

Idaho Employment

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

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THE GRAYING OF THE TRADES

Idaho's demographic landscape continues to shift as baby boomers edge toward retirement. It was only a couple years ago during the unparalleled economic expansion that the labor force shortages existing then would be exacerbated as the population bubble of baby boomers left the workplace. But the global financial crisis eroded 401(k)s, pension plans and even paychecks and stripped value from residential real estate – typically the biggest asset older workers have. Combined with escalating health care and insurance costs, many older workers have put retirement plans on hold, maintaining skill levels in many areas.

While this has pushed the unemployment rate higher, it has provided readily available manpower to meet demand when economic expansion does resume.

Demographers estimate Idaho's overall population growth will continue to outpace the nation during the next decade. While the nation grows at under 10 percent by 2020, Idaho will grow by nearly 14 percent. Like the rest of the country, however, Idaho is also aging. With a median age of nearly 34½ – about two years younger than the national median of nearly 37 – Idaho is still relatively younger than the rest of the nation. Only Alaska, Texas and Utah have lower median ages. However, Idaho's demographics are shifting at a faster rate than most states, creating real work force challenges over the next decade. For the most part this is the result of significant in-migration over the last several years by people wanting to retire in the open spaces in the West, especially the Rocky Mountain region. For example, the number of Idahoans between 65 to 74 years old is expected to grow by more than 60,000, or 62 percent, during the next decade. At the same time, the number of people 25 to 29 and 45 to 54 will actually decline. This is notable since both groups are



in their intellectual prime with the training and skills that cause an economy to thrive.

Construction has been a sector that is feeling the brunt of this demographic shift. Based on data from the Local Employment Dynamics program, more than 60 percent of construction workers in 1992 were 25 to 44 years old, and just over 23 percent were older. By 2008, only half the work force was 25 to 44 and a third was older.

The specialty trades – electricians, plumbers, masons, glaziers, sheet metal and HVAC workers, framers, roofers, drywallers and others – have seen the same shift. In 1992 workers 25 to 44 years old comprised 61 percent of that work force. By 2008 that age group was down to 51 percent while older workers rose from 19.5 percent in 1992 to 30 percent in 2008.



Unemployment insurance data indicates the recession has exacerbated the aging of the construction labor force as contractors and other employers laid off less experienced workers. Following the 2001 recession as the construction sector slowly began what became a dramatic expansion, 54 percent of the unemployed construction workers were 45 years old and older while only 19 percent were under 35.

At construction's peak in 2006, 44 percent of unemployed workers were 45 years old and older and 32 percent were under age 35. Today that ratio has reversed. Forty-one percent of unemployed construction workers are under age 35 and only 35 percent are 45 years old and older.



EDUCATION WORK FORCE CHALLENGES

KNOWLEDGE, SKILLS AND ABILITIES

The evolving educational shift lends change to the individual components of knowledge, skills and abilities, which are vital to a vibrant work force and economy.

Idaho's manufacturing expertise is on average 10 percent above the national average making the Gem State an attractive location for manufacturers that wish to relocate or expand. The state matches the national averages in business, science, technical, resource management and system skills but falls below the national average in all other skill components.



As far as work force abilities, Idaho is slightly above the nation in psychomotor, physical and sensory abilities while lagging the nation in other designations. These same relative proportions are expected to remain over the next decade even as Idaho's educational demographic landscape shifts.

SKILL GAPS

Idaho's challenge in the next decade is to educate and train its work force to handle significant economic growth in the edu-

cation, information and energy sectors. While these sectors are forecast to grow nationally, they are expected to grow even faster in Idaho – as much as 30 percent.

Construction, on the other hand, is likely to recover slowly from the recession because of the excessive residential inventory throughout much of the state. At the same time, that slower recovery to prerecession levels – possibly taking more than a decade – will ease the pressure the work force would have otherwise faced because it is aging.

Among the forecasted mismatches between job requirements and worker qualifications, jobs requiring bachelor's degrees or greater are expected to grow 21 percent over the next decade while the number of Idaho residents with a bachelor's degree or greater will only grow about 10 percent. This training gap can only be met by more in-state educational resources or the attraction of workers with those qualifications from outside the state. Jobs requiring associate degrees are expected to grow by almost 23 percent, but Idahoans with newly acquired associate degrees are only forecasted to increase about 16 percent.



These kinds of gaps can lead to economic volatility by encouraging artificial wage increases to attract the necessary workers with the skills businesses need to survive. But while that tactic momentarily plugs the gap, it also can create artificial cost pressures that force businesses to cut back to remain competitive and in the process become a drag on the local economy and undermine forecasted growth rates in those industries.

Without training programs that provide needed skills like those in construction, the state's economic foundation will be gradually relegated to service industries that do not provide sustainable high paying jobs. The lion's share of construction trades provide good paying jobs without significant investment in education greater than associate level training. These jobs provide strong wealth creation opportunities for Idahoans that do not have the financial wherewithal to pursue higher levels of training or education.



The slow recovery of construction, however, can impede programs intended to fill the pipeline with skilled craftsmen to maintain that labor pool.

The Idaho Department of Labor, in conjunction with the U.S. Department of Labor's Office of Apprenticeship, worked with school districts in Kootenai County to establish the state's first School to Registered Apprenticeship Program offering students long-term career and occupational education and training in both the classroom and job site.

State department staff are trained in this program and are ready to establish similar programs in communities around the state. That effort is currently under way in Kamiah.

But because of the recession, cost has become a problem for school districts interested in this apprenticeship partnership with business, and that issue has been compounded by the dramatic contraction in the construction sector of the past three years.

An apprenticeship program cannot be successful without employers.

In an attempt to interest high school students in careers in the skilled trades, the department has begun sponsoring trade career days. Two have been held in Coeur d'Alene – called Hard Hats, Hammers and Hotdogs – and a third in Burley called Heavy Metal and Cashing In. Similar events have been held in Grangeville, Twin Falls and Salmon.

Over the next decade, Idahoans younger than age 20 and between 45 and 65 will grow at about the same pace – around 13 percent. Those in between will increase by only about 8 percent while those over 70 will increase by 39 percent. Steady growth of the youngest group of Idahoans and rapid growth of the elderly will result in education and health care driving much of the economy.

These industries have educational demands for associate or greater degrees while the educational level of the Idaho work force is forecast to grow more rapidly below the associate-degree level. Idaho will need to strike a balance between expanding its skill base through its own educational resources and attracting necessary human capital from outside the state. Only with this balance can Idaho develop a well educated, effective work force that supports the demands of a flourishing economy that generates high paying, sustainable jobs.

Some economists expect Idaho to grow out of this recession more slowly than much of the rest of the nation but then pick up momentum to outpace national growth by the end of the next decade based on sheer population growth and in-migration. But that expansion could be jeopardized if the state does not plug these projected gaps in education, training and skills.

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JOBS AND PAYROLL DECREASE FROM YEAR-AGO LEVELS

The worst recession since World War II stripped Idaho's economy of 34,800 jobs by March 2009, a decline of 5.4 percent between the first three months of 2008 and the first quarter of 2009.

The Quarterly Census of Employment and Wages also showed that the slide cost the Idaho economy almost \$263 million in wages by the first three months of this year, a loss of 5 percent from the first quarter of 2008.

Job losses were reported in 16 industry sectors with the largest in construction, manufacturing and retail trade. Modest year-over-year increases were seen in utilities, education, health care and government. From the first quarter of 2008 to the first quarter of 2009 the average weekly wage remained relatively stagnant, increasing just \$3 to \$638.

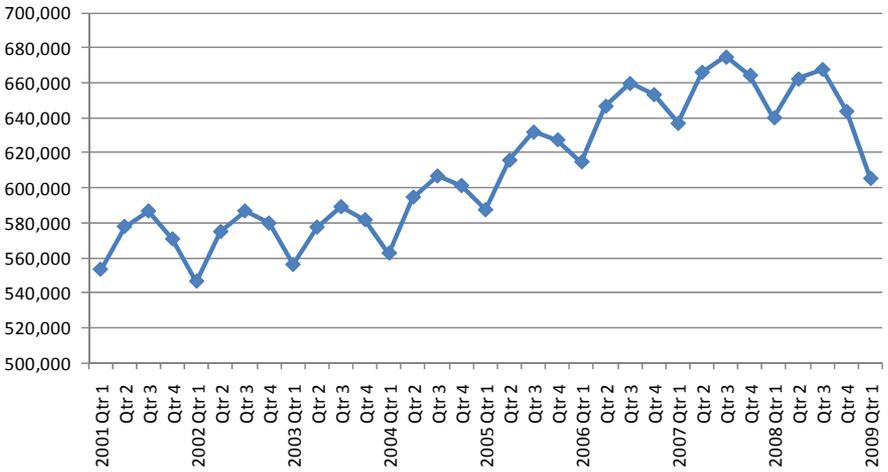
Recessionary forces amplified the normal seasonal decreases seen in the first quarter of the year, resulting in the largest quarterly decline in employment since the start of the recession in December 2007.

Jobs covered by the unemployment insurance system in the first three months of this year declined 6 percent to 605,329 from the final three months of 2008. Over the previous eight years the seasonal job decline between the fourth and first quarters has ranged between 2 percent and 4 percent.

The private sector as expected bore nearly all of the loss, shedding 6.9 percent of its jobs between the fourth quarter of 2008 and the first quarter of

2009 to leave it down 6.6 percent from the first three months of 2008. The only sector showing growth was arts and entertainment, which gained just 334 jobs. Construction, manufacturing and retail trade saw the bulk of the job losses.

Idaho Total Employment: 1st Quarter 2001 to 1st Quarter 2009



Declines in consumer spending and deteriorating economic conditions have hit construction and manufacturing hard. Employment in manufacturing peaked at 70,970 in the fourth quarter of 2000 and then steadily fell to just over 66,000 jobs in 2007. During the following year, however, the sector saw a 12.3 percent decline that put jobs at just 56,160 in the first quarter of 2009.

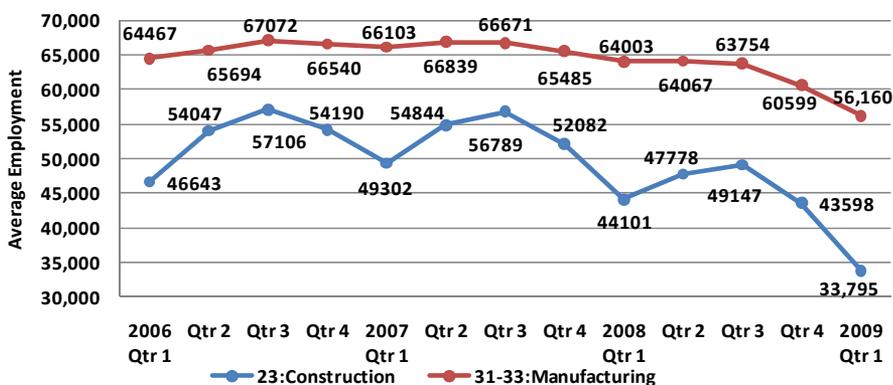
Computer and electronic product manufacturing and wood product manufacturing suffered the biggest losses. Computer and electronic products was off 18.6 percent as significant structural changes pushed jobs down to 12,044. Wood products, once the largest component and backbone of Idaho’s manufacturing sector, reported a 29.5 percent drop, over 2,000 jobs, to a first quarter average under 5,000 for the first time since at least World War II.

Food product manufacturing has now become the largest component of Idaho’s manufacturing sector, assuming that status during the final three months of 2007. Employment in the first quarter of 2009 averaged 15,366. This subsector has been reporting job losses as the other manufacturing components have but at a much slower pace. It dropped just 113 jobs from the first quarter of 2008 for a 0.7 percent decline.

The recession is affecting all aspects of construction, resulting in declines in both employment and average weekly wages. In the first quarter, construction shrank by 9,802 jobs, or 22.5 percent from the final three months of 2008 and 10,306 jobs, a decline of 23.4 percent, from the first quarter of 2008. Most of the decline was in residential construction, which along with specialty trades fell at record rates. From the first quarter of 2008 to the first quarter of 2009 employment in the residential construction subsector declined by 2,449 or 34.6 percent and specialty trade contractors lost 6,448 jobs, a 23.8 percent decline. Over the year the average weekly wage earned for the jobs that remained in construction dropped 1.2 percent or \$8. See figure 1 on page 6.

Services and health care sectors led employment growth in Idaho until the start of the recession, and many of those jobs were considered immune to the business cycle. But over the year key components like trade, transportation, financial activities and leisure and hospitality experienced declining employment levels although significantly less dramatic than manufacturing and con-

Figure 1. Construction & Manufacturing Employment : 1st Quarter 2006 to 1st Quarter 2009



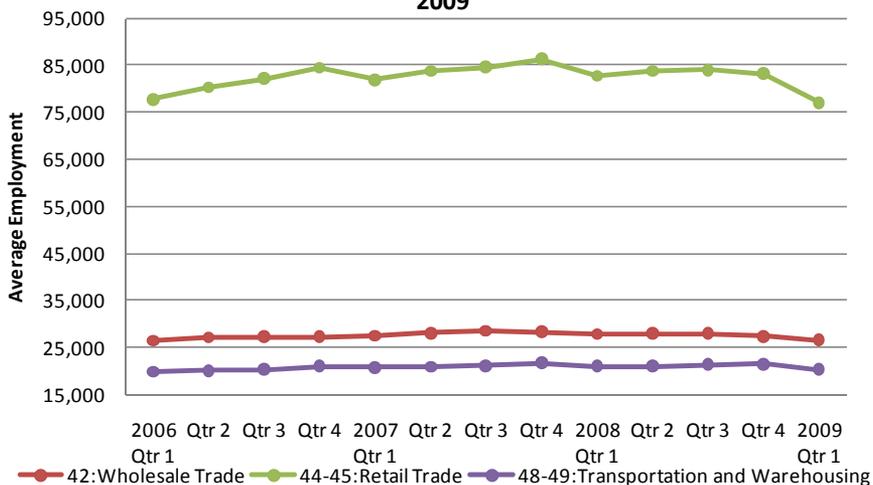
struction. From the first quarter of 2008 to the first quarter of 2009 retail trade lost 5,758 jobs, wholesale trade 1,237 and transportation and warehousing 659.

From the fourth to the first quarters, retail trade lost 6,118 jobs, wholesale trade 768 and transportation and warehousing 1,250. See figure 2.

Finance and insurance showed a slight decline of 594 jobs, or 2.7 percent, year-over-year. Real estate rental and leasing was off 1,032 jobs, or 12.2 percent.

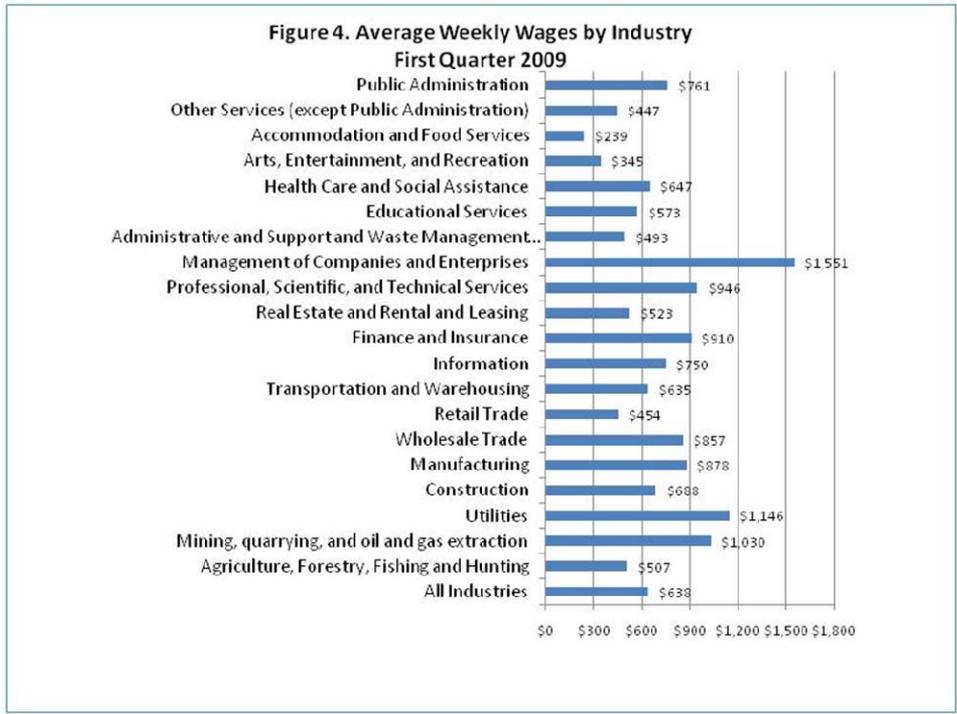
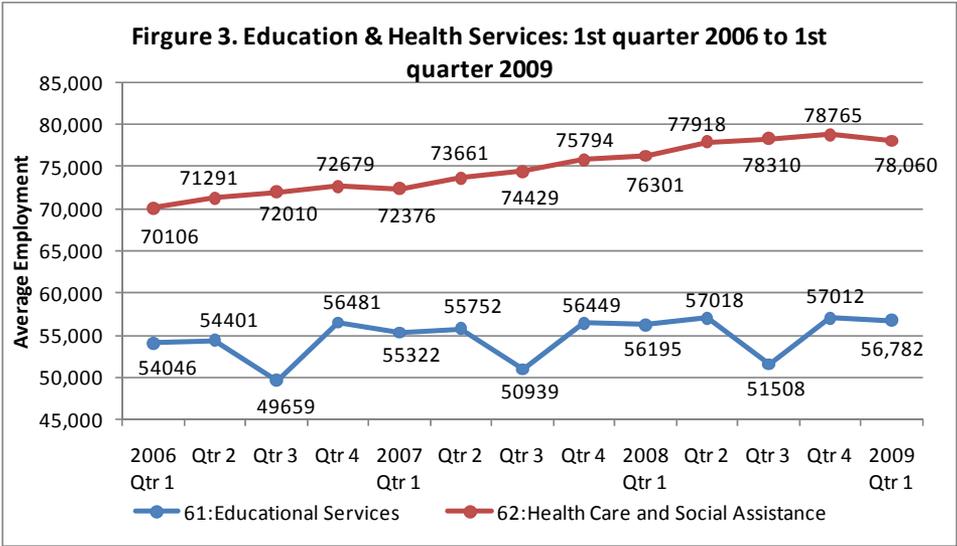
The 3.6 percent increase in arts, entertainment and recreation jobs from the fourth quarter helped offset year-over-year losses, holding them under 400. Employment in hotels and restaurants went the opposite direction, falling 2,763 jobs, or 5.2 percent, from the fourth quarter to push the year-over-year decline above 4,000. Employment averaged just under 50,000 in the first quarter of 2009.

