from 547 to 620. These numbers do not include Berg Integrated Systems and the tribe's casino, hotel and golf course, where it employs more than 1,000 in Worley, just over the Benewah-Kootenai county line.

With Inland Northwest residents reducing their trips to Las Vegas, they are visiting the casino in greater numbers. The tribe broke ground in June on a \$75 million addition. When it opens in June 2011, the addition will provide 105 guest rooms, bringing the hotel up to 307 rooms. It also will provide more casino space, a gourmet dining room, fitness center, 15,000-square foot spa and natural amphitheater for concerts and fireworks. The addition is expected to create 150 new jobs.

The tribe is in the midst of several other construction projects. It received a \$2 million federal stimulus grant to build 10 homes for low-income and moderate-income families in Plummer. Grants also are allowing the tribe to under-

take a \$500,000 expansion of the sewer lagoon system, a \$1 million renovation of Agency Road and construction of a \$460,000 maintenance garage for its Citylink bus service.

With the number of unemployed residents soaring, employed workers becoming more conservative with their spending and tourists also pinching their pennies, taxable sales fell 24 percent to \$27.1 million in the first nine months of 2009 from \$35.9 million in the same months the year before. They already had fallen 7 percent in 2008. Despite the reduced spending, retail employment has hovered around 340 jobs since 2007, but many retail employees are working fewer hours.

The recession caused most other industries to falter. The health care industry, which normally is a source of job gains, has stood firm at 430 jobs. Most other services showed small jobs losses in 2009.

Construction remained depressed, despite the tribe's projects, on-going sewer system overhaul in Plummer, the completion of the new Tensed fire station and the start of the new Plummer library building. Construction fell from 200 jobs in 2006 to 110 in 2009. Declining revenues forced the loss of 40 jobs from state government, school districts and cities.

BONNER COUNTY YEAR IN REVIEW

Bonner County continued to lay a foundation for strong, diversified growth in the future, but could not enjoy those benefits yet because of the national economic meltdown. Nonfarm jobs fell an estimated 6 percent from 14,556 in 2008 to 13,650 in 2009, after falling 3 percent from 14,942 in 2007.

The county's unemployment rate peaked at 12.6 percent in October, its highest level since April 1991. The county's average unemployment rate for 2009 was 10.4 percent, nearly double its 2008 average of 5.3 percent. About 1,860 people left the county's labor force by moving to find jobs elsewhere or by giving up on the job search.

For the first time since the early 1990s, it's likely more people moved out of the county than moved in. Birth rates declined, which typically occurs during recessions. But births still exceeded deaths slightly, allowing the population to remain the same instead of experiencing its normal rapid increase. The Sandpoint area probably gained a little population, while the rest of the county, particularly the timber-dependent Priest River area, lost population.

Construction and related industries — building material wholesalers and retailers, appliance, garden and landscaping businesses, architects, engineers, mortgage, title insurance and real estate — lost about 400 jobs in 2008, or roughly 15 percent of the jobs they had in 2007. Construction and related industries appears to have lost another 400 jobs this year. If it weren't for the massive bypass project in Sandpoint and federal stimulus projects, including the Dover Bridge replacement and Forest Service construction projects, the losses would have been even greater.

A depressed housing market has taken a severe toll on the county's mills and logging companies that employed 1,140 in 2006, then dropped to fewer than half as many people — 470 — in 2009. The biggest loss occurred in October 2008, when JD Lumber closed the county's largest mill, putting 216 people out of work. The county's highest employment ever for logging and wood products manufacturing was 1,182 in 1990. In the harsh 1981-1982 recession, they employed 972. In the last half of 2009, some hopeful signs suggested that the timber industry will recover some jobs in the coming year.

The county's manufacturers outside the wood products sector enjoyed much better luck. Bonner County added about 960 non-wood products manufacturing jobs between 2000 and 2009, far more than any other Idaho county.

Despite the recession, which cost the U.S. 2.1 million manufacturing jobs, the county's non-wood manufacturing sector added 60 jobs in 2009, after adding 110 the year before. The sector employed about 1,640 in 2009. Quest Aircraft, the maker of single-engine cargo planes in Sandpoint, has been the source of much of the sector's growth in the last two years. Its employment soared from 170 jobs at the end of 2007 to 330 by the end of 2009. Unicep Packaging, the Sandpoint maker of one-dose plastic applicators, saw its employment grow from 107 in May 2008 to 165 in November 2009. Pure Health Solutions, a Sandpoint manufacturer of water purification systems, landed on Inc. magazine's list of the 5,000 fastest-growing private companies in the U.S. It currently employs about 60 people. Litehouse Foods—the manufacturer of salad dressings, dips and marinades in Sandpoint—introduced a new line of ciders this fall, which are proving to be a success. More than 360 people work at the Litehouse headquarters and production facility on Boyer Avenue. Encoder Products, which makes motion feedback devices in Sagle, expanded its employment slightly to 120.

Retail employment fell from 2,710 in 2007 to 2,586 in 2008 to 2,421 in 2009. As the county's largest private-sector employer, Coldwater Creek's national retail headquarters and its store in downtown Sandpoint make up a significant amount of the county's retail jobs. Coldwater has undergone a few downsizings since the recession began in December 2007. With so many residents having experienced falling incomes, local retail stores—especially auto dealers, furniture and appliance stores and building material outlets—have cut jobs in recent years. Grocery and discount stores have held their own. Super 1 Foods broke ground on a 53,000-square-foot supermarket in Sandpoint toward the end of the year. When it opens this spring, it'll employ up to 110 people. High gas prices plus reduced business travel explain the 30 jobs lost at gasoline stations and convenience stores. Taxable sales in the first nine months of the year fell 16 percent from \$260.1 million in 2008 to \$219.1 million in 2009.

Leisure and hospitality employment has remained around 1,850 for the last three years. Although local residents and American tourists have reduced their spending somewhat, Canadians are visiting in their highest numbers ever. They have not experienced as severe income losses or consumer confidence declines as Americans, and changes in the exchange rate in the last few years make the Canadian dollar go farther here, making it an attractive place to visit. Another benefit for the tourism sector was Schweitzer Mountain Resort's banner ski season last winter. The current ski season got an earlier-than-normal start and looks promising.

Lodging employment has held steady, but some staff are working fewer hours. A Holiday Inn Express with 83 guest rooms and an indoor saltwater swimming pool opened toward the end of the summer tourist season in late summer in Ponderay. Hotel-motel receipts fell 11.1 percent from \$15.5 million in the first 10 months of 2008 to \$13.8 million in the same time period in 2009 because of a decrease in visitors and a reduction in room rates.

The recession is even making the health care sector sluggish. For the first time in 18 years, the health care sector didn't add jobs. It lost about 25 jobs in 2009, declining to 1,175 jobs. Falling incomes, people losing health insurance, and families moving out of the county offset the factors that have fostered long-term growth in health care.

BOUNDARY COUNTY YEAR IN REVIEW

In 2009, Boundary County experienced another year of disappointments. Nonfarm jobs dropped 4 percent from 3,312 in 2008 to 3,190 in 2009, after remaining steady between 2007 and 2008. Last year ended with the closure of the county's second largest mill, Welco in Naples, which employed 93 peo-

ple. Because the closure was at the end of the year, averages for 2009 do not reflect the closures. In 2010, the ripple effects of the Welco closure will lead to job losses in logging, transportation, retail and services.

In November, before the Welco closure, the county's unemployment rate rose to 16.4 percent, its highest level since May 1982. It's very likely that by January the county's rate will approach 20 percent, by far its highest rate since the Great Depression.

An estimated 130 people left the labor force in 2009, as people moved out of the county to find work and others gave up looking. The county probably lost 100 people from its 2008 population base of 10,962. In recent years, it normally has gained 130 residents per year.

After losing 85 mill and logging jobs between 2006 and 2008 as the U.S. housing market collapsed, the county lost 30 more timber jobs in early 2009. Although an August fire destroyed the main facility of TrussTek, the county's third largest mill located three miles north of Bonners Ferry, the mill still is filling orders and is being rebuilt. Toward the end of the year, the timber industry seemed to be stabilizing until Welco announced it would close its Naples cedar plank mill in mid-December. The rest of the timber industry is a little stronger than it was at the beginning of 2009. Idaho Forest Group increased production at its Moyie Springs stud mill in November, requiring half of its 96 employees to work overtime. The mill expects to add 25 jobs in the coming year.

Other manufacturers managed to hold their own in 2009, employing 60 people just as they did in 2007. One manufacturer, Northwest Industrial Manufacturing in Bonners Ferry, has the strong potential to add dozens of jobs this year because of a new product it has introduced for truckers.

The county's large and diversified agricultural sector saw prices for its products drop from the highs of 2007 to much lower prices this year. The drop in wheat and other grain prices have reduced the spending power of most county farmers who are spending less on farm equipment, automobiles, farm supplies retail products and services. The county's tree nurseries tend to thrive when lots of new American homes are being built. So the low level of U.S. housing starts has taken a toll on nursery employment, which fell from 151 in 2007 to 112 by 2009. Improved technology has reduced employment slightly at Anheuser Busch's Elk Mountain hops farm, the county's largest agricultural employer. When the frames for hop plants are strung and then the plants are trained in the spring and when harvest occurs in late August, the farm employs more than 250 people, — mostly migrant seasonal farm workers.

Despite the recession, the county's leisure and hospitality sector employed the same number of people in 2009 as it did in 2007 at 280. Kootenai River Inn and Casino, owned by the Kootenai Tribe, employs about 170 people and draws many Inland Northwest and Canadian visitors to Bonners Ferry. The International Selkirk Loop — a scenic route through Bonners Ferry, Priest River, Sandpoint, eastern Washington and southern British Columbia — also helps draw visitors to the area. Hotel-motel receipts totaled \$3.2 million in the first 10 months of 2009, about 6 percent more than in the same period in 2007. The county got its second bed and breakfast in early 2009 when Mary Cook's Little Bear Bed & Breakfast opened in the foothills of the Cabinet Mountains. Blue Lake RV Resort, just off Highway 95 in Naples, added a clubhouse with a kitchen that can serve 50 people, some camping cabins and a new dock that offers canoe and kayak rentals. The Bonners Ferry Visitor Center, which used to be open half the year, began operating year-round. The Boundary Economic Development Council reported that 9,889 visitors passed through the doors of the Bonners Ferry visitor center in the first 10 months of the year — a 53 percent increase over the same months the year before. Though the increased numbers were partially because the center volunteers found better methods of

getting people to take time to sign the visitor book, most of the increase reflected a greater flow of visitors.

Sharp drops in incomes have reduced retail and related sales. Taxable sales fell 11 percent from \$56.1 million in the first nine months of 2008 to \$50.4 million in the same months a year later. Retail employment remained at 440, but many retail employees are working fewer hours. A fire destroyed the showroom and offices of Riverside Auto Center in Bonners Ferry in August. The Dodge, Chrysler and Jeep dealership currently is being rebuilt. Badger Building Center plans to open a building materials store in Bonners Ferry in the next year or two.

Lower incomes, population decline and tighter credit pushed construction employment from 336 in 2007 to 230 in 2009, while real estate and related activities remained depressed.

Bonners Ferry landed on Mother Earth News' 2009 list of "Great Places You've (Maybe) Never Heard Of," recognizing towns that demonstrate positive civic energy, investment in the local economy and meaningful initiatives for the environment. The issue released in late September spotlighted Bonners Ferry's reinvention from a logging town to a vibrant, diversified community with a strong commitment to local business.

From the time the recession began in December 2007 to December 2009, when the Welco mill closed, four supersectors have lost 270 covered jobs – jobs covered by unemployment insurance, which is more than 95 percent of payroll jobs in Boundary County – while the other supersectors stayed the same or gained jobs. The net result was the loss of 220 jobs. The chart below shows the supersector distribution of the 270 job losses.

Source of Job Losses Between Dec 2007 and Dec 2009



KOOTENAI COUNTY YEAR IN REVIEW

The recession has temporarily put Kootenai County's powerful job creation machine out of commission. Nonfarm jobs fell 7 percent from 56,876 in 2008 to 52,930 in 2009 after remaining virtually unchanged in the prior year. By October, the county's unemployment rate had reached 11.1 percent, its highest level since November 1986. About 4,700 people left the labor force in 2009 by taking early retirements or giving up looking for work because of their discouragement with the labor market.

The poor labor market and the tendency of Americans as a whole to stay put in the last two years, mostly because of the troubled housing market, have slowed population growth. The county's population added about 1,800 people to its 2008 population base of 137,457. From 2000 to 2007 it added 3,520 people per year.

The county's manufacturing sector lost 480 jobs or 12 percent of its 4,739 jobs between 2008 and 2009 after keeping employment between 2007 and 2008. U.S. manufacturing jobs fell 11 percent between 2008 and 2009 after falling 3 percent the year before.

Wood products manufacturing continued to decline, falling from 930 in 2007 to 820 in 2008 to 660. Idaho Veneer, which employs 40 people in Post Falls, shut down for two weeks each in both January and October 2009. Some other mills have reduced hours of work during the last couple of years, as well as laying off workers. Reduced lumber production has depressed logging employment from 307 in 2007 to 170 two years later. Toward the end of the year, an improvement in lumber prices helped the industry stabilize, although rumors persist about the possible closure of the Potlatch plant in Post Falls, which employs about 50 people.

Almost every manufacturing segment lost jobs in 2009. In the first quarter, Century Publishing, which primarily produces magazines for the real estate industry, cut 70 jobs at its Post Falls plant, and Mor Manufacturing, a custom electronics manufacturer in Post Falls, cut 50. In the second quarter, Advanced Input Systems, the Coeur d'Alene designer and manufacturer of keyboards and control panels, laid off 26 workers; IMCO, an aluminum recycling facility near Hauser Lake, reduced production; and Buck Knives in Post Falls implemented a 10 percent reduction in pay and/or work hours for its 200 employees. U.S. Products closed its Coeur d'Alene plant and moved production to Mexico in the fourth quarter, eliminating 40 jobs. In December, Computrol closed its Post Falls plant, which built electronic assemblies for the medical, industrial, aerospace and military sectors. The plant employed 30 full-time workers. About 30 people also worked there as employees of a temporary agency.

A few manufacturers bucked the downward trend. Sunshine Minting in Coeur d'Alene doubled its work force in 2008, as was noted by an article in USA Today about businesses that are doing well despite the recession. Sunshine Minting currently employs nearly 200 people. Bullet Tools in Hayden has grown as its tools for installing laminate and Pergo flooring have become widely accepted by the flooring industry. It employs about 20 people. Heater Craft, the Rathdrum manufacturer of heating equipment for boats and RVs, is diversifying. It's using money from the Idaho Department of Labor's Workforce Development Training Fund to train 15 workers for its new technology. Blue Water Technologies in Hayden was awarded a \$400,000 subcontract to install its phosphorus-removal system in the wastewater treatment plant under construction in Plummer.

Even as the recession ravaged it, the county's manufacturing sector was laying the foundation for future growth. Two Spokane manufacturers, Berg Companies and Burlly Products, are in the process of moving to Post Falls. Together, they'll bring about 110 jobs, and both expect to expand significantly in the next few years. The new owners of Century Publishing expect to restore many of the 100 jobs it lost in the last two years. Among the local manufacturers who currently are expanding are Advanced Input Systems; Mountain Top Manufacturing, a Rathdrum contract electronics manufacturer; and Accurate Molded Plastics, which does custom injection molding and tool-making in Coeur d'Alene.

The tourism industry endured huge losses in 2009. Leisure and hospitality jobs, including the Coeur d'Alene Tribe's casino resort, fell 12 percent from 9,060 in 2008 to 7,960 in 2009. Lodging operations lost 260 jobs because the recession caused a severe decrease in conventions. Hotel-motel receipts in the first 10 months of 2009 totaled \$44.3 million, 16 percent lower than \$52.7 million in the same period the year before. Reduced spending by locals,

in addition to the decrease in conventions, caused amusement and recreation facilities to lose 130 jobs and restaurants to lose 610.

Even the health care sector didn't add jobs in 2009. Its employment fell from 6,621 in 2008 to 6,590 in 2009. But it's evident that health care will soon return to generating a few hundred jobs a year. Kootenai Health opened its \$14.5 million cancer facility in Post Falls in November. Northwest Specialty Hospital, a surgical hospital in Post Falls, currently is building a \$7 million addition to prepare for future growth. A company recruited by Jobs Plus, BioLife Plasma Services, plans to open a center in Hayden where it will collect plasma. When it opens in July, it will employ more than 50 people.

The retail sector experienced its worst year since the early 1980s. Retail employment fell 8 percent from 8,259 in 2008 to 7,580, while taxable sales fell 17 percent from \$829.9 million to \$738.6 million. Building material and garden stores, which tend to thrive when lots of new homes are being built, experienced the big job losses. Businesses that sell big ticket items — automotive dealerships, furniture and appliance stores — had the next biggest job losses. No retail segments showed growth. However, some retailers have faith that the county will once again be a great place to thrive. Western States Cat opened a \$10 million, 55,000-square-foot facility in Hayden this summer. A few months later, Walgreens opened a store in Hayden staff with 25 workers. Wal-Mart is building a 150,000-square-foot supercenter near Cabela's in Post Falls and a 200,000-square-foot supercenter on U.S. 95 in Hayden. Together, they will employ nearly 500 people.

Construction employment continued to decline in 2009, dropping from 5,220 to 4,060. But construction permits — which usually are good predictors of construction activity about six to ten months after they are granted — suggest construction employment will grow in 2010. Permits for new dwelling units rose from 537 in the first nine months of 2008 to 662 in the first nine months of 2009, while other permits rose from 1,290 to 2,307.

In May, Kootenai County gained a major new amenity that makes it an even more attractive place to live. The Salvation Army opened its spectacular Kroc Community Center, hiring 80 people to staff its pools, spas, gyms, walking tracks, classrooms and theater.

Several corporations headquartered in Coeur d'Alene are expanding and creating a few dozen jobs. They include mining firms Hecla and Coeur; restaurant franchisers, Pita Pit and San Francisco Sourdough Eatery; adventure travel company, ROW Inc.; and Global Drug Testing.

SHOSHONE COUNTY YEAR IN REVIEW

Stormy weather assailed Shoshone County's economy for much of the year, but the economic skies appeared to be clearing towards the end of the year.

