

Idaho Employment

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

IDAHO
DEPARTMENT OF LABOR

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C.L. "BUTCH" OTTER, GOVERNOR

ROGER B. MADSEN, DIRECTOR

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Panhandle, North Central, Southwestern, South Central, Southeastern,
East Central

Glossary of Labor Terms

ECONOMIC DECLINE DEEPER THAN EXPECTED IN 2008, EVEN DEEPER IN 2009

The economic slowdown that was anticipated through 2008 was clearly deeper than expected. This full-blown recession is mirroring the unemployment pattern of the 2001 recession. But nonfarm jobs, which stalled but did not decline during the 2001 recession and its aftermath, have been dropping steadily since last spring and will continue falling behind year-earlier levels while the unemployment rate escalates through much of 2009.

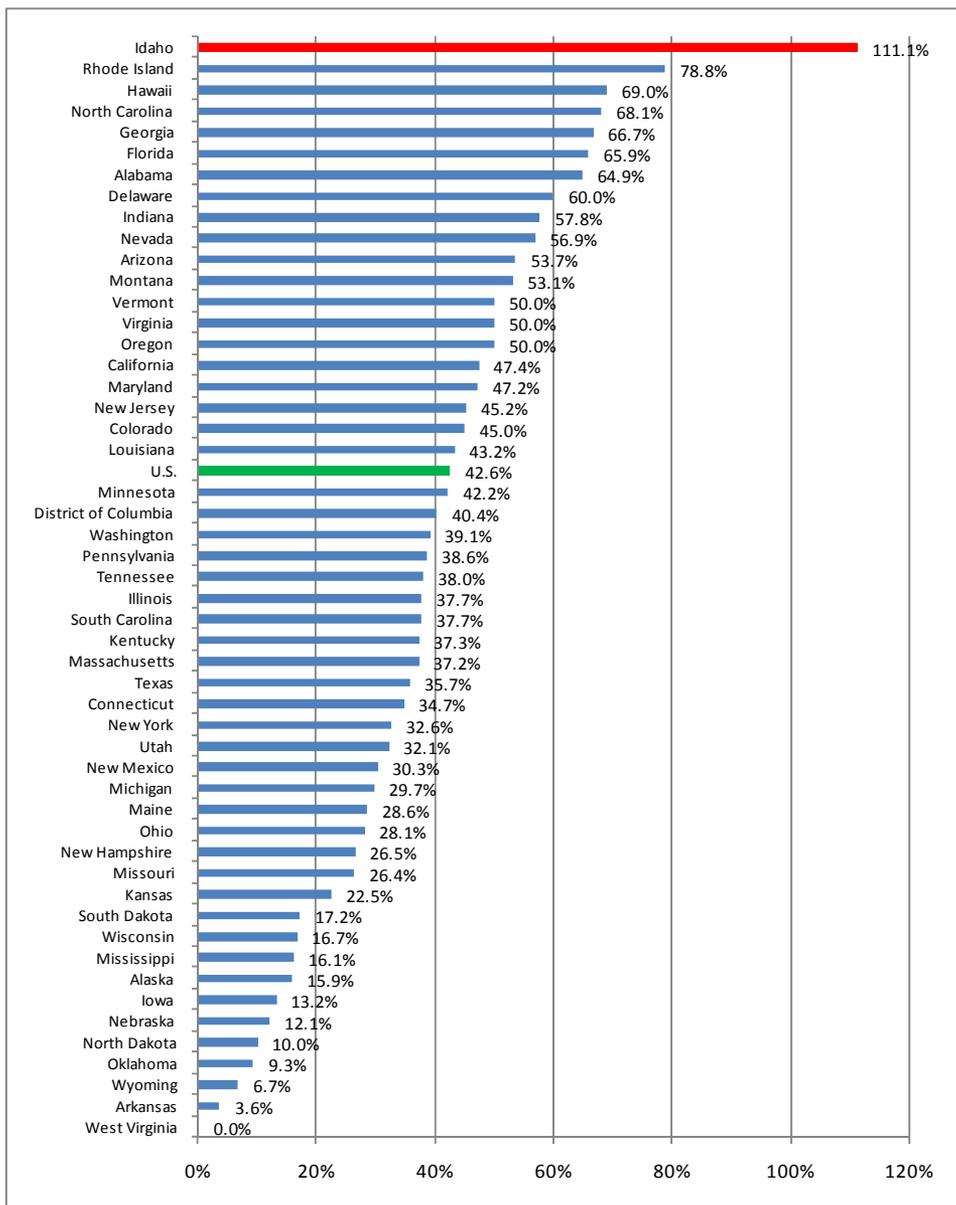
In December 2007 Idaho had the lowest unemployment rate in the nation at 2.7 percent. There may have been some question about the quality of the jobs the economy was generating. But based on the fact that help-wanted signs were just about everywhere, there was no question that there were jobs for people who wanted to work.

The change over the past year could not be more stark as shown in Chart 1 on page 2.

By December 2008 Idaho's unemployment rate had shot up nearly four full percentage points to 6.6 percent. It was up nine-tenths of a point from November, when 18 other states had lower unemployment rates and the economy was beginning to shed jobs at a serious rate. No other state saw an unemployment rate increase as great as Idaho's on a percentage basis, and only two states – Rhode Island and North Carolina – posted increases of more than Idaho's three percentage points from November 2007 to November 2008.

For the first time ever, the Unemployment Insurance Trust Fund paid more than \$6 million a week in benefits during the first three weeks of December, \$7.5 million in the last week, \$9 million in the first week of January and over \$10 million in the second.

Chart 1: Percentage Increase in November Unemployment Rates 2007-2008



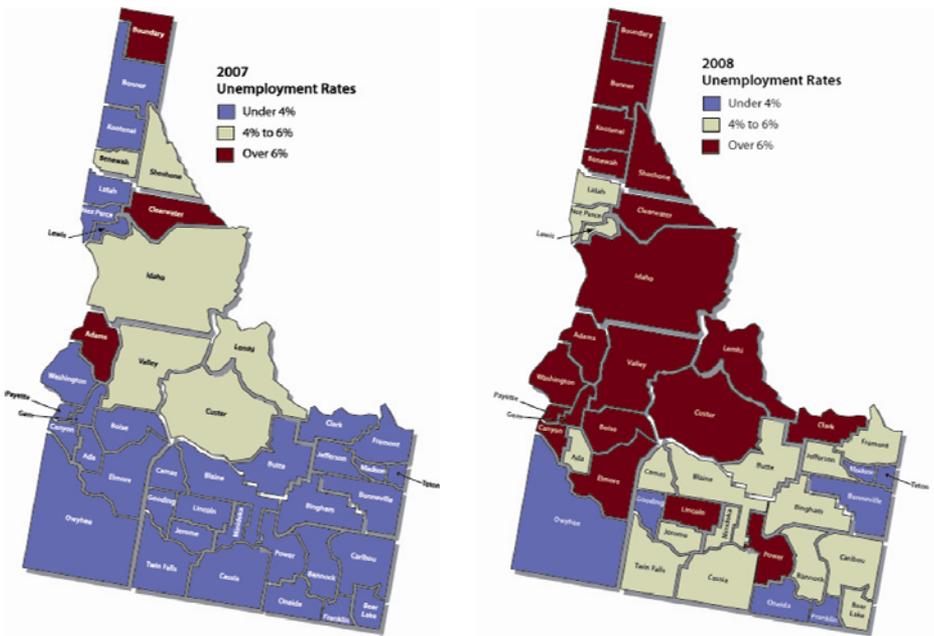
The national rate has been climbing as well, but the gap between Idaho and the nation has narrowed from over two percentage points at the end of 2007 to just six-tenths of a point at the close of 2008. But for all Idaho’s economic problems, the state does not appear to face as severe a set of circumstances as many others and could still remain below the national rate as it has for over seven years.