Figure 2. Trade & Transportation: 1st quarter 2006 to 1st quarter 2009



Health care and social assistance saw the strongest employment growth, adding 1,759 jobs from the first quarter of 2008. But the downturn in the broader economy left more people putting off medical care, tempering the growth previously seen in the sector. Over the last several quarters health care employment has been steadily flattening out and then reported quarterly job loss for the first time in two years during the first three months of 2009. All components were affected, combining for a loss of 700 jobs from the final three months of 2008.

Educational services expanded by 1 percent from the beginning of 2008, ending the first quarter with 56,782 jobs. Employment declined by 230 jobs from the fourth quarter, a 0.4 percent loss. See figure 3.



WAGES

During the first quarter of 2009, Idaho’s average weekly wage for all industries was \$638, reflecting a seasonal decrease in wages of 7.9 percent. This decline was in large part a result of pay returning to normal after end-of-year bonuses paid in the fourth quarter. The lowest average weekly wages were reported in hotels and restaurants at \$239, a \$3 increase from a year earlier, and arts and recreation at \$345, an over-the-year decrease of \$8. The highest weekly wage was in management of companies at \$1,551, but that was up just \$8 from a year earlier.

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A TALE OF TWO UNEMPLOYMENT RATES

Why was Kootenai County’s unemployment rate 11.1 percent in October when Spokane County’s rate was 7.9 percent? That question was posed by Jobs Plus. What seems to be an alarming difference is not much of a difference at all.

Unlike the U.S. Bureau of Labor Statistics, Idaho and most other states, Washington does not seasonally adjust the unemployment rates and other labor force statistics it publishes. So the rate comparison is not an accurate one.

Kootenai County’s published rate — the seasonally adjusted rate — for October was 11.1 percent, but Kootenai County’s unadjusted rate for October was 9.2 percent. Spokane County’s unadjusted unemployment rate in October was 7.9 percent.

Another reason for the difference is that the economies of Kootenai County and Spokane County have different seasonal patterns.

In October, Kootenai County is just passing its peak period of the year so unadjusted unemployment always increases between September and October. It normally increases three-tenths of a percentage point. And that’s what happened this year. The unadjusted September rate was 8.9 percent, and the unadjusted October rate was 9.2 percent.

In Spokane County, October is the month of peak employment every year so unadjusted unemployment almost always decreases between September and October. In a normal year, the unadjusted September rate drops three-tenths of a percentage point between September and October. This year, it dropped two-tenths of a percentage point—from 8.1 to 7.9 percent.

Employment

	Oct 2007	Oct 2009	Change
Kootenai County	69,538	72,621	4.4%
Spokane County	235,450	241,430	2.5%
United States <i>(in thousands)</i>	153,516	153,636	0.1%

Kootenai County’s labor force has also grown considerably faster than Spokane County’s labor force. Because Kootenai County is considered a more attractive place to live and over the long run, its economy has grown much more rapidly, its population — and therefore labor force — tends to grow much faster than Spokane County’s. In a recession, faster labor force growth results in faster unemployment growth since more people become optimistic about finding work before the new jobs are actually created. But in the long run, faster labor growth benefits Kootenai County, assuring the necessary labor pool will be on hand to help the economy grow more rapidly.

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KOOTENAI COUNTY: TWO YEARS AFTER THE GREAT RECESSION BEGAN

After four years of heady growth, Kootenai County’s economy stumbled in 2008 and then fell sharply in 2009. The county has been affected by job losses in roughly the same degree as the nation.

The recession officially began in December 2007. It probably ended in the third quarter of this year, but its effects on the local labor market will linger for months to come.

While the seasonally adjusted unemployment rate across the nation climbed from 4.7 percent in November 2007 to 10 percent two years later, Kootenai County's rate rose from 3.9 percent to 11 percent. The county's employment fell 2.9 percent – less than the 5.6 percent U.S. employment fell. But its unemployment rate rose more steeply because the county's labor force grew 4.9 percent while the U.S. labor force remained unchanged.

The labor force grew in Kootenai County for two major reasons – people moved into the county to enjoy its lifestyle, and some people who had been retired rejoined the labor force when they lost income potential in the stock market collapse of 2008.

Although glimmers of a recovery are appearing, employers remain cautious about hiring. In the third week of November, the Coeur d'Alene office of the Idaho Department of Labor had 82 open job orders from employers seeking workers. That was the lowest level in the third week of November since that data started being tracked in 1993. It was even considerably below the 127 job orders a year earlier, and that was just a third of the levels in 2004 through 2006.

A November job fair for veterans in Post Falls sponsored by the Idaho Department of Labor drew many job applicants but few employers. Two years ago, the fair had 54 employers. Last year there were 30. This year just 13 participated.

The extensive job loss appears to have stopped in Kootenai County's wood products manufacturing sector. Lumber prices have risen from their extremely low levels this spring, and most experts expect U.S. housing starts will rise slightly in the coming months. Wood products employment fell from 930 in November 2007 to 700 this year. Most experts believe that the industry has stabilized and will see no further job losses and is likely to see some job gains in the next year, but they also don't expect full recovery for several years, if ever."

.After years of strong growth in non-wood manufacturing, Kootenai County saw some job losses this year. The sector's employment went from 3,800 in November 2009 to 3,920 a year later to 3,790 this November. Fortunately, manufacturing appears to be starting to recover. In recent months, product orders have increased, and manufacturers are starting to increase their employees' work hours or hire workers from temporary employment agencies. Among the companies planning to expand during the next few months are Mountain Top Manufacturing, a contract electronics maker in Rathdrum; Accurate Molded Plastics, a custom injection molding and tool-making firm in Coeur d'Alene; Heater Craft, a maker of heating equipment for boats and RVs in Rathdrum; Blue Water Technologies Inc., a designer and manufacturer of phosphorus-removal systems in Hayden; Bullet Tools, a maker of tools for the flooring industry in Hayden; and Advanced Input Systems, which makes keyboards, control panels and interface devices in Coeur d'Alene. The manufacturing sector gained 22 jobs when Burly Products, a metal fabrication company, moved from Spokane to Post Falls this fall.

The county's total manufacturing employment fell 5.1 percent in the two-year period, while U.S. manufacturing employment fell 14.9 percent. So despite the much greater importance of the volatile wood products industry in the county, the manufacturing sector still was able to perform better than the nation.

During the initial year of this recession, tourism employment increased in 2008. But with the county hosting fewer conventions and the tourists who do visit spending less on average per visit, some of those gains eroded in the last year. There would have been even greater job loss had it not been for the low value of the U.S. dollar relative to the Canadian dollar, which makes it more

attractive for Canadians to visit northern Idaho. The expansion of Silverwood Theme Park also helped offset some of the losses last summer. The county's leisure and hospitality industry gained 290 jobs, growing 4 percent since the recession began. At the national level, the industry lost 3 percent of its jobs.

Almost every sector has seen employment decline as the spending power of Kootenai County residents dropped. The retail sector contracted, especially building material stores, car dealers, appliance and furniture stores and sellers of other big ticket items.

Health care is one of the few sectors to grow in the last 12 months. It added about 150 jobs since November 2008. That's low compared to the 600 jobs added annually in recent years.

A table showing Kootenai County's nonfarm payroll jobs by industry in November 2009 compared to the month before and the year before is in the tables on page 45.

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METRO LEWISTON: AFTER 24 MONTHS OF U.S. JOB LOSS

U.S. employment has been declining for 24 months, shedding 5.2 percent of its nonfarm payroll jobs since the recession began in December 2007. In the same period, jobs in the Lewiston metropolitan area were stable, neither increasing nor decreasing.

The collapse of the U.S. housing market claimed local construction jobs and harmed the lumber industry. Construction jobs in metro Lewiston, which includes Nez Perce and Asotin, Wash., counties, fell 14.2 percent over the last 24 months while construction jobs nationally plunged 20.4 percent.

The manufacturing sector in Lewiston fell 6.7 percent from 3,350 in November 2007 to 3,140 in November 2009. In the same period, U.S. lost nearly 2.1 million manufacturing jobs — 14.9 percent. Wood products manufacturing dropped from 570 jobs to 380 in those two years. That decline claimed 50 logging jobs as well. But employment at Clearwater Paper's paperboard and tissue complex in Lewiston held steady during the recession.

Gains by ATK, the Lewiston ammunition manufacturer that has added about 250 jobs since the recession began, and two of its main suppliers — Howell Machine and Ammo Load Worldwide — more than offset losses at jet boat makers, machine shops and elsewhere as consumer demand wilted. The net result was an increase of 100 jobs in other manufacturing to 1,750.

In the financial sector, Regence BlueShield of Idaho eliminated 100 jobs in just the last year to reduce its payroll to 642 at its health insurance center in Lewiston.

The metropolitan area appears to be attracting the same number of visitors although they are spending less than normal. Combined with financial caution among residents, that took a bite out of restaurant and recreation employment. Leisure and hospitality jobs fell 11.9 percent to 2,150 since November 2007. That is much more dramatic than the 3 percent drop the U.S. experienced.

But retail employment performed better than the nation. The Lewiston area added 330 retail jobs, an 8.5 percent increase, while retailers were cutting 6.7 percent of their jobs nationally. Most of the Lewiston gains came from this fall's opening of a larger Wal-Mart store. But although retail employment is up, the hours worked by retail employees are down.

While government jobs have held their own through the recession, major job losses could occur, especially at the local level, in the next year as govern-

Unemployment Benefit Claimant Characteristics in November 2009 and Covered Employee Characteristics in November 2008

North Central Idaho	Claimants		Employment	
	Number	Percent of Total	Number	Percent of Total
Total	1,483	100.0%	39,987	100.0%
Male	1,008	68.0%	19,437	48.6%
Female	475	32.0%	20,550	51.4%
Under 22 Years Old	57	3.8%	3,546	8.9%
22 to 24	93	6.3%	2,820	7.1%
25 to 34	326	22.0%	8,088	20.2%
35 to 44	311	21.0%	8,041	20.1%
45 to 54	348	23.5%	9,635	24.1%
55 to 64	259	17.5%	6,378	16.0%
65 Years & Over	89	6.0%	1,479	3.7%
Industries with Most UI Claims	Number	Percent of Total	Number	Percent of Total
Manufacturing	230	15.5%	3,827	9.6%
Construction	206	13.9%	2,000	5.0%
Retail Trade	163	11.0%	5,883	14.7%
Health Care & Social Assistance	122	8.2%	6,349	15.9%
Agriculture & Forestry	121	8.2%	991	2.5%
Accommodation & Food Services	82	5.5%	3,730	9.3%
Admin. Support & Waste Management	62	4.2%	835	2.1%
Public Administration	56	3.8%	2,735	6.8%
Transportation & Warehousing	53	3.6%	1,373	3.4%
Finance & Insurance	47	3.2%	1,872	4.7%

ments continue grappling with declining revenues. Alternatively, the federal government saw employment rise from 250 to 280 after a decade of decline, and the Nez Perce Tribe added about 60 jobs in the last two years to push its payroll to 750 people at its health clinic, casino, bus service and other enterprises.

The metropolitan unemployment rate has nearly doubled since the recession began, hitting 7.7 percent in November. The extent of the increase was the result of much higher unemployment on the Washington side of the metro area, where depressed timber, construction and transportation sectors pushed the rate to 9.7 percent. Nez Perce County's seasonally adjusted unemployment rate was 6.5 percent, the highest in 22 years but well below the state-wide Idaho rate of 9.1 percent.

Nez Perce County is one of only five Idaho counties to experience growth in employment in the last year. Employment was up 1.4 percent to 18,870 in November.

North central Idaho now has 4,315 unemployed workers, the highest number since January 1986 but well below the post-recession peak of 7,534 in October 1982.

The unemployment rate for all five counties in the region rose to 8.6 percent in November, its highest level since December 1987 but well below the modern peak of 11.5 percent, again in October 1982.

Clearwater County's unemployment rate in November reached 18.4 percent and Idaho County's was 13.1 percent. Many of their 1,540 unemployed residents are looking to Nez Perce County for jobs.

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GOVERNMENTS DEAL WITH FINANCIAL CRISIS

Local governments are struggling to maintain services while their revenues decline, and they see even greater revenue problems looming in the next year. Many have laid off employees, instituted hiring moratoriums or frozen wages.

The examples are widespread.

The Lewiston city library recently eliminated a position and reduced its hours of operation in a response to a \$47,000 cut in its budget.

Facing an anticipated budget shortfall of \$500,000, the Latah County commissioners declared a financial emergency in early December. They instituted cost-cutting measures that included employee furloughs and courthouse closures.

Lewis County is strained by a decline in sales tax income and a drop in market value. The November 2008 closure of its largest manufacturer, the Three Rivers Mill, also is likely to affect people's abilities to pay their property taxes this December.

Every school in the region is dealing with dwindling dollars. Budget shortfalls forced Mountain View School District based in Grangeville to close its White Bird school last May. The Lewiston district lost \$983,000 in state funding, and Moscow lost \$500,000. Schools are cutting class sizes, using outdated textbooks and postponing building maintenance and computer upgrades.

If it weren't for the stimulus package, the weakness in local government would be much greater. Federal stimulus dollars preserved about 30 jobs in the Lewiston School District and an unestimated number of jobs throughout the region. When the stimulus money goes away in 2010, many school districts are likely to undergo more financial emergencies.

Local government revenues typically lag the economy. They don't fall as sharply as personal income when a recession begins, but they also tend to continue to fall for a year or so after the economy begins to improve. So, even if the local economy improves significantly in the next few months, cities, counties and school districts will struggle with revenue shortfalls for another year or two.

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EDUCATIONAL ATTAINMENT IN NORTH CENTRAL IDAHO

North central Idaho's work force is better educated than the state's and the nation's. The region has a better high school graduation rate than the state, which outperforms the U.S. The region also has a higher level of post-secondary education than either the state or the nation. Young men especially stand out for their educational attainment compared to young men in Idaho and the nation.

North central Idaho has significantly increased the educational level of its adult population in the last three decades. In 1980, only 73.6 percent of the region's population 25 years and older were high school graduates. Today, 91

percent are graduates. In 1980, 17.3 percent of the 25-plus population had earned a bachelor's degree or higher. That percent has risen to 24.6 percent today. There also has been a significant increase in individuals earning technical certificates and associate degrees, reflected by the increase in people with "some college." The 2008 statistics for north central Idaho come from the Census Bureau's American Community Survey, which has a significant margin of error for small areas.