The county had continued to enjoy strong growth through the summer of 2008, long after the rest of the U.S. was reeling from the recession. But job losses in late 2008 and early 2009 reversed its growth. Nonfarm jobs fell 8 percent from 5,046 in 2008 to 4,630 in 2009, after rising 4 percent from 4,840 in 2007.

In July 2008, before the closure of the Sunshine Mine and the other mine layoffs, the seasonally adjusted unemployment rate was 6.9 percent. The rate rose to double digits in late 2008 after the closure and layoffs. It continued to rise in 2009, reaching 17.0 percent in November, its highest level since May 1993.

Although the unemployment rate rose, only 40 people withdrew from the labor force between 2008 and 2009. Given that the local labor force has an especially high proportion of older workers, most of the withdrawals were due to retirement. The population probably stayed around 12,900 in 2009.

The last half of 2008 brought an abrupt end to the expansion in silver mining employment that had begun four years before. Mining employment rose from 477 at the beginning of 2007 to 650 by the end of that year after the Sunshine Mine reopened and other mining operations expanded. It peaked at 765 in August 2008. Then the price of silver fell from more than \$18 an ounce to less than \$10. The prices of the mines' major byproducts — lead, zinc and copper — also tumbled. The falling prices caused the Sunshine to close, the Galena to reduce staff and mining service companies to slash jobs. Mining employment fell to 480 last summer. Then, the price of silver soared, reaching \$18 in late October. By the end of the year, mining employment had risen to 535. The reopening of the Sunshine looked like a possibility, work on reopening the Crescent Mine near Kellogg was underway and the Galena, Lucky Friday and mining service companies were planning to hire more workers. Higher prices for lead, zinc and copper also have helped bolster employment prospects. The astronomically high price of gold likely will help increase employment at the Golden Chest Mine near Murray in the next year.

The improved outlook for mining not only boosts local spending power because of increased employment and the high level of wages for mining jobs, but higher silver prices also add significantly to the amount that miners take home through their profit-sharing bonuses. It's likely that the average mining industry employee will once again earn more than \$60,000 in 2010, just as they did in 2007. That boost in spending power will make a big difference for the county's retail and service sectors.

The county's manufacturing sector also has taken a beating. Its employment has fallen 16 percent from 251 in 2007 to 210 in 2009. Wood products manufacturing lost 14 of its 53 jobs, while other manufacturers lost nearly 30 jobs. Silver Valley businesses that manufacture and sell their products include Bandz Inc., adult diapers; Enyeart Cedar Products; Essential Metals Corp., metal refining; Hoffman's Boots; Kellogg Plastics, outdoor lights; Malloy Veneer; Silver Needle, clothing for industrial safety; Spunstrand, industrial ducts; West Pack, bulk bags; and Zanetti Brothers, concrete. The lumber market has improved since early 2009, and further employment losses are unlikely. Some other manufacturers saw a rise in orders toward the end of the year and increased work hours.

Tourism held its ground in 2009, employing 460, about the same number it employed two years before. Last spring's introduction of an indoor water park at Silver Mountain Resort in Kellogg helped bring some more visitors. Another addition to the tourism haunts is an addition to the manufacturing sector. The Wallace Brewing Company opened in downtown Wallace. Lookout and Silver Mountain had good ski seasons last winter and had an early start for the current ski season. In the summer, the Route of the Hiawatha and the Trail of the Coeur d'Alenes drew record numbers of bicyclists and walkers. Old Mission State Park at Cataldo opened a \$3 million visitor center next to the state's oldest building in June. Hotel-motel receipts totaled \$4.5 million in the first 10 months of 2009, up 14 percent from \$4.0 million in the same period the year before, which had been 16 percent above the \$3.4 million in 2007.

Next year may bring a few extra tourists for the centennial commemoration of the Big Blow-up of 1910, when fire destroyed more than 3 million acres of forest in Idaho and Montana in just two days. The fire, which was the largest in historic times, destroyed more than a third of Wallace.

Residential construction was far lower in 2009 than in the heady days around 2005, but a surge of stimulus dollars for Superfund and much needed sewer and water projects boosted other construction jobs. The county's construction sector employed about 240 people in 2009, just as it did in 2007 and 2008.

SHOSHONE COUNTY CONSTRUCTION PERMITS IN THE FIRST NINE MONTHS OF EACH YEAR

	New Dwelling Units	Other
2004	94	170
2005	71	275
2006	149	146
2007	70	121
2008	20	86
2009	13	60

The economic downturn also beat up on Shoshone County’s retail sector. With both residents and visitors spending more conservatively and with sales down at the county’s largest employer, the Dave Smith auto dealership, retail employment dropped from 993 in 2007 to 941 the next year to 830 in 2009. Taxable sales in the first nine months of the year plummeted 10 percent from \$101.1 million in 2007 to \$90.9 million in 2008 and further fell 16 percent to \$76.5 million in 2009.

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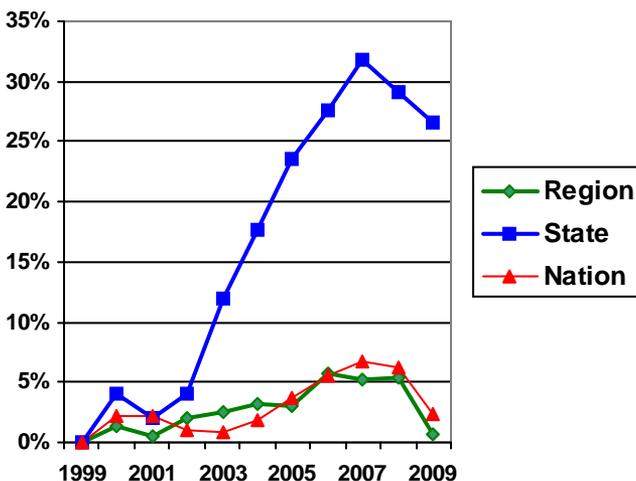
NORTH CENTRAL IDAHO

Clearwater, Idaho, Latah, Lewis and Nez Perce counties

2009: THE YEAR IN REVIEW—NORTH CENTRAL IDAHO

Last year was the worst in a thoroughly disappointing decade. In the last 10 years, north central Idaho has experienced very little job growth. Nonfarm jobs in 2009 were only 2 percent higher than in 1999. Compared to the rest of the state, the region’s lack of job growth is especially discouraging, though the region performed better than the nation, which experienced virtually no job growth. Some economists are calling this the “lost decade” because Americans experienced no gains in income or employment and the working and middle classes actually lost some ground.

Nonfarm Payroll Job Growth since 1999



The 2009 labor statistics, including unemployment rates, in the following report are preliminary numbers, while the 2009 nonfarm job statistics are estimates made by using the actual data for the first half of the year and estimating the second half of the year based on a sample of employers and known business openings, closings, expansions and reductions in force.

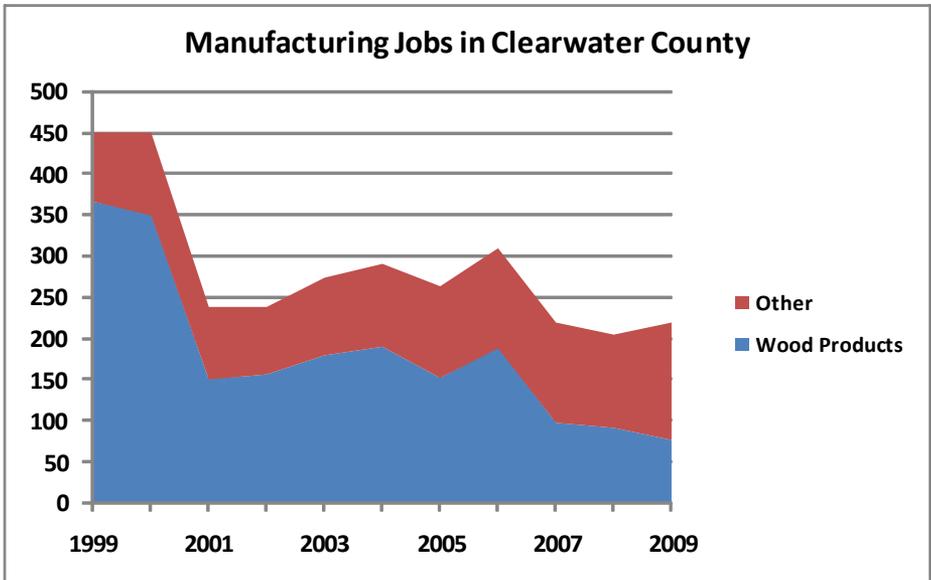
CLEARWATER COUNTY YEAR IN REVIEW

2009 was a dismal year for Clearwater County. Troubles in the timber industry pushed the county’s unemployment rate to 18.4 percent by November. Nonfarm jobs fell 5 percent from 3,044 in 2008 to 2,890 in 2009.

The year began with fears that the state budget crisis might lead to closure of the state prison, which employs 140 people in Orofino. It ended with the state announcing it would close Dworshak State Park, the crown jewel of the county’s tourism sector, in 2010. The county hopes to take over the park’s lease, averting potential disaster. Both threats reminded residents of the precarious economic future of the county.

Shrinking job opportunities forced many Clearwater County residents to move out in 2009. Estimates indicate the county’s population fell from 8,176 to about 7,900. The county has been experiencing similar population losses throughout most of this decade. With fewer residents and the housing market troubles, construction employment fell from 200 in 2008 to 140 jobs in 2009.

Manufacturing was a mixed bag. Wood products manufacturing fell from 90 to 70 jobs, while other manufacturing rose from 114 to more than 140 jobs. SJX Boats, the jet boat manufacturer that moved to the Orofino industrial park in 2008, and Nightforce Optics, the Orofino manufacturer of high-quality rifle scopes, created the new jobs. The decline in wood products manufacturing throughout the region pushed logging jobs from 207 two years ago to 90 in 2009.



High unemployment, falling incomes for many of those who remain employed, increased conservatism of consumers and the closure of Barnett-Thompson Chevrolet in Orofino pushed retail employment from 334 in 2008 to 280 in 2009. Even grocery stores have lost a few jobs. Taxable sales in the first nine months of 2009 totaled \$33.9 million —14 percent lower than the \$39.1 million in the first nine months of the year before.

Despite the troubled economic waters, the tourism sector remained buoyant. Leisure and hospitality employment has hovered around 210 for the last

three years. Hotel-motel receipts in the first 10 months of the year rose 13 percent from \$1.8 million to \$2.1 million in 2009 after rising 6 percent from \$1.7 million in 2007.

The Idaho Parks and Recreation Board voted in September to terminate its lease of Dworshak Park, which is owned by the Army Corps of Engineers. The county has been trying to make arrangements to take over the park’s lease. The park on Dworshak Dam’s reservoir provides recreational boating, fishing and camping opportunities. It plays a key role in the county’s economic development efforts. The county commissioners say the park’s closure would cost residents millions of tourist dollars. Economic developers believe the park can help attract manufacturers of recreational products to the area.

Federal and state employment plays an important role in Clearwater County. The Army Corps of Engineers employs 45 people at Dworshak Dam, and the U.S. Fish & Wildlife Service also employs 45 people at its nearby hatchery. In an average month, the U.S. Forest Service employs 100. State Hospital North, a psychiatric hospital in Orofino, employs about 110 people, while the state prison in Orofino employs 140.

Clearwater County won a \$140,000 stimulus grant to determine the feasibility of a woody biomass plant. The plant would burn wood waste to generate electricity to be sold on the grid and excess steam would be used to heat the prison next door. The plant would give the local timber industry another outlet for its products and help reduce the costs at the prison making it more likely to remain open. The plant would be owned by the county and run by a private contractor.

A LONGER LOOK AT THE TIMBER INDUSTRY IN CLEARWATER COUNTY

The table below shows statistics for timber jobs — private-sector forestry, logging and wood products manufacturing jobs. It understates the importance of the timber industry since it excludes independent or “gypo” loggers, truck drivers hauling logs, wood products and chips; and logging support workers such as those working for companies that build and maintain forest roads. An analysis of the table shows the following:

- In 1994, forestry, logging and wood products manufacturing jobs made up 39 percent of private-sector jobs in Clearwater County. Today, they make up 10 percent of jobs.
- Between 1996 and 2009, timber jobs fell 77 percent, while other private-sector jobs grew 38 percent.
- The loss of timber jobs is especially hard on the families of the workers who lose their jobs because of the higher level of average pay in

Jobs	1994	1997	2000	2005	2006	2009
Timber Industry	755	751	608	344	388	172
Rest of Private Sector	1,181	1,312	1,377	1,618	1,663	1,631
Employers						
Timber Industry	56	41	42	30	29	22
Rest of Private Sector	231	241	245	263	261	250
Total Payroll Adjusted for Inflation (in thousands of dollars)						
Timber Industry	27,497	29,481	25,436	12,527	15,725	6,108
Rest of Private Sector	24,319	28,377	32,293	40,183	42,653	42,407
Average Pay Adjusted for Inflation						
Timber Industry	\$36,420	\$39,282	\$41,864	\$36,380	\$40,494	\$35,510
Rest of Private Sector	\$20,585	\$21,636	\$23,450	\$24,830	\$25,646	\$26,005

that industry relative to other private-sector jobs. Their job losses also have larger impacts on the community because of the large drop in spending power.

- In the past three years, Clearwater County lost \$9.6 million in timber payrolls – a tremendous loss of income and spending power in the county.
- Because many people in the timber industry were working reduced hours or experienced intermittent work stoppages in the last year, average annual pay has declined in the timber industry since 2006.

IDAHO AND LEWIS COUNTIES YEAR IN REVIEW

The timber industry's troubles and reduced incomes led to large job losses in Idaho and Lewis counties in 2009. After losing only a dozen jobs in 2008, the counties lost more than 300 in 2009. Nonfarm jobs fell 5 percent to 5,840. A table showing economic indicators for both counties is on page 36.

By November, the counties' unemployment rates soared to 12.2 percent, their highest levels since March 1995. Nearly 700 people dropped out of the counties' labor market in 2009, as people moved out to find work elsewhere and discouraged workers gave up looking for work. The counties most likely lost about 120 people from its 2008 population base of 19,042.

As U.S. housing starts began falling from peak levels around 2005 to their lowest level since World War II, lumber prices plummeted from \$438 to \$192 per 1,000 board feet this May. That resulted in the two counties losing 180 wood products manufacturing jobs and 60 logging jobs since 2007. Kamiah's largest employer, Three Rivers Timber, closed in December 2008, putting 108 people out of work. Other mills have laid off workers. In addition to layoffs, mills have experienced intermittent shutdowns and reduced hours during the last three years.

Lumber prices increased to \$250 per 1,000 board feet by the first of this year, in response to decreased supply and increased demand, which should staunch the bleeding in the local timber industry.

Other manufacturing operations in the two counties showed remarkable resilience, while the U.S. lost 1.9 million jobs between 2007 and 2009. They added about 30 jobs this year after adding 30 the year before. Today, they employ about 270 people. They include Nezperce's Hillco Technologies; Ferdinand's Pacific Cabinets; and Grangeville's Aqua Jet, Gem Chain Bar, Inter-mountain Machine and Idaho Sewing for Sports. Hillco Technologies has strong potential to grow much larger in the next year. The city of Craigmont received a \$9,500 grant towards a study investigating the feasibility of opening a foundry there.

Anderson Aeromotive, a certified repair station specializing in the overhaul of Pratt and Whitney and Curtiss-Wright radial engines, has clients throughout the country. Many corporate planes fly into the Grangeville airport for repairs. It employs about 30 people and has considerable potential to expand especially if Idaho County expands and improves the airport like it hopes to in the next few years.

Flying B Ranch, the upscale hunting lodge near Kamiah, also brings clients from all over the U.S. to the Grangeville airport. In addition to offering hunting on its 5,000-acre ranch where it raises 80,000 birds a year, the Flying B holds exclusive outfitter rights to a vast tract of special permit areas in the Nez Perce and Clearwater national forests, though the recession has temporarily put a crimp in its style. In December 2008, it laid off 18 of its 55 employees. They returned to work for this fall's hunting season.

Although the county's farms and ranches benefited from lower prices for gasoline, fertilizer and other inputs in 2009, they were hurt because prices for

their products fell much more. As a consequence, farmers, like other consumers, reduced their spending especially on big-ticket items such as farm equipment and automobiles.

Agriculture is a major mainstay of the local economy. In 2007, according to the Census of Agriculture conducted every five years, the two counties had 985 farms and ranches. Their crops included wheat, forage crops, barley, oats, canola, peas and lentils. They cared for 31,900 cattle and calves. Some farms also raised bees, horses and sheep. In 2007, the counties' agricultural products were valued at \$95.1 million. The global recession has depressed prices of wheat and other agricultural commodities. To keep customers during the recession, retailers slashed beef prices, which pushed down the price of cattle. Falling prices for wheat and other agricultural products reduced the value of the counties' products in 2009.

Leisure and hospitality lost nearly 50 of its 500 jobs between 2008 and 2009, after no changes between 2007 and 2008. Restaurants were the source of all the job losses. Reduced income in the county presumably played a bigger role in those losses than visitors, since lodging operations held their own. Hotel-motel receipts fell 1 percent from \$4.4 million in the first 10 months of 2007 to remain steady for that same period of 2008, and then rose 2 percent to \$4.5 million in the same period in 2009. The state overall saw

Economic Statistics for Idaho and Lewis Counties 2007 to 2009

	Change				
	2009	2008	2007	2008-9	2007-8
Population	18,910	19,042	18,880	-0.7%	0.9%
Idaho County	15,330	15,448	15,315	-0.8%	0.9%
Lewis County	3,580	3,594	3,565	-0.4%	0.8%
Labor Force	8,428	9,107	8,810	-7.5%	3.4%
Idaho County	6,827	7,321	7,100	-6.7%	3.1%
Lewis County	1,600	1,787	1,710	-10.4%	4.5%
Unemp. Rate	9.4%	5.6%	4.5%		
Idaho County	10.3%	6.2%	5.0%	N/A	N/A
Lewis County	5.5%	3.1%	2.6%	N/A	N/A
Nonfarm Jobs	5,840	6,165	6,177	-5.3%	-0.2%
Idaho County	4,410	4,691	4,733	-6.0%	-0.9%
Lewis County	1,430	1,474	1,444	-3.0%	2.1%
Manufacturing Jobs	500	631	625	-20.7%	0.9%
Idaho County	150	156	138	-3.9%	13.0%
Lewis County	350	475	487	-26.3%	-2.6%
Taxable Sales*	\$75,574,669	\$88,344,687	\$98,260,841	-14.5%	-10.1%
Idaho County	60,291,935	69,428,354	78,983,965	-13.2%	-12.1%
Lewis County	15,282,734	18,916,333	19,276,876	-19.2%	-1.9%
Hotel-Motel Receipts**	\$4,501,195	\$4,411,643	\$4,441,992	2.0%	-0.7%
Idaho County	3,959,864	3,867,523	3,582,345	2.4%	8.0%
Lewis County	541,331	544,120	859,647	-0.5%	-36.7%

* January to September data

** January to October data

hotel-motel receipts rise 4 percent and then fall 14 percent during that same time period.