The economic deterioration Idaho experienced in 2008 will continue well into 2009. The unemployment rate will exceed 7 percent at some point and could hit 8 percent before topping out and beginning to subside.

The state’s nonfarm jobs began disappearing last May compared to a year earlier. Total nonfarm jobs in May were a third of a percentage point below May 2007. By December, that gap had widened to 4.1 percent. It is expected to remain around 4 percent into spring before stabilizing and beginning to narrow. By June 30, 2010 – the end of Fiscal Year 2010 – the Idaho economy will have essentially the same number of nonfarm jobs as it did in July 2008 – around 728,000 including 65,000 self-employed.

The continued slide in construction, manufacturing and financial services

Graphic 1: Shift in unemployment Rates 2007 Compared to 2008



will be offset by what should be comparatively normal growth in health care and education and modest growth in some sectors on the service-side of the economy. While Idaho’s population growth has slowed significantly from three and four years ago, the state remains among the fastest growing in the nation. This should keep health care and education growing while limiting the erosion in retail trade and some other service sectors.

Nonfarm jobs in 2008 averaged 0.9 below 2007, the first annual job loss since 1986. They will continue to run below 2008 levels into 2009 before bottoming out and beginning a slow recovery.

The impact of this recession on Idaho has been broad-based. In November 2007 the vast majority of counties had unemployment rates below 4 percent. Several were between 4 percent and 6 percent, and three were over 6 percent

But in the past year every county has seen its unemployment rate rise at least a full percentage point, and 25 have had rates more than double. The highest rates have been in northern and north central Idaho, where mill closures have been significant, and in the counties east, north and west of Ada, where manufacturing has been hit hard.

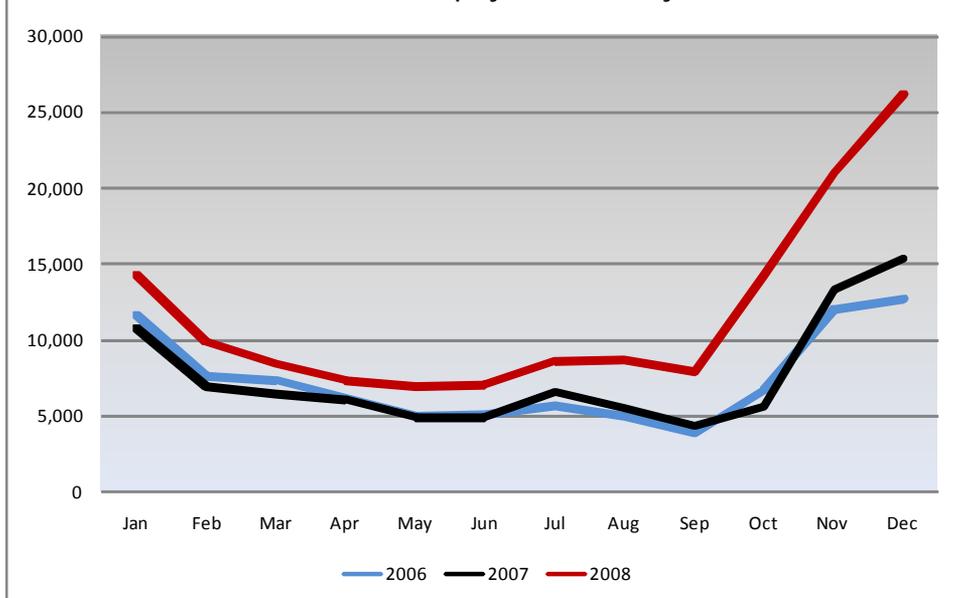
By November 2008, counties with rates under 4 percent had dwindled significantly while those over 6 percent approached half. Graphic 1 shows the shift in unemployment rates by county in one year.

Overall, the state lost 27,300 jobs between December 2007 and December 2008, and nearly 27,000 fewer people were working.

Over 26,000 workers filed initial claims for unemployment benefits in December – a record number although not a record in relation to the size of the labor force. See Chart 2 on page 4.

That followed 21,000 initial claims in November, the first back-to-back months of 20,000 or more claims each. The only other month initial claims have exceeded 20,000 was in December 2002. For 2008, 140,000 workers filed initial claims for jobless benefits from a covered labor force of around 629,000. While significant, the ratio is still below 2002 and less than half the ratios posted in the 1980s.

Chart 2: Initial Unemployment Claims by Month



Since the economy peaked in 2006, the state has lost 8,500 construction jobs, 9,000 manufacturing jobs and 1,500 financial services jobs. Those losses rippled into other sectors. In the last year, about 5,400 retail and wholesale trade jobs have disappeared along with 6,000 in professional and business services, 3,300 in hotels and restaurants and 700 in trucking and warehousing. See Chart 3 on page 5 for details.

Job loss began accelerating last spring and will likely continue for the next six to 10 months.

Exports running at another record pace through the first nine months of this year may have muted to some extent manufacturing job losses. But with foreign sales still being driven overwhelmingly by high-tech goods, the global nature of the recession is likely to see many international markets rein in their purchases and further reduce export-linked jobs in Idaho.

Taking into consideration the jobs lost since mid-year, the economy will end up in mid-2010 with fewer than 1,000 more jobs than there were last summer. But the mix will have shifted. Manufacturing jobs will be down 5,200, construction another 3,300 and financial services over 1,000. See Chart 4 on page 6.

Offsetting that will be 7,400 new jobs in health care and education and about 1,100 more in professional and business services. More modest growth will be seen in several other service sectors.

But while there should be a net gain in jobs by mid-2010, the value of those jobs is less than the ones they're replacing.