The most recent educational attainment data for counties comes from the 2000 census. Latah County with the University of Idaho was the only county in

Educational Attainment of the Population 25 Years & Older, 2000

Age Cohort	North Central		State of Idaho		United States	
	Female	Male	Female	Male	Female	Male
25 to 34 years						
High school graduates	91.1%	90.8%	87.7%	85.1%	85.9%	81.9%
Some college incl. assoc. deg.	39.5%	36.3%	39.3%	36.3%	32.3%	28.7%
Bachelor's degree or higher	28.4%	28.3%	22.8%	21.3%	29.4%	25.7%
35 to 44 years						
High school graduates	91.8%	91.3%	88.7%	86.2%	86.6%	83.4%
Some college incl. assoc. deg.	35.5%	33.4%	39.3%	34.7%	33.0%	28.3%
Bachelor's degree or higher	25.2%	23.8%	21.2%	22.8%	26.0%	25.8%
45 to 64 years						
High school graduates	89.6%	89.4%	88.3%	88.2%	83.4%	82.9%
Some college incl. assoc. deg.	33.7%	31.5%	38.3%	35.1%	28.9%	27.3%
Bachelor's degree or higher	24.6%	29.4%	21.0%	29.0%	23.7%	29.3%
65 years and over						
High school graduates	73.1%	68.8%	73.0%	71.7%	64.9%	66.4%
Some college incl. assoc. deg.	21.6%	18.5%	24.3%	22.7%	18.0%	18.4%
Bachelor's degree or higher	13.1%	18.9%	11.1%	18.6%	11.8%	20.5%

North Central Idaho Educational Attainment Population 25 Years and Older

	2008	2000	1990	1980
Less than 9th grade	3.0%	4.3%	10.2%	13.4%
9th to 12th grade, no diploma	5.9%	9.6%	22.1%	13.1%
High school graduate (& equivalency)	33.2%	30.7%	31.1%	37.4%
Some college	33.2%	31.2%	26.0%	18.8%
Bachelor's degree	16.4%	15.4%	10.7%	8.7%
Graduate or professional degree	8.2%	8.8%	3.9%	8.6%

the region with a higher college graduation rate than the United States. About 80.2 percent of Clearwater County's adult population were high school graduates, roughly the same as the nation's 80.4 percent. All the other counties in the region have higher percentages of high school graduates.

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Educational Attainment of Population 25 Years and Older, 2000

	Clearwater County	Idaho County	Latah County
Less than 9th grade	5.2%	6.3%	3.1%
9th to 12th grade, no diploma	14.7%	10.8%	5.9%
High school graduate or equivalent	37.3%	38.3%	22.6%
Some college	29.5%	30.2%	27.4%
Bachelor's degree	9.1%	10.7%	22.7%
Graduate or professional degree	4.3%	3.8%	18.2%

Educational Attainment of Population 25 Years and Older, 2000

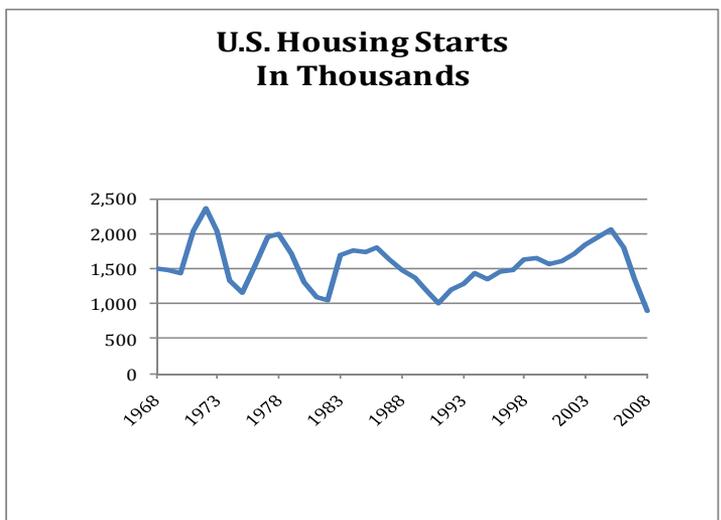
	Lewis County	Nez Perce County	United States
Less than 9th grade	6.5%	3.9%	7.5%
9th to 12th grade, no diploma	9.3%	10.6%	12.1%
High school graduate or equivalent	34.7%	31.8%	28.6%
Some college	34.6%	34.8%	27.4%
Bachelor's degree	11.1%	13.7%	15.5%
Graduate or professional degree	3.7%	5.2%	8.9%

HOUSING STARTS, LUMBER PRICES & FOREST PRODUCTS EMPLOYMENT

Logging and wood products employment depends on the level of U.S. housing construction. With housing starts falling to historically low levels, lumber prices have plummeted in the last few years, and timber sector employment has dropped steeply. Monthly housing, expressed in seasonally adjusted annual rates, peaked nationally at 2.2 million in February 2005. By this past

April, they had fallen to a post-World War II low of 479,000. By October, starts had edged upward to 529,000.

Lumber prices have followed a similar pattern. In March 2005, the Random Lengths composite index for per thousand board feet of



framing lumber peaked at \$438. This March prices hit their lowest level in 26 years — \$192. Prices had climbed back to \$250 by Nov. 27 in response to decreased supply and increased demand.

Lumber and wood products employment in north central Idaho also showed a similar pattern. Logging and wood products manufacturing employment peaked at 1,880 in the third quarter of 2006. By the third quarter of 2009, employment had slumped to 1,320, a 30 percent decrease. In addition, several mills are running shifts for only 30 to 35 hours a week rather than the 40 to 50 hours that is normal when the lumber industry is on an upswing.

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INL WEATHERS RECESSION WITH STIMULUS MONEY ASSISTANCE

During a time of economic uncertainty and confusion, eastern Idaho's largest employer is weathering the recession with the help of federal stimulus money. The Idaho National Laboratory currently has over 8,000 employees working at a myriad of facilities between Idaho Falls and Arco,

That is up over 300 since the first quarter of 2008 during a time when many other businesses have been forced to lay off workers, cut back hours or close completely. The stimulus funding essentially sidetracked planned layoffs of workers from cleanup projects that had been completed. The \$413 million stimulus boost to waste cleanup at the site being handled by CH2M-WG Idaho LLC meant those workers were kept on the payroll and even more were hired to accelerate projects already scheduled and begin others that had yet to be scheduled.

The laboratory's main operating contractor, Battelle Energy Alliance, which picked up \$55 million more in stimulus funding, has been steadily hiring throughout this period although its labor force is aging. Four in 10 Battelle workers are 50 or older or will be in the next five years, offering prospects for future hiring as these workers leave the labor force.

Idaho's award of \$468 million was part of \$6 billion the U.S. Department of Energy sent to 12 states. The INL has been tabbed as the nation's premier nuclear research facility and is a mainstay of eastern Idaho's economy, helping the region weather national economic change with limited disruption.

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LAVA HOT SPRINGS: A TOURISM TOWN STRUGGLING THROUGH A RECESSION

Once a part of the Fort Hall Reservation, Lava Hot Springs today is another Idaho tourism community struggling through the worst recession the state and nation have seen since World War II.

Although part of the Pocatello metropolitan area, the city is in the mountainous valley of the Portneuf River, the old route of the Oregon and California trails, and numerous hot springs have made it a popular resort destination. But the traffic is highly seasonal, and without any other significant economic activity, Lava Hot Springs has experienced no growth. The 2000 census put the population at 521. It was estimated at 492 in 2008.

Its history is grounded in the springs. The Shoshone-Bannock Tribes called the area Poha-Ba, or the Land of Healing Waters. The federal government bought the land in 1900, opening it to settlers, and two years later the area

was ceded to the state, which placed it under control of the Lava Hot Springs Foundation in 1918.

During the heyday of rail transportation, tourists flocked to Lava Hot Springs to bask in the healing waters of the hot pools. But as automobiles became popular, the town started to fail. Then a flood in 1963 closed down much of the town including the hot pool and swimming pool. It was slowly rebuilt to what it is today.

Just two years ago the local option tax available to only a handful of small resort cities was raised from 2 percent to 3 percent in Lava Hot Springs to focus on tourism promotion and improve the local infrastructure and police operations.

Still, economic activity has been limited. The most recent business expansion was two years ago when Shawn's Market upgraded its grocery store in the middle of town.

The Lava Hot Springs Foundation opened an indoor swimming pool with a rock climbing wall three years ago and this past summer installed two large slides at its outdoor Olympic swimming pool. But the geothermal springs have always been the tourist draw, attracting over 140,000 visitors a year. The combination with the town's other attractions has pushed visitor totals to over 200,000 a year since 1999, and that number could exceed 300,000 for the first time in 2009 as Lava Hot Springs benefits from stay-close-to-home outings prompted by the recession.

At the same time, while hotel occupancy runs at 65 percent during the summer, it drops dramatically the rest of the year to average just 40 percent year-round. Summer tourism carries businesses through the rest of the year when they barely have enough traffic to stay open even though hotel occupancy routinely hits 100 percent on Saturday nights.

The community is looking at more ways to market itself as a year-round destination and recently began gathering information to direct that campaign. About 60 percent of the visitors come from Utah, mostly Salt Lake City, Ogden and Logan with the Salt Lake airport only two hours away. U.S. Highway 30 also runs right through the city south of Jackson Hole, Wyo., and there are plans to start marketing Lava Hot Springs to those travelers. Improvements are already being made to the highway between the city and Interstate 15 to the West.

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TWIN FALLS RETAIL ...HO HO HUMBUG...

The retail hub in south central Idaho traditionally has been the city of Twin Falls. This status was heightened by the addition of big box retailers in and around the canyon such as Costco, Home Depot, Shopko, Target, Pet Smart, Winco, Office Max, the canyon strip mall with stable national retailers and the ongoing expansions at the Magic Valley Mall that have been met with start-stop success. Holiday hiring has fallen off in recent years. The numbers tell the story of the retail history of Twin Falls County.

Retail as an industry continues to be a mixed bag. Retailers contribute much to the community and are major participants in promotions, festivals, fundraisers and service activities. The sector overall is typically in the top three for employment. However, the majority of lesser-skilled retail jobs are part-time and do not typically offer competitive benefit packages. This is particularly true during downturns when the labor pool is broader and employers can be more selective.

Typically economic development efforts are not geared toward retail because the big boxes target their stores based on demographics. They follow population growth and depending on the product, focus on niche markets. Population growth and construction activity drove the retail explosion in Twin Falls County over the last decade. While retail is important, it is not worth the additional investment to woo a sector uninfluenced by such persuasion.

AVERAGE EMPLOYMENT

Twin Falls County retail employment took a hit at the end of 2008 compared to the other counties in the region and the state. Twin Falls County lost 245 jobs between fourth quarter of 2007 and fourth quarter of 2008, a 4.9 percent decline, while the region fell only 1 percent and the state dropped 3.7 percent. The last three months of the year are traditionally a time retailers beef up for the holiday shopping rush. But over the last five years in particular, Internet sales have increased and reduced some of that pressure. This has particularly been the case in rural areas where snowy road conditions, long travel times and limited shopping options hinder holiday shopping efforts. Seasonal retail job fairs have shown limited participation in the past two years. Twin Falls retail payroll during this time has fallen even more dramatically at 7.8 percent compared to a decline statewide of 5.8 percent and a regional drop of just 3.8 percent.

The decline in total retail wages in Twin Falls County is evidence that county retailers are bucking the national trend of retailers providing more hours to existing workers and reducing seasonal hiring, particularly with the increases in the minimum wage over the last three years. Retail is one of several industries notably impacted by the minimum wage increase. In addition south central Idaho has the lowest average wage of any region in the state so this increase was larger than most retail, hospitality and food service workers had likely experienced in the previous five years. The last increase from \$6.55 an hour to \$7.25 an hour may have hurt businesses to the point that they increased their personal and family's participation in day-to-day operations to avoid hiring.

ESTABLISHMENTS

At first glance, the sizeable drop in payroll and employment might suggest a rash of business closures. Certainly Twin Falls County has not been immune, and the greatest losses occurred in 2009 as the recession wore on. The question is whether holiday hiring by the new Wal-Mart, Walgreens and small business will offset the jobs lost to the closures of auto dealerships, furniture stores and specialty stores. Historically the persistent growth of small businesses in Twin Falls has offset other retail job losses among businesses that maintained stability through the end of the expansion and into the recession. From 2005 to 2006, a time of solid housing starts and explosive growth in south central Idaho and the state's larger cities, there was a net growth of 274 retailers statewide. While 2006 to 2007 was not a dud year, the housing market was slowing and the state started losing momentum with a net gain of only 82 retail businesses. With the economy losing many jobs from 2007 to 2008 as high technology, construction and timber slumped significantly, there was a net loss of four businesses in that year. Over these same three years, Twin Falls County saw a net gain of five businesses between 2005 and 2006, the loss of one between 2006 and 2007 and a net increase of six from 2007 to 2008.

HOLIDAY HIRING

The ratio of average retail employment in the fourth quarter compared to average employment throughout the year confirms Twin Falls County as the region's retail hub with a ratio typically over 100 in the final three months of the year. Jerome County saw a surge in 2000 when Wal-Mart opened. Fourth quarter employment in Twin Falls County peaked when new retailers entered

the market as evidenced by retail development of the canyon rim in 2002 and Lowe's opening in 2005. It is clear that during the 1990s before heavy Internet usage and retail expansion in Minidoka and Cassia counties, the fourth quarter had generally higher ratios for Twin Falls. Prior to the recession, the large-scale hiring that was considered part of back-to-school and holiday consumerism was gradually decreasing.

Blaine County, which includes the Sun Valley Resort, emphasizes recreation, and the figures indicate vacationers are more interested in hitting the golf courses, tennis courts, ski slopes, restaurants and bars than in shopping. Retail does not accelerate in the fourth quarter because the county has become a year-round tourist destination with summer and fall conferences a popular draw. In addition, the resort's high-end retail stores are not specifically geared to typical Christmas shopping. Blaine County does not have a lot of options for purchasing electronic equipment, but there are art galleries for collectors and designers and sports equipment shops for bikers and skiers. Regular repeat business is not the norm. These types of retail purchases in Blaine County can be made any time, tempering fourth quarter hiring.

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Fourth Quarter Retail Jobs, 1991-2008

	Idaho	South Central Region	Blaine County	Camas County	Cassia County
4Q 1991	54,843	7,602	1,045	17	1,204
4Q 1992	57,756	8,136	1,071	14	1,448
4Q 1993	60,887	8,362	1,146	22	1,406
Q4 1994	64,184	8,794	1,238	17	1,424
Q4 1995	63,530	8,817	1,311	15	1,391
4Q 1996	68,439	9,400	1,354	20	1,455
4Q 1997	69,859	9,382	1,347	13	1,420
4Q 1998	72,416	9,569	1,413	16	1,450
4Q 1999	74,752	9,606	1,485	21	1,448
4Q 2000	78,148	9,923	1,573	17	1,452
4Q 2001	74,239	9,351	1,546	19	1,447
4Q 2002	74,580	9,597	1,605	19	1,494
4Q 2003	75,385	9,530	1,624	17	1,395
4Q 2004	76,843	9,409	1,684	19	1,365
4Q 2005	80,310	9,776	1,709	22	1,418
4Q 2006	84,431	10,188	1,754	19	1,425
4Q 2007	86,327	10,117	1,741	23	1,464
4Q 2008	83,094	10,017	1,697	10	1,520
10-year Annualized Avg	1.4%	0.5%	1.8%	-4.4%	0.5%
5-year Annualized Avg	2.0%	1.0%	0.9%	-10.4%	1.7%
1 Year % Change	-3.7%	-1.0%	-2.5%	-55.9%	3.8%

Table continued on page 19.