Riggins received two grants for engineering and technical assistance to develop a whitewater park. It plans to build three structures in the Little Salmon River for kayaking, boogie boarding and fishing and a city park that overlooks the river. Whitewater parks can serve as tourist destinations for recreation, provide a safe environment to learn kayaking and host kayaking and fishing competitions.

The federal stimulus plan provided \$1.1 million to upgrade the U.S. Fish and Wildlife Service's hatchery in Kooskia; \$6 million to improve and widen the White Bird grade; and \$34 million to update the Lolo Pass Visitor Center, improve Forest Service facilities, improve roads, and rehabilitate hundreds of miles of trails in the Clearwater and Nez Perce national forests.

Toward the end of the year, the city of Nezperce celebrated finished improvement projects such as upgrading the main street, building a new library with a community center, improving access to its courthouse and modernizing its sewer system. The city of Cottonwood recently broke ground on a new community center.

The recession reduced retail jobs from 737 in 2007 to 690 in 2009. The biggest reductions occurred at automotive dealerships, furniture stores and building material stores. Taxable sales fell 10 percent from \$98.3 million in the first nine months of 2008 to \$88.3 million in the first nine months of 2009 and then fell 15 percent to \$75.6 million in the first nine months of 2009.

LATAH COUNTY YEAR IN REVIEW

Although Latah County is somewhat insulated from economic downturns because of its reliance on the University of Idaho, which provides nearly one in three jobs, it definitely felt the economic chill this year. Nonfarm payroll jobs numbered 15,700 in 2007, rose less than 1 percent in 2008 and then fell 5 percent to 15,040 in 2009.

Latah County's unemployment rate rose from 2.9 percent in November 2007 to 4.8 percent a year later to 7.1 percent this November. Although the rate still is considerably below the nation's 10 percent, it was the county's highest rate since December 1999.

A drop in the birth rate caused by the recession and a reduction in people moving into the county slowed population growth. The county probably added 40 people to its 2008 base of 35,906. It normally adds 110 people a year.

With enrollment rising in response to the recession, the University of Idaho's work force held at 4,800 in 2009. However, the county's reliance on the university makes it vulnerable as the state's budget problems intensify.

Latah County also benefits from the stability of Washington State University and the growth of Schweitzer Engineering Lab in Pullman, Wash., just across the state line.

Agriculture is another mainstay of the local economy. In 2007 and 2008, exceptionally high prices for wheat and other agricultural products gave farmers an income surge that helped offset the effect of rising prices for gas and other supplies. Much of the increased income was spent at farm equipment and automotive dealerships and boosted sales of local retailers and service providers. Now that prices for wheat, peas and lentils have fallen, farmers have cut back their spending. Tight credit also is restraining farmers' investments in equipment.

With U.S. housing starts falling to their lowest level since the Great Depression, demand for lumber and other wood products has declined sharply over the last three years. Logging and lumber mill employment fell from 425 jobs in

2006 to 325 this year — the lowest level in more than a century. The county's largest manufacturing operation, Bennett Lumber Products in Princeton, laid off 30 workers in February. Other wood product manufacturers and logging operations also have curtailed employment or reduced hours.

Other manufacturing operations fell from a work force of 235 in 2008 to 190 in 2009. The largest employers in this sector are D8 Inc., a Potlatch business that makes dies, tools and jigs and offers reverse engineering and model making services; and Potting Shed Creations, a maker of handcrafted seed kits in Troy.

Technology transfer — spinning off businesses using products and technology developed by university researchers — is the main reason the professional services sector has grown considerably over the last decade. In 1998, about 30 people worked in management, scientific and technology firms in Latah County. By 2007, that grew to 170. Two years later, it was 230. Major employers in this sector include Economic Modeling Specialists Inc., Anatech Labs, EcoAnalysts and Go Nano Technologies.

The health care sector has thrived in recent years, growing to 1,069 jobs in 2009. Gritman Medical Center, which is the county's second largest employer, added about 40 jobs in 2009 bringing its work force close to 400. Fresenius Medical Care opened the Palouse's first dialysis clinic in August.

The recession has dampened activity in the retail and leisure and hospitality sectors. It forced consumers to be more frugal, resulting in employment losses in retail, restaurant, hotel and recreation. Retail lost 120 jobs in 2009, while leisure and hospitality lost 177. Together, the sectors employ about 3,400. Taxable sales plummeted 14 percent from \$134.4 million in the first nine months of 2008 to \$115.9 million in the same period a year later. Despite the economic slowdown, hotel-motel receipts rose 4 percent from \$6.4 million in the first 10 months of 2008 to \$6.6 million in the first 10 months of 2009.

Construction employment declined from 622 in 2007 to 450 two years later. Construction would have fallen even lower if it hadn't been for stimulus projects and a \$10 million renovation of the university's Kibbie Dome.

Moscow has two major economic development projects under way. The city landed a \$50,000 grant to make plans and prepare infrastructure for a 65-acre light industrial park. It also plans to turn a 100-year-old grain elevator into dwelling units, retail space and office space. Located between downtown and the university campus, the mixed-used development will replace blight with high-density urban living.

Federal, state and local government kept their employment steady in 2009. Stimulus funds helped school districts and local governments keep some jobs. The Moscow office of the Federal Defender Services of Idaho, which employed 16 people to defend the last appeals of death row inmates in Idaho and Washington, moved to Boise in May.

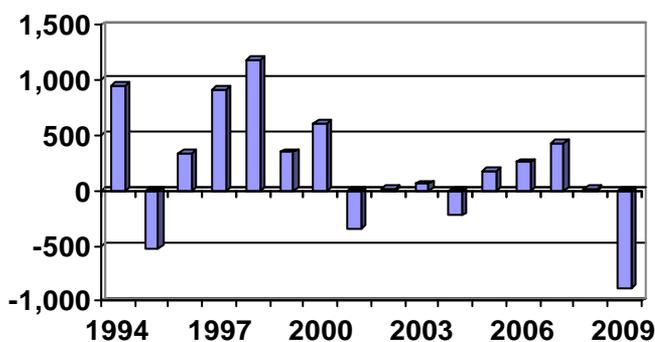
NEZ PERCE COUNTY: YEAR IN REVIEW

The recession hit Nez Perce County hard in 2009. The county lost 880 jobs — about 4 percent of the 24,040 payroll jobs it had in 2008. Nonfarm jobs had remained the same between 2007 and 2008. U.S. nonfarm jobs followed the same pattern — remaining the same in 2008 and falling 4 percent in 2009.

The county's unemployment rate rose from an average of 3.7 percent in 2008 to 6.5 percent in November 2009, its highest level since November 1987.

About 440 people left the county's labor force between 2008 and 2009 as limited job opportunities persuaded some people to retire early, go back to school for further training or education and otherwise give up looking for work.

Nez Perce County Nonfarm Jobs Lost, Added Per Year



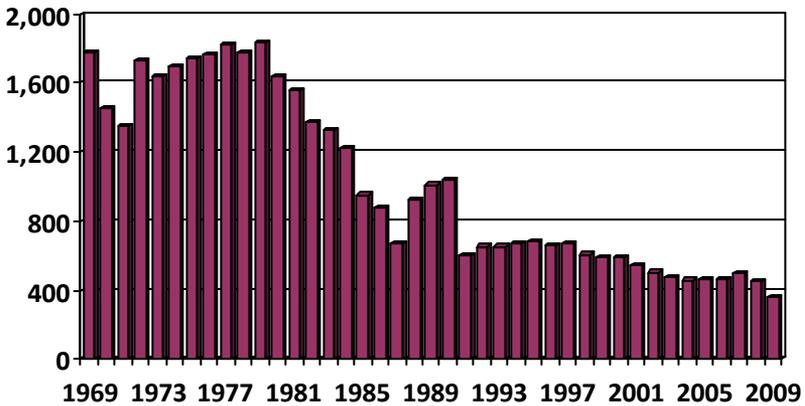
This economy also prevented some young people from entering the labor force.

The county's population appeared to grow, although about half as fast as normal, from 38,975 in 2008 to an estimated 39,060 in 2009.

While the U.S. lost 1.4 million manufacturing jobs – 11 percent– in 2009, Nez Perce County managed to keep its manufacturing jobs at roughly the same level. Employment at Clearwater Paper's paperboard and tissue complex in Lewiston held steady during the recession. Although paperboard is down a bit because other manufacturers are making fewer products, Clearwater's consumer products division, which primarily makes store-brand tissue and paper towels, saw an increase in demand as consumers become more cost-conscious. Clearwater Paper is the source of all the paper product jobs, but about 250 of its 1,600 jobs are in wood products manufacturing and the rest is in the management of companies, part of the professional and business services supersector. ATK, the Lewiston ammunition manufacturer, grew from nearly 900 jobs at the end of 2008 to 1,100 jobs 12 months later. Its growth also helped two of its main suppliers, Howell Machine and Ammo Load Worldwide, to expand and offset some of the job losses at jet boat manufacturers and machine shops. A variety of small manufacturers in other segments lost jobs this year.

Manufacturing Jobs in Nez Perce County	2009	2008	2007
Manufacturing	2,740	2,764	2,793
Wood Products	300	351	404
Paper Products	1,060	1,091	1,141
Fabricated Metal Products	1,210	1,122	1,043
Other Products	170	200	205

WOOD PRODUCTS MANUFACTURING AND LOGGING JOBS IN NEZ PERCE COUNTY



Reduced consumer spending pushed retail employment down from 2,940 in 2008 to 2,750 in 2009. Home improvement, convenience, clothing and general merchandise stores had the biggest job losses. Taxable retail sales fell 9 percent from \$242.9 million in the first nine months of 2009 to \$220.4 million in the same period a year later, which was better than the state's 14 percent decrease in taxable sales.

Wal-Mart opened its new Clarkston supercenter and closed its Lewiston store in September. It kept the 280 Lewiston workers and hired 220 more people, although it did reduce retail employment in Lewiston.

Regence BlueShield of Idaho employed 742 people at its Lewiston insurance office in late 2008. Since then, the recession has eliminated nearly 100 jobs.

Lewis-Clark State College is struggling to handle reductions in the state budget at the same time it has experienced a surge in enrollment. The college's employment has hovered around 700 for the last three years. In August, the college celebrated the opening of its \$16 million nursing and health science facility, which will allow it to significantly increase how many nurses it graduates.

The Nez Perce Tribe employs about 700 people at its headquarters, casino, medical clinic, its Appaloosa Express public bus system serving its large reservation that extends to Lewis and Idaho counties and other enterprises in Nez Perce County. Its employment stayed steady in 2009.

The county's leisure and hospitality sector took a beating in 2009. Jobs fell from 1,868 in 2008 to 1,740 in 2009. Restaurants and amusement places lost jobs, but inns held their own. While the state's hotel-motel receipts fell 14 percent between the first 10 months of 2008 and of 2010, the county's receipts only fell 2 percent. Some national articles touting the Lewiston area for its hunting, fishing, boating and other recreational opportunities will probably draw more tourists in the next few years.

Construction employment, which peaked at 886 in 2006, fell from 831 in 2008 to 740 in 2009. During the housing boom, construction had played an especially important role in Nez Perce County's economic growth. Of the 276 total nonfarm jobs the county added between 2002 and 2006, 77 percent were in construction. Of the 7.7 million nonfarm jobs the nation added between 2002 and 2006, 17 percent were in construction.

CONSTRUCTION PERMITS IN THE FIRST NINE MONTHS OF THE YEAR

	2009	2008	2007	2006	2005
New Dwelling Units					
Lewiston	45	65	119	98	86
Nez Perce Co.	35	44	50	37	30
Total	80	109	169	135	116
Other					
Lewiston	397	371	515	613	570
Nez Perce Co.	83	99	51	40	39
Total	480	470	566	653	609

The wholesale and transportation sectors held their own despite the recession. Wholesalers employ about 580 people and trucking firms, railroads and the port employ 1,050.

Professional, business, financial, personal, information and other services, which includes membership organizations and nonprofit agencies, lost jobs in 2009, while repair services added 60 jobs as cautious consumers tried to keep products longer rather than buying replacements.

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STEELHEAD HELP OFFSET SOME RECESSION-CAUSED LOSSES

This fall's record-setting run of steelhead — 72,000 wild and 240,000 hatchery fish, which is the highest number since 1975 when records were first kept — has helped bolster the tourism sector during these hard times. Anglers also were drawn by the increased daily catch limit on the Snake River from three to five. In recent years, there's been an upswing in the number of anglers from out-of-state for the steelhead run. Outfitters and guides report an increase in customers, largely due to the steelhead run.

The recession has made some difference in the demographics and spending habits of anglers and hunters. Many locals who have lost their jobs are relying more than ever on game and fish to stock their families' freezers. On average, locals and visitors are not forking over money as freely as they did before the recession. Where hunters might have once ended their trip with a visit to a fine-dining restaurant in the past, this year they were more likely to go to cafés and fast food outlets. Local sporting good stores were seeing more shoppers, but the average shopper was spending less this year.

The steelhead run is probably the main reason why hotel-motel receipts in Clearwater, Idaho, Lewis and Nez Perce counties rose 49 percent from \$1.8 million in October 2008 to \$2.7 million this October.

The state issued 56,907 steelhead permits in 2009, 5,224 of them to non-residents. That was up 8 percent from 52,662 the year before. More than 19,000 of the permits were resident sportsman's package licenses, which include steelhead and salmon permits along with a hunting license, tags for deer, elk, bear, mountain lion and turkey. Additionally, the state sold 10,604 nonresident three-day salmon/steelhead fishing licenses in 2009, according to Craig Wiedmeier, license operations manager for Idaho Fish and Game in Boise.

“The anglers with the greatest impact on the economy include nonresidents who spring for guided trips (about \$200 per person), purchase accommodations (\$85 to \$125 a night), eat out (\$15 to \$40 per meal) and party at bars,” according to a Nov. 8, 2009, article by Elaine Williams in the Lewiston Tribune.

A very rough estimate suggests that hunters and anglers are responsible for about \$4.3 million in hotel-motel receipts in north central Idaho in the last three months of the year. That’s nearly one-fifth of the year’s hotel-motel receipts, and is about the same as the \$4.4 million in hotel-receipts from summer tourists who come to enjoy the scenery, hike, go whitewater rafting, take jet boat trips to Hells Canyon, visit historic sites and fish. In Idaho, Clearwater and Lewis counties, the anglers and fishers have an especially high impact. Their hotel-motel receipts usually peak in October.

Restaurant and store owners also benefit from hunter and angler spending. The region probably has about 100 more restaurant jobs in the last three months of the year than it would have if hunters and anglers weren’t visiting the region.

AREA DEVELOPMENTS

ECONOMIC DEVELOPERS RECEIVE AWARDS

- Inland Northwest Partners — a consortium of economic development groups in northern Idaho, eastern Washington and northeast Oregon — presented awards to some locals in December. Jack Coyner received a Hometown Hero award for his work in preserving the historic railroad station in Potlatch by securing grants to restore the exterior and replace its foundation and roof. The partnership award went to Clearwater Economic Development Association, USDA Rural Development, First Step Internet and the Nez Perce Tribe for improving telecommunications in north central Idaho. The ports of Lewiston and Clarkston also received economic development awards. The Port of Lewiston provides Idaho with access to the Pacific Ocean and offers incubator services for fledging companies. The Port of Clarkston has promoted tourism with development of a winery, brewery and restaurant along the waterfront.

NEZ PERCE TRIBE

- The Nez Perce Tribe has received \$311,300 in stimulus funds to purchase buses and build a construction base, washing station and busy bay for its Appaloosa Express bus system. The Appaloosa Express began carrying passengers between Lewiston, Kamiah and Culdesac in May 2008. Now, it operates three buses on routes along the Clearwater River and employs nine drivers. Taxes on fuel at the tribe’s gas stations, along with bus fares, help pay for the buses to run.

CLEARWATER COUNTY

- The Pierce-Weippe Chamber of Commerce recently began distributing its new tourist brochure featuring points of interest, local events, campgrounds, roads, and snowmobile, ATV and walking trails in Clearwater County’s backcountry from Idaho Highway 11 east to the North Fork of the Clearwater River.

IDAHO AND LEWIS COUNTIES

- The county’s ski areas — Snowhaven near Grangeville and Cottonwood Butte near Cottonwood — opened for the season in mid-December. Snowhaven made several improvements to its ski hill, extended the tubing area, hired a ski instructor and three other new employees and

introduced an expanded menu featuring healthier choices. Together, the two ski areas employ about a dozen people. They impact the local economy by bringing visitors from as far away as Lewiston and Clarkston and by providing amenities that make the Camas Prairie a more attractive place to live.

LATAH COUNTY

- Latah County's economy relies heavily on the University of Idaho. In 2008, the University of Idaho's payroll made up 35 percent of total payroll — wages, salaries, tips and other labor income — in Latah County. In Madison County, Brigham Young University-Idaho in Rexburg accounts for 20 percent of the county's payroll. Idaho State University in Pocatello was responsible for nearly 10 percent of Bannock County's payroll. The College of Southern Idaho made up 2 percent of Twin Falls County's payroll, while Boise State University made up less than 2 percent of Ada County's payroll. North Idaho College made up a little more than 1 percent of Kootenai County's payroll. The long-standing private colleges, Northwest Nazarene University in Nampa and College of Idaho in Caldwell, and the new technical college in Nampa, College of Western Idaho, together make up slightly more than 1 percent of Canyon County's payroll. Eastern Idaho Technical College in Idaho Falls provides only 0.3 percent of Bonneville County's wages and salaries. These statistics are for covered employment — jobs covered by unemployment insurance — and do not include the wages of work-study students at the colleges.
- In Whitman County, Wash., Washington State University plays an even greater role. In 2008, about 43 percent of the county's total payroll was paid by the university.