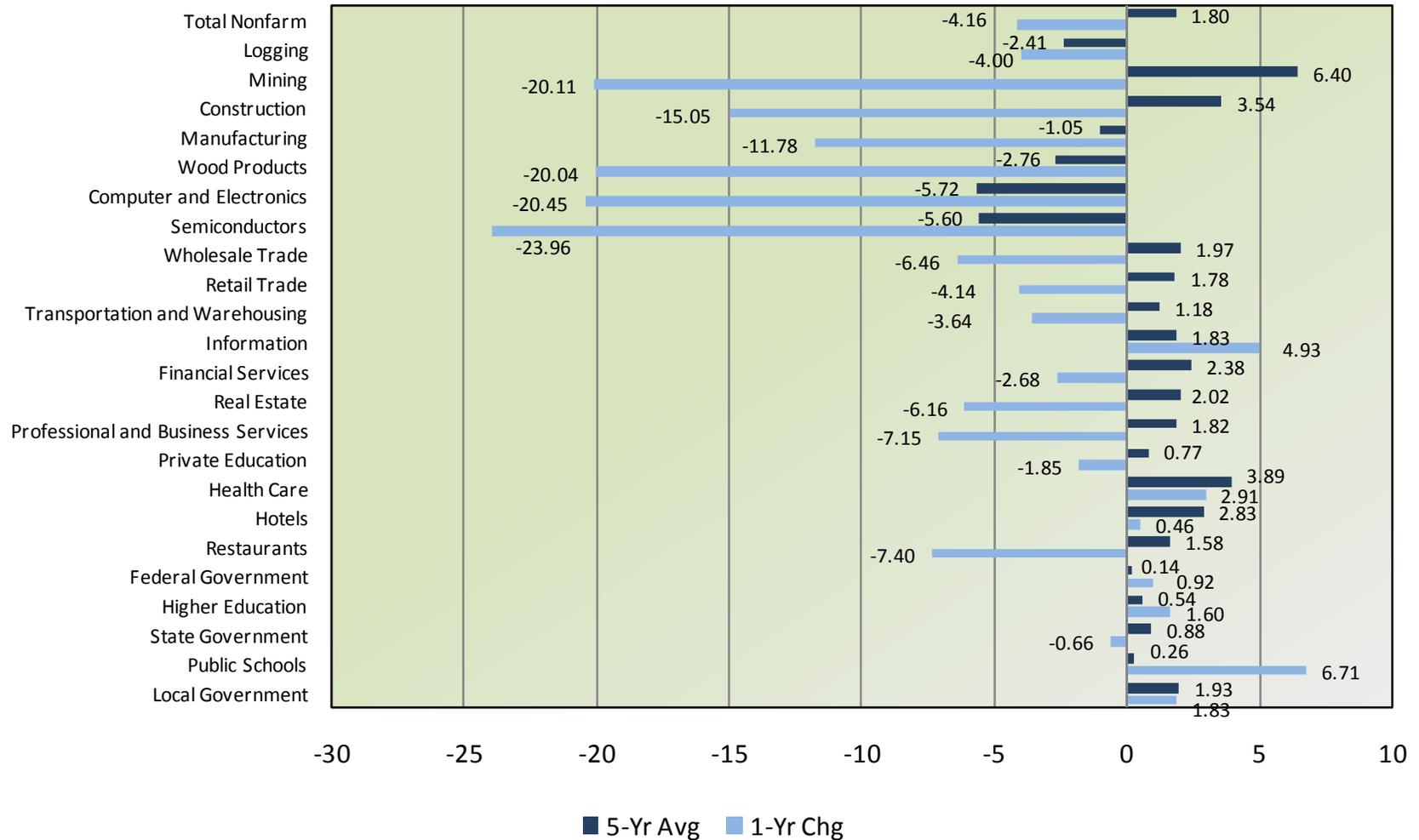
At 2008 average wage rates, the job losses in construction and manufacturing, particularly in high technology, along with those in financial services will suck almost \$600 million out of the economy annually while the jobs replacing them – mainly in health care and education – will add less than \$400 million. See Chart 5 on page 7.

The net impact is a loss in total payroll of \$210 million.

UNEMPLOYMENT INSURANCE TRUST FUND IMPACT

The economic contraction is taking a toll on the unemployment insurance system. See Chart 6 on page 8.

Chart 3: Percent Change in November Jobs, 2007-2008 Compared to Five-Year Average



January 2009

Chart 4: Projected Job Gains, Losses Mid-2008 to Mid-2010

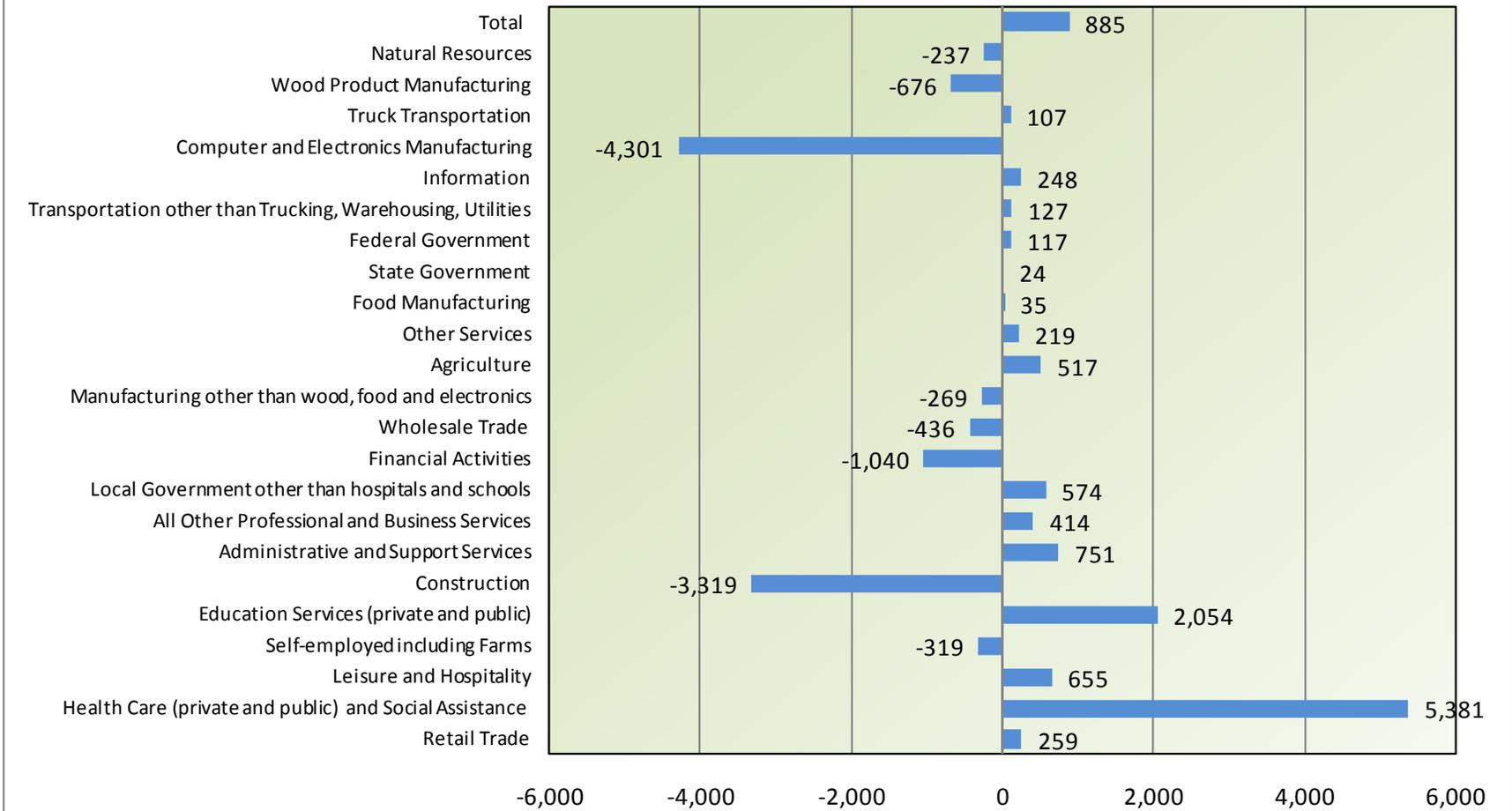


Chart 5: Annual Payroll Loss, Gain -- Q2 '08 to Q2 '10
Based on Average 2008 Wage
(in millions)