Fourth Quarter Retail Jobs, 1991-2008
(Continued from previous page)

	Gooding County	Jerome County	Lincoln County	Minidoka County	Twin Falls County
4Q 1991	429	573	23	529	3,781
4Q 1992	440	607	17	530	4,010
4Q 1993	442	615	21	558	4,151
Q4 1994	436	638	46	544	4,450
Q4 1995	456	643	43	536	4,422
4Q 1996	462	665	39	552	4,853
4Q 1997	438	729	39	542	4,853
4Q 1998	436	730	48	538	4,938
4Q 1999	426	793	38	481	4,914
4Q 2000	411	1,094	52	525	4,799
4Q 2001	365	1,015	49	462	4,448
4Q 2002	367	1,119	47	465	4,482
4Q 2003	382	1,054	45	475	4,538
4Q 2004	380	993	49	488	4,431
4Q 2005	408	1,006	49	519	4,645
4Q 2006	424	1,054	49	495	4,968
4Q 2007	402	1,004	46	458	4,980
4Q 2008	414	1,066	77	498	4,735
10-year Annualized Avg	-0.5%	3.9%	4.9%	-0.8%	-0.4%
5-year Annualized Avg	1.6%	0.2%	11.6%	0.9%	0.9%
1 Year % Change	2.9%	6.2%	69.3%	8.7%	-4.9%

Ratio of 4th Qtr Average Retail Employment Compared to Annual Average Retail Employment

	Idaho	South Central Region	Blaine County	Camas County	Cassia County
1991	104.1%	102.6%	98.4%	98.1%	100.6%
1992	104.7%	104.7%	97.3%	106.3%	112.9%
1993	104.7%	102.5%	99.4%	117.6%	98.4%
1994	104.5%	104.1%	102.6%	113.7%	103.0%
1995	104.3%	102.8%	101.1%	114.0%	102.9%
1996	104.0%	102.2%	99.0%	130.4%	100.2%
1997	103.3%	101.0%	98.1%	89.9%	99.3%
1998	104.0%	102.2%	98.2%	122.9%	103.0%
1999	104.0%	100.8%	99.5%	133.3%	99.1%
2000	104.1%	103.2%	101.0%	109.7%	101.8%
2001	101.5%	99.6%	98.3%	114.3%	101.4%
2002	102.3%	102.7%	101.7%	107.4%	103.8%
2003	103.1%	101.1%	99.8%	107.2%	98.7%
2004	103.4%	101.3%	99.7%	104.2%	100.5%
2005	103.8%	102.0%	98.6%	118.4%	99.9%
2006	104.1%	102.0%	99.9%	110.5%	100.3%
2007	102.6%	100.1%	94.9%	134.7%	98.9%
2008	99.6%	99.4%	94.9%	88.9%	100.4%

Average 103.5% 101.9% 99.0% 112.3% 101.4%

	Gooding County	Jerome County	Lincoln County	Minidoka County	Twin Falls County
1991	106.4%	101.4%	114.8%	97.6%	105.0%
1992	100.8%	101.6%	88.9%	99.8%	105.7%
1993	99.9%	98.5%	93.1%	104.1%	105.6%
1994	97.6%	99.6%	115.0%	97.6%	107.0%
1995	102.6%	103.7%	99.2%	99.4%	103.6%
1996	98.8%	99.7%	89.0%	99.5%	104.8%
1997	98.1%	96.8%	96.1%	97.9%	103.7%
1998	98.4%	100.3%	116.6%	99.8%	103.9%
1999	96.3%	100.2%	83.3%	94.7%	103.0%
2000	97.1%	122.5%	121.0%	98.1%	101.6%
2001	96.2%	101.5%	103.1%	95.5%	99.7%
2002	98.1%	102.7%	103.5%	97.9%	103.5%
2003	100.1%	100.2%	103.9%	101.7%	102.6%
2004	98.9%	99.8%	105.8%	100.9%	102.6%
2005	98.7%	102.2%	102.6%	98.7%	104.7%
2006	100.7%	102.4%	104.8%	95.7%	104.0%
2007	95.2%	100.9%	93.5%	98.3%	102.8%
2008	97.7%	101.4%	101.6%	101.4%	100.2%

Average 99.0% 102.0% 102.0% 98.8% 103.6%



Area and County Developments

PANHANDLE

Benewah, Bonner, Boundary, Kootenai & Shoshone counties

COUNTY DEVELOPMENTS

BENEWAH COUNTY

- The Coeur d'Alene Tribe's bus system now provides service to St. Maries. A 14-passenger Citylink van operates from 8 a.m. to 5 p.m. every day including holidays. Passengers must make reservations 48 hours in advance. Citylink operates regular bus service between Worley, Plummer, Tensed, Post Falls, Coeur d'Alene and Hayden.
- Benewah County voters approved a major expansion and modernization of their 50-year-old hospital in St. Maries, giving the hospital board the authority to borrow up to \$28.5 million. Construction on a 60,000-square-foot expansion should begin in spring 2011 and take three years. The project includes an expanded emergency department, modern examination rooms, updated medical equipment, a larger clinic, private patient rooms, more space for medical offices and 75 additional covered parking spaces.
- Plummer Rock Products opened three miles east of Plummer in August. A large rock pit provides crushed rock, boulders, topsoil and fill dirt. So far, the business has sold about 750 truckloads of rock and gravel, mostly to the Worley Highway District and the Coeur d'Alene Casino. It also rents equipment and do some trucking.

BONNER COUNTY

- Schweitzer Mountain Resort near Sandpoint opened the Friday after Thanksgiving because of its new snowmaking system. At its peak around New Year's Day, Schweitzer employs about 600.
- A Sandpoint company has been awarded a \$1.16 million contract for a National Park Service facility on the Alaska Peninsula. Formed in 1991, Northern Management Services Inc. bills itself as a leading provider of maintenance and construction services for the General Services Administration, the U.S. military, the U.S. Fish and Wildlife Service and municipalities. It currently has 37 contracts in 19 states.
- A migration corridor for moose, elk, deer and other wildlife between the Selkirk and Cabinet-Yaak mountains will be protected forever from development but will remain open to timber harvesting and nonmotorized public access under a program approved by Congress. Under the Forestry Legacy program, 3,700 acres in the McArthur Lake area between Sandpoint and Bonners Ferry will receive permanent conservation easements on forest land owned by Forest Capital Partners for \$3.4 million.

BOUNDARY COUNTY

- Boundary County is bracing for the closure of the Welco mill in the second week of December. The closure will reduce logging employment in the Naples area, and it will be another reduction in payrolls in a county that already has experienced massive job losses in recent years. JMF Inc. in St. Maries, which runs the log yard and hauls cedar chips from the mill to Superior, Mont., for landscaping, expects to lose \$500,000 in revenue. Its

two employees who normally work in the log yard will be given jobs elsewhere. All 93 mill workers qualify for Idaho Department of Labor help with retraining, job search and relocation.

- A study by Dartmouth Medical School ranks Boundary Community Hospital in Bonners Ferry as the least costly rural health care facility of its kind in the nation. After reviewing Medicare costs at 2,990 rural hospitals, the study's authors found the average per capita Medicare cost at Boundary Community Hospital was \$3,616, which was the lowest.
- The Idaho Forest Group mill in Moyie Springs increased production in November, requiring half of its employees to work overtime, a big break for the mill workers and the entire community. The mill, which makes wooden studs used for renovating homes, forecasts a 10 percent increase in demand in 2010. If so, the mill probably will add 25 workers at wages of about \$16 an hour plus benefits. The increase came from Idaho Forest Group's contracts with two of the largest home improvement chains, Lowe's and Menards. Idaho Forest Group employs 96 people at Moyie Springs. With such a high volume of production, the mill also generates about 120 logging and trucking jobs to provide 95 million board feet of logs for the mill. Safety is the number one priority at the mill. In 2008, its OSHA incident rating was among the lowest in the industry. The mill also is committed to being an active, vital business partner in the community.
- Idaho Panhandle National Forest announced in November that it had completed upgrades to Pack River Road, significantly improving access into the Pack River drainage and numerous high mountain lakes that are popular destinations. Before the road was improved, only vehicles with high clearance could use it. Federal stimulus funds helped pay for the upgrade.
- The Bonners Ferry area is home to Northwest Academy and a few smaller school programs for teens, and the Classical Learning Resource Center is the latest to join them. The online school provides resources for homeschoolers throughout the world. Founded by John and Anne Van Fossen last year, it teaches classes from a Christian perspective. Its classical curriculum teaches critical thinking and offers Greek and Latin language courses.
- WeeCycle is the newest store at the Bonnerport Mall in Bonners Ferry. Owner Kim Casey opened the consignment store on Dec. 1, specializing in children's clothes, cribs, high chairs, strollers and toys.

KOOTENAI COUNTY

- Kootenai Health opened its state-of-the-art cancer treatment and research facility at its health care park in Post Falls in November. The \$14.5 million facility includes a pharmacy, laboratory and research department where cancer patients who haven't responded to treatment will undergo clinical tests. A new \$2.7 million linear accelerator is the centerpiece of the radiology department. It can pinpoint tumors anywhere in the body and even track their motion during the breathing cycle. For the patients, the center provides a beautiful environment — with windows overlooking beautiful landscaping, paintings and sculptures, two fireplaces and a meditation garden intended to create a serene atmosphere conducive to healing. Studies indicate the need for cancer services in northern Idaho will increase 40 percent over the next 10 years. The Post Falls facility will ease pressure on the Coeur d'Alene and Sandpoint facilities and better serve clients on the west side of Kootenai County and eastern Washington. In the coming year the facility will offer a complementary therapy program including massage therapy, yoga, acupuncture, strength training and skin therapy.

- Mountain Top Manufacturing broke ground in November on a 7,000-square-foot building in Rathdrum that should be finished next spring. The seven-year-old contract electronics manufacturer currently leases 4,000 square feet in Rathdrum. In the next two to three years, Mountain Top expects to construct a complex of four business units around the new plant for a total of about 15,000 square feet. The majority of the company's work now is building amplifiers for communications for LCF Enterprises of Post Falls. It also builds parts for other companies.
- Northwest Picture Co. in Coeur d'Alene recently released "Wolfpeople," a feature-length horror picture filmed in Kootenai and Bonner counties and written and produced by a Bonners Ferry man. "Wolfpeople" can be purchased at Amazon.com and createspace.com. The company's next project is a horror movie about a masquerade party with an escaped convict. Coeur d'Alene and Sandpoint are being considered as filming locations. Groups in both Kootenai and Bonner counties are working hard to create a local film industry.
- The Art and Home Center opened in November on Lee Court in Coeur d'Alene. The 5,000-square-foot store features the work of local artists including paintings, furniture, stained glass, candles, soaps and lotions. The center also contains a frame shop and an art studio, and it offers demonstrations of arts and crafts. The store near the Kroc Center and a proposed WinCo Foods will open an outdoor country market in the summer that can hold up to 100 vendors.
- To accommodate anticipated growth, Accurate Molded Plastics in Coeur d'Alene is building a 20,000-square-foot facility next to its plant on Industrial Loop. The company expects the facility to be ready by spring. Its 160 employees do custom injection molding and tool-making for the medical, aerospace, transportation, electronics and consumer products sectors.
- North Idaho College's nursing department has partnered with the Idaho Department of Labor to provide practical nursing training in rural northern Idaho. The Idaho Workforce Development Council recently earmarked \$50,000 in Workforce Investment Act Funds to the college for practical nursing education for certified nursing assistants in rural communities as a way to help increase the number of licensed health care providers in the region. The funding will allow the school to convert the didactic portion of the practical nursing program to an online format so it can be delivered at health care facilities where the certified nursing assistants are employed. Funding will also go to lab supplies, training materials and developing and delivering online preceptor training.
- Local employers will recommend certified nursing assistants from their facilities to participate in the program. The certified nursing assistants must meet all the prerequisites to be accepted. The first practical nursing program will be offered next June.
- Among the new stores in Post Falls are Art Conscious Picture Framing and Smitten Clothing Boutique.
- Coeur d'Alene Chocolates celebrated its grand opening Dec. 5. Its specialty chocolates are handmade in Coeur d'Alene and showcased at Edna's Gallery of Art. Private label gourmet creations can be customized for special events, company logos or personal designs. The company also offers gift baskets and party favors for weddings or corporate events.
- To meet the needs of the growing population west of Hayden, C&C Grocery is under construction in a mini-mall. The 1,500-square-foot convenience store will offer a drive-through window.

- Breakfast Nook opened in the former Wingers building in Post Falls. The 100-seat restaurant offers breakfast and lunch just like the other Breakfast Nooks in Coeur d'Alene and Rathdrum. It employs about 15.

SHOSHONE COUNTY

- Silver prices generally follow gold prices. With gold's price skyrocketing above \$1,170 per ounce, silver's price rose to \$18.56 by the beginning of December. Not only is the price of silver up, but so is the price of the mines' major byproducts — lead, zinc and copper. Higher prices are leading to increased production and employment at the county's two major mines. The Lucky Friday mine near Mullan hired 13 people in the last couple of months, bringing its employment up to 253. The mine, owned by Hecla Mining, produced 930,258 ounces of silver during the third quarter of 2009, a 26 percent increase over 739,870 ounces in the third quarter of 2008. At the Galena Mine, U.S. Silver produced 558,071 ounces of silver in the third quarter of 2009, 8 percent more than the same quarter in 2008. Lead production was up 27 percent and copper production 15 percent. Despite the increase, production was lower than expected. Rock bursts, like small earthquakes underground, in July disrupted production. U.S. Silver Corp. has created 21 new jobs since July. Rising metals prices and strong production means rising profits, which means higher pay for miners. Both the Lucky Friday and the Galena mines share profits with employees.
- The ski season began earlier than normal, and the ski areas are hoping for record attendance this year. Lookout Pass on the Idaho-Montana border opened Nov. 13, its earliest opening since 2003. Lookout employs about 100. Silver Mountain Resort, including its gondola and indoor water park in Kellogg, opened on the Friday after Thanksgiving. The ski area rarely makes its hoped-for Thanksgiving weekend opening because snow levels typically are not sufficient until mid-December. The resort employs 300 to 350.

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NORTH CENTRAL IDAHO

Clearwater, Idaho, Latah, Lewis and Nez Perce counties

REGIONAL NEWS

NATURAL GAS PRICES FALL

- On Nov. 1, Avista's rates for natural gas fell to their lowest levels in five years. Avista serves the 10 northern Idaho counties, eastern Washington and the northeast corner of Oregon. Residential rates for natural gas in northern Idaho fell 30 percent, or about \$24.82 month on average. That should help families struggling to pay their bills in this recession, and give businesses some relief as well.

CLEARWATER COUNTY

- Clearwater County is getting a \$140,000 Idaho Office of Energy Resources grant to determine the feasibility of a woody biomass plant. The \$140,000 grant authorized under the federal stimulus program, will finance a consultant and engineer to finalize a feasibility study. The plant, to be owned by the county and run by a private contractor, would be adjacent to the state medium-security prison in Orofino. It would produce steam from burning wood waste to power a turbine generating electricity that would be sold on the grid. Excess steam would be used to heat the prison. The pro-

ject 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. With 92 percent of the county's land covered by forests, wood waste will be readily available. Clearwater County Economic Development, which has spearheaded the biomass project, also has submitted a grant to the U.S. Forest Service that would help fund construction of the plant.

- Clearwater County is doing its best to prevent the closure of Dworshak State Park, the centerpiece of its tourism industry. Dworshak is one of three state parks being considered for closure to deal with budget problems. Dworshak is owned by the Army Corps of Engineers but managed by the state under a 25 year-lease agreement that expires in 2014. The Idaho Parks and Recreation Board voted Sept. 2 to terminate the state's lease. The park, which hosts 121,000 visitors in an average year, is on the reservoir behind Dworshak Dam near Orofino. Known for its recreational boating, fishing and camping opportunities, the park includes the Big Eddy Marina and Lodge, Freeman Creek Campground and Three Meadows Group Camp. Dworshak is key to tourism and the county's economic development efforts. County commissioners believe the park's closure would cost residents millions of dollars in tourism and related spending. The county hopes to create opportunities for houseboats on the reservoir, which would potentially attract new residents to a county that has lost 8.4 percent of its population since 2000. In addition to the possible park closure, the \$150,000 earmarked for a wave attenuator to allow houseboats to operate out of Big Eddy has fallen to budget cuts. Enhancing the recreational opportunities on the reservoir also has the potential of attracting manufacturers of recreational products. Last year, SJ-X Jet Boats moved to Orofino. While closing the park would eliminate only three full-time workers and a seasonal employee, the number of jobs indirectly affected is much greater. The Parks and Recreation Board has agreed to explore the possibility of the county managing the park, and chambers of commerce and communities throughout the region have expressed support for the county's efforts to keep the park open.
- Randy Krall, owner of the Camp, Cabin and Home in Lewiston, opened a second store on Highway 12 in Orofino in October. Krall chose Orofino for its proximity to world-class fishing and hunting. Anglers can find rods, reels, tackle and bait while hunters, campers and hikers can get equipment and supplies. The store also sells ammunition and other accessories for firearms.

IDAHO & LEWIS COUNTIES

- Idaho County commissioners believe the county airport in Grangeville can play a key role in economic development. To foster the airport's development, they recently set up an airport development authority to determine the needs of local businesses and pursue the best strategy for airport development. It also will set up a fixed-based operator or an airport manager, who can build the business for out-of-the-area customers. The authority will study moving the airport runway farther from the taxi area and possibly enlarging it to accommodate larger aircraft. It also will explore ways of expanding business with the U.S. Forest Service, which maintains a smoke-jumper base in Grangeville and accounts for 83 percent of the airport's use. The Federal Aviation Administration gives the airport \$150,000 a year for maintenance because of the smokejumper base. The commissioners say the Forest Service may consider moving its smokejumper base from McCall to Grangeville and using the Nez Perce Forest as an annual training camp for smokejumpers throughout the region. Among the authority's tasks will be developing opportunities for Anderson Aeromotive Inc., a cer-

tified repair station specializing in the overhaul of Pratt and Whitney and Curtiss-Wright radial engines. The Grangeville company has clients throughout the country. Flying B Ranch in Kamiah also wants better air service at the hunting resort for guests who fly in from around the world. The commission believes even more businesses would locate in Grangeville if the airport offered more hangar space and other services such as restaurants and lodging. The commission budgeted \$200,000 this year to install an automated weather service that will be installed in January and will advise pilots about flying conditions in north central Idaho.