NEZ PERCE AND ASOTIN COUNTIES

- The Lewiston-Clarkston Valley is the safest place in the country, according to a recent Farmer Insurance Group report that looked at 48 towns with populations of 150,000 or less across the U.S. The report assessed police and fire departments, local job markets, schools and the overall economy. Lewiston and Clarkson scored high because of excellent job growth, low crime and minimal housing depreciation.
- The Port of Clarkston is adding a valuable recreational asset to Clarkston's waterfront. It has begun building a new 10-space, day use boat dock and pathway at Granite Lake Park near Rooster's Landing. The port has been developing a large area along the waterfront that offers lodging, restaurants and shopping along with commercial office space, all within easy walking distance of each other. The boat dock will provide one more way for people to visit the growing area. The \$450,000 project is slated for completion in late February. HDB Marine, a company based in Harrison on Lake Coeur d'Alene that specializes in dock construction, is the main contractor.
- The Asotin County Public Transportation Benefit Area began operating a new fixed route system Jan. 4. Three color-coded routes now serve the cities of Asotin, Clarkston and Lewiston. The system installed 11 bus shelters, hired nine bus drivers and spent \$318,000 in stimulus funds to purchase four small buses. Clarkston's bus system is coordinated with Lewiston's. With the recent improvements in Lewiston, the twin cities now provide a complete and reliable bus system, and rural communities like Asotin, Kamiah, Orofino and Lapwai are tied into the system through the Clarkston system or the tribe's Appaloosa Express.

- Morgan's Alley in downtown Lewiston now includes the MarketPlace, where 24 local vendors sell their products. Artisans sell handcrafted wood trunks, candles, clothing and decorations, while other vendors sell a variety of new and used products.
- The December opening of a Papa John's pizza outlet on Lewiston's 10th Avenue brings the Nez Perce County restaurant count to 65, employing about 780 people.

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SOUTHWESTERN IDAHO

Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley & Washington counties

AREA DEVELOPMENTS

ADA COUNTY

- The new year has brought some not-so-welcome news as several retail outlets have announced they will be closing. In March, Macy's downtown will close. Macy's, along with its predecessors, has been a mainstay in downtown Boise for many years. The closure was part of Macy's effort to deal with the slow economy. Closing Macy's, which has 118,000 square feet, will more than double the amount of vacant retail space downtown. It was also announced that New York & Company, the Disney Store, Kiddie Kandids, Marketplace Gifts and The Walking Company in the Boise Towne Square Mall will close. These closures will result in more than 100 jobs lost.
- Long-time Boise fixture Michael's Furniture Showplace, facing foreclosure, has decided to close its doors. The closure is a result of the mortgage crisis and a nationwide slowdown in furniture sales since the decline in the housing market.
- The nonprofit company Healthwise is focused on one thing — developing [consumer health content](#) to help people make health decisions that are right for them. The company was founded in Boise in 1975. The company employs more than 200 but was forced to cut more than two dozen full- and part-time workers on Dec. 2. The company provides a consumer-health database used by WebMD, MSN, Yahoo and many of the nation's largest health plans. The use of Healthwise's printed products has declined resulting in a decrease in revenues. The most promising area for growth is to put information into the hands of patients through electronic medical records, according to Don Kemper, Healthwise president and CEO. It works like this: You go to your doctor and receive a new diagnosis, which your doctor enters into your electronic medical record along with tests or medications he has ordered. The medical record system then creates an "information prescription" you can take with you to help you learn about your condition. This area of expansion has given the company the opportunity to create three new jobs.
- Idaho ranks 43rd in the nation in the percentage of students who complete a post-secondary degree, according to the 2008 National Report Card on Higher Education. In an effort to bring up that ranking, the J.A. and Kathryn Albertson Foundation launched Go On, a statewide initiative that aims to equip students for higher education through scholarships, an

awareness campaign and research. The foundation contributed \$20 million to the project, part of which went toward scholarships at local colleges and universities. Treasure Valley Community College, The College of Idaho and Boise State University each received donations of \$1 million for scholarships. The donation marks the single largest financial gift the Treasure Valley college has ever received. Of the \$20 million \$11 million will go toward targeted statewide scholarships to help Idaho improve college opportunities and increase post-secondary participation and completion, \$6 million will be given to the Idaho Education Network to increase access to relevant data and equal educational opportunities to Idaho stakeholders statewide and up to \$3 million will fund an awareness campaign about additional opportunities beyond high school and for KnowHow2Go Idaho, a support and guidance program that helps turn college dreams into action-oriented goals.

- Idaho's had its first Startup Weekend in November. The event, which takes place around the world, provides the avenue for teams of entrepreneurs, techies, investors, lawyers and idea people from a range of ages gather for a full weekend and pitch ideas. The goal is that by Sunday night they've created viable startups. About 30 participants showed up at the Water Cooler in Boise. The Idaho event resulted in four ventures developed during the 54-hour event that have potential to move forward:
 - Morgan's Journey, an online social network connecting families and individuals dealing with cancer, was launched at www.morgansjourney.com and already has the makings of a nonprofit board and board of advisers.
 - Yaro, a Web platform that provides a central location where users can manage their presence across a range of social media, also went live at www.getyaro.com.
 - A Web site offering an innovative platform that allows users to exchange goods and services among themselves - ranging from legal services to Web design to tools to advice to be called Barteri.us. The Web site is still under construction at press time.
 - MobiDealer, also Web-based, enables car dealerships or mechanics to communicate with customers using text messaging, the tool is intended to eliminate the hassle of playing phone tag with the auto shop.
- The owners of the Royal Plaza, luxury condominiums and retail space filed for bankruptcy in December. The completed project consists of 26 units and four retail spaces with only a dozen units sold. The developer is working on a plan that could provide financing for buyers. Prices range from \$275,000 to \$830,000 for the remaining units.
- Construction Monitor reported in December that the number of active homebuilders in Ada County dropped significantly from 2005 when 770 builders pulled permits to build new homes in Ada County. In 2009, just 160 builders have done the same – a 79 percent drop. And only 60 of those builders this year have built more than one home. Builders in general need to build at least four homes a year to run a viable business. According to BuildIdaho.com, only 37 builders hit that goal in 2009. Builders are hoping that the bottom has been reached but it will take years, if ever, for the industry to return to the glory days of 2005 and 2006.
- After years of not making a profit, losing its status as the state's largest private employer and reducing the number of workers by 3,500 since 2008, Micron Technology continues to survive. The company experienced its first profit in three years for the quarter ending Dec. 1 of \$204 million, according to Chairman and CEO Steve Appleton. Micron is the last memory-chip manufacturer based in the Western world. Throughout the economic

bleakness of 2009, Micron has maintained a strong balance sheet and is poised to be strong as the memory-chip glut subsides.

- Unity Medical Inc. in Eagle makes two- to three-minute videos that deliver medical advice to patients through personalized video interaction between health care providers and patients. The videos are part of a suite of Internet tools designed to provide information on everything from chronic diseases to wellness. Unity Medical recently won the audience award for best new service at a recent Health 2.0 Conference in San Francisco. The content can be tailored to physician practices, hospitals or other health businesses. Unity Medical has a partnership with St. Luke's Health System, one of the biggest private employers in Idaho.
- Lucky Bums, an outdoor gear company that designs and sells year-round products for children and teens, is expanding its product offerings and facilities, and improving its Web site. The business started with ski trainers for kids and has now branched from snow gear to camo helmets, backpacks, sleeping bags and fishing vests. The company moved into an 8,000-square-foot facility that houses the warehouse, office and showroom. In 2009, the company almost doubled the number of retailers that purchase its merchandise - from 200 to almost 350. The new facility will allow the company to continue to expand.
- Idaho Power was awarded a stimulus grant of \$47 million to modernize its electric transmission and distribution infrastructure, including the deployment of a smart meter network for all 475,000 customers the company serves. The money will also finance a new outage management system and irrigation load control program to reduce peak and overall energy use and improve system reliability. The money will also help the company continue to build more of a "self-healing network" that senses and monitors disruptions, sections off downed lines to minimize interruptions and changes power flows to adapt to customer use. The company estimates creating 45 jobs, mainly linemen and construction workers, plus \$30 million worth of equipment purchases from local companies. It estimates an annual reduction of 15,000 tons of carbon dioxide emissions.
- M2M Communications received a \$2.2 million stimulus grant to install smart-grid compatible irrigation load control systems in California's central valley agricultural area to reduce peak electric demand. The company plans to hire 12 full-time workers in Idaho.
- Despite numerous business closures in Boise, Idaho's first Hobby Lobby craft store is set to open Feb. 1. The new 55,000-square-foot store will be located at the CentrePoint Marketplace on North Eagle Road in Meridian. Hobby Lobby, a national company based in Oklahoma City, offers a wide range of products for local crafters. The company opened 25 new stores last year and has plans to open about the same number of new stores this year. It recently raised its minimum wage for all full-time employees to \$10 an hour.

ADAMS COUNTY

- Council has a pizza place once again. One Eye Jack's Pizza recently re-opened to a large first-night celebration. New owner Darrin Watson leased the building from the previous operators who closed their doors in 2007.
- Adams County received \$70,000 to study using woodchips to fuel a 10 megawatt power plant next to the Goodrich Landfill. Adams County has committed \$150,000 of its own money in lieu of taxes to aid the study. The main funding is part of a federal economic stimulus program that des-

ignates Renewable Energy Enterprise Zones to spur economic growth and job creation by encouraging renewable energy development collaboration between local authorities and energy developers.

- An Idaho Tax Commission study reported that Idaho had the sixth lowest overall per capita tax burden in the country and the lowest tax burden among western states, according to the Adams County Recorder. The study compares Idaho taxes with national taxes and those of an 11-state western region. The data is from fiscal year 2007, the latest fiscal year for which census figures are available. The study showed a significant decrease in property taxes with the state providing a much larger share of school funding. This change resulted in Idaho's overall property tax collection dropping by 10 percent in contrast with an average rate of increase of 6.9 percent per year over the previous four years. In 2007 Idaho's property tax burden was 29.5 percent below the national level. This was the lowest burden level in 22 years. Idaho's per capita sales tax burden increased to 13.8 percent below the national average compared to 22 percent in 2006. The individual income tax burden increased from 27th highest nationally to 23rd highest. Idaho's corporate income tax burden remained below the national average at 37.3 percent in 2007 compared to 23.5 percent in 2006. Motor vehicle taxes remained unchanged at 24.7 percent of the national average. When comparing taxes to income, the overall tax burden in Idaho decreased 6.8 percent to just under \$100 per \$1,000 of income in 2007, 9.5 percent below the U.S. average. Idaho's per capita taxes rose 3.6 percent in 2007 to \$3,185.37 for each person compared to \$4,233.63 per person nationally.
- Evergreen Forest Products laid off four employees at the mill near New Meadows in early December. The layoffs occurred when production dropped from 80 hours to 60 hours a week because of a slowdown in timber supply. It also left the mill with 90 employees. It's anticipated these workers would return to work this month. The company is building three dry kilns that should be completed in February and is expected to create an additional four to five positions to operate the equipment.
- Treasure Valley Transit is nearly ready to begin bus service between Adams County and Valley County that would allow residents in Council and New Meadows to obtain free two-way transportation to McCall for work, shopping and recreation. The funds are provided by a stimulus grant to encourage increased public transportation. Once the bus has been purchased, service is expected to have a morning and evening run Mondays through Fridays.
- A new group has been formed to promote business and economic development in Meadows Valley. The group, tentatively titled Economic Development and Socially Based Organization, held its first meeting in November. The activities of the organization will be determined by the participants. The group hopes to assume the activities of the Meadows Valley Chamber of Commerce, which was disbanded in early 2009, by dividing its focus between business promotion and event coordination. While the group exists on its own and is not part of the city of New Meadows, the city has indicated that will provide support.
- In 1971 Adams County showed a total of 182 farms in the 1969 Census of Agriculture, down from the 225 farms reported in the 1964 census. The 2007 census reported an increase to 258 farms.

BOISE COUNTY

- As part of the Renewable Energy Enterprise Zones stimulus money, Boise County will receive \$140,000 for a woody biomass combined heat and power project.
- The long-awaited ski season for Treasure Valley residents began Dec. 17 when Bogus Basin opened for the season. Visitors to Bogus Basin Mountain Recreation area can snowboard, alpine and Nordic ski, snowshoe and go tubing. Employment at the recreation area can range from 50 during the spring and summer months and reach nearly 700 during the peak winter season. Caldwell Transportation provides valley wide bus transportation to and from the ski area on a daily basis for a fee.

CANYON COUNTY

- The city of Nampa received over \$181,000 Renewable Energy Enterprise Zones stimulus money and plans to use \$143,738 for a wastewater biogas boiler system for sale outside of the zone. Amalgamated Sugar will receive \$37,290 for a feasibility study on the potential benefits of a natural gas-fired combined heat and power facility that could simultaneously generate electricity for Idaho Power and steam for sugar beet processing. Some experts believe the steam requirement of Amalgamated Sugar's sugar beet processing is sufficient to support a 100-megawatt power facility, enough to meet the electricity needs of 58,000 homes.
- Sam's Club will close its Nampa location Jan. 22 because the local store continues to lose money, according to company officials. The Nampa store opened in 2006 and employed 132 full- and part-time workers. Company officials said employees would receive 60 days of pay and the company is working to help them find new employment. Eligible employees will receive accrued vacation and severance pay, and those enrolled in benefits will have coverage through March 11. Sam's Club is a division of Wal-Mart, one of the largest private employers in Idaho. The Nampa Sam's Club location is one of two in Idaho; the other is in Idaho Falls. The pharmacy at the Nampa Sam's Club will close Jan. 25, officials said.
- Karcher Mall has a several new tenants. Avon opened a skin-care clinic, which offers free skin-care consultations to women and men, samples and demonstrations of a wide variety of Avon products. Avon orders will be taken at the new clinic. Pleasures of Romance showroom opened in November. The business is part of a network of people who conduct home parties. Discount Furniture is opening in the mall after 12 years on Garrity Boulevard because of its favorable location, low lease rate and triple amount of space. The business specializes in mattresses but also carries a variety of household furniture.
- Downtown Nampa has a new Tuxedo Warehouse. The family-run business was started 30 years ago and offers a variety of formal wear from size 4 for boys all the way to size 68L.
- Lithia Chevrolet of Caldwell halted operations last fall, moving inventory and some employees to Lithia's other branches in Boise and Meridian. In December, Larry Miller Automall in Caldwell said it would close. All dealerships at the Caldwell complex will be affected — Ford, Lincoln, Mercury, Pontiac, Buick and GMC. The dealership and car manufacturers decided that the market had more dealerships than was needed. The automall opened in Caldwell on Cleveland Boulevard in 1997 and employs 47 workers.
- The Coalition for Agriculture's Future has voiced concern about Canyon County developing an enterprise zone intended to boost job growth and

development in the region. The coalition is concerned about the future of valuable farmland to produce food and wishes to protect it from uncontrolled growth and development. Canyon County commissioners say the enterprise zone idea is in a preliminary stage and it's still unclear how county residents will define the zone. The coalition is comprised of individuals in agri-businesses, associations and the private sector, was established by James White in 1874 to print a magazine called Signs of the Times at his home in Oakland, Calif., using a manual printing press on his dining room table. The organization now occupies 61 acres in Nampa with a building the size of three football fields and state-of-the-art technology. It publishes more than 40 trade books a year for adults and children, Signs of the Times magazine, two Spanish journals and two weekly magazines for kids, as well as school textbooks, chapel music and more.

- The J.R. Simplot Company, working with the University of Idaho, has offered to fund a \$1.5 million, multi-year agreement that would keep the Parma Research and Extension Center operational. Action by the Idaho Legislature and the governor's holdback directive, in the face of declining state revenues, reduced the state appropriation to the Agricultural Research and Extension Service budget this year by 17 percent, or \$4.7 million, leading to a proposal to close the research facility. The Parma center was founded in 1925 to sustain and improve the productivity of crops grown in southwest Idaho. The agreement states that Simplot would contribute \$300,000 each year for five years to the center. Simplot researchers would have use of facilities and up to 50 acres for crop studies and development. The funds would be used to pay the university's labor, materials and other operating costs directly applicable to management and operation of the land and facilities provided by the university and to contribute to costs associated with the university's overall maintenance of the Parma center.
- In January 2009, College of Western Idaho officials expected about 1,700 students for the first semester at the state's newest community college, but only topped 1,200. The fall semester saw that enrollment increase to 2,150 full-time students and 1,468 part-time students. By December, spring enrollment numbered 3,300 students. The college had a job fair in December in hopes of hiring 20 full-time and 80 part-time faculty members for the spring semester to deal with the explosive growth, which is expected to continue for at least two years. It could mean more jobs, mostly part-time and requiring master's degrees. The need for instructors will likely taper off as current adjunct or part-time instructors take on more classes. Starting salaries for those positions are \$875 per credit hour.
- Nampa is the third city in the Treasure Valley with free Wi-Fi connections in their downtown core. The city used a \$17,467 grant from Capital Matrix to set up the free service. City leaders see the free Internet access as an economic development tool that could create additional reasons for people to visit downtown and encourage the location of new businesses, restaurants and offices in the downtown core. With the grant, the city has provided signs and marketing materials to help downtown businesses advertise the free Internet system. Nampa contracted with Indigo Networks to install the network, and downtown businesses allowed the city to use their rooftops for the placement of equipment. Businesses also had the opportunity to buy additional equipment to boost the strength of the signal inside their buildings.
- Davis Creek Cellars and Fujishin Family Cellars are the first tenants in a winery incubator in Caldwell. Start-up wineries that use the incubator can

receive industry specific technical assistance and can access federally compliant, climate-controlled storage necessary for their permit process. The Fujishin Family Cellars and two other local wineries, Bitner Vineyards and Vale Wine Company, have partnered to open Coyotes, a co-operative wine-tasting room in downtown Caldwell.