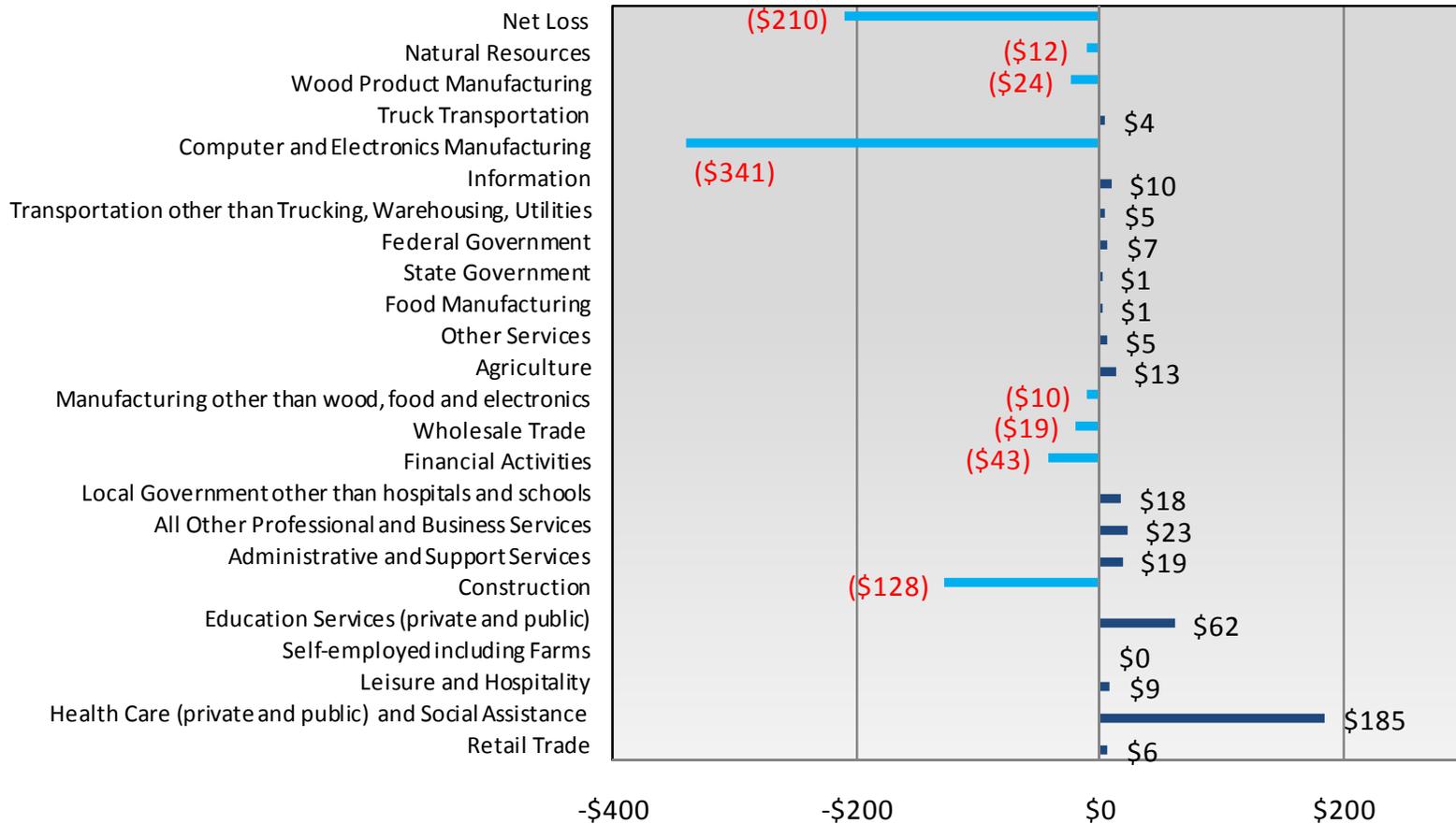
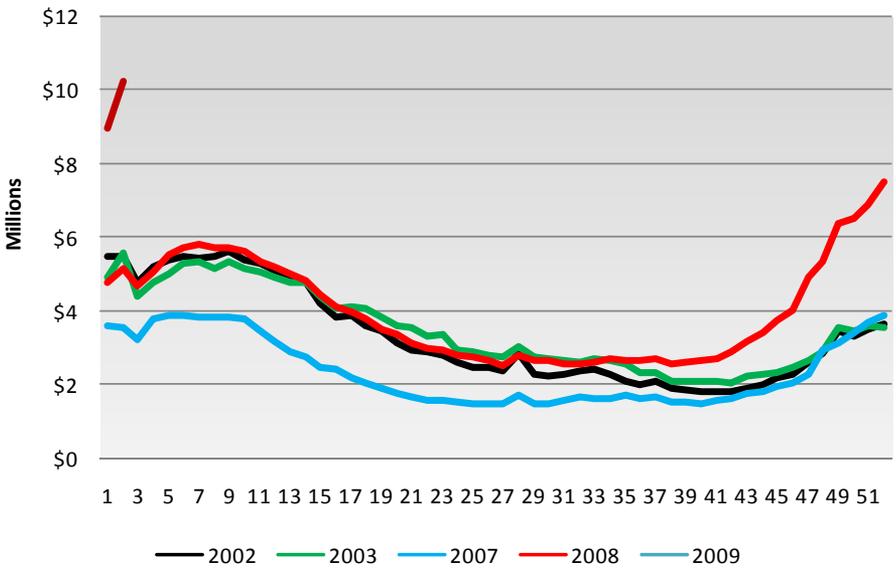
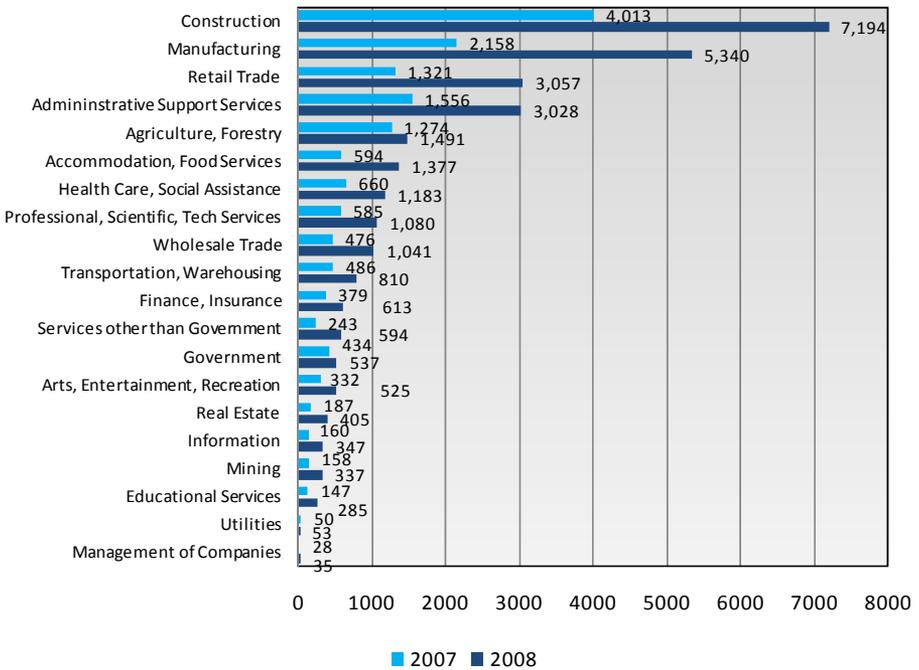