- Riggins is moving closer to developing a whitewater park. The National Park Service recently awarded the city a technical assistance grant to develop the park, which would provide three in-stream structures along the Little Salmon River for kayaking, boogie boarding and salmon and steelhead fishing along with an area for viewing and picnicking. The Old Mill Bridge will be converted to pedestrian use only so it can be part of a proposed trail system that will tie the city to the park. Riggins previously received a \$50,000 grant from the Idaho Department of Commerce to design the park.
- St. Peter and Paul Catholic church in Grangeville broke ground in August on a \$2.5 million activity center that will connect the church and its school. Scheduled for completion by next August, the 15,500-square-foot center will serve as a parish hall with a kitchen, auditorium stage and sports gymnasium.
- White Bird, a city with 110 residents, recently launched a community Web site that contains chamber of commerce news, information about the community and its businesses, upcoming events and visitor information. It's at <http://www.visitwhitebird.com/>.
- The Idaho Banana Co. opened Nov. 12 in Riggins near the confluence of the Main and Little Salmon rivers. The store offers local art works, antiques, jewelry, historical posters, cards, wine and cheese.
- An Idaho Bureau of Homeland Security grant of \$135,000 has allowed Idaho County to plug some holes in its radio communication network and replace aging infrastructure. The disruptions in radio communications in the state's largest county had posed public safety and law enforcement problems. In the Riggins area, radio communication improved with the installation of a tower. Repeater installation also is planned for the Salmon Point area above Riggins. Near Mount Idaho, a new radio repeater and antenna on the Inland Cellular tower were installed. Another repeater soon will be installed at Pilot Knob. Radio communication on U.S. Highway 12 in the Lochsa River corridor was improved with the installation of two radio repeaters.
- Idaho County has been quite successful in attracting small businesses. Between 1993 and 2008, the number of private-sector employers grew 37.7 percent from 403 to 555. In 2008, private-sector employers paid \$86.5 million in wages and salaries. Employers with fewer than five employees paid \$13.3 million, 15.4 percent of the county's total private-sector payroll. When adjusted for inflation and expressed in 2008 dollars, the county's private-sector payroll totaled \$54.1 million in 1993. Therefore, real private-sector payroll increased 59.9 percent. See table on page 27 for more information.

Size of Private-Sector Employers in Idaho County

Size of Employer	Employers		% of Total Payroll	
	1993	2008	1993	2008
Under 5 employees	257	385	12.9%	15.4%
5 to 9	84	94	20.0%	15.4%
10 to 19	40	45	20.3%	20.8%
20 to 49	19	25	23.9%	20.2%
50 to 99	3	3	12.2%	8.5%
100 to 249	2	3	10.7%	19.8%
Total	403	555	100.0%	100.0%

LATAH COUNTY

- The University of Idaho cut its 2009-2010 budget by \$19 million. The deep cuts required the university to eliminate a quarter of its faculty searches, put a freeze on new hires, restrict travel and drop or consolidate 35 programs.
- Global Credit Union closed its Moscow branch in early November. Five people lost their jobs.
- How the recession has affected Latah County's economy is reflected in the comparison of employer establishments and employment by industry between the second quarter of 2007 and the second quarter of 2009.
- Nearly one in three people who work in Latah County work for the University of Idaho. Its employment has remained relatively stable. Demand for lumber and other wood products has declined sharply from 425 jobs in

Latah County Employer Establishments & Employment

	Q2 2007		Q2 2009	
	# of Estab.	# of Empl.	# of Estab.	# of Empl.
Total	1,054	13,985	1,086	14,435
Agriculture & Forestry	58	248	55	298
Construction	116	420	144	633
Manufacturing	34	366	34	428
Wholesale Trade	30	206	34	220
Retail Trade	145	1,838	150	1,935
Transportation & Warehousing	23	72	23	77
Information	23	236	23	274
Finance, Insurance & Real Estate	104	396	99	488
Professional & Technical Services	90	468	88	454
Business Services	42	222	47	247
Educational Services	12	110	10	105
Health Care & Social Assistance	90	1,463	92	1,444
Arts, Entertainment & Recreation	15	100	17	98
Accommodations	25	262	26	304
Food Services	81	1,238	77	1,418
Mining, Utilities & Other Services	83	353	84	335
Federal Government	21	202	21	210
State Government	16	4,356	17	4,048
Local Government	46	1,430	45	1,419

2006 to 355 this year. Other manufacturing operations in Latah County are holding steady at 200 jobs, despite the recession. The health care sector has thrived in recent years, growing to 1,048 jobs in 2008. Gritman Medical Center in Moscow is the county's second largest employer, employing 485.

- Technology transfer — spinning off businesses using products and technology developed by university researchers — is the main reason why professional services has grown considerably over the last decade. In 1998, about 30 people worked in management, scientific and technology firms in Latah County. Today, more than 220 people do. Major employers in this sector include Economic Modeling Specialists Inc., Anatech Labs, EcoAnalysts and Go Nano Technologies.
- The recession has taken a toll on retail stores and the leisure and hospitality sector. The recession forced consumers to be more frugal and reduced the number of conferences, so retail, restaurant, hotel and recreation employment has fallen.

NEZ PERCE & ASOTIN COUNTIES

- Ammunition maker ATK continues to grow in Lewiston. Employment, which was nearly 900 a year ago, has surged to 1,100. ATK expects to produce more in every ammunition product line in Lewiston during 2009 than in any other single year. In the U.S., there is an unprecedented demand for ammunition to match the growing sales of guns. Since President Obama was elected a year ago, gun sales have risen steadily amid fear that the government will restrict firearm ownership, according to the National Shooting Sports Foundation. ATK also landed a contract potentially worth more than \$14 million over four years to supply ammunition for French law enforcement.
- The sawmill at Clearwater Paper will take three days of downtime at the end of December. The temporary layoff of the mill's 250 workers Dec. 28-30 is a routine holiday downtime. The company's wood products segment lost \$14.9 million in the first three quarters of 2009 when U.S. housing construction bottomed out. Another 1,450 people work at Clearwater Paper's Lewiston paper plant, which makes store-brand tissue products such as toilet paper. It has thrived in the recession as consumers have become more price conscious. The company may even expand distribution of its tissue products east of the Mississippi River. Pulp and paperboard have been helped by reduced prices for the wood fiber used to make pulp and the energy needed for the manufacturing process. Clearwater Paper, which is the region's largest private-sector employer, made \$16.5 million in the third quarter of 2009 above the \$29.7 million it earned through federal tax credits for alternative fuels.

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SOUTHWESTERN IDAHO

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

AREA DEVELOPMENTS

SOUTHWESTERN IDAHO

- The J.A. and Kathryn Albertson Foundation has contributed \$20 million to a statewide initiative to equip students for higher education through scholarships, an awareness campaign and research. Of the contribution, \$11

million goes toward statewide scholarships to help Idaho improve college opportunities and increase post-secondary participation and completion; \$6 million for the Idaho Education Network to increase access to relevant data and equal educational opportunities statewide, and up to \$3 million for 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.

- Jacksons Food Stores and the Idaho Partners Against Domestic Violence have launched a holiday campaign to raise money for the prevention of domestic and dating violence. Jacksons CEO John Jackson will match contributions dollar for dollar up to \$25,000. Through the “Give the Gift of Peace” campaign, customers can purchase a paper dove for \$1 at any Jacksons Food Store. The program raised over \$25,000 in 2008.
- Attorney General Lawrence Wasden has teamed up with federal regulators and 26 other states to get tough on foreclosure rescue fraud. The states and Federal Trade Commission are joining forces in Operation Stolen Hope, a nationwide program that combines law enforcement and public education. Wasden says complaints about companies offering mortgage modification services are rising faster than any other type of business. His office has already sued two of these companies and launched investigations into others.

ADA COUNTY

- Invest Idaho LLC of Boise has won federal approval to serve as a regional center for foreign investment. The company joins the list of more than 70 centers across the country authorized to channel money from qualified foreign investors into the local economy under the EB-5 visa program. Initially, the company plans to attract \$50 million from qualified foreign investors, which will be used to set up a fund that could subsidize dozens of projects in any of Idaho's 44 counties. The EB-5 program offers green cards to foreign nationals who invest either \$500,000 or \$1 million in the United States and create at least 10 jobs within two years.
- The poor economy has stalled most big development in the Boise Foothills, which opens new doors for the Foothills Conservation Advisory Committee to ensure land preservation through the 2001 voter-approved \$10 million property tax levy. Levy money has purchased more than 8,000 acres since 2002. So far this year, it has bought just 10 acres for \$10,000, but officials say there are several deals in the works.
- A Boise couple with longtime ties to the Boise State University athletic program has donated \$500,000 toward the school's new business building. Larry and Marianne Williams have served on the Bronco Athletic Association board, and Larry Williams was president in 1993. He also serves on the Boise State Foundation board and the campaign steering committee. The Micron Technology Foundation committed \$12.5 million for the business building in 2007, with \$5 million contingent on Boise State raising matching funds by the end of 2009. The university has less than \$1 million to go to meet the match.
- Ada County single-family home building permits fell 65 percent in January through October 2009 from the same 10 months in 2008, dropping from 354 to 121. In Nampa, permits were down 68 percent from 167 to 54, but in Boise, permits held their own – 159 in 2008 and 161 in 2009.
- Boise Cascade Holdings LLC announced net income of \$26.2 million for the quarter that ended Sept. 30. Included was \$28.2 million of noncash

income associated with the company's equity investment in Boise Inc. The company's building products subsidiary, which lost \$3.5 million in second quarter, saw its cash and net debt position improve during the third quarter.

- The grim economy is forcing Healthwise, a nonprofit health information publisher in Boise, to cut more than two dozen full- and part-time workers from its work force of about 222. The use of Healthwise's printed products including the ubiquitous Healthwise Handbook is declining, and the products are dragging down revenues for the current budget year, which began July 1. The losses from books, pamphlets and other printed materials were projected to be "seven figure drops" by the end of the fiscal year next June 30. The company will scale back its print-media products.
- Boise State University's athletic department hopes to raise \$20 million for facility projects by selling shares in a new corporation – the same kind of stock sales that allow the small-town Green Bay Packers to compete in the big-city NFL. The school has formed a nonprofit corporation, Boise State Broncos Inc., and will sell shares for \$100 each. Shareholders receive a certificate and the right to vote on the board of directors at the annual meeting. But the shares don't have any value, and the board acts as an advisory panel to the athletic department. The shares are tax-deductible. The initial offering of 200,000 shares would generate \$20 million.
- Micron Technology was one of only two global memory chip makers to increase market share in the NAND flash space during third quarter 2009. A chip industry research firm reported that Micron's revenue from NAND sales rose 33.9 percent to \$316 million during the quarter, pushing the Boise-based chip maker's share of the market from 8.6 percent to 9.4 percent. Samsung was the other NAND vendor to see expanded market share, growing from 37.6 percent to 38.5 percent to retain its position as the industry leader. Toshiba ranked second with 34.7 percent, and Micron eclipsed Hynix to take the third spot.
- Sun Valley Stages is offering service from Boise to Sun Valley. The cost is \$50 one way for adults and \$10 for children. The shuttle stops at Hailey's Wood River Inn and the Sun Valley Lodge. During the ski season buses depart from the Sun Valley Lodge at 6 a.m., 9 a.m. and noon. They will depart from the Boise Airport at noon, 4 p.m. and 6:45 p.m.

CANYON COUNTY

- Pacific Press Publishing marked 25 years in Nampa in November. Established by James White in 1874 to print a magazine called Signs of the Times at his home in Oakland, Calif., the publisher 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.
- Supporters of the Parma Research and Extension Center in southwest Idaho are confident they have come up with a plan to keep the center open through June 30. The plan combines budget reductions and pledges from farmers and other groups to total more than the \$250,000 the center needs to survive the rest of the fiscal year.
- Despite an early frost, Idaho's 2009 grape harvest produced a strong yield and high hopes for successful wines, according to the Idaho Grape Growers and Wine Producers Commission. A wet spring led to a big crop-set that required manual cluster-thinning, and warm temperatures in August

and September created good ripening. The sugars remained high, nurtured during long summer days, while acids were maintained at favorable levels by comparatively cool evenings.

- The Larry H. Miller Automall in Caldwell has closed permanently after 12 years, idling 47 workers. The dealer and the car makers determined the region has more dealerships than can be justified. Miller joined Lithia Chevrolet of Caldwell, which closed in October, moving inventory and some employees to its other dealerships in Boise and Meridian.
- After dropping substantially in September, Canyon County foreclosures jumped 53 percent in October. New foreclosure filings dropped 41 percent to 193 in September before rebounding to 296 last month, american-dataproviders.com reported. So far in 2009 a total of 2,815 new foreclosure starts have been filed in Canyon County. This is a 284 percent increase from 2007, when 732 starts were filed, and a 65 percent increase over 2008, when 1,709 starts were filed from January through September.
- With the recession easing its grip on the economy, momentum is building at the Nampa Gateway Center's on-site leasing office. Three new retailers have been added in recent months, and a new Edwards Cinemas opens next December with 12 screens. Until this year, JCPenney was Gateway's sole tenant. But Macy's opened in November and is being joined by smaller local retailer Import Outlet. The Idaho Athletic Club also opened in November, joining the Sports Authority, which opened in August.

ELMORE COUNTY

- A 20-year agreement has been reached between Mountain Home Air Force Base and the Republic of Singapore to train flight and ground crews for F-15 fighter jets. The deal will pump millions of dollars into the area economy and could help the base land an F-35 fighter jet mission. Mountain Home is among six finalists the military is considering for a long-term F-35 mission. Already having a training deal in place with Singapore could help Mountain Home when a decision is made about the F-35s.
- The gears are ever-so-slightly moving again on a proposal to build a 1,600-megawatt nuclear power plant near Hammett in Elmore County. The county Planning and Zoning Commission voted 4-3 in November to begin amending the comprehensive plan to accommodate the plant proposed by Alternate Energy Holdings Inc. Public meetings are being held in December on the proposal.

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SOUTH CENTRAL IDAHO

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

AREA DEVELOPMENTS

TWIN FALLS COUNTY

- Like Santa Claus, the Twin Falls Health Initiative Trust's sole mission is to give once a year. This year it doled out \$420,081 to non-profits serving Twin Falls County in health care, wellness and education related to those topics. The fund originated from the sale of the Magic Valley Regional Hos-

pital to St. Luke’s in 2006 and is viewed as a symbol of its commitment to the region. Grants this year were provided to:

Regence Caring Foundation for Children	\$45,000	Dental care to low income under insured children.
Southern Idaho Learning Center	\$30,000	Access for low-income students w/ learning disabilities to obtain assessments and intervention.
Family Health Services	\$88,000	Provide low-income dental service in Buhl.
Twin Falls County TARC Program	\$40,000	Provide intensive outpatient drug & alcohol treatment for offenders at Twin Falls County jail.
College of Southern Idaho Dental Hygiene Program	\$79,221	Establish a community dental clinic for economically disadvantaged staffed by students as part of their
Community Organization for Rehabilitative Efforts	\$15,000	Assist uninsured with chronic mental illness.
Interfaith Volunteer Caregivers	\$46,560	Provide services by volunteers to chronically ill, fragile and persons with disabilities.
South Central Public Health District	\$26,300	Free HIV Testing clinics for residents of Twin Falls County.
Boys & Girls Club of Magic Valley	\$50,000	Establish a program for better fitness, nutrition and health for its juvenile members.
Total	\$420,081	

- The Pinnacle West has scaled back its plans to deal with the current economy yet embrace the upscale appeal of previous projects on the canyon rim. The original project called for two buildings, five stories each with residential condos on the upper levels. Work has begun on one four-story building without a residential component, untried in this traditionally detached home market. The Magic Valley Arts Council continues as the anchor tenant with 5,000 square feet split between two stories and plans to use the outdoor plaza’s capacity for 500 during the summer for social art gatherings. A Sun Valley restaurateur has committed to the first floor with the remaining space devoted to professional offices. The \$6 million project should be completed next fall.
- The J.A. and Kathryn Albertson Foundation responded to a request by the College of Southern Idaho’s “Building Our Futures Together” campaign to build up scholarship capacity. The foundation awarded \$1 million to the college for future scholarships, which will be distributed to a broad range of students:
 - High school seniors needing financial assistance, who will be the first in their families to attend college.
 - Students enrolled in a transfer program such as K-12 Education, which leads to a bachelor’s degree at a four-year institution.
 - Returning students seeking degrees.