ELMORE COUNTY

- Mountain Home Air Force Base has started training flight and ground crews from the Republic of Singapore to operate F-15 fighter jets. Officials hope the 20-year agreement with the Republic will help bring a long-term F-35 mission to the base. Idaho is one of six finalists. The Republic of Singapore has hired 95 contractors to maintain the jets, which will bring \$25 million to the base through Sept. 30, 2012. Singapore is covering the cost of housing and training the 428th Fighter Squadron. About 255 military and other personnel and 200 family members from Singapore are based in Mountain Home.
- Mountain Home Air Force Base will get millions of dollars for improvements as part of a large spending bill passed in Congress in December. More than \$20.5 million dollars was allocated for a new logistics readiness center. The appropriations also designated an extra \$690,000 to cover planning and design costs related to constructing a new civil engineering maintenance complex. Earlier in 2009, Congress designated \$14 million in federal stimulus money to replace the base's agency infrastructure. The new center will replace a condemned 53-year-old wooden supply warehouse. Some of the money will be used to demolish dozens of smaller buildings originally built in the 1940s and 1950s and move people who oversee base civil engineering operations into consolidated facilities. Work is also continuing to upgrade military housing by tearing down older units built in the 1960s and replacing them with more energy efficient structures. Congress has also earmarked \$10.7 million for needed roof repairs at several buildings, repairs to the dining and lodging facilities, security upgrades and repairs on the aircraft flight line.
- Kim's Haircut is now officially open. The beauty shop consists for four tanning beds and three beauty stations with a staff of two beauticians and a masseuse.
- Instead of field crops, wind turbines are sprouting up in Elmore County. Idaho Power recently signed an agreement with Idaho Winds to purchase the output from the 21-MW Sawtooth Wind Project near Glenns Ferry. The project will provide the average energy supply for about 10,000 homes. Montana-based Exergy Development Group will lead the development of a large scale wind farm spanning Elmore County and three surrounding counties. Idaho Wind Project will spend \$500 million to build nearly 150 wind turbines capable of generating up to 219 megawatts of power. Sparse population and open range space with average, sustainable winds prompted the development in the Bell Rapids area. The area does not have robust wind but the more manageable wind current prevents excessive wear and tear on the turbines, helping reduce maintenance. Construction on the Idaho Wind Project is expected to be completed and the turbines online by September 2010. This wind farm should create up to 20 new jobs at the company's operations center in Jerome and 200 temporary jobs related to the construction.
- The Mountain Home Public Library offers free access to Career Information Systems, a comprehensive, computerized information system for career exploration and planning. It includes resources for choosing a training

program, college major or school, as well as finding financial aid specific to Idaho. The service is a collaborative effort between the Idaho Commission for Libraries and the Idaho Department of Labor. CIS joins IdahoWorks, the Idaho Department of Labor's online service for employers and workers, resources for students, employers and job seekers. Both are free and available at through the library's computers.

GEM COUNTY

- Emmet High School held its annual college/financial aid night in December. About 130 students and parents attended the event, which provided college information, workshops, specialized scholarship information, college athletics information, a financial aid speaker and a Spanish language financial aid presentation. The students in the culinary arts class made the dinner that was served.
- Emmett Public Library is back in service following the completion of the new foyer project. The foyer serves as a buffer from the cold weather and provides space for the ongoing book sale by the Friends of the Library.
- The Messenger Index celebrated 116 years of service to the people of Emmett and Gem County on Nov. 4. The weekly Messenger Index is a true small-town, community newspaper that continues its role of reporting births, marriages, deaths, triumphs, victories, tragedies, sorrows and the day-to-day events. The newspaper goes out to subscribers every Tuesday and hits the newsstands on Wednesday.
- Mother and daughter team Debbie Rouwenhorst and Michelle Welch opened Black Canyon Fudge with a November ribbon cutting. Their famous fudge, a recipe dating back to the late 1880s, is now available to the public in 15 standard flavors and 15 additional flavors that rotate with the seasons.

OWYHEE COUNTY

- The American Recovery and Reinvestment Act – or stimulus bill – money enabled several Bureau of Land Management projects in Owyhee County to be completed. Jump Creek Park has a newly graded road, cleaned and refurbished restroom, new steps on eroded trails and trail extensions. The hands-on trail reconstruction was done by five Idaho Youth Corps workers. The Cover Recreational site is also on tap for some rehabilitation. Three restrooms in Silver City were improved. Materials and building techniques were used in the Silver City project so the facilities would match the look of the historic city.
- Homedale resident Larry Landa was recognized in December by the Small Business Association as the 2008 Minority Small Business Person of the Year for Idaho. His Homedale-based company, LarKor Construction, was formed in 2002. LarKor worked on several projects, such as the Army Reserve Center in Hayden Lake, Veterans Administration Regional Office Building in Boise, Physiological Training Unit at Fairchild Air Force Base in Spokane, Wash., Spinal Cord Injury Spaces Revocation in Seattle, repair of C-17 Shortfield Assault Strip at McChord Air Force Base in Moses Lake, Wash., and seven upgrades at the Veterans Affairs Building in Seattle. Landa, who farmed up until 2002, was part of the SBA program created to help small disadvantaged businesses compete in the American economy and access the federal procurement market. Qualifying participants can receive sole-source contracts of up to \$3 million for goods and services and \$5 million for manufacturing. Landa uses many contractors based in Idaho on his jobs.

PAYETTE COUNTY

- The newly refurbished rest area on U.S. 95 at Midvale Hill opened just in time for holiday travelers. Improvements included the completely reconstructed restrooms, improved caretaker facilities, additional truck parking and other repairs. WF Construction & Sales LLC of Meridian was the contractor on the \$1.4 million project.
- Lonnie's Market, one of three grocery stores in Payette, closed in December after 21 years. The private, family-owned grocery store was closed due to the economy and equipment break down that was too expensive to replace. The market had employed up to 20 people but had dropped to 10.
- Swire Coca-Cola Bonneville Production Center of Idaho in Fruitland is expanding with a 52,500-square-foot addition. The plant, originally built in 1986, is expanding its warehouse capacity and adding new shipment docks and parking. The addition of nine loading docks doubles the number of docks and increases the company's ability to move product.

VALLEY COUNTY

- Brundage Mountain opened all five ski lifts Dec. 18, slightly later than average but ahead of its Dec. 20 opening last year. When skiers and snowboards arrive at Brundage Mountain this year, they will find some improvements. The lodge has a new roof and the exterior has been repainted. Smoky's Pub underwent extensive remodeling. The bottom of Engen was extended to connect with the Lower 45th Parallel. The resort conducted summer run maintenance on Warren's Way and Skid Row so the slope could be groomed easily during the winter. A significant amount of brush was removed in several areas. Brundage offers more than 19,000 acres of snowy runs, steep tree-lined glades and powdery bowls. Brundage's employment ranges from about 30 in the off season months to over 100 during the ski season.
- The other ski resort in the area, Tamarack, will not open this year. The resort closed March 4, 2009, due to financial difficulties, although the golf course and zip line opened in June. The Tamarack Homeowners' Association filed a motion this fall to reopen Tamarack Resort for the 2009-10 season using \$8 million from a Mexican real estate company, but the request was denied.
- The Activity Barn south of McCall opened its lift-served snow tubing hill just in time of the Christmas holiday. The area features runs more than 700 feet long and 360-degree views across Long Valley. The tubes are covered in material and specialty molded plastic bottoms to increase their slide capabilities. The tow lift has a handle that easily attaches to the tube, allowing the rider to sit in the tube and ride up with hands and feet free. Snowshoes and skate cross-country trails are also available and pet friendly.
- The city of McCall received a federal grant of nearly \$172,000 from the Renewable Energy Enterprise Zone program. The money will be used to help pay for solar panels that will create electricity at a dozen locations around the city. The electricity generated from the panels will be put into the power grid, and the owners will receive credits from Idaho Power. The panels will be installed on eight businesses between August and October 2010.
- Payette Lakes Medical Clinic in McCall became part of St Luke's Health System in January. The merger was intended to provide patients the benefits of the business office of St. Luke's while relieving doctors from the role of business managers, all part of a plan to improve patient access while

ensuring an efficient work environment for physicians. The clinic will continue to accept current insurance providers, and fees for services will not increase. The nine doctors and two dozen other staffers became employees of St. Luke's. The physicians working at the clinic will continue staffing the emergency room at McCall Memorial Hospital. Meadows Valley Medical Clinic in New Meadows and Salmon River Medical Clinic in Riggins, which are operated by the Payette Lakes Medical Clinic, will become part of St. Luke's physician clinics.

- Life Flight Network has stationed a new, high-performance helicopter at the air ambulance's base at McCall airport. The AStar B3 replaced the former helicopter, an Agusta Koala, because it not only holds the record for high-altitude landings but has a more powerful engine to providing greater lift capabilities. This will allow the helicopter to take off from McCall fully fueled in the summer, thus increasing its range. The helicopter carries a pilot, a paramedic and a registered nurse trained for air medical evacuations.
- Cascade Medical Center has a new program that uses a robot for remote psychiatric consultations. The "tele-psych" program is used around the region whenever access to medical expertise is limited. The remote services can extend a physician's reach to manage patient care, removing time and distance barriers. The robot is mounted with a high-tech camera that transmits live images of a patient with a zoom option that allows doctors a close-up view of their distant patient. The two-way video also allows the patient to see the doctor. This service is available to all medical providers offering the opportunity to refer adult patients who are struggling with various forms of mental illness. The robot sessions will be available on the fourth Thursday of the month.
- The 2010 McCall Winter Carnival, Jan. 29 through Feb. 7, again will feature snow and ice sculptures along with the other festivities. This year's theme is Wild Idaho. The event drew more than 10,000 visitors last year who spent money on food, lodging, gas and goods.
- Arrow Construction Supply has opened a new outlet in Lake Fork to cover the Boise to Lewiston area. Arrow sells a variety of products including concrete, asphalt, excavating supplies and erosion control. It's also a certified Ariens snow blower machine distributor.
- May Hardware has joined the green trend and is looking forward to saving dollars. The hardware store recently switched from high intensity incandescent lighting to fluorescent lighting. The new lights are equipped with electronic ballasts which enhance the lights' energy efficiency. Motion-activated light switches were installed through the store to further economize. Store owners hope the green lighting will cut the electricity cost by half. May Hardware took advantage of two programs to help trim the cost of the installation – a rebate from Idaho Power and a USDA Rural Development Grant.



Snow sculpture from a previous McCall Winter Carnival. Photo: Idaho Tourism.

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SOUTH CENTRAL IDAHO

Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka and Twin Falls counties

AREA DEVELOPMENTS

BLAINE COUNTY

- Idaho State University is committed to bringing a Masters of Business Administration program to the Wood River Valley, using e-learning and vacationing CEOs as guest lecturers. Program organizers hope to start with 20-25 students, many residing in or near Twin Falls but also as far away as Boise and Pocatello. The vision grows to include a program with participants from across the nation and that employer support will provide the financial thrust to fill the initial class. The application process will include nominations from employers accompanying student letters of interest. The cost is estimated to range from \$18,000 to \$25,000 for the two-year degree with the first class starting fall of 2010. This venture is partially economic development motivated, with valley leaders eager for students to embrace the valley's quality of life and permanently settle down in the area.
- Carey was the home of state government in December as the Governor hosted a "Capitol for a Day" operating out of the local high school gym. The event was particularly memorable as Pete Cenaarusa, former Idaho Secretary of State for 36 years, was honored – the day before his 92nd birthday. His family originated from the Carey area where they ranched, raising sheep for many years. Topics broached by attending citizens were tied to natural resource issues and the economy.
- Whiskey Jacques in downtown Ketchum has reopened after it burned to the ground in 2007. The big opening draw was local bands the first weekend. The business also set up a Web site showing scheduled entertainment for 2010. While the ambiance is the same, there is a new improved stage and sound system.
- Friedman Memorial Airport in Hailey and Magic Valley Regional Airport in Twin Falls were included in the Transportation Security Administration's 2009 Airport of the Year Award. The honor was based in part on positive customer feedback, maintaining the highest level of security and special performance during the 2009 Special Olympics winter games. The award included the Boise Airport and airports in Pocatello, Idaho Falls and Lewiston. They were chosen out of 400 commercial service airports across the country. Idaho's TSA Advisory Council was also named the "Best Employee Advisory Council in the Northwest."
- Hailey's Sustainability Center provides locally grown fresh foods to the community, ranging from farm fresh eggs to cuts of lamb from Trailing of the Sheep's wool-bedecked participants. The Center's motto is "Grown Right and Right Nearby," with a few exceptions such as the salmon from Bristol Bay where the center's proprietor, Dick Springs, personally knows the family that catches and ships the fish. The purpose is to become close to the source of the food we ingest and enhance learning opportunities through discussions at the center among fellow consumers.
- The new Sun Valley Pavilion earned recognition from the American Institute of Architects. The institute gave a merit award to Sun Valley Co., Sun Valley Summer Symphony, Ruscitto/Latham/Blanton Architecture and FTL Design Engineering Studio in the 2009 Northwest and Pacific Region. The

pavilion, designed by Ruscitto/Latham/Blanton for Sun Valley Co., was cited as a "powerful landmark and excellent integration of engineering."

- Ketchum continues to wow its constituency with its innovation, this time with a new restaurant that combines good nutrition with elegant cuisine, local art pieces and a community garden that supplies the restaurant's kitchen and educates kids. Taking vision from renowned restaurateur Alice Waters of Berkley, Calif., Sego Restaurant in downtown Ketchum will employ 28 and promote organic and small farm products. Waters created the Edible Schoolyard program in the public schools system of Berkley to combat child obesity and poor nutrition, advocating eating locally-produced foods that are in season. Waters contends the international shipment of mass-produced food is both harmful to the environment and produces an inferior product for the consumer. Restaurant owner Kevin Stuessi and executive chef Taite Pearson plan to partner with the Environmental Resource Center and area students to plant a community garden and renovate an existing garden shed with the help of woodshop students to house the resource center's telescope for night time viewing.
- Rolling in Dough rolled out from a home business to a retail location on Warm Springs Road. The European pastry company provides artisan breads, tortes, brioches and sandwiches to many businesses throughout Ketchum including Iconoclast Books and Café, Atkinsons' Market, Zenergy and Penelope's Café and distributes its product through Idaho's Bounty, an organic food cooperative.
- The Smoking Dog Tobacco Company in Hailey opened its doors this fall providing a venue that does not ban smoking. The business provides an air filtration system and has the only humididor in Hailey. Smoking Dog also offers hookahs for social smoking of a low-nicotine, fruit-flavored tobacco. The business sells high-end cigars and bulk tobacco for rolling cigarettes that can be smoked in the store's lounge or for takeout.
- The Powerhouse Pub and Bike Store hung out its shingle just one week before Christmas. The owner, a former bike mechanic, said friends often brought six-packs into the bike shop while they worked and most of them also worked part-time at restaurants.
- Bruce Willis performed for the Wood River Valley after a two-year hiatus. His last local show was at the Kick Ash Bash to benefit the Castle Rock firefighters in 2007. The Mint in Hailey hosted Willis and other entertainers for both Christmas and New Year's concerts. The Christmas show was cut off after only 30 minutes when the Wood River Valley experienced a power outage that lasted up to 27 hours for some parts of the valley.
- The Brick House Bar and Grill opened this summer in the turn-of-the-century Bank Building on Bellevue's Main Street attracting commuters and rural residents from Carey, Picabo and Shoshone. Owner Tom Nickel has operated numerous restaurants in the Wood River Valley.

TWIN FALLS COUNTY

- Baby Back Shack has opened in Buhl with a menu and venue for barbecue lovers. Operating a restaurant is a passion that originated in owner Kami Lammer's childhood when her family ran the Shake-Out Restaurant in Kimberly.
- Castleford Community Center is celebrating its grand opening with a ribbon cutting. The new facility includes a general meeting room, kitchen, multi-purpose room and office space for Castleford Quick Response and the City of Castleford. The new facility is open for the public to use. The Castleford Men's Club spearheaded the construction.

- Grupo Modelo S.B.A., brewer of Corona, Modelo and Pacifico beer, is expected to set up operations in western Twin Falls County later this year. The addition of Modelo would mean that the nation's four largest brewers would rely on Magic Valley barley growers for the key ingredient in their beer. The company is in the process of contracting with area barley producers and setting up a grain elevator. A facility on a rail spur currently sits idle after a bio-diesel company was not able to reach production stages. The barley will have to be harvested and shipped to Idaho Falls more than two and half hours away. From there, the barley will be malted and then shipped to a brewery in Sonora or one of six other breweries in Mexico. Freight is an important component of the deal. Coors is currently south central Idaho's the largest barley customer, followed by Anheuser-Busch InBev and Great Western Malting Co. Together they have contracts from almost 300 growers in southern Idaho.
- Precision Aviation is expanding its services by spinning off a new company, Precision Aviation Maintenance, Inc., providing maintenance inspections and services for all types of aircraft including piston, turbo-prop and jet, according to owner Mark Doerr. The office and hangar, which includes the original charter service, are located at the Magic Valley Regional Airport.
- Denney & Company, Chartered Public Accountants, commemorated its new office building with a ribbon cutting by the Twin Falls Chamber of Commerce. The company has provided an array of financial services to the community for over 15 years.
- Multi-Care Home Health & Personal Care Service Inc. has opened its doors in Twin Falls providing home health care to a market that is projected to achieve high growth due to the aging demographics of the nation, state and region.
- Grandma's Attic is an umbrella for collectible dealers who pay monthly rent for space. It recently moved from its downtown location to the former Second Time Around, which moved to the Shoshone area after a car drove through its front entry. Grandma's Attic changed location primarily after it lost a sizeable portion of its foot traffic when Mustard Seed, a non-profit thrift store, moved out of the downtown core. The new venue has a strong traffic pattern and is easily accessible. The store features comic books, old tools, antique sporting goods, police memorabilia along with vintage jewelry, clothing, art and furniture.
- While hunting is a significant contributor to the economy in south central Idaho, duck hunting doesn't garner as much press or interest from the public as other hunts. But when Sportsman's Warehouse hosted Buck Garner, a celebrity in the duck hunting world, people showed up. Garner is a former world champion duck caller and domestically manufactures reasonably-priced, good quality duck calls. The Memphis, Tenn., resident taught a workshop in Twin Falls in December.
- Ridley's Family Markets, an independent grocer, has expanded its base of stores in Utah by purchasing two Albertson's in Orem. The company recently moved its corporate headquarters to Twin Falls, operating out of the building that originally housed Jayco RV. The new stores bring an additional staff of 120 under its organization. Ridley's is already familiar with the Utah market, currently operating two stores in Tremonton and Hyrum.
- The Small Business Administration guaranteed loans to 48 Magic Valley businesses, ensuring financing of \$7.8 million in 2009. Loans to Idaho businesses as a whole totaled more than \$84 million.