Chart 6: Weekly Unemployment Benefit Payout



**Chart 7: Covered Unemployment By Industry
December 2007, 2008**

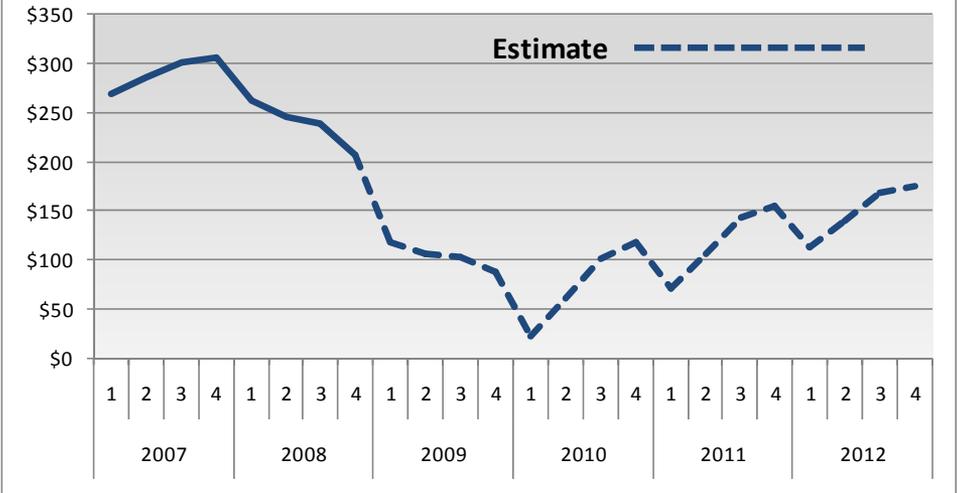


Unemployment benefit claims are already at record levels and will continue climbing over the next six months to a year, depending on the effect from any extraordinary action taken by the federal or state governments to create jobs.

With claims in recent months running well ahead of the 2003 record both in number of claimants and amounts paid, the Unemployment Insurance Trust Fund is being drained.

The unemployment rate has risen steadily since the fiscal year began in July – from 4.1 percent to 6.6 percent in December – averaging 4.2 percent for 2008, well above the record low 2.7 percent rate in 2007. The rate will

Chart 8: Unemployment Insurance Trust Fund Balance
(in millions)



continue rising into the summer before stabilizing and beginning to drop. It will likely average around 6 percent for 2009. That would be the highest annual average since the early 1990s.

Aside from more than doubling in the past year as the economy contracted, there has been slightly higher unemployment benefit activity from retail and wholesale trade and hotels and restaurants. The largest percentage of claimants still comes from construction and manufacturing as it did a year ago – just twice as many now. See Chart 7.

The fund, which stood at nearly \$320 million in November 2007, slipped below \$190 million at the end of December. That has triggered a 70 percent increase in employer tax rates in general for 2009, and some employers will pay even higher rates if they change rate classes due to increased benefit claims against their accounts. See Chart 8.

This increase, however, will raise only about \$50 million in additional revenue for the fund – just one-sixth of the savings employers have experienced since the unemployment law was rewritten in 2005.

Based on projections made before the unprecedented \$9 million and \$10 million weekly payouts, the fund was likely to be drawn down to just \$22 million during the first few months of 2010 before beginning to rebuild its balance. As a precaution, the department will prepare to secure a bridge loan from the U.S. Department of Labor that will be repaid without interest before December 2010. But the continued pressure on the fund will cause another sizeable tax rate increase in 2010. The actual amount will not be determined until next fall.

Overall, Idaho’s job situation will continue to deteriorate, and the unemployment rate rise through much of 2009 before finding bottom, putting the trust fund to the test.

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DECEMBER JOB NUMBERS REFLECT ECONOMIC TURMOIL

Job growth in Idaho continued to suffer in December under global economic turmoil that brought the state's 21-year stretch of year-over-year job growth to an end.

Idaho began and closed 2008 in a recession. During the last recession in 2002, despite eight consecutive months of negative year-over-year job growth, the state still succeeded in closing the year with a slight 0.09 percent job gain. This current recession has been much deeper by comparison and average annual nonfarm payrolls shed 6,200 jobs from 2007 to 2008, a decline of 0.94 percent. This is Idaho's first negative annual average job growth since 1986.

December nonfarm payrolls dropped 13,100 from November, a 2.03 percent loss. Since last December, 28,000 jobs disappeared from the Idaho economy. The last time the state witnessed such a loss from one December to the next, President Dwight Eisenhower was finishing his first year in office – 1953. Part of this decline was due to poor seasonal hiring by retailers for the holiday shoppers. From 2003 to 2007, the average growth rate from the third to fourth quarters was 2.14 percent. This year retail jobs declined 1.37 percent as retailers anticipated a disastrous 2008 Christmas season.

Construction suffered another loss of jobs from November to December – 3,800. This 8.2 percent decline was not unique. It came at the end of a year that started substantially below the previous year and posted a meager seasonal increase. December was 15.05 percent lower than December 2007 and was below the level of employment achieved in 2005.

Idaho began and ended
2008 in recession.

The final phase of the most recent round of layoffs at Micron combined with the disintegration of MPC Computers to suck 1,300 more manufacturing jobs out of the economy from November. That 2.21 percent decrease capped a year that saw the sector drop 11.78 percent below 2007. Idaho has not had so few jobs in manufacturing since May of 1992.