- Nontraditional students, who have never attended college and have been out of high school for at least one year.
- Students of academic merit.
- A couple of new businesses in Twin Falls are seeing higher sales than projected based on the embrace of trends like eBay, Craig's List and Twin Fall's ever-popular garage sales. The Wild Orchid takes ordinary furniture and other items and gives them a finish or cut that makes them special at attractive prices. Owner Lora Petitt admits she has much to learn, particularly about bidding custom jobs where it is difficult to estimate the time required. The Twin Falls Trading Co. showcases its often unique used and new items in an older home, appealing to a growing market of consumers interested in stretching their dollars with items the retailer gets from estate and bank auctions.
- Acentra recently cut the ribbon on its historic preservation services. The company converts old slides, 8 mm and 16 mm home movies and reel-to-reel and camcorder tapes to DVDs, CDs and zip drives. With technology constantly evolving the current DVDs and zip drives will likely become obsolete in about 10 years.
- Seneca Foods is celebrating its 60th anniversary. The company, launched in 1949 when its emphasis was on grape juice, is headquartered in Marion, N.Y., and has over 20 plants and distribution centers in Idaho, California, Illinois, Washington, New York, Minnesota and Wisconsin. It is the only major food processor to manufacture its own cans. In times of recession, spending rises on food in the home and drops on food outside, and that has been the case for Seneca. In fiscal year 2009 net earnings were up 134 percent on an 18.5 percent increase in sales to \$1.28 billion. The Buhl plant handled 6,894 acres of sugar snap peas grown in Picabo, Carey, American Falls, Shelley and Hermiston, Ore., and 12,400 acres of corn. Seneca officials believe that "while our international and food service businesses will be more susceptible to economic trends and currency fluctuations, the overall demand for our products continues to grow." Seneca claims the largest share of the private label, food service and export canned vegetable markets.
- Jayco received an award for its recreational vehicle design. This comes on the heels of hiring announcements for plants in both Indiana and Idaho, where about 30 more workers will be hired locally.
- A second Zulu Bagels coffee shop is opening next to the Java Jungle in a Twin Falls complex that includes conference space with wireless Internet connections, high technology hardware for presentations, catering and a beer and wine bar. Work should be completed by May. Construction is nearly completed on the new Rosenau's Funeral Home, and work is under way on a large car wash in Twin Falls.

BLAINE COUNTY

- For military veterans, returning to civilian life is never easy, especially in a down economy. Post Traumatic Stress Disorder, brain injuries and depression affect their ability to reintegrate into society, and mental and physical ailments have significantly increased, in part, because of the numerous deployments to and unusual conditions of the wars in Iraq and Afghanistan. Just since 2007, an estimated 1.65 million Americans have served in these wars. Sun Valley Adaptive Sports is among 100 organizations throughout the nation that directly address problems veterans have with stress management, relationships, self-confidence issues and communica-

tion skills, particularly with their spouses. The divorce rate is estimated at 80 percent for men returning from Iraq and Afghanistan. The annual summer camp held by Sun Valley Adaptive Sports at Petit Lake between Ketchum and Stanley offers the opportunity to combine sports such as water skiing, white water rafting and kayaking with bonding and communication between spouses and fellow soldiers. The organization provides sports club memberships to help connect veterans with community sports organizations and follows up on the progress they are making in their personal lives. The organization has collaborated with universities to develop its sports and recreation therapy curriculum and hopes to secure some of the federal funding available to help veterans suffering from traumatic stress and traumatic brain injuries.

- The Ketchum City Council has waived the affordable housing requirement for new construction, giving an \$800,000 boost to the proposed Sun Valley Center for the arts. But as a condition, the council required the developers to seek building permits by January 2011 for the \$17 million project that is being financed by donations. The center must be completed by July 2012. The non-profit organization has raised \$6 million since starting its drive in 2005.



- The recession has forced some residents to flee Blaine County's high cost of living in the past year, and that translated into a 9 percent enrollment decline at Bellevue Elementary School. Other schools in the Wood River Valley also reported significant declines – 7 percent at Wood River Middle School and 4 percent at Wood River High School.
- The Blaine County School District will receive \$4 million in federal stimulus money to retrofit schools in Hailey, Carey and Bellevue with geothermal heating systems. Utah State University will use its share of the Energy Department funds to drill mile-deep wells in Kimberly and Kimama to test the geothermal reservoirs found beneath the volcanic plains.
- Voters passed a \$59.8 million plant facilities levy for the Blaine County School District. The levy replaces an existing one that expires next year to continue infrastructure financing for another decade. A home valued at \$500,000 would see a property tax hike of \$187 annually.
- Hailey has agreed to pay half the cost – up to \$3 million – for a new rodeo grounds, skating rink and expanded skate park. The other half must come from private donations. The city had initially financed planning and design. Construction will be completed in a year. The Hailey Parks and Lands Foundation will run the fund-raising campaign. Hailey Ice has already agreed to pay for the skating rink, providing a practice and game venue for the Sawtooth Rangers hockey team. The new facility will seat 3,500.
- Hailey is considering an ordinance allowing wind turbines both attached to individual homes and free-standing in industrial or commercial settings. Turbines would be limited to areas with adequate wind, require approval by a licensed engineer and then be regularly used.
- The Hailey local option tax has been extended for another 20 years by an 84 percent vote. The option imposes a 3 percent tax on tourism-related purchases such as car rentals and lodging, a 2 percent tax on alcoholic

drinks and a 1 percent tax on restaurants – all on top of the state’s 6 percent general sales tax. The option tax raises about \$1 million a year in Hailey.

- Hailey is emphasizing art appreciation. What is starting with a single mural on the PM Brown Building will hopefully end up being a street bedecked by murals. The Planning and Zoning Commission vote was unanimous for the artwork to promote world peace, although one of the commissioners commented on its provocative nature.
- The Sun Valley Resort opened the mountain to skiers on Thanksgiving Day, a full two weeks earlier than last year. New is a gondola that streamlines riders halfway up Bald Mountain to the renovated Roundhouse restaurant offering breakfast and lunch and a new beer and wine bar called Averell’s – in years past the fine dining option on the hill. The resort reported 200 gondola riders on the Friday after Thanksgiving. The snow tubing hill and snow boarding terrain park are features that the resort hopes will draw a younger crowd to the oldest destination ski resort in the nation.



GOODING COUNTY

- Politics came down to luck for the new Wendell Mayor Brad Christopherson, who needed a coin toss to break an election day tie. With 215 votes each, incumbent Mayor Rick Cowen and Christopherson waited for the coin to settle in front of a crowd at the regular City Council meeting. Tails won out and so did Christopherson, who takes over in January.
- The Gooding School District was ranked among the nation’s top 10 most publicly open school districts with fewer than 2,500 students – and the only Idaho school ranked – in a survey conducted by the Center for Digital Education, The National School Boards Association and Converge magazine. The survey assessed how transparent and accessible a district is to its patrons. In Gooding, the district Web site includes Board of Trustee meeting packets among other information. Gooding was recognized for its efficient use of available technology. Superintendent Heather Williams said donations of older computer equipment by the Idaho Department of Lands earlier this year have been crucial. “Technology is one of the most sought-after skills in industry today, and our students must be equipped for this expanding job market,” she said. “The donation allowed us to upgrade our computer systems in the elementary and middle schools so 100 percent of our classrooms have working computers.”
- Gooding Elementary School finished first in the nation in the U.S. Department of Agriculture’s Healthier School Challenging, becoming the only school in the nation to receive the HealthierUS School Challenge Gold Award of Distinction. The students’ improvement in both nutrition and physical activity was spurred in part by a South Central Public Health District report last year that found the heaviest Idaho third-graders in the south-central district.
- Women’s Professional Rodeo barrel racers on the Wilderness Circuit voted Gooding as having the best grounds and hospitality. Gooding rose above Reno, Caldwell, Nampa and other cities on the circuit that covers Idaho, Nevada and Utah.

JEROME COUNTY

- The Jerome City Council agreed to pay \$2,500 for Trans IV bus service through the Magic Valley. In Jerome, the service is provided on demand, filling the gap for elderly no longer able to drive, the disabled and people who have lost their licenses. The College of Southern Idaho has subsidized Trans IV since October 1979. The public transportation system provides service between Jerome, Wendell, Twin Falls, Filer, Kimberly, Burley and Buhl. In Twin Falls, daily bus service is provided along with the Dial-A-Ride option, which provides door-to-door service.
- Jerome School District has agreed to sell the old Central Elementary School building to the city for eventual development as a municipal center. The campus could potentially include City Hall offices, a police station with jail and a fire station. The 7.7 acre site is priced at \$398,500. The city would offset part of that by covering some costs for upgrading infrastructure and razing an outbuilding.

LINCOLN COUNTY

- A mini-mall is operating in Shoshone, providing some of the hand-made and home-grown products that are making a come-back in these lean times. Front Porch Marketplace operates three days a week from the Fresh Country Hair shop that also houses Back Porch Fabrics and a local quilting bee. According to owner Sally Hubbs, the goal is to “provide an outlet for the amazing talent we have in our area.” While the concept is a source of local pride, so are the products including locally grown lamb, herbs, sheep’s milk cheese, homemade quilts, wooden stools, home baked bread and desserts and clothing.

CASSIA COUNTY

- Pacific Ethanol has announced plans to restart fuel ethanol production in January. The company is hiring again after shutting down in February 2009 because of a poor market.

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SOUTHEASTERN IDAHO

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

AREA DEVELOPMENTS

BANNOCK COUNTY

- A new swimwear company has been launched by a Pocatello woman. Sun Safe Swimwear designs and produces swimsuits in a variety of styles that reduce a woman’s exposure to the sun. Designer Judy Tolman started the business after a close friend was diagnosed with skin cancer and could not find anything that allowed her to be safe in the sun and still look fashionable. The protective swimsuits are versatile enough to go from water to sand to trail to boat. Along with the women’s line, Tolman is ready to start a children’s line. Information is at sunsafeswimwear.biz.
- Five Guys Burgers and Fries recently opened near Costco in Pocatello. It’s the fourth outlet in Idaho for franchisee BurgerMeister LLC and is known nationwide since expanding outside the Washington, D.C., in 2002. Five Guys makes French fries from fresh Idaho potatoes.
- Idaho State University was selected by the American Association of University Women, the Women & Politics Institute and Running Start to be a

Campaign College site for 2010. It will host day-long training sessions in February to teach women how to run for and win government positions at their schools and prepare them for other leadership opportunities in their communities. The training will be open to both students and selected southeastern Idaho high school students. Applications can soon be found at www.isu.edu/andersoncenter.

BINGHAM COUNTY

- Premier Technology Inc. headquartered in Blackfoot was featured by Gov. C.L. “Butch” Otter as the 2009 Corporation of the Year in the annual Governor’s Brightest Stars Awards. The engineering, manufacturing and construction management company fit the governor’s vision of providing public service in Idaho communities. Premier was very active in the career expo in Salmon in September and is also a partner in the state’s Project 60 program to increase Idaho’s gross state product to \$60 billion a year. President Doug Sayer has been committed to helping rural communities by locating business in them. Mackay will be its next location with construction on a plant to start next year.

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EAST CENTRAL IDAHO

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

AREA DEVELOPMENTS

BONNEVILLE COUNTY

- Eastern Idaho Regional Medical Center in Idaho Falls announced plans for a \$20 million addition to its Women’s and Infant Care and Newborn Intensive Care centers to meet increased demand for services and a rising number of high-risk pregnancies and premature births. Three years ago the hospital recruited two neonatologists to upgrade its care for severely premature infants, and since then the number of cases handled by the newborn unit has nearly tripled to 16 infants a day. The 42,000-square-foot addition with state-of-the-art clinical technology will include 16 more newborn beds, 10 more beds for the continuing-care nursery, a four-bed antepartum testing area, a triage suite and shell space for future expansion. Completion is expected in 2011.
- Idaho Falls Power will participate with a dozen other Pacific Northwest utilities in a five-year study of the smart-grid system financed by \$8.2 million in federal stimulus money. Idaho Falls Power will match the funds with money from a reserve account to purchase and evaluate next-generation smart meters, breakers and communication software. The smart meters tell customers their hourly usage so they can make better decisions on energy efficiency while helping the utility analyze high-use periods. The test will involve only a targeted area of Idaho Falls Power’s service area, but the city has applied for a grant to convert up to half its antiquated meters to smart meters.
- Iggy’s Sports Grill in Idaho Falls at Snake River Landing closed Dec. 1 along with the other two sites in Meridian and Utah. Owners cited the economy. In addition, Okie’s Hamburgers across from Idaho Falls’ Grand Teton Mall closed. Together, the two closures cost the Idaho Falls economy 70 jobs.

CUSTER COUNTY

- Thompson Creek Mine above Clayton will hire another 50 employees to run the molybdenum mill at full capacity starting in January. That will put total employment at Thompson Creek at nearly 400. The mine started filling casual and temporary jobs in the fall and so far has received over 1,000 applications from experienced miners throughout the West. The company plans to reclassify casual and temporary workers to permanent employees in the near future. It will also begin around the clock operation. The mine is expanding with the price for molybdenum rising, and the company has identified new reserves to operate another 10 to 16 years. Molybdenum is used to harden steel.
- The first ever Stanley-Sawtooth Winterfest is set for Jan. 15-17 to promote the area for winter activities. The Winterfest will include a mixed winter relay involving snow machines, skis and snowshoes; snowman building; snow tubing for all ages; ice hockey on the frozen pond where the first annual Real Stanley Cup will be awarded; ice skating; dog sled rides; hayrides through the town and the first annual Downtown Stanley Drag Race where men will dress in drag and race down Main Street on snowshoes.

LEMHI COUNTY

- The Salmon Public Library has a facelift, new metal roof and fresh paint and wood stain. The old roof leaked regularly on books, library materials and even into light fixtures.

MADISON COUNTY

- Madison Memorial Hospital bought North Fork Surgery Center in Rexburg and will rename it Madison Memorial Surgery Center. For the last year the hospital and surgery center have been considering the partnership that will meet area growth while improving patient care. With neighboring Teton Radiology Madison, which joined the hospital earlier in the year, total employment is almost 550.
- The recession claimed another victim in Rexburg with the closure of the Diamond Gallery, which specialized in engagement rings. Owner Kathleen Smith said tightening credit restrictions making it increasing difficult for customers to get financing was a major factor.
- Gandolfo's Deli in downtown Rexburg has closed. But a sign on the store indicates it will reopen soon under new management.

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Census Facts

Christmas Trees and Decorations

\$410 million — Sales by U.S. Christmas tree farmers in 2007.

\$470.3 million — The value of U.S. imports of Christmas tree ornaments from China between January and August 2009. China was the leading country of origin for such items. Similarly, China was the leading foreign source of artificial Christmas trees shipped to the United States – \$28.6 million worth – during the same period.

More on page 39.



IT'S IN OUR HANDS

Census Facts

The 2009 Holiday Season

The holiday season is a time for celebrating with friends and family, gift-giving, reflection and thanks. To commemorate this time of year, the U.S. Census Bureau offers these holiday-related facts.

It's in the Mail — 19 billion

Number of cards, letters and packages the U.S. Postal Service delivered between Thanksgiving and Christmas last year. The busiest delivery day was Dec. 17. On Dec. 15, the Postal Service processed the largest volume of mail of the season — 960 million cards and letters.

Rush to the Stores — \$28.2 billion

Retail sales by the nation's department stores in December 2008 — a 40 percent jump from the previous month when retail sales, many holiday-related, registered \$20.2 billion. No other month-to-month increase in department store sales last year was as large.

Other U.S. retailers with sizable jumps in sales between November and December 2008 were book stores at 95 percent, clothing stores at 32 percent, jewelry stores at 125 percent, radio, TV and other electronics stores at 38 percent and sporting goods stores at 62 percent.

14 percent

The proportion of total 2008 sales for department stores in December. For jewelry stores, the percentage was 18 percent.

23 percent

The growth in inventories by our nation's department stores from Aug. 31 to Nov. 30, 2008. Thanks to the holiday crowds, inventories plummeted by 25 percent in December.

\$24 billion

Value of retail sales by electronic shopping and mail-order houses in December 2008 — the highest total for any month last year.

16,670

The number of electronic shopping and mail-order houses in business in 2007. These businesses, which employed 268,328 workers, are a popular source of holiday gifts. Their 2007 sales were \$199 billion, of which 44.6 percent were attributable to e-commerce. California led the nation in the number of these establishments and their employees, with 2,493 and 32,971, respectively.