- Asset Bookkeeping and Tax Service had a grand opening and ribbon cutting in Hansen to commemorate its new business service, just in time for tax season. The business emphasizes customer service including on-site meetings or home visits for customers.
- The Foothills Café opted to close its doors in December after struggling with decreased patronage during the second half of 2009. The café had been open for over five years.
- St. Luke's financial services office will occupy a renovated facility close to Old Towne next spring. The move will bring the 100 employees currently split between two temporary locations to one location, and the price was right. The Twin Falls Urban Renewal Agency sold the building at an affordable price and provided ample parking for the workers. This decision frees up space at the new hospital for health-care related enterprises versus administrative. The lack of an employment base downtown has been a barrier for implementing some of the mixed use development plans touted by the city's consultants, including residential units above restaurants, retail outlets and offices.

NEW TO DOWNTOWN TWIN FALLS

- The Bead Shop
- Pam's Stained Glass
- Von Scheidt Brewing Company — bar and restaurant

JEROME

- The Perrine Bell was placed at the new Jerome Senior Center in a dedication ceremony attended by the great-granddaughter of I.B. Perrine, who first brought the bell to Idaho from a trip to Pennsylvania. It is believed the bell was forged in 1751, the same year as the famous Liberty Bell, both of which have developed a crack. The 250-year old bell was used to call ranch hands for emergencies and mealtimes. Then for 40 years the bell was used to call the ferry for passage across the river. There is an unconfirmed legend of a second bell that was lost when a tree grew around it.

CASSIA/MINIDOKA COUNTIES

- TND Collectables has opened its doors Fridays and Saturdays in the Burley market. The business offers handmade glass gifts, sports cards and memorabilia.
- Burley City Council is considering a request from Renova Energy creditors to defer rent payments they owe to the city and Minidoka County. Local subcontractors are hoping to recoup some of the estimated \$15 million the now-defunct company owes them by either selling the plant wholly or liquidating some of the equipment and fixtures through a lien holder's trust. Last fall, the creditors unsuccessfully asked the council to waive \$77,000 of back rent. So far, Renova has yet to bring the arrears current. Renova owes Minidoka County \$327,936 in unpaid 2008 taxes for the plant, transfer station and tanks, along with late charges and interest, according to Minidoka County Treasurer Laura Twiss. Construction of the plant is approximately 95 percent complete.
- In an effort to smooth the way for a chicken processing plant, the Cassia County Planning & Zoning Committee approved Magic Valley Poultry International's request for changes to the poultry Confined Animal Feeding Operation's ordinance, clearing the way to confine 4.2 million chickens per facility. Commentary from the public also stimulated a four-mile buffer zone requirement based on the potential for odor issues.

- Cassia and Minidoka counties have canceled the contract between New West Strategies, a lobbying group established by former U.S. Sen. Larry Craig, based on federal budget drafts indicating the prison facility will not be included in the next round of funding. The counties were paying the consulting group \$5,000 monthly when site selection was still a possibility for the U.S. Geothermal site, just east of the Jim Sage Mountains in Cassia County.

GOODING COUNTY

- The J.A. and Kathryn Albertson Foundation provided \$175,000 for expansion projects at two area charter schools. The North Valley Academy of Gooding is applying \$75,000 towards renovation of the Gibbons Building, which is moving from the Idaho School for the Deaf and Blind. The academy anticipates classes will start at the new facility by February. Xavier School in Twin Falls is using \$100,000 towards its new school building. State law does not allow charter schools to finance building with public bonding. Of the total \$925,000 the foundation granted throughout the state, the south central region was awarded almost 20 percent.
- Newly appointed Idaho Parks and Recreation Director Nancy Merrill visited Hagerman in December following up on the Park and Recreation Board’s recommendation that Thousand Springs State Park be on the short list for closure should another round of budget reductions be required by the Idaho Legislature. The proposed closure is not a surprise as the current fee system does not offset the park’s expenses, but the park indirectly generates millions for the region based on its visitor draw and corresponding economic impact.

THOUSAND SPRINGS STATE PARK - 5 PARKS IN ONE

Unit Name	Amenities/Activities
Malad Gorge	Hiking trails, vistas, picnicking, site of annual St. Patrick’s Day Run
Billingsley Creek	Equestrian arena, garden center, walking/biking path, scenic creek, site of Blues in the Park and Saturday Flea Market
Niagra Springs / Crystal Springs	Picnic, hiking, fishing, photography, non-motorized boating on Crystal Lake
Box Canyon	11 th largest spring, wildlife viewing, hiking, eagle migration/bird watching, restrooms
Ritter Island	Minnie Miller stone home and restored dairy barn, picnic, hiking, site of annual Thousand Springs Art Festival

- J. D. Heiskell & Company, headquartered in Tulare, Calif., will absorb the Land O’Lakes Purina feed facilities in Twin Falls and Gooding. The company currently has operations throughout southern Idaho including a storage facility in Bliss, a feed manufacturing plant in Wendell and a grain rolling business in Mountain Home.

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SOUTHEASTERN IDAHO

Bannock, Bear Lake, Bingham, Caribou, Franklin, Oneida & Power counties

AREA DEVELOPMENTS

BANNOCK COUNTY

- Nordic Windpower in Pocatello sent its first shipment of wind turbines to Uruguay. The assembly plant, located at the old Naval Ordnance Plant on Pole Line Road, has many more shipments planned for various destinations. The company makes an innovative two-blade, 1-megawatt turbine that weighs 50 tons and has a price tag of \$1.2 million. The company currently can produce 100 units a year and has the ability to expand as it only uses about 40 percent of its warehouse space. Nordic plans to be producing 200 units in three years as business continues to increase. Nordic is headquartered in Berkley, Calif. and opened the Pocatello plant in 2008.
- Hoku Scientific, Inc. recently had some good news. The clean energy company specializing in silicon wafers, photovoltaic cells, modules and systems learned that financing has come through to finish construction at the Pocatello plant. That plant, Hoku Materials, will manufacture, market and sell polysilicon for the solar market. Hoku finally closed on a deal with Tianwei New Energy Holding Co., Ltd. that will allow the company to pay down debt with enough money remaining to complete projects including the Pocatello one. Hoku moved into the Pocatello area in early 2009, but manufacturing had been stalled due to financial issues.
- Idaho State University geosciences professors Nancy Glenn and Daniel Ames will get to develop high-tech tools to analyze and manage watersheds for local communities, agencies and government thanks to U.S. Rep. Mike Simpson who secured \$340,650 from the Physical Sciences Division of the National Oceanic and Atmospheric Administration for the project. Watersheds are vast areas of land that drain into lakes and rivers and provide water for drinking, irrigation, wildlife, recreation and commerce. Glenn heads the ISU Boise Center Aerospace Laboratory and Ames is at the ISU Geospatial Laboratory at the Center for Advanced Energy Studies in Idaho Falls. Both researchers will be assisted by graduate students to develop sophisticated light detection and ranging LiDAR tools for the project. They will map the area with MapWindow GIS developed by Ames and remote sensing tools developed by Glenn.
- Idaho State University reports that out-of-state student enrollment is on the rise. California is the major contributor as ISU's out-of-state fees are cheaper than most in-state fees for California residents. The university is focused on recruiting from other states by sending recruiters to 10 states promoting the university and avidly using Facebook and Twitter to reach potential applicants.
- The National Science Foundation awarded \$568,935 to Idaho State University to fund scholarships for chemistry and biochemistry students. The scholarships will be awarded over the next five years. The STEM grant is designed to promote careers in science, technology, engineering and mathematics. At ISU, the program has the potential to fund 20 four-year scholarships over its duration and will help decrease attrition. The program is currently seeking applicants and will start screening for the 2010-11 academic year as early as March. Robert Holman is the contact at holmrobe@isu.edu or (208)282-4444.
- Idaho State University professor Howard A. Schmidt has been appointed White House Cybersecurity Coordinator by President Barak Obama, reporting to the national Security Council and supporting the National Economic Council on cyber issues. Schmidt, a research professor of information as-

insurance policy at ISU, is also a member of the Informatics Research Institute, works with students in the CyberCorps program regularly and guides students in the nationally-recognized academic and research program at ISU. Schmidt is the chief executive officer of the nonprofit London-based Information Security Forum, a computer security trade association. He also was chief security officer at eBay and chief security officer at Microsoft. He also served as the vice chairman of the president's Critical Infrastructure Protection Board and special adviser for cyberspace security under the Bush administration. In the Air Force and Army he was in computer security and also led a forensics team for the FBI at the National Drug Intelligence Center.

CARIBOU COUNTY

- Agrium in Soda Springs laid off over 100 employees at the end of December and is waiting to hear who will hold the contract at this time. The employees of the phosphate manufacturer believe they will return to the company where Washington Group most recently held the contract.

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EAST CENTRAL IDAHO

Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison & Teton counties

AREA DEVELOPMENTS

IDAHO NATIONAL LABORATORY

- Construction will soon begin on a 10,000-square-foot laboratory addition to Idaho National Laboratory's battery and testing facility more than doubling its size. Funding of \$5 million from the American Recovery and Reinvestment Act will allow the INL to test new battery technologies for cars and create batteries that are cheaper, have a longer life and are more powerful. The new facility will be known as the High Energy Battery Test Facility.

BONNEVILLE COUNTY

- Wealth of Health combined its two locations and moved into a 4,500-square-foot former Blockbuster Video on Woodruff Avenue. Wealth of Health specializes in nutrition products, supplements and specialty foods.
- Idaho Falls was recently named as the best place in Idaho to raise children by Business Week. Magazine staff considered school performance, crime rate, job growth and diversity in making the decision, but the announcement put emphasis on the city's affordability and presence of the Idaho National Laboratory, noting the city also had its own baseball team, museums, a symphony and a zoo.
- Bonneville Joint School District 93 just opened an eCenter at Lincoln High School offering the students another avenue for earning their diploma. The center offers online courses to help students who have struggled at alternative or traditional high schools and will help the district bring in additional funding. The classes are free to students who qualify, but will cost no more than \$100 per credit to those who don't qualify for assistance. The center has space for up to 200 students.
- Several new restaurants have opened or changed hands in the Idaho Falls area. The Cheeseburger Factory opened in Ammon on the corner of Sunnyside and Hitt roads, offering a "burger-centric" menu. Owner Scott Finck

owns the Cheeseburger Factory in Driggs and Billy's Burgers in Jackson Hole, Wyo. A third Wendy's opened nearby. Rich Franco opened Lucy's Authentic New York Style Pizzeria on Anderson Street with 18-inch thin crust pizzas. Franco along with three others started Lucy's in Roberts earlier in the year with great success. The El Salvadoreno just opened on E 17th Street in Idaho Falls and offers Central American dishes including pupusas – flatbread filled with steak and onions. The Hard Hat Steakhouse at 1175 Pier View Drive changed ownership to Idaho Falls native Dan Boyd who changed the name to Hard Hat Woodfire Grill. The menu was also expanded to include seafood and barbeque along with the steak and prime rib. Pickett's Bambinos will be opening in February on Fremont Drive near Higham Street.

- U.S. Senator Jim Risch opened an office at 901 Pier View Drive at Snake River Landing in Idaho Falls.
- North Wind Inc., an environmental and technical consulting firm, was recently sold to Cook Inlet Region Inc., Development Corp. Previous owner Sylvia Media will remain as the company president and all 400 plus employees will be retained. North Wind will remain a small business because Cook is set up as an Alaskan Native regional corporation. North Wind, which has grown and developed very well in a short period of time in Idaho Falls, will continue to operate under that name.
- After 76 years, Farr's Candy Company in Idaho Falls is moving from D Street to South Boulevard. The candy and ice cream company is under a third generation family owner, Kevin Call. The company has experienced growth in the past two years as it signed a new distribution contract with a Sam's Club warehouse in Utah and introduced the Huckleberry Cordial. The bigger building will help handle the capacity of making about 2,000 gallons of ice cream and 4,800 candy bars every day during busy summer months.
- The Center for Advanced Energy Studies in Idaho Falls recently installed a second windmill as a renewable-energy test bed so researchers and students can study it for performance and potential additions. The first windmill installed in the fall of 2009 has a vertical axis while the new one has a horizontal axis. Having both windmills side-by-side in the same wind conditions will help define pros and cons to the different designs and help enhance performance of windmills. They are also connected the Idaho Falls' power grid and will produce as much as 1.5 kilowatts per hour. The center is also working to install two solar panels that will rotate to face the sun directly at all time. These should be in operation before the middle of the year.
- Ammon dedicated a new \$4.4 million water complex that will boost water pressure and significantly increase storage capacity. The new complex is located in Founder's Pointe housing development in the foothills of Idaho Falls. It has a 2 million gallon tank and 10 pumps at the booster station. While the new station became operational about eight months ago, a line connecting the tank to the rest of the city's system will be opening very soon. The city has struggled for many years as exponential growth has kept the city from keeping up with demand and many residents have had frustrating water problems.
- The city of Ammon has distributed a resident information guide on CD to all city residents that answers the most commonly asked questions about city policies. Residents without computer access can use computers at city hall to read the guide. The CD production was donated and the city only had to foot the bill for postage.

JEFFERSON COUNTY

- An explosion at Ike's Tesoro service station in Terreton in mid-December was seen as far away as Rexburg. No injuries occurred when a fuel truck and three large fuel tanks exploded. Residents five miles away felt the blasts and the truck was almost disintegrated. Close to 100 firefighters and emergency personnel were there to fight the blaze that burned for two and a half hours. Local fire stations, the INL and surrounding city fire stations responded.

LEMHI COUNTY

- Formation Capital plans to open the Idaho Cobalt Mine, the country's only cobalt mine. The opening is planned for mid-2011 and will be located underground in the Salmon-Challis National Forest 40 miles southwest of Salmon. Currently, the United States imports all the cobalt it uses in batteries of hybrid cars and engines of wind turbines and prosthetics. The company anticipates mining 800 tons of high-grade cobalt deposits that will be processed at a facility near Kellogg. The mine could employ 160 workers once in operation. It has taken over a decade for the project to see reality and the company has spent over \$50 million on studies and the permitting process. The location was chosen because it has unique geological features that produce rare, high-grade cobalt deposits.
- Rags & Wags is the new Lemhi County Humane Society thrift store. It opened on Main Street in Salmon on the remodeled lower floor of the Odd Fellows building.

MADISON COUNTY

- Madison Memorial Hospital in Rexburg is using a \$350,000 federal grant to go digital. The hospital plans to convert medical records to a digital format to easily store and transmit from office to office. Part of the grant will go towards buying the equipment needed. The laboratory and radiology department started converting records last year and nurses and staff have been working on it since the spring.
- The Rexburg Standard Journal has a new publisher. Kristy Geisler, most recently the community affairs director of the city of Rexburg, returned to the paper after previously working as advertising director and later associate publisher and special sections editor. She follows Tod Young who resigned in November. The Standard Journal is owned by Pioneer Newspapers of Seattle and is published three times a week.

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State of Idaho Data

December 2009 Labor Force (preliminary) compared to November 2008 data
(continued on next page).

Seasonally Adjusted Data	Dec 2009				Dec 2008			
	Civilian Labor Force	# Unem- ployed	% Unem- ployed	Total Employment	Civilian Labor Force	# Unem- ployed	% Unem- ployed	Total Employment
STATE OF IDAHO	753,927	69,016	9.2	684,911	759,249	46,019	6.1	713,230
COUNTIES								
ADA	190,599	15,284	8.0	175,315	195,045	10,157	5.2	184,889
ADAMS	2,093	508	24.3	1,585	1,920	327	17.0	1,594
BANNOCK	39,410	2,830	7.2	36,581	41,020	1,844	4.5	39,177
BEAR LAKE	3,277	244	7.4	3,033	3,300	134	4.1	3,165
BENEWAH	4,126	684	16.6	3,442	4,128	542	13.1	3,585
BINGHAM	21,004	1,558	7.4	19,445	20,722	1,048	5.1	19,675
BLAINE	13,463	1,203	8.9	12,260	14,411	719	5.0	13,692
BOISE	3,583	426	11.9	3,157	3,622	292	8.1	3,330
BONNER	21,840	2,671	12.2	19,169	21,867	1,700	7.8	20,167
BONNEVILLE	50,239	3,063	6.1	47,175	51,146	2,000	3.9	49,145
BOUNDARY	4,544	746	16.4	3,798	4,265	482	11.3	3,783
BUTTE	1,385	98	7.1	1,287	1,319	60	4.5	1,259
CAMAS	632	80	12.7	552	660	44	6.7	616
CANYON	83,753	9,989	11.9	73,764	84,784	6,992	8.2	77,792
CARIBOU	3,682	283	7.7	3,399	3,418	205	6.0	3,213
CASSIA	9,447	715	7.6	8,732	9,281	481	5.2	8,799
CLARK	515	64	12.5	451	473	35	7.4	438
CLEARWATER	3,341	610	18.3	2,731	3,338	492	14.7	2,845
CUSTER	2,477	266	10.7	2,211	2,363	173	7.3	2,190
ELMORE	11,140	1,028	9.2	10,112	11,146	718	6.4	10,428
FRANKLIN	5,930	272	4.6	5,658	6,002	187	3.1	5,816
FREMONT	5,685	729	12.8	4,957	5,785	420	7.3	5,365
GEM	7,052	824	11.7	6,227	7,157	590	8.2	6,567
GOODING	8,695	665	7.6	8,030	8,540	335	3.9	8,205
IDAHO	7,544	1,042	13.8	6,502	7,285	820	11.3	6,465
JEFFERSON	11,381	951	8.4	10,429	11,459	594	5.2	10,865
JEROME	10,452	933	8.9	9,518	10,351	533	5.2	9,818
KOOTENAI	73,944	7,830	10.6	66,114	72,337	5,334	7.4	67,003
LATAH	18,030	1,198	6.6	16,832	17,604	859	4.9	16,745
LEMHI	3,635	480	13.2	3,155	3,536	368	10.4	3,168
LEWIS	1,709	103	6.0	1,606	1,670	74	4.4	1,596
LINCOLN	2,627	465	17.7	2,161	2,428	258	10.6	2,169
MADISON	15,386	959	6.2	14,427	16,270	656	4.0	15,615
MINIDOKA	8,863	802	9.1	8,061	8,645	522	6.0	8,123
NEZ PERCE	20,325	1,258	6.2	19,067	19,649	889	4.5	18,760
ONEIDA	2,260	133	5.9	2,127	2,272	81	3.6	2,191
OWYHEE	4,173	172	4.1	4,001	4,331	112	2.6	4,219
PAYETTE	10,804	1,251	11.6	9,554	10,277	839	8.2	9,438
POWER	3,828	532	13.9	3,296	3,845	314	8.2	3,531
SHOSHONE	6,524	1,072	16.4	5,452	6,768	813	12.0	5,955
TETON	5,147	485	9.4	4,662	5,526	251	4.5	5,275
TWIN FALLS	39,665	3,003	7.6	36,663	39,560	1,743	4.4	37,818
VALLEY	4,989	961	19.3	4,027	5,047	596	11.8	4,452
WASHINGTON	4,731	544	11.5	4,187	4,674	386	8.2	4,289
ASOTIN WA	10,876	1,047	9.6	9,829	11,047	1,062	9.6	9,985

* In thousands

State of Idaho Data

December 2009 Labor Force (preliminary) compared to November 2008 data
(continued from previous page).