Professional and business services declined by 4,300 jobs from November, a reduction of 5.3 percent. This sector slid beneath 2007 job levels in April and has further deteriorated since. The year-over-year loss was 7.88 percent, a difference of 6,400 jobs.

The health care sector finished 2008 with the most robust year-over-year growth, adding almost 2,000 jobs. December marked the end of a sobering year, and leaves in question the fortunes that 2009 hold.

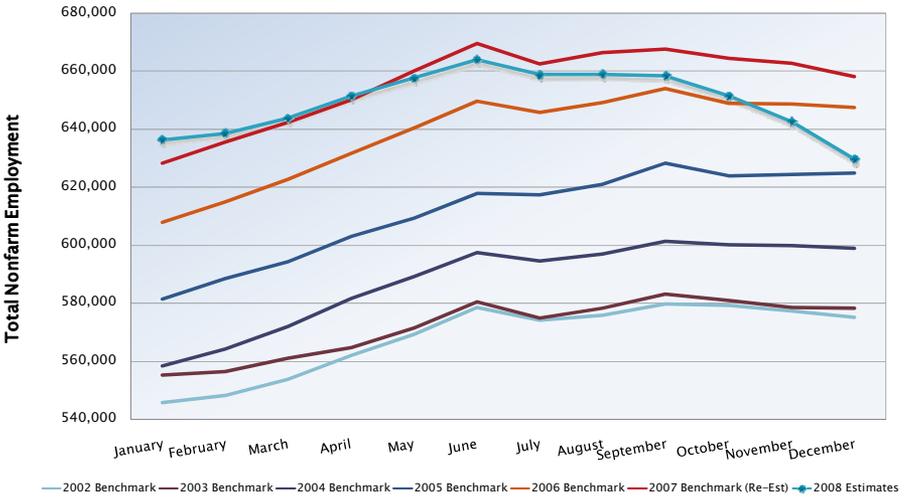
See more charts on pages 11-12.

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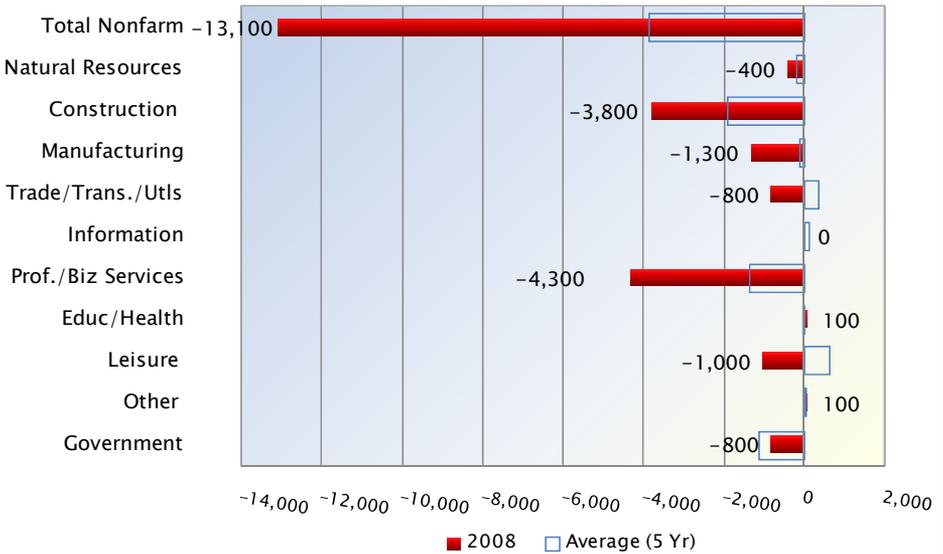
Close to 3,000 athletes, coaches, event officials, family members and fans from over 100 countries are expected to descend on Boise and the Wood River Valley in early February to participate in the 2009 Special Olympics World Winter Games, bringing an estimated total economic impact of \$42 million dollars to the area. The opening ceremony is scheduled for 2 to 5 p.m. Feb. 7 at the Idaho Center in Nampa. Qwest Arena, Bogus Basin Mountain Recreation Area, Ponderosa State Park, Dollar Mountain, Sun Valley Resort and Idaho IceWorld are some of the venues hosting a myriad of winter sports competition from Feb 8-13. For a calendar of events and more information, log onto www.2009worldgames.org.



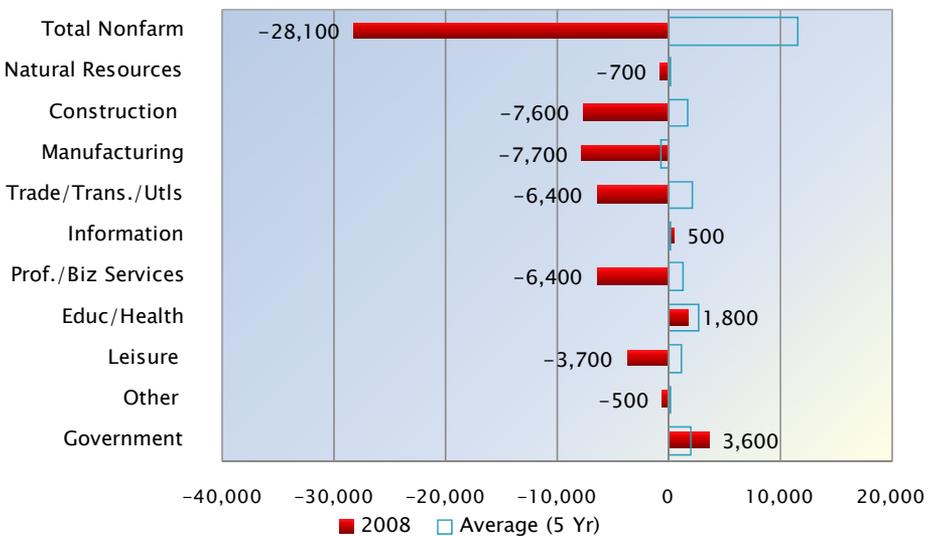
Statewide Benchmark and Estimates 2002 to Present