Source: U.S. Census Bureau, Fun Facts



IT'S IN OUR HANDS

State of Idaho Data

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

Seasonally Adjusted Data	Nov 2009				Nov 2008			
	Civilian Labor Force	# Unemployed	% Unemployed	Total Employment	Civilian Labor Force	# Unemployed	% Unemployed	Total Employment
STATE OF IDAHO	755,360	68,797	9.1	686,563	759,373	44,324	5.8	715,049
COUNTIES								
ADA	192,839	16,165	8.4	176,674	195,619	10,038	5.1	185,581
ADAMS	2,030	504	24.8	1,527	1,908	353	18.5	1,555
BANNOCK	40,109	2,999	7.5	37,109	41,427	1,823	4.4	39,604
BEAR LAKE	3,284	234	7.1	3,050	3,327	141	4.2	3,186
BENEWAH	4,135	715	17.3	3,420	4,302	729	17.0	3,572
BINGHAM	21,565	1,296	6.0	20,269	21,404	853	4.0	20,552
BLAINE	12,940	1,322	10.2	11,618	13,484	685	5.1	12,798
BOISE	3,526	340	9.6	3,186	3,623	275	7.6	3,347
BONNER	21,022	2,570	12.2	18,452	20,988	1,593	7.6	19,395
BONNEVILLE	51,038	2,945	5.8	48,093	51,546	1,753	3.4	49,793
BOUNDARY	4,286	696	16.2	3,590	4,081	473	11.6	3,608
BUTTE	1,472	101	6.8	1,371	1,413	59	4.2	1,354
CAMAS	598	77	12.8	522	606	31	5.1	575
CANYON	84,282	10,016	11.9	74,266	84,851	6,840	8.1	78,011
CARIBOU	3,671	251	6.8	3,420	3,486	172	4.9	3,314
CASSIA	10,044	684	6.8	9,360	9,888	430	4.3	9,458
CLARK	566	72	12.8	494	525	43	8.3	481
CLEARWATER	3,285	603	18.4	2,682	3,315	522	15.7	2,793
CUSTER	2,456	235	9.6	2,221	2,369	169	7.1	2,200
ELMORE	11,164	987	8.8	10,177	11,245	720	6.4	10,525
FRANKLIN	6,144	393	6.4	5,752	6,062	228	3.8	5,835
FREMONT	5,932	633	10.7	5,299	6,097	343	5.6	5,754
GEM	7,074	788	11.1	6,286	7,223	620	8.6	6,603
GOODING	8,573	582	6.8	7,991	8,515	307	3.6	8,208
IDAHO	7,154	940	13.1	6,214	6,953	739	10.6	6,214
JEFFERSON	11,391	766	6.7	10,625	11,418	417	3.7	11,001
JEROME	10,079	807	8.0	9,273	10,078	454	4.5	9,624
KOOTENAI	73,024	8,012	11.0	65,013	71,748	5,108	7.1	66,640
LATAH	18,061	1,315	7.3	16,745	18,022	872	4.8	17,151
LEMHI	3,678	414	11.3	3,264	3,659	359	9.8	3,299
LEWIS	1,679	142	8.5	1,537	1,600	63	4.0	1,537
LINCOLN	2,573	390	15.1	2,183	2,398	216	9.0	2,182
MADISON	16,231	907	5.6	15,324	17,179	538	3.1	16,640
MINIDOKA	9,307	665	7.1	8,642	9,171	438	4.8	8,733
NEZ PERCE	20,180	1,314	6.5	18,866	19,554	945	4.8	18,609
ONEIDA	2,328	148	6.4	2,180	2,318	88	3.8	2,230
OWYHEE	4,214	169	4.0	4,046	4,360	110	2.5	4,250
PAYETTE	10,864	1,107	10.2	9,757	10,538	758	7.2	9,780
POWER	3,856	521	13.5	3,335	3,837	278	7.2	3,560
SHOSHONE	6,300	1,056	16.8	5,244	6,555	803	12.3	5,751
TETON	4,151	352	8.5	3,800	4,394	171	3.9	4,223
TWIN FALLS	38,675	3,000	7.8	35,675	38,802	1,775	4.6	37,027
VALLEY	4,750	960	20.2	3,790	4,798	623	13.0	4,175
WASHINGTON	4,825	607	12.6	4,218	4,688	367	7.8	4,321
ASOTIN WA	11,191	1,091	9.7	10,100	10,839	827	7.6	10,013

* In thousands

State of Idaho Data

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

LABOR MARKET AREAS	Seasonally Adjusted Data				Now 2009				Nov 2008			
	Civilian Labor Force	# Unem- ployed	% Unem- ployed	Total Employ- ment	Civilian Labor Force	# Unem- ployed	% Unem- ployed	Total Employ- ment	Civilian Labor Force	# Unem- ployed	% Unem- ployed	Total Employ- ment
BOISE CITY-NAMPA MSA	291,935	27,477	9.4	264,458	295,676	17,883	6.0	277,793				
BURLEY MicSA	19,352	1,349	7.0	18,002	19,059	868	4.6	18,191				
COEUR D'ALENE MSA	73,024	8,012	11.0	65,013	71,748	5,108	7.1	66,640				
GRANGEVILLE SLMA	8,833	1,082	12.2	7,751	8,553	802	9.4	7,751				
HAILEY SLMA	13,539	1,399	10.3	12,140	14,090	716	5.1	13,373				
IDAHO FALLS MSA	62,429	3,710	5.9	58,719	62,964	2,170	3.4	60,794				
LEWISTON MSA	31,371	2,405	7.7	28,966	30,394	1,772	5.8	28,622				
POCATELLO MSA	43,965	3,520	8.0	40,445	45,265	2,101	4.6	43,164				
REXBURG MicSA	22,164	1,541	7.0	20,623	23,276	882	3.8	22,394				
TWIN FALLS MicSA	48,755	3,806	7.8	44,948	48,880	2,229	4.6	46,651				
CITIES												
BOISE	108,839	10,456	9.6	98,383	109,513	6,558	6.0	102,955				
CALDWELL	18,315	2,446	13.4	15,870	18,211	1,603	8.8	16,607				
COEUR D' ALENE	23,461	2,565	10.9	20,896	22,887	1,549	6.8	21,338				
IDAHO FALLS	28,358	1,993	7.0	26,365	28,372	1,177	4.1	27,195				
LEWISTON	16,733	1,092	6.5	15,641	16,171	801	5.0	15,370				
MERIDIAN	32,637	3,268	10.0	29,369	32,737	2,004	6.1	30,734				
NAMPA	36,534	4,109	11.2	32,426	36,948	3,015	8.2	33,933				
POCATELLO	28,090	2,174	7.7	25,917	28,859	1,302	4.5	27,557				
TWIN FALLS	21,905	1,721	7.9	20,184	21,941	1,071	4.9	20,870				
United States*	153,877	15,375	10.0	138,502	154,620	10,476	6.8	144,144				

* In thousands

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

State of Idaho Data — Nonfarm Jobs

% change from

BY PLACE OF WORK	Nov 2009*	Oct 2009	Nov 2008	Last Month	Last Year
TOTAL NONFARM	607,100	608,100	640,300	-0.2	-5.2
TOTAL PRIVATE	487,300	488,800	518,000	-0.3	-5.9
GOODS PRODUCING	90,900	92,300	106,800	-1.5	-14.9
SERVICE PROD. (INC. GOV)	516,200	515,800	533,500	0.1	-3.2
PRIVATE SERVICE PROVIDING	396,400	396,500	411,200	0.0	-3.6
NATURAL RESOURCES	3,400	3,400	4,100	0.0	-17.1
LOGGING	1,400	1,400	1,700	0.0	-17.6
MINING	2,000	2,000	2,400	0.0	-16.7
CONSTRUCTION	32,600	33,300	42,600	-2.1	-23.5
CONSTRUCTION OF BUILDING	7,400	7,700	10,300	-3.9	-28.2
RESIDENTIAL BUILDING CONSTRUCTION	5,200	5,300	6,200	-1.9	-16.1
HEAVY AND CIVIL ENGINEERING CONSTRUCTION	5,600	5,800	5,700	-3.4	-1.8
SPECIALTY TRADE CONTRACTORS	19,600	19,800	26,600	-1.0	-26.3
FOUNDATION, STRUCTURE AND BUILDING CONTRACTORS	5,100	5,100	7,000	0.0	-27.1
BUILDING EQUIPMENT CONTRACTORS	6,900	7,000	10,000	-1.4	-31.0
BUILDING FINISHING CONTRACTORS	3,800	3,800	5,100	0.0	-25.5
OTHER SPECIALTY TRADE CONTRACTORS	3,800	3,900	4,500	-2.6	-15.6
MANUFACTURING	54,900	55,600	60,100	-1.3	-8.7
DURABLE GOODS	30,400	30,500	35,700	-0.3	-14.8
WOOD PRODUCT MANUFACTURING	4,700	4,700	5,800	0.0	-19.0
MACHINERY MANUFACTURING	2,500	2,500	3,100	0.0	-19.4
COMPUTER AND ELECTRONIC MANUFACTURING	10,600	10,700	13,100	-0.9	-19.1
COMPUTER AND PERIPHERAL MANUFACTURING	2,900	2,900	3,300	0.0	-12.1
SEMICONDUCTER AND OTHER ELECTRONIC MANUFACTURING	7,300	7,300	9,400	0.0	-22.3
NONDURABLE GOODS	24,500	25,100	24,400	-2.4	0.4
FOOD MANUFACTURING	16,000	16,800	15,800	-4.8	1.3
FRUIT AND VEGETABLE PRESERVING MANUFACTURING	7,700	7,900	7,700	-2.5	0.0
TRADE, TRANSPORTATION AND UTILITIES	123,200	121,800	131,200	1.1	-6.1
WHOLESALE TRADE	25,600	26,000	27,300	-1.5	-6.2
MERCHANT WHOLESALERS DURABLE GOODS	11,200	11,500	12,400	-2.6	-9.7
MERCHANT WHOLESALERS NONDURABLE GOODS	11,700	11,600	12,000	0.9	-2.5
RETAIL TRADE	77,400	75,600	82,500	2.4	-6.2
MOTOR VEHICLE AND PARTS DEALERS	10,200	10,300	11,300	-1.0	-9.7
BUILDING MATERIALS AND GARDEN SUPPLIES	7,500	7,500	8,100	0.0	-7.4
FOOD AND BEVERAGE STORES	12,800	12,700	13,100	0.8	-2.3
GROCERY STORES	10,900	10,800	11,300	0.9	-3.5
GENERAL MERCHANDISE STORES	18,000	17,000	18,000	5.9	0.0
DEPARTMENT STORES	6,000	5,400	6,200	11.1	-3.2
OTHER GENERAL MERCHANDISE STORES	11,900	11,500	11,800	3.5	0.8
TRANSPORTATION, WAREHOUSE AND UTILITIES	20,200	20,200	21,400	0.0	-5.6
UTILITIES	2,100	2,100	2,300	0.0	-8.7
TRANSPORTATION AND WAREHOUSING	18,000	18,000	19,100	0.0	-5.8
TRUCK TRANSPORTATION	8,700	8,800	9,400	-1.1	-7.4
GENERAL FREIGHT TRUCKING	6,100	6,100	6,300	0.0	-3.2
INFORMATION	10,200	10,100	12,300	1.0	-17.1
TELECOMMUNICATIONS	3,500	3,500	5,200	0.0	-32.7
FINANCIAL ACTIVITIES	29,500	29,500	31,000	0.0	-4.8

Continued from previous page.

State of Idaho Data — Nonfarm Payroll Jobs					% change from	
BY PLACE OF WORK	Nov 2009*	Oct 2009	Nov 2008	Last Month	Last Year	
Total Nonfarm Jobs**	607,100	608,100	640,300	-0.2	-5.2	
FINANCE AND INSURANCE	22,500	22,400	23,100	0.4	-2.6	
CREDIT INTERMEDIATION AND RELATED ACTIVITIES	11,100	11,100	11,600	0.0	-4.3	
INSURANCE CARRIERS AND RELATED ACTIVITIES	9,700	9,700	9,700	0.0	0.0	
REAL ESTATE AND RENTAL AND LEASING	7,000	7,100	7,900	-1.4	-11.4	
PROFESSIONAL AND BUSINESS SERVICES	74,800	75,500	78,300	-0.9	-4.5	
PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES	32,000	32,100	33,500	-0.3	-4.5	
ARCHITECTURAL, ENGINEERING AND RELATED SERVICES	5,500	5,500	7,000	0.0	-21.4	
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	36,100	36,700	37,800	-1.6	-4.5	
ADMINISTRATIVE, SUPPORT SERVICES	34,100	34,800	36,200	-2.0	-5.8	
EMPLOYMENT SERVICES	10,500	10,500	13,300	0.0	-21.1	
BUSINESS SUPPORT SERVICES	11,600	11,500	10,500	0.9	10.5	
**TELEPHONE CALL CENTERS	8,500	8,500	7,700	0.0	10.4	
SERVICES TO BUILDINGS AND DWELLINGS	7,200	7,800	8,000	-7.7	-10.0	
EDUCATION AND HEALTH SERVICES	81,100	80,700	79,400	0.5	2.1	
EDUCATIONAL SERVICES	9,200	9,200	9,400	0.0	-2.1	
HEALTH CARE AND SOCIAL SERVICES	71,900	71,500	70,000	0.6	2.7	
AMBULATORY HEALTH CARE	28,800	28,400	27,800	1.4	3.6	
HOSPITALS	18,800	18,800	17,500	0.0	7.4	
GENERAL MEDICAL AND SURGICAL HOSPITALS	16,800	16,700	15,600	0.6	7.7	
NURSING AND RESIDENTIAL CARE FACILITIES	12,400	12,300	12,800	0.8	-3.1	
SOCIAL ASSISTANCE	11,900	12,000	11,900	-0.8	0.0	
LEISURE AND HOSPITALITY	57,600	58,600	58,900	-1.7	-2.2	
ARTS, ENTERTAINMENT AND RECREATION	7,200	7,800	7,300	-7.7	-1.4	
AMUSEMENT GAMBLING AND RECREATION	6,600	7,000	6,500	-5.7	1.5	
OTHER AMUSEMENT AND RECREATION INDUSTRIES	5,700	6,000	6,000	-5.0	-5.0	
ACCOMMODATION AND FOOD SERVICES	50,300	50,800	51,600	-1.0	-2.5	
ACCOMMODATIONS	8,200	8,400	8,200	-2.4	0.0	
FOOD SERVICE AND DRINKING PLACES	42,200	42,400	43,400	-0.5	-2.8	
FULL SERVICE RESTAURANTS	19,000	19,300	20,100	-1.6	-5.5	
LIMITED SERVICE RESTAURANTS	19,000	19,000	19,200	0.0	-1.0	
OTHER SERVICES	20,000	20,300	20,100	-1.5	-0.5	
REPAIR AND MAINTENANCE	5,800	5,900	6,000	-1.7	-3.3	
AUTOMOTIVE REPAIR AND MAINTENANCE	4,300	4,400	4,600	-2.3	-6.5	
TOTAL GOVERNMENT	119,800	119,300	122,300	0.4	-2.0	
FEDERAL GOVERNMENT	13,000	13,300	12,700	-2.3	2.4	
STATE GOVERNMENT	29,500	29,100	31,100	1.4	-5.1	
STATE EDUCATION	13,600	13,400	15,100	1.5	-9.9	
STATE ADMINISTRATION	15,900	15,700	16,000	1.3	-0.6	
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

	Nov 2009	Oct 2009	Nov 2008	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	755,400	753,900	759,300	0.2	-0.5
Unemployment	68,800	67,800	44,300	1.5	55.3
Percent of Labor Force Unemployed	9.1	9.0	5.8		
Total Employment	686,600	686,100	715,000	0.1	-4.0
<i>Unadjusted</i>					
Civilian Labor Force	753,800	756,100	756,000	-0.3	-0.3
Unemployment	67,500	63,000	44,000	7.1	53.4
Percent of Labor Force Unemployed	9.0	8.3	5.8		
Total Employment	686,300	693,100	712,000	-1.0	-3.6

U. S. UNEMPLOYMENT RATE ⁽²⁾

	10.0	10.2	6.8
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UNEMPLOYMENT INSURANCE

Claims Activities

Initial Claims ⁽³⁾	20,604	15,183	20,657	35.7	-0.3
Weeks Claimed ⁽⁴⁾	134,885	92,966	90,588	45.1	48.9

Benefit Payment Activities⁽⁵⁾

Weeks Compensated	89,532	78,881	71,022	13.5	26.1
Total Benefit \$ Paid	22,406,559	19,838,987	18,524,208	12.9	21.0
Average Weekly Benefit Amount	\$250.26	\$251.51	\$260.82	-0.5	-4.0
Covered Employers	49,300	49,610	51,276	-0.6	-3.9
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$401,143,419	\$397,261,068	\$202,022,281	1.0	98.6

U.S. CONSUMER PRICE INDEX ⁽²⁾

	Oct 2009	Sep 2009	Oct 2008	% Change Month	% Change Year
Urban Wage Earners & Clerical Workers (CPI-W)	211.5	211.3	212.2	0.1%	-0.3%
All Urban Consumer (CPI-U)	216.2	216.0	216.6	0.1%	-0.2%

(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

	Nov 2009*	Oct 2009	Nov 2008	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	73,020	72,280	71,750	1.0	1.8
Unemployed	8,010	8,150	5,110	-1.7	56.8
% of Labor Force Unemployed	11.0	11.3	7.1		
Total Employment	65,010	64,130	66,640	1.4	-2.4
<i>Unadjusted</i>					
Civilian Labor Force	72,830	72,770	71,660	0.1	1.6
Unemployed	7,290	6,830	4,720	6.7	54.4
% of Labor Force Unemployed	10.0	9.4	6.6		
Total Employment	65,540	65,940	66,940	-0.6	-2.1
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	54,670	55,030	57,020	-0.7	-4.1
Total Private	9,810	9,920	10,300	-1.1	-4.8
<i>Goods-Producing Industries</i>	270	290	390	-6.9	-30.8
Mining & Logging	5,050	5,170	5,200	-2.3	-2.9
Construction	4,490	4,460	4,710	0.7	-4.7
Manufacturing	700	710	790	-1.4	-11.4
Wood Products	3,790	3,750	3,920	1.1	-3.3
<i>Service-Providing Industries</i>	44,860	45,110	46,720	-0.6	-4.0
Private Service Providing	10,550	10,450	11,010	1.0	-4.2
Trade, Transportation, & Utilities	1,430	1,450	1,520	-1.4	-5.9
Wholesale Trade	8,130	8,000	8,400	1.6	-3.2
Retail Trade	990	1,000	1,090	-1.0	-9.2
Transportation, Warehousing & Utilities	890	890	920	0.0	-3.3
Information	3,110	3,110	3,110	0.0	0.0
Financial Activities	5,460	5,480	5,670	-0.4	-3.7
Professional & Business Services	6,310	6,280	6,160	0.5	2.4
Educational & Health Services	7,590	7,940	8,480	-4.4	-10.5
Leisure & Hospitality	1,240	1,260	1,420	-1.6	-12.7
Other Services	9,710	9,700	9,950	0.1	-2.4
Government	570	610	550	-6.6	3.6
Federal Government	9,140	9,090	9,400	0.6	-2.8
State Government	3,510	3,500	3,300	0.3	6.4
Local Government	840	860	900	-2.3	-6.7
Government Education	4,790	4,730	5,200	1.3	-7.9
Government Administration	6,200	5,380	6,670	15.2%	-7.0%

* 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.