Seasonally Adjusted Data LABOR MARKET AREAS	Dec 2009				Dec 2008			
	Civilian Labor Force	# Unemployed	% Unemployed	Total Employment	Civilian Labor Force	# Unemployed	% Unemployed	Total Employment
BOISE CITY-NAMPA MSA	289,159	26,695	9.2	262,464	294,940	18,143	6.2	276,797
BURLEY MicSA	18,310	1,517	8.3	16,793	17,926	1,004	5.6	16,923
COEUR D'ALENE MSA	73,944	7,830	10.6	66,114	72,337	5,334	7.4	67,003
GRANGEVILLE SLMA	9,253	1,145	12.4	8,108	8,955	894	10.0	8,061
HAILEY SLMA	14,095	1,283	9.1	12,812	15,071	763	5.1	14,307
IDAHO FALLS MSA	61,619	4,015	6.5	57,605	62,604	2,594	4.1	60,010
LEWISTON MSA	31,201	2,305	7.4	28,896	30,696	1,951	6.4	28,745
POCATELLO MSA	43,238	3,362	7.8	39,877	44,865	2,158	4.8	42,707
REXBURG MicSA	21,071	1,687	8.0	19,384	22,056	1,076	4.9	20,980
TWIN FALLS MicSA	50,117	3,936	7.9	46,181	49,912	2,276	4.6	47,636
CITIES								
BOISE	106,717	10,126	9.5	96,591	108,221	7,193	6.6	101,028
CALDWELL	18,036	2,441	13.5	15,595	18,042	1,731	9.6	16,311
COEUR D' ALENE	23,321	2,207	9.5	21,115	22,743	1,520	6.7	21,223
IDAHO FALLS	28,260	1,937	6.9	26,323	28,483	1,286	4.5	27,197
LEWISTON	16,602	1,014	6.1	15,587	15,967	757	4.7	15,210
MERIDIAN	32,116	3,288	10.2	28,828	32,349	2,196	6.8	30,152
NAMPA	35,942	4,076	11.3	31,866	36,514	3,184	8.7	33,330
POCATELLO	28,019	2,115	7.5	25,904	28,956	1,441	5.0	27,515
TWIN FALLS	22,300	1,967	8.8	20,333	22,000	1,198	5.4	20,801
United States*	153,059	15,267	10.0	137,792	154,587	11,400	7.4	143,188

* In thousands

SOURCE: Idaho Department of Labor, Research & Analysis and Public Affairs.

State of Idaho Data — Nonfarm Jobs

% change from

BY PLACE OF WORK	Dec 2009*	Nov 2009	Dec 2008	Last Month	Last Year
TOTAL NONFARM	601,100	605,500	634,700	-0.7%	-5.3%
TOTAL PRIVATE	483,300	486,800	512,700	-0.7%	-5.7%
GOODS PRODUCING	88,400	90,700	103,100	-2.5%	-14.3%
SERVICE PROD. (INC. GOV)	3,200	3,300	3,900	-3.0%	-17.9%
PRIVATE SERVICE PROVIDING	1,300	1,300	1,500	0.0%	-13.3%
NATURAL RESOURCES	1,900	2,000	2,400	-5.0%	-20.8%
LOGGING	31,100	32,600	40,200	-4.6%	-22.6%
MINING	7,200	7,500	9,900	-4.0%	-27.3%
CONSTRUCTION	5,000	5,200	5,900	-3.8%	-15.3%
CONSTRUCTION OF BUILDING	5,000	5,500	5,200	-9.1%	-3.8%
RESIDENTIAL BUILDING CONSTRUCTION	18,900	19,600	25,100	-3.6%	-24.7%
HEAVY AND CIVIL ENGINEERING CONSTRUCTION	4,900	5,100	6,400	-3.9%	-23.4%
SPECIALTY TRADE CONTRACTORS	6,800	6,900	9,800	-1.4%	-30.6%
FOUNDATION, STRUCTURE AND BUILDING CONTRACTORS	3,700	3,800	4,800	-2.6%	-22.9%
BUILDING EQUIPMENT CONTRACTORS	3,500	3,800	4,100	-7.9%	-14.6%
BUILDING FINISHING CONTRACTORS	54,100	54,800	59,000	-1.3%	-8.3%
OTHER SPECIALTY TRADE CONTRACTORS	24,100	24,200	24,300	-0.4%	-0.8%
MANUFACTURING	16,100	16,200	15,800	-0.6%	1.9%
DURABLE GOODS	7,800	7,700	7,800	1.3%	0.0%
WOOD PRODUCT MANUFACTURING	30,000	30,600	34,700	-2.0%	-13.5%
MACHINERY MANUFACTURING	4,800	4,700	5,400	2.1%	-11.1%
COMPUTER AND ELECTRONIC MANUFACTURING	2,600	2,500	3,100	4.0%	-16.1%
COMPUTER AND PERIPHERAL MANUFACTURING	10,600	10,700	12,800	-0.9%	-17.2%
SEMICONDUCTER AND OTHER ELECTRONIC MANUFACTURING	2,900	2,900	3,300	0.0%	-12.1%
NONDURABLE GOODS	7,300	7,300	9,000	0.0%	-18.9%
FOOD MANUFACTURING	512,700	514,800	531,500	-0.4%	-3.5%
FRUIT AND VEGETABLE PRESERVING MANUFACTURING	394,900	396,100	409,500	-0.3%	-3.6%
TRADE, TRANSPORTATION AND UTILITIES	122,200	122,800	131,000	-0.5%	-6.7%
WHOLESALE TRADE	25,300	25,500	27,100	-0.8%	-6.6%
MERCHANT WHOLESALERS DURABLE GOODS	11,100	11,100	12,300	0.0%	-9.8%
MERCHANT WHOLESALERS NONDURABLE GOODS	11,600	11,600	11,900	0.0%	-2.5%
RETAIL TRADE	76,600	77,200	82,300	-0.8%	-6.9%
MOTOR VEHICLE AND PARTS DEALERS	10,100	10,300	11,000	-1.9%	-8.2%
BUILDING MATERIALS AND GARDEN SUPPLIES	7,400	7,400	7,800	0.0%	-5.1%
FOOD AND BEVERAGE STORES	12,700	12,700	13,200	0.0%	-3.8%
GROCERY STORES	10,700	10,800	11,200	-0.9%	-4.5%
GENERAL MERCHANDISE STORES	18,100	18,000	18,100	0.6%	0.0%
DEPARTMENT STORES	6,200	6,100	6,400	1.6%	-3.1%
OTHER GENERAL MERCHANDISE STORES	11,800	11,800	11,800	0.0%	0.0%
TRANSPORTATION, WAREHOUSE AND UTILITIES	20,300	20,100	21,600	1.0%	-6.0%
UTILITIES	2,100	2,100	2,300	0.0%	-8.7%
TRANSPORTATION AND WAREHOUSING	18,100	17,900	19,300	1.1%	-6.2%
TRUCK TRANSPORTATION	8,700	8,700	9,400	0.0%	-7.4%
GENERAL FREIGHT TRUCKING	6,100	6,100	6,200	0.0%	-1.6%
INFORMATION	10,100	10,100	12,000	0.0%	-15.8%
TELECOMMUNICATIONS	3,500	3,500	5,000	0.0%	-30.0%
FINANCIAL ACTIVITIES	29,500	29,600	31,000	-0.3%	-4.8%

Continued from previous page.

State of Idaho Data — Nonfarm Payroll Jobs					% change from	
BY PLACE OF WORK	Dec 2009*	Nov 2009	Dec 2008	Last Month	Last Year	
Total Nonfarm Jobs**	601,100	605,500	634,700	-0.7%	-5.3%	
FINANCE AND INSURANCE	22,400	22,500	23,100	-0.4%	-3.0%	
CREDIT INTERMEDIATION AND RELATED ACTIVITIES	11,200	11,200	11,500	0.0%	-2.6%	
INSURANCE CARRIERS AND RELATED ACTIVITIES	9,700	9,700	9,700	0.0%	0.0%	
REAL ESTATE AND RENTAL AND LEASING	7,100	7,100	7,900	0.0%	-10.1%	
PROFESSIONAL AND BUSINESS SERVICES	74,100	74,600	77,400	-0.7%	-4.3%	
PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES	32,500	32,100	33,600	1.2%	-3.3%	
ARCHITECTURAL, ENGINEERING AND RELATED SERVICES	5,500	5,500	6,800	0.0%	-19.1%	
SCIENTIFIC RESEARCH AND DEVELOPMENT	7,900	7,800	7,400	1.3%	6.8%	
MANAGEMENT OF COMPANIES AND ENTERPRISES	6,700	6,700	7,000	0.0%	-4.3%	
ADMINISTRATIVE, SUPPORT AND WASTE MANAGEMENT SERVICES	34,900	35,800	36,800	-2.5%	-5.2%	
ADMINISTRATIVE, SUPPORT SERVICES	33,000	33,800	35,300	-2.4%	-6.5%	
EMPLOYMENT SERVICES	10,300	10,500	12,900	-1.9%	-20.2%	
BUSINESS SUPPORT SERVICES	11,900	11,700	10,600	1.7%	12.3%	
**TELEPHONE CALL CENTERS	6,500	7,200	7,400	-9.7%	-12.2%	
SERVICES TO BUILDINGS AND DWELLINGS	81,400	81,200	79,800	0.2%	2.0%	
EDUCATION AND HEALTH SERVICES	9,300	9,300	9,300	0.0%	0.0%	
EDUCATIONAL SERVICES	72,100	71,900	70,400	0.3%	2.4%	
HEALTH CARE AND SOCIAL SERVICES	28,800	28,700	27,900	0.3%	3.2%	
AMBULATORY HEALTH CARE	18,900	18,900	17,700	0.0%	6.8%	
HOSPITALS	17,000	16,900	15,700	0.6%	8.3%	
GENERAL MEDICAL AND SURGICAL HOSPITALS	12,500	12,300	12,900	1.6%	-3.1%	
NURSING AND RESIDENTIAL CARE FACILITIES	11,900	12,000	12,000	-0.8%	-0.8%	
SOCIAL ASSISTANCE	57,700	57,600	58,300	0.2%	-1.0%	
LEISURE AND HOSPITALITY	7,600	7,400	7,300	2.7%	4.1%	
ARTS, ENTERTAINMENT AND RECREATION	6,800	6,700	6,400	1.5%	6.3%	
AMUSEMENT GAMBLING AND RECREATION	6,000	5,800	6,000	3.4%	0.0%	
OTHER AMUSEMENT AND RECREATION INDUSTRIES	50,100	50,100	51,000	0.0%	-1.8%	
ACCOMMODATION AND FOOD SERVICES	8,500	8,100	8,300	4.9%	2.4%	
ACCOMODATIONS	41,600	42,100	42,800	-1.2%	-2.8%	
FOOD SERVICE AND DRINKING PLACES	19,100	19,200	19,800	-0.5%	-3.5%	
FULL SERVICE RESTAURANTS	18,700	18,900	19,000	-1.1%	-1.6%	
LIMITED SERVICE RESTAURANTS	19,900	20,200	20,000	-1.5%	-0.5%	
OTHER SERVICES	5,800	5,800	5,900	0.0%	-1.7%	
REPAIR AND MAINTENANCE	4,300	4,400	4,500	-2.3%	-4.4%	
AUTOMOTIVE REPAIR AND MAINTENANCE	117,800	118,700	122,000	-0.8%	-3.4%	
TOTAL GOVERNMENT	12,100	12,500	12,500	-3.2%	-3.2%	
FEDERAL GOVERNMENT	28,800	29,000	30,800	-0.7%	-6.5%	
STATE GOVERNMENT	13,300	13,500	14,900	-1.5%	-10.7%	
STATE EDUCATION	76,900	77,200	78,700	-0.4%	-2.3%	
STATE ADMINISTRATION	41,800	42,200	42,700	-0.9%	-2.1%	
LOCAL GOVERNMENT	77,300	76,900	78,500	0.5	-1.5	
LOCAL EDUCATION	42,100	41,800	42,500	0.7	-0.9	
LOCAL ADMINISTRATION	35,200	35,100	36,000	0.3	-2.2	
STATE AND LOCAL GOVERNMENT	106,800	106,000	109,600	0.8	-2.6	

State of Idaho Data — State Economic Indicators

	Dec 2009*	Nov 2009	Dec 2008	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	753,927	755,384	759,249	-0.2	-0.7
Unemployment	69,016	68,897	46,019	0.2	50.0
Percent of Labor Force Unemployed	9.2	9.1	6.1		
Total Employment	684,911	686,487	713,230	-0.2	-4.0
<i>Unadjusted</i>					
Civilian Labor Force	751,043	753,857	753,140	-0.4	-0.3
Unemployment	68,852	67,591	48,752	1.9	41.2
Percent of Labor Force Unemployed	9.2	9.0	6.5		
Total Employment	682,191	686,266	704,388	-0.6	-3.2

U. S. UNEMPLOYMENT RATE ⁽²⁾

10.0 10.2 6.8

UNEMPLOYMENT INSURANCE

Claims Activities

Initial Claims ⁽³⁾	24,667	20,604	28,559	19.7	-13.6
Weeks Claimed ⁽⁴⁾	148,680	134,885	170,240	10.2	-12.7

Benefit Payment Activities⁽⁵⁾

Weeks Compensated	146,179	89,532	138,863	63.3	5.3
Total Benefit \$ Paid	37,263,974	22,406,559	36,923,316	66.3	0.9
Average Weekly Benefit Amount	\$254.92	\$250.26	\$265.90	1.9	-4.1
Covered Employers	49,232	49,300	51,053	-0.1	-3.6
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$401,484,077	\$401,143,419	\$224,180,373	0.1	79.1

U.S. CONSUMER PRICE INDEX ⁽²⁾

	Dec 2009	Nov 2009	Dec 2008	% Change Month	% Change Year
Urban Wage Earners & Clerical Workers (CPI-W)	211.7	212.0	204.8	-0.1%	3.4%
All Urban Consumer (CPI-U)	215.9	216.3	210.2	-0.2%	2.7%

(1) Preliminary estimate

(2) Source: U.S. Bureau of Labor Statistics — CPI Index is released the 14th of each month.

(3) Includes all entitlements/programs on intrastate and interstate agent, new and additional claims.

(4) Includes all entitlements/programs, intrastate and interstate agent.

(5) Includes all entitlements/programs, total liable activities.

Panhandle Data

Coeur d'Alene MSA Labor Force & Employment – Kootenai County

	Dec 2009*	Nov 2009	Dec 2008	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	73,944	73,091	72,337	1.2	2.2
Unemployed	7,830	8,086	5,334	-3.2	46.8
% of Labor Force Unemployed	10.6	11.1	7.4		
Total Employment	66,114	65,005	67,003	1.7	-1.3
<i>Unadjusted</i>					
Civilian Labor Force	73,302	72,896	71,535	0.6	2.5
Unemployed	7,608	7,357	5,505	3.4	38.2
% of Labor Force Unemployed	10.4	10.1	7.7		
Total Employment	65,694	65,539	66,030	0.2	-0.5
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	54,250	54,720	56,290	-0.9%	-3.6%
Total Private	44,500	45,000	46,300	-1.1%	-3.9%
<i>Goods-Producing Industries</i>	9,340	9,710	9,860	-3.8%	-5.3%
Mining & Logging	250	260	380	-3.8%	-34.2%
Construction	4,730	5,040	4,930	-6.2%	-4.1%
Manufacturing	4,360	4,410	4,550	-1.1%	-4.2%
Wood Products	660	670	780	-1.5%	-15.4%
<i>Service-Providing Industries</i>	44,910	45,010	46,430	-0.2%	-3.3%
Private Service Providing	35,160	35,290	36,440	-0.4%	-3.5%
Trade, Transportation, & Utilities	10,580	10,580	11,060	0.0%	-4.3%
Wholesale Trade	1,430	1,430	1,540	0.0%	-7.1%
Retail Trade	8,150	8,160	8,420	-0.1%	-3.2%
Transportation, Warehousing & Utilities	1,000	990	1,100	1.0%	-9.1%
Information	890	890	910	0.0%	-2.2%
Financial Activities	3,110	3,110	3,150	0.0%	-1.3%
Professional & Business Services	5,430	5,460	5,510	-0.5%	-1.5%
Educational & Health Services	6,370	6,310	6,240	1.0%	2.1%
Leisure & Hospitality	7,540	7,690	8,160	-2.0%	-7.6%
Other Services	1,240	1,250	1,410	-0.8%	-12.1%
Government	9,750	9,720	9,990	0.3%	-2.4%
Federal Government	550	550	540	0.0%	1.9%
State Government	730	730	800	0.0%	-8.8%
Local Government	8,470	8,440	8,650	0.4%	-2.1%
Government Education	3,580	3,560	3,730	0.6%	-4.0%
Government Administration	6,170	6,160	6,260	0.2%	-1.4%

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month.