November to December Job Growth Compared with Five Year Average



December 2007 to 2008 Job Growth Compared with Five Year Average



State of Idaho Data — Nonfarm Payroll Jobs

% change from

BY PLACE OF WORK

	Dec 2008*	Nov 2008	Dec 2007	Last Month	Last Year
Nonfarm Payroll Jobs**	629,600	642,800	659,000	-2.1	-4.5
GOODS-PRODUCING INDUSTRIES	104,300	110,000	119,400	-5.2	-12.6
<i>Natural Resources & Mining</i>	3,900	4,300	4,600	-9.3	-15.2
Logging	1,800	1,900	1,800	-5.3	0.0
Mining	2,100	2,400	2,800	-12.5	-25.0
Metal Ore Mining	1,200	1,200	1,100	0.0	9.1
<i>Construction</i>	42,700	46,700	49,500	-8.6	-13.7
<i>Manufacturing</i>	57,700	59,000	65,300	-2.2	-11.6
Durable Goods	36,400	37,200	40,900	-2.2	-11.0
Wood Product Manufacturing	6,000	6,400	7,500	-6.3	-20.0
Sawmills & Wood Preservation	1,800	1,900	2,400	-5.3	-25.0
Veneer & Engineered Products	1,100	1,200	1,400	-8.3	-21.4
Other Wood Product Manufacturing	3,100	3,300	3,700	-6.1	-16.2
Fabricated Metal Product Manufacturing	4,700	4,600	4,700	2.2	0.0
Machinery Manufacturing	2,800	2,800	3,100	0.0	-9.7
Computer & Electronic Product Manufacturing	12,000	12,600	15,000	-4.8	-20.0
Transportation Equipment Manufacturing	3,000	3,100	3,500	-3.2	-14.3
Other Durable Goods	7,900	7,700	7,100	2.6	11.3
Nondurable Goods	21,300	21,800	24,400	-2.3	-12.7
Food Manufacturing	14,200	14,300	15,600	-0.7	-9.0
Fruits & Vegetable Preserving & Specialty	7,200	7,200	7,800	0.0	-7.7
Paper Manufacturing	1,600	1,600	1,700	0.0	-5.9
Printing & Related Support Activities	1,800	1,800	1,900	0.0	-5.3
Chemical Manufacturing	2,400	2,400	2,300	0.0	4.3
Other Nondurable Goods	1,300	1,700	2,900	-23.5	-55.2
SERVICE-PROVIDING INDUSTRIES	525,300	532,800	539,600	-1.4	-2.7
<i>Trade, Transportation, & Utilities</i>	128,700	129,500	136,500	-0.6	-5.7
Trade	108,400	109,300	114,900	-0.8	-5.7
Wholesale Trade	26,600	26,900	28,300	-1.1	-6.0
Wholesalers, Durable Goods	12,800	12,700	13,100	0.8	-2.3
Wholesalers, Nondurable Goods	11,300	11,400	12,100	-0.9	-6.6
Retail Trade	81,800	82,400	86,600	-0.7	-5.5
Motor Vehicle and Parts Dealers	12,000	12,300	12,500	-2.4	-4.0
Building Material and Garden Equipment	8,500	8,900	9,000	-4.5	-5.6
Food & Beverage Stores	12,600	12,600	12,900	0.0	-2.3
General Merchandise Stores	18,100	18,300	18,800	-1.1	-3.7
Transportation, Warehousing, & Utilities	20,300	20,200	21,600	0.5	-6.0
Utilities	2,000	2,000	2,100	0.0	-4.8
Transportation & Warehousing	18,300	18,200	19,500	0.5	-6.2
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,800	9,000	9,600	-2.2	-8.3
Information	11,400	11,400	11,100	0.0	2.7
Telecommunications	4,100	4,200	4,000	-2.4	2.5
<i>Financial Activities</i>	30,800	31,800	32,400	-3.1	-4.9
Finance & Insurance	22,800	23,100	23,600	-1.3	-3.4
Real Estate & Rental & Leasing	8,000	8,700	8,800	-8.0	-9.1
<i>Professional & Business Services</i>	76,000	80,200	82,800	-5.2	-8.2
Professional, Scientific, & Technical	32,100	32,600	33,700	-1.5	-4.7
Scientific Research & Development	7,700	7,600	5,800	1.3	32.8
Management of Companies & Enterprises	7,000	7,000	7,800	0.0	-10.3
Administrative & Support & Waste Management	36,900	40,600	41,300	-9.1	-10.7
Administrative & Support Services	36,200	39,600	39,100	-8.6	-7.4
<i>Educational & Health Services</i>	76,600	76,600	76,500	0.0	0.1
Educational Services	8,100	8,200	8,900	-1.2	-9.0
Health Care & Social Assistance	68,500	68,400	67,600	0.1	1.3
Hospitals	16,800	16,800	16,900	0.0	-0.6
<i>Leisure & Hospitality</i>	58,600	59,600	62,100	-1.7	-5.6
Arts, Entertainment, & Recreation	7,900	7,800	7,900	1.3	0.0
Accommodation & Food Services	50,700	51,800	54,200	-2.1	-6.5
Accommodation	8,900	8,900	8,800	0.0	1.1
Food Services & Drinking Places	41,800	42,900	45,400	-2.6	-7.9
<i>Other Services</i>	18,800	18,700	19,500	0.5	-3.6
Total Government	124,400	125,000	118,700	-0.5	4.8
Federal Government	12,600	12,800	12,000	-1.6	5.0
State & Local Government	111,800	112,200	106,700	-0.4	4.8
State Government	30,900	31,100	30,200	-0.6	2.3
State Government Education	15,200	15,500	14,900	-1.9	2.0
State Government Administration	15,700	15,600	15,300	0.6	2.6
Local Government	80,900	81,100	76,500	-0.2	5.8
Local Government Education	42,300	42,400	41,000	-0.2	3.2
Local Government Administration	35,200	35,300	32,200	-0.3	9.3
Local Government Tribes	3,400	3,400	3,300	0.0	3.0

*Preliminary estimate ** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.



Area and County Developments

PANHANDLE

Benewah, Bonner, Boundary, Kootenai & Shoshone counties

2008 – THE YEAR IN REVIEW

BENEWAH COUNTY

With the U.S. lumber market at its lowest point since 1982, Benewah County, the Idaho county most dependent on forest products, suffered many losses in 2008. The county's seasonally adjusted unemployment rate rose to double-digits this fall. In November, during a temporary shutdown at the Potlatch plywood plant, the jobless rate was at 15.7 percent. A year before, in November 2007, it was 5.7 percent.

Wood products manufacturing dropped 60 jobs in 2008. Every mill in the county has lost jobs since mid-2007. A sharp fall in U.S. housing starts led Potlatch Corp. to lay off 160 employees at its St. Maries plywood plant for two weeks in November. Now they are working just every other week.

The industry also became more concentrated with Stimson Lumber Co. buying the Regulus Stud Mill, the second largest in the county with 100 employees in St. Maries. Stimson owned the third largest mill, the Plummer mill.

The troubles in the wood products industry spread to logging and trucking, where a fifth of the jobs – 120 – were lost.

But the county's other manufacturers held their own at 110 jobs. The two largest are the Coeur d'Alene Tribe's Berg Integrated System in Plummer and Peet Shoe Dryers in St. Maries.

Jobs also declined in construction, which shed 10 percent of its jobs last year.

Health care continued to expand despite the economic crisis. Officials from the hospital and clinic in St. Maries, which employ 150, currently are studying how to effectively expand in the next 10 years. The Coeur d'Alene Tribe expanded its Benewah Medical and Wellness Center to boost employment to about 130. Panhandle Health District moved into a larger building in St. Maries in July. Valley Vista, a nonprofit company created 20 years ago to run the nursing home in St. Maries, also runs nursing homes in four other Idaho communities. It employs about 180 people in St. Maries and another 180 people at its other locations.