	Nov 2009*	Oct 2009	Nov 2008	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	31,370	31,120	30,390	0.8	3.2
Unemployment	2,410	2,140	1,770	12.6	36.2
% of Labor Force Unemployed	7.7	6.9	5.8		
Total Employment	28,960	28,980	28,620	-0.1	1.2
<i>Unadjusted</i>					
Civilian Labor Force	31,040	30,880	30,070	0.5	3.2
Unemployment	2,160	2,000	1,600	8.0	35.0
% of Labor Force Unemployed	7.0	6.5	5.3		
Total Employment	28,880	28,880	28,470	0.0	1.4
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	28,090	28,240	29,580	-0.5	-5.0
Total Private	4,600	4,640	4,740	-0.9	-3.0
<i>Goods-Producing Industries</i>					
	190	210	220	-9.5	-13.6
Natural Resources & Mining	1,270	1,290	1,370	-1.6	-7.3
Construction	3,140	3,140	3,150	0.0	-0.3
Manufacturing	380	380	430	0.0	-11.6
Wood Products Mnfct	1,010	1,010	1,050	0.0	-3.8
Paper Mnfct	1,750	1,750	1,670	0.0	4.8
<i>Service-Providing Industries</i>					
	23,490	23,600	24,840	-0.5	-5.4
<i>Private Service Providing</i>					
	5,760	5,610	569	2.7	912.3
Trade, Transportation & Utilities	590	600	670	-1.7	-11.9
Wholesale Trade	4,140	4,030	3,910	2.7	5.9
Retail Trade	1,030	980	1,110	5.1	-7.2
Transportation & Warehousing	390	390	390	0.0	0.0
Information	1,790	1,790	1,800	0.0	-0.6
Financial Activities	1,420	1,390	1,660	2.2	-14.5
Professional & Business Services	4,760	4,760	5,150	0.0	-7.6
Education & Health Services	2,150	2,190	2,920	-1.8	-26.4
Leisure & Hospitality	730	750	760	-2.7	-3.9
Other Services	6,490	6,720	6,470	-3.4	0.3
<i>Government</i>					
	280	280	230	0.0	21.7
Federal Government	6,210	6,440	6,240	-3.6	-0.5
State Government	2,230	2,230	2,210	0.0	0.9
Local Government	750	740	730	1.4	2.7
Government Education	3,230	3,520	3,530	-8.2	-8.5
Government Administration	4,490	4,360	4,250	3.0%	5.6%

*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

	Nov 2009*	Oct 2009	Nov 2008	% Change	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	291,940	287,550	295,670	1.5	-1.3
Unemployment	27,480	28,650	17,880	-4.1	53.7
% of Labor Force Unemployed	9.4	10.0	4.9		
Total Employment	264,460	258,900	277,790	2.1	-4.8
<i>Unadjusted</i>					
Civilian Labor Force	290,100	287,150	292,300	1.0	-0.8
Unemployment	29,090	27,830	19,160	4.5	51.8
% of Labor Force Unemployed	10.0	9.7	6.6		
Total Employment	261,010	259,320	273,140	0.7	-4.4
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	250,160	250,060	266,760	0.0%	-6.2%
Total Private	206,790	205,680	222,050	0.5%	-6.9%
GOODS-PRODUCING INDUSTRIES					
<i>Mining, Logging & Construction</i>	15,710	15,790	18,160	-0.5%	-13.5%
Construction	13,300	13,490	16,890	-1.4%	-21.3%
Construction of Buildings	2,860	2,870	3,360	-0.3%	-14.9%
Specialty Trade Contractors	10,400	10,650	11,630	-2.3%	-10.6%
Foundation, Structure & Bldg Contractors	1,930	1,980	2,480	-2.5%	-22.2%
<i>Manufacturing</i>	22,920	23,190	26,990	-1.2%	-15.1%
Non-Durable Goods	6,930	7,110	7,030	-2.5%	-1.4%
Food Manufacturing	4,960	5,030	4,940	-1.4%	0.4%
Durable Goods	15,990	16,080	19,960	-0.6%	-19.9%
Wood Product Manufacturing	1,180	1,200	1,670	-1.7%	-29.3%
Fabricated Metal Products	1,340	1,350	1,480	-0.7%	-9.5%
Machinery Manufacturing	830	830	1,130	0.0%	-26.5%
Computer & Electronic Mfg.	9,260	9,290	11,270	-0.3%	-17.8%
Computer & Peripheral Mfg.	2,830	2,870	3,050	-1.4%	-7.2%
Semiconductor & Other Mfg.	6,120	6,150	8,330	-0.5%	-26.5%
Transportation Equipment Mfg.	1,440	1,440	1,740	0.0%	-17.2%
SERVICE-PROVIDING INDUSTRIES					
Private Service Providing	168,160	166,700	176,900	0.9%	-4.9%
<i>Trade, Transportation & Utilities</i>	50,050	49,210	53,110	1.7%	-5.8%
Wholesale Trade	11,440	11,510	11,860	-0.6%	-3.5%
Merchant Wholesalers (Durable Goods)	6,380	6,430	6,570	-0.8%	-2.9%
Retail Trade	30,610	29,910	32,980	2.3%	-7.2%
Food & Beverage Stores	4,820	4,850	5,000	-0.6%	-3.6%
Grocery Stores	3,660	3,710	3,750	-1.3%	-2.4%
General Merchandise Stores	6,520	6,170	6,920	5.7%	-5.8%
Other General Merch. Stores	4,540	4,400	4,720	3.2%	-3.8%
Transportation, Warehousing & Utilities	8,000	7,790	8,270	2.7%	-3.3%
<i>Information</i>	5,490	5,450	5,850	0.7%	-6.2%
Telecommunications	1,330	1,330	2,440	0.0%	-45.5%
<i>Financial Activities</i>	13,150	13,130	14,040	0.2%	-6.3%
Finance & Insurance	10,420	10,410	10,400	0.1%	0.2%
Credit Intermediation & Related Activities	4,770	4,700	4,900	1.5%	-2.7%
Real Estate & Rental & Leasing	2,730	2,720	3,640	0.4%	-25.0%
<i>Professional & Business Services</i>	34,360	34,330	38,630	0.1%	-11.1%
Professional, Scientific & Technical Svcs.	11,490	11,370	12,280	1.1%	-6.4%

Continued on next page.

Southwestern Idaho Data *(continued)*

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

	<u>% Change</u>				
	Nov 2009*	Oct 2009	Nov 2008	Last Month	Last Year
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	250,160	250,060	266,760	0.0%	-6.2%
Mgmt. of Companies & Enterprises	4,540	4,560	5,160	-0.4%	-12.0%
Administrative / Support & Waste Mgmt.	18,340	18,410	21,190	-0.4%	-13.4%
Employment Services	6,850	6,660	7,250	2.9%	-5.5%
Business Support Services	6,780	6,640	6,500	2.1%	4.3%
Services to Bldg and Dwellings	4,260	4,480	4,360	-4.9%	-2.3%
Educational & Health Services	34,320	33,950	34,240	1.1%	0.2%
Educational Services	2,970	2,730	2,600	8.8%	14.2%
Health Care & Social Assistance	31,350	31,220	31,640	0.4%	-0.9%
Ambulatory Health Care Service	12,390	12,340	11,870	0.4%	4.4%
Hospitals	10,010	9,990	10,280	0.2%	-2.6%
General Medical and Surgical Hospitals	9,020	8,970	9,250	0.6%	-2.5%
Leisure & Hospitality	22,770	22,610	23,070	0.7%	-1.3%
Arts, Entertainment, & Recreation	3,140	2,830	2,960	11.0%	6.1%
Accommodation & Food Services	19,630	19,780	20,110	-0.8%	-2.4%
Food Services & Drinking Places	17,780	17,920	18,310	-0.8%	-2.9%
Full-Service Restaurants	8,250	8,320	8,900	-0.8%	-7.3%
Limited-Service Eating Places	7,200	7,240	7,280	-0.6%	-1.1%
Other Services	8,020	8,020	7,960	0.0%	0.8%
Government	43,370	44,380	44,710	-2.3%	-3.0%
Federal Government	6,090	6,300	6,130	-3.3%	-0.7%
State Government	13,520	13,560	14,350	-0.3%	-5.8%
State Government Educational Services	4,420	4,540	4,510	-2.6%	-2.0%
Local Government	23,760	24,520	24,230	-3.1%	-1.9%
Local Government Educational Services	16,150	16,390	15,300	-1.5%	5.6%

* 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>				
	Nov 2009*	Oct 2009	Nov 2008	Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	48,760	48,500	48,880	0.5	-0.2
Unemployment	3,810	3,420	2,230	11.4	70.9
% of Labor Force Unemployed	7.8	7.1	4.9		
Total Employment	44,950	45,080	46,650	-0.3	-3.6
<i>Unadjusted</i>					
Civilian Labor Force	49,490	49,420	49,550	0.1	-0.1
Unemployment	3,700	3,300	2,200	12.1	68.2
% of Labor Force Unemployed	7.5	6.7	4.4		
Total Employment	45,790	46,120	47,350	-0.7	-3.3
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	39,520	39,530	40,460	0.0%	-2.3%
Total Private	33,520	33,570	34,660	-0.1%	-3.3%
<i>Goods-Producing Industries</i>					
Logging, Mining & Construction	1,830	1,850	2,340	-1.1%	-21.8%
Manufacturing	4,400	4,660	4,470	-5.6%	-1.6%
Food Manufacturing	2,750	3,030	2,640	-9.2%	4.2%
Other Manufacturing	1,600	1,630	1,820	-1.8%	-12.1%
<i>Service-Providing Industries</i>					
Private Service Providing	27,290	27,060	27,850	0.8%	-2.0%
Trade, Transportation & Utilities	10,350	10,170	10,450	1.8%	-1.0%
Wholesale Trade	1,780	1,780	1,960	0.0%	-9.2%
Retail Trade	5,840	5,700	5,800	2.5%	0.7%
Transportation, Warehousing & Utilities	2,730	2,690	2,690	1.5%	1.5%
Information	690	680	660	1.5%	4.5%
Financial Activities	1,690	1,690	1,750	0.0%	-3.4%
Professional & Business Services	4,420	4,340	4,960	1.8%	-10.9%
Educational & Health Services	5,990	5,960	5,390	0.5%	11.1%
Leisure & Hospitality	2,990	3,040	3,170	-1.6%	-5.7%
Other Services	1,160	1,180	1,470	-1.7%	-21.1%
Government	6,000	5,960	5,800	0.7%	3.4%
Government Education	3,370	3,320	3,410	1.5%	-1.2%
Government Administration	2,630	2,640	2,390	-0.4%	10.0%

*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

	Nov 2009*	Oct 2009	% Change From		
			Nov 2008	Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	43,960	45,010	45,260	-2.3	-2.9
Unemployment	3,520	3,260	2,100	8.0	67.6
% of Labor Force Unemployed	8.0	7.2	4.9		
	40,440	41,750	43,160	-3.1	-6.3
<i>Unadjusted</i>					
Civilian Labor Force	43,330	43,740	44,510	-0.9	-2.7
Unemployment	3,420	3,280	2,080	4.3	64.4
% of Labor Force Unemployed	7.9	7.5	4.7		
Total Employment	39,910	40,460	42,430	-1.4	-5.9
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	36,280	36,430	38,280	-0.4%	-5.2%
Total Private	26,680	26,850	28,270	-0.6%	-5.6%
<i>Goods-Producing Industries</i>					
Natural Resources & Mining	1,640	1,690	2,030	-3.0%	-19.2%
Manufacturing	3,500	3,560	3,620	-1.7%	-3.3%
Fabricated Metal Product Mfg	270	270	250	0.0%	8.0%
<i>Service-Providing Industries</i>					
Private Service Providing	21,540	21,600	22,620	-0.3%	-4.8%
Trade, Transportation & Utilities	6,780	6,680	7,140	1.5%	-5.0%
Wholesale Trade	1,390	1,390	1,380	0.0%	0.7%
Retail Trade	4,200	4,100	4,590	2.4%	-8.5%
Transportation & Warehousing	1,190	1,190	1,170	0.0%	1.7%
Information	510	510	600	0.0%	-15.0%
Financial Activities	2,170	2,180	2,140	-0.5%	1.4%
Professional & Business Services	4,070	4,070	4,080	0.0%	-0.2%
Educational & Health Services	3,600	3,600	3,920	0.0%	-8.2%
Leisure & Hospitality	3,620	3,700	3,870	-2.2%	-6.5%
Other Services	790	860	870	-8.1%	-9.2%
Government	9,600	9,580	10,010	0.2%	-4.1%
Federal Government	550	600	550	-8.3%	0.0%
State Government	3,980	3,960	4,320	0.5%	-7.9%
Local Government	5,070	5,020	5,140	1.0%	-1.4%
Government Education	4,510	4,490	4,780	0.4%	-5.6%
Government Administration	5,090	5,090	5,230	0.0%	-2.7%

*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

	Nov 2009*	Oct 2009	Nov 2008	<u>% Change From</u>	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	62,430	62,080	62,960	0.6	-0.8
Unemployment	3,710	3,660	2,170	1.4	71.0
% of Labor Force Unemployed	5.9	5.9	4.9		
Total Employment	58,720	58,420	60,790	0.5	-3.4
<i>Unadjusted</i>					
Civilian Labor Force	62,050	62,440	62,260	-0.6	-0.3
Unemployment	4,000	3,730	2,380	7.2	68.1
% of Labor Force Unemployed	6.4	6.0	3.8		
Total Employment	58,050	58,710	59,880	-1.1	-3.1
JOBS BY PLACE OF WORK					
Total Nonfarm Jobs**	50,000	49,750	51,790	0.5%	-3.5%
Total Private	42,520	42,420	44,460	0.2%	-4.4%
<i>Goods-Producing Industries</i>					
Construction	3,400	3,400	3,680	0.0%	-7.6%
Manufacturing	3,380	3,380	3,350	0.0%	0.9%
Food Manufacturing	880	880	940	0.0%	-6.4%
Fabricated Metal Product Manfct	260	260	290	0.0%	-10.3%
<i>Service-Providing Industries</i>					
Private Service Providing	34,860	34,760	36,490	0.3%	-4.5%
Trade, Transportation & Utilities	12,110	11,970	13,150	1.2%	-7.9%
Wholesale Trade	3,280	3,250	3,580	0.9%	-8.4%
Retail Trade	7,430	7,330	8,010	1.4%	-7.2%
Transportation, Warehousing and Utilities	1,400	1,390	1,560	0.7%	-10.3%
Information	1,210	1,200	1,360	0.8%	-11.0%
Financial Activities	1,940	1,950	2,050	-0.5%	-5.4%
Professional & Business Services	4,760	4,770	4,870	-0.2%	-2.3%
Educational & Health Services	7,250	7,230	7,540	0.3%	-3.8%
Leisure & Hospitality	5,160	5,210	5,060	-1.0%	2.0%
Other Services	2,430	2,430	2,460	0.0%	-1.2%
Government	7,480	7,330	7,330	2.0%	2.0%
Federal Government	970	950	830	2.1%	16.9%
State Government	960	960	940	0.0%	2.1%
Local Government	5,550	5,420	5,560	2.4%	-0.2%
Government Education	3,870	3,850	3,840	0.5%	0.8%
Government Administration	3,610	3,480	3,490	3.7%	3.4%

*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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