North Central Idaho Data

Lewiston MSA Labor Force & Employment – Nez Perce County, Idaho and Asotin County, Wash.

	Dec 2009*	Nov 2009	Dec 2008	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	31,201	30,940	30,696	0.8	1.6
Unemployment	2,305	2,130	1,951	8.2	18.2
% of Labor Force Unemployed	7.4	6.9	6.4		
Total Employment	28,896	28,810	28,745	0.3	0.5
<i>Unadjusted</i>					
Civilian Labor Force	30,848	30,650	30,247	0.6	2.0
Unemployment	2,198	1,931	1,894	13.8	16.1
% of Labor Force Unemployed	7.1	6.3	6.3		
Total Employment	28,650	28,719	28,353	-0.2	1.0
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	27,880	28,130	28,790	-0.9%	-3.2%
Total Private	21,510	21,650	22,260	-0.6%	-3.4%
<i>Goods-Producing Industries</i>					
Natural Resources & Mining	180	190	220	-5.3%	-18.2%
Construction	1,150	1,270	1,580	-9.4%	-27.2%
Manufacturing	3,200	3,140	3,090	1.9%	3.6%
Wood Products Mnfct	380	380	430	0.0%	-11.6%
Paper Mnfct	1,010	1,010	1,050	0.0%	-3.8%
<i>Service-Providing Industries</i>					
Private Service Providing	16,980	17,050	17,370	-0.4%	-2.2%
Trade, Transportation & Utilities	5,790	5,780	5,740	0.2%	0.9%
Wholesale Trade	590	590	710	0.0%	-16.9%
Retail Trade	4,120	4,140	3,950	-0.5%	4.3%
Transportation & Warehousing	1,080	1,050	1,080	2.9%	0.0%
Information	380	390	390	-2.6%	-2.6%
Financial Activities	1,780	1,790	1,760	-0.6%	1.1%
Professional & Business Services	1,410	1,410	1,410	0.0%	0.0%
Education & Health Services	4,740	4,780	5,050	-0.8%	-6.1%
Leisure & Hospitality	2,160	2,170	2,260	-0.5%	-4.4%
Other Services	720	730	760	-1.4%	-5.3%
Government	6,370	6,480	6,530	-1.7%	-2.5%
Federal Government	290	280	230	3.6%	26.1%
State Government	1,690	1,760	1,680	-4.0%	0.6%
Local Government	4,390	4,440	4,620	-1.1%	-5.0%
Government Education	2,220	2,230	2,200	-0.4%	0.9%
Government Administration	4,150	4,250	4,330	-2.4%	-4.2%

*Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month.

Southwestern Idaho Data

Boise-Nampa MSA Labor Force & Employment – Ada, Canyon, Boise, Gem and Owyhee counties

	Dec 2009*	Nov 2009	Dec 2008	% Change	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	289,159	292,093	294,940	-1.0	-2.0
Unemployment	26,695	27,705	18,143	-3.6	47.1
% of Labor Force Unemployed	9.2	9.5	6.2		
Total Employment	262,464	264,388	276,797	-0.7	-5.2
<i>Unadjusted</i>					
Civilian Labor Force	286,290	290,273	290,181	-1.4	-1.3
Unemployment	28,485	29,330	20,533	-2.9	38.7
% of Labor Force Unemployed	9.9	10.1	7.1		
Total Employment	257,805	260,943	269,648	-1.2	-4.4
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	248,740	249,520	263,510	-0.3%	-5.6%
Total Private	205,270	206,020	218,870	-0.4%	-6.2%
GOODS-PRODUCING INDUSTRIES					
<i>Mining, Logging & Construction</i>	15,020	15,360	17,600	-2.2%	-14.7%
Construction	12,990	13,300	16,090	-2.3%	-19.3%
Construction of Buildings	2,710	2,800	3,290	-3.2%	-17.6%
Specialty Trade Contractors	10,200	10,400	11,400	-1.9%	-10.5%
Foundation, Structure & Bldg Contractors	1,890	1,970	2,270	-4.1%	-16.7%
<i>Manufacturing</i>	22,620	22,770	26,060	-0.7%	-13.2%
Non-Durable Goods	6,710	6,760	7,050	-0.7%	-4.8%
Food Manufacturing	4,970	4,980	4,990	-0.2%	-0.4%
Durable Goods	15,910	16,010	19,010	-0.6%	-16.3%
Wood Product Manufacturing	1,140	1,180	1,540	-3.4%	-26.0%
Fabricated Metal Products	1,350	1,340	1,480	0.7%	-8.8%
Machinery Manufacturing	830	830	1,110	0.0%	-25.2%
Computer & Electronic Mfg.	9,230	9,280	10,330	-0.5%	-10.6%
Computer & Peripheral Mfg.	2,830	2,830	3,080	0.0%	-8.1%
Semiconductor & Other Mfg.	6,130	6,130	7,380	0.0%	-16.9%
Transportation Equipment Mfg.	1,430	1,440	1,690	-0.7%	-15.4%
SERVICE-PROVIDING INDUSTRIES					
Private Service Providing	167,630	167,890	175,210	-0.2%	-4.3%
<i>Trade, Transportation & Utilities</i>	49,940	49,630	53,490	0.6%	-6.6%
Wholesale Trade	11,400	11,420	11,850	-0.2%	-3.8%
Merchant Wholesalers (Durable Goods)	6,370	6,380	6,560	-0.2%	-2.9%
Retail Trade	30,530	30,220	33,300	1.0%	-8.3%
Food & Beverage Stores	4,850	4,840	5,030	0.2%	-3.6%
Grocery Stores	3,690	3,710	3,750	-0.5%	-1.6%
General Merchandise Stores	6,360	6,360	6,910	0.0%	-8.0%
Other General Merch. Stores	4,520	4,520	4,700	0.0%	-3.8%
Transportation, Warehousing & Utilities	8,010	7,990	8,340	0.3%	-4.0%
<i>Information</i>	5,410	5,470	5,760	-1.1%	-6.1%
Telecommunications	1,340	1,330	2,410	0.8%	-44.4%
<i>Financial Activities</i>	13,140	13,160	13,930	-0.2%	-5.7%
Finance & Insurance	10,360	10,390	10,360	-0.3%	0.0%
Credit Intermediation & Related Activities	4,760	4,750	4,850	0.2%	-1.9%
Real Estate & Rental & Leasing	2,780	2,770	3,570	0.4%	-22.1%
<i>Professional & Business Services</i>	34,080	34,330	37,550	-0.7%	-9.2%
Professional, Scientific & Technical Svcs.	11,540	11,430	12,130	1.0%	-4.9%

Continued on next page.

Southwestern Idaho Data *(continued)*

Boise-Nampa MSA Labor Force & Employment – Ada, Canyon, Boise, Gem and Owyhee counties

	<u>% Change</u>				
	Dec 2009*	Nov 2009	Dec 2008	Last Month	Last Year
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	248,740	249,520	263,510	-0.3%	-5.6%
Mgmt. of Companies & Enterprises	4,540	4,540	5,140	0.0%	-11.7%
Administrative / Support & Waste Mgmt.	17,990	18,350	20,280	-2.0%	-11.3%
Employment Services	6,430	6,630	7,030	-3.0%	-8.5%
Business Support Services	6,860	6,790	6,590	1.0%	4.1%
Services to Bldg and Dwellings	3,860	4,180	3,990	-7.7%	-3.3%
<i>Educational & Health Services</i>	34,530	34,410	33,970	0.3%	1.6%
Educational Services	3,010	2,950	2,420	2.0%	24.4%
Health Care & Social Assistance	31,520	31,460	31,550	0.2%	-0.1%
Ambulatory Health Care Service	12,450	12,420	11,930	0.2%	4.4%
Hospitals	10,050	10,110	10,240	-0.6%	-1.9%
General Medical and Surgical Hospitals	9,110	9,080	9,220	0.3%	-1.2%
<i>Leisure & Hospitality</i>	22,480	22,840	22,550	-1.6%	-0.3%
Arts, Entertainment, & Recreation	3,020	3,140	2,930	-3.8%	3.1%
Accommodation & Food Services	19,460	19,700	19,620	-1.2%	-0.8%
Food Services & Drinking Places	17,680	17,830	17,740	-0.8%	-0.3%
Full-Service Restaurants	8,200	8,240	8,460	-0.5%	-3.1%
Limited-Service Eating Places	7,180	7,190	7,230	-0.1%	-0.7%
<i>Other Services</i>	8,050	8,050	7,960	0.0%	1.1%
<i>Government</i>	43,470	43,500	44,640	-0.1%	-2.6%
Federal Government	6,070	6,070	6,110	0.0%	-0.7%
State Government	13,550	13,620	14,370	-0.5%	-5.7%
State Government Educational Services	4,500	4,480	4,550	0.4%	-1.1%
Local Government	23,850	23,810	24,160	0.2%	-1.3%
Local Government Educational Services	16,110	16,170	15,220	-0.4%	5.8%

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month.

South Central Idaho Data

Twin Falls-Jerome MSA Labor Force & Employment – Twin Falls and Jerome counties

	<u>% Change From</u>				
	Dec 2009*	Nov 2009	Dec 2008	Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	50,117	48,730	49,912	2.8	0.4
Unemployment	3,936	3,792	2,276	3.8	73.0
% of Labor Force Unemployed	7.9	7.8	4.6		
Total Employment	46,181	44,938	47,636	2.8	-3.1
<i>Unadjusted</i>					
Civilian Labor Force	50,130	49,461	49,626	1.4	1.0
Unemployment	4,058	3,682	2,493	10.2	62.8
% of Labor Force Unemployed	8.1	7.4	5.0		
Total Employment	46,072	45,779	47,133	0.6	-2.3
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	39,620	39,520	40,400	0.3%	-1.9%
Total Private	33,590	33,520	34,580	0.2%	-2.9%
<i>Goods-Producing Industries</i>	6,170	6,230	6,670	-1.0%	-7.5%
Logging, Mining & Construction	1,780	1,830	2,200	-2.7%	-19.1%
Manufacturing	4,390	4,400	4,470	-0.2%	-1.8%
Food Manufacturing	2,760	2,750	2,690	0.4%	2.6%
Other Manufacturing	1,590	1,600	1,780	-0.6%	-10.7%
<i>Service-Providing Industries</i>	33,450	33,290	33,730	0.5%	-0.8%
Private Service Providing	27,420	27,290	27,910	0.5%	-1.8%
Trade, Transportation & Utilities	10,440	10,350	10,520	0.9%	-0.8%
Wholesale Trade	1,790	1,780	1,950	0.6%	-8.2%
Retail Trade	5,860	5,840	5,780	0.3%	1.4%
Transportation, Warehousing & Utilities	2,790	2,730	2,790	2.2%	0.0%
Information	680	690	650	-1.4%	4.6%
Financial Activities	1,700	1,690	1,780	0.6%	-4.5%
Professional & Business Services	4,490	4,420	5,020	1.6%	-10.6%
Educational & Health Services	6,010	5,990	5,370	0.3%	11.9%
Leisure & Hospitality	2,950	2,990	3,110	-1.3%	-5.1%
Other Services	1,150	1,160	1,460	-0.9%	-21.2%
Government	6,030	6,000	5,820	0.5%	3.6%
Government Education	3,380	3,370	3,390	0.3%	-0.3%
Government Administration	2,650	2,630	2,430	0.8%	9.1%

*Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month.

Southeastern Idaho Data

Pocatello MSA Labor Force & Employment – Bannock and Power counties

	Dec 2009*	Nov 2009	% Change From		
			Dec 2008	Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	43,238	43,977	44,865	-1.7	-3.6
Unemployment	3,362	3,515	2,158	-4.4	55.8
% of Labor Force Unemployed	7.8	8.0	4.8		
	39,877	40,461	42,707	-1.4	-6.6
<i>Unadjusted</i>					
Civilian Labor Force	43,272	43,334	44,686	-0.1	-3.2
Unemployment	3,382	3,411	2,316	-0.9	46.0
% of Labor Force Unemployed	7.8	7.9	5.2		
Total Employment	39,890	39,923	42,370	-0.1	-5.9
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	36,000	36,280	37,770	-0.8%	-4.7%
Total Private	26,470	26,720	27,790	-0.9%	-4.7%
<i>Goods-Producing Industries</i>					
Natural Resources & Mining	1,480	1,620	2,100	-8.6%	-29.5%
Manufacturing	3,450	3,480	3,630	-0.9%	-5.0%
Fabricated Metal Product Mfg	270	270	240	0.0%	12.5%
<i>Service-Providing Industries</i>					
Private Service Providing	21,540	21,620	22,060	-0.4%	-2.4%
Trade, Transportation & Utilities	6,750	6,800	7,370	-0.7%	-8.4%
Wholesale Trade	1,380	1,390	1,380	-0.7%	0.0%
Retail Trade	4,180	4,220	4,510	-0.9%	-7.3%
Transportation & Warehousing	1,190	1,190	1,480	0.0%	-19.6%
Information	500	510	570	-2.0%	-12.3%
Financial Activities	2,160	2,150	2,120	0.5%	1.9%
Professional & Business Services	4,050	4,070	3,530	-0.5%	14.7%
Educational & Health Services	3,580	3,590	3,990	-0.3%	-10.3%
Leisure & Hospitality	3,650	3,640	3,610	0.3%	1.1%
Other Services	850	860	870	-1.2%	-2.3%
Government	9,530	9,560	9,980	-0.3%	-4.5%
Federal Government	510	520	560	-1.9%	-8.9%
State Government	3,970	3,970	4,240	0.0%	-6.4%
Local Government	5,050	5,070	5,180	-0.4%	-2.5%
Government Education	4,470	4,510	4,700	-0.9%	-4.9%
Government Administration	5,060	5,050	5,280	0.2%	-4.2%

*Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month.

East Central Idaho Data

Idaho Falls MSA Labor Force & Employment – Bonneville and Jefferson counties

	Dec 2009*	Nov 2009	Dec 2008	<u>% Change From</u>	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	61,619	62,413	62,604	-1.3	-1.6
Unemployment	4,015	3,659	2,594	9.7	54.7
% of Labor Force Unemployed	6.5	5.9	4.1		
Total Employment	57,605	58,754	60,010	-2.0	-4.0
<i>Unadjusted</i>					
Civilian Labor Force	61,799	62,031	62,430	-0.4	-1.0
Unemployment	4,105	3,946	2,821	4.0	45.5
% of Labor Force Unemployed	6.6	6.4	4.5		
Total Employment	57,694	58,085	59,609	-0.7	-3.2
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	49,360	49,830	51,430	-0.9%	-4.0%
Total Private	42,220	42,540	44,180	-0.8%	-4.4%
<i>Goods-Producing Industries</i>					
Mining, Logging and Construction	3,110	3,400	3,250	-8.5%	-4.3%
Manufacturing	3,290	3,310	3,340	-0.6%	-1.5%
Food Manufacturing	900	880	950	2.3%	-5.3%
Fabricated Metal Product Manfct	240	260	280	-7.7%	-14.3%
<i>Service-Providing Industries</i>					
Private Service Providing	34,920	34,950	36,640	-0.1%	-4.7%
Trade, Transportation & Utilities	12,150	12,190	13,020	-0.3%	-6.7%
Wholesale Trade	3,280	3,280	3,520	0.0%	-6.8%
Retail Trade	7,490	7,520	7,860	-0.4%	-4.7%
Transportation, Warehousing and Utilities	1,380	1,390	1,640	-0.7%	-15.9%
Information	1,200	1,210	1,360	-0.8%	-11.8%
Financial Activities	1,940	1,940	2,110	0.0%	-8.1%
Professional & Business Services	4,730	4,750	4,700	-0.4%	0.6%
Educational & Health Services	7,260	7,250	7,660	0.1%	-5.2%
Leisure & Hospitality	5,220	5,170	5,200	1.0%	0.4%
Other Services	2,420	2,440	2,590	-0.8%	-6.6%
Government	7,140	7,290	7,250	-2.1%	-1.5%
Federal Government	840	890	820	-5.6%	2.4%
State Government	920	920	900	0.0%	2.2%
Local Government	5,380	5,480	5,530	-1.8%	-2.7%
Government Education	3,930	3,870	3,820	1.6%	2.9%
Government Administration	3,210	3,420	3,430	-6.1%	-6.4%

*Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month.

Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Metropolitan Statistical Areas (MSA): A county or a combination of counties in which at least half the residents live in an urban center of 50,000 or more and the rest have significant commuting ties to that central county. The Office of Management and Budget designates the MSAs. Idaho has five MSAs: Boise MSA including Ada, Canyon, Boise, Gem and Owyhee counties; Bonneville MSA including Bonneville and Jefferson counties; Pocatello MSA including Bannock and Power counties; Lewiston MSA including Nez Perce County and Asotin County, Wash.; Coeur d’Alene MSA including Kootenai County.

Micropolitan Statistical Area (MicSA): Combinations of counties in which at least half the residents live in urban centers totaling at least 10,000—or 5,000 living in a single urban center—and the rest have significant commuting ties to that central county. The Office of Management and Budget designates the MicSAs. Idaho has three MicSAs: Burley MicSA including Cassia and Minidoka counties; Rexburg MicSA including Madison and Fremont counties; Twin Falls MicSA including Twin Falls and Jerome counties.

Glossary of Labor Market Terms (cont.)

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Small Labor Market Areas (SLMA): Combinations of counties with significant ties through commuting patterns but no urban centers with populations of 10,000 or more. The Office of Management and Budget designates the SLMAs. Idaho has two SLMAs: Hailey SLMA including Blaine and Camas counties; Grangeville SLMA including Lewis and Idaho counties.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.

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