The county's small tourism sector benefited from improvements at Heyburn State Park and the growing reputation of the Trail of the Coeur d'Alenes, the 79-mile bicycle trail from Mullan to Plummer on a former railway line.

In 2008, St. Maries' tourist accommodations got a boost. The St. Maries Inn opened in May. It includes six rooms upstairs and a restaurant at street level. In addition, Curtis and Yvette Benham transformed seven apartments in St. Maries into extended stay suites, calling them The Riverfront Suites.

Plummer is receiving \$7.3 million in federal grants and loans to build a new sewage treatment plant. Two years ago, the city was forced to impose a moratorium on building, because of insufficient sewage treatment capacity. When the new treatment plant begins operating in late 2010, the moratorium will be lifted. This will allow new businesses to move in and existing businesses to expand.

BONNER COUNTY

Bonner County — especially the western half — has taken some hard hits from the U.S. recession, but the natural vitality of Sandpoint has protected the county from being knocked out. The county's seasonally adjusted unemployment rate rose from 3.1 percent in November 2007 to 6.9 percent a year later.

Low lumber prices have taken a terrible toll on the county's mills and logging companies that have slashed employment from 1,140 in January 2006 to fewer than 500 in January 2009. Stimson Lumber started 2008 by permanently laying off another 22 people from its mill in Priest River. Stimson already had lost 40 jobs in 2007. Other mills cut shifts or curbed payroll by not replacing workers who leave or retire. Some have reduced hours of work or shut down for a week or two at a time. The largest blow came Oct. 3 when the county's largest mill, JD Lumber in Priest River, permanently closed, putting 216 people out of work. Idaho Forest Group, which had been Riley Creek Lumber, ceased production at its mill in Laclede in December, putting more than 100 people out of work. It hopes to reopen the mill in the spring.

Fortune continued to smile on Bonner County's other manufacturers, who added about 900 jobs between 2000 and 2007, more than any other Idaho county. A variety of manufacturers added 140 jobs in 2008. About 90 of those jobs came at Quest Aircraft in Sandpoint, which began producing its first Kodiak airplane in late 2007 and is working through a three-year backlog of orders. It now employs 250 people and expects to add more.

Construction and related industries — building material wholesalers and retailers, appliance, garden and landscaping businesses, architects, engineers, mortgage, title insurance and real estate — lost about 400 jobs in 2008, about 14 percent of the jobs they had in 2007.

Reduced spending by American consumers on upscale clothing caused Coldwater Creek, the Sandpoint-based national retailer, to eliminate 51 jobs at its corporate headquarters in January. Before the layoff, Coldwater Creek employed more than 600 people in the Sandpoint area.

Last winter's good ski and snowmobiling season, a large influx of Canadian visitors, record attendance at the Festival at Sandpoint and a good summer allowed the tourism sector to add 100 jobs in 2008. Sunset magazine named Sandpoint as one of the West's top 10 dream towns, ideal for both vacations and living.

The transportation department broke ground on the \$98 million Sand Creek Byway on Oct. 29.

In the face of the job losses, the Priest River Development Corp. is intensifying its efforts to expand and diversify the local economy. Priest River also has made itself more attractive for tourists and potential residents with major improvements downtown. In October, the renovated Beardmore Block made its debut. The Beardmore renovation has been a catalyst for Priest River to create an urban renewal district and plans to open up its riverfront area.

BOUNDARY COUNTY

Boundary County's seasonally adjusted unemployment rate increased from 6.7 percent in November 2007 to 11.1 percent this past November as trouble in the lumber industry depressed economic activity.

Area mills laid off, shut down intermittently and reduced hours in 2008. Mills and logging companies lost 80 of their 450 jobs. In late December, the Idaho Forest Group, which used to be Riley Creek Lumber, laid off 14 workers at its mill in Moyie Springs because of poor market conditions. The mill hopes to recall them in May. In December, the open market price for studs was \$190 per thousand board feet, a fraction of the 10-year average of \$330.

One of the county's largest employers, Idaho Educational Services, which owns the former Rocky Mountain Academy and other facilities for troubled

teens, failed to add dozens of jobs in 2008 as it did in 2007. With state and local budgets growing tighter and many families losing income and wealth, there are fewer agencies and families able to send teens for intensive care.

Since wheat prices fell from a record \$16 a bushel last spring to under \$6 this fall, farmers reined in spending as they coped with high prices for fuel, fertilizer and seed along with more difficulties getting financing.

Tourism held its own as Canadian visitors surged on the strength of the Canadian dollar against the U.S. buck, making up for the decline in U.S. visitors.

Downtown Bonners Ferry put a 50-foot, four-faced clock tower on the roof of city hall – the finishing touch to the downtown revitalization that began two years ago.

For the third consecutive year, the Bonners Ferry-based International Selkirk Loop was awarded a Federal Highway Administration grant under the National Scenic Byways Program. The loop was one of only three groups in Idaho to receive that funding. The \$114,800 grant will pay for an International gateway sign fronting U.S. Highway 95 in downtown Bonners Ferry, a recreational trip guide distributed at the visitor center and a high-quality interpretive sign at McArthur Lake. Three other signs will be posted at scenic overlooks on Idaho Highway 1 and U.S. Highway 95 through the Selkirk Mountains and the Kootenai Valley. About \$5,000 will be spent to improve the loop's Web site. The International Selkirk Loop received attention from seven national publications in 2008, and Rand McNally's 2009 Road Atlas selected the loop as one of its five annual picks for "must see and do drives."

The Boundary County Airport received a \$546,250 Federal Aviation Administration grant to double the size of the aircraft parking ramp area and upgrade taxiways to handle bigger jets. Improved jet access is expected to bring more visitors and help local businesses. The U.S. Border Patrol reportedly plans to construct a new building near the airport.

KOOTENAI COUNTY

After four years of heady growth, Kootenai County's economy slipped in 2008. Its seasonally adjusted unemployment rate more than doubled from 3 percent in November 2007 to 6.7 percent in November 2008.

Wood products manufacturing employment fell from 930 to 770. Stimson Lumber closed the DeArmond Mill near North Idaho College in May because of low lumber prices, idling 72 workers. Idaho Forest Group permanently laid off 40 of the 190 workers at its Chilco mill in December.

Fortunately, many other manufacturers added jobs in 2008. Esterline Advanced Input Systems – the Coeur d'Alene designer and manufacturer of keyboards, control panels and touchscreens – hired 40 new employees, bringing its payroll to 390. Transtector, a Hayden manufacturer of power-surge protection and signal integrity devices, added about 20 employees in 2008. It now employs more than 150.

North Idaho College reported record enrollment of 4,856 this fall, up 4.4 percent from fall 2007. Dwindling job prospects during the recession prompted the surge as recent high school graduates and adults looked to improve their work skills.

Silverwood Theme Park's new roller coaster and an influx of Canadians drawn by the high value of their Canadian loonie helped keep tourism in 2008 at record levels. Silverwood, the only theme park in the Northwest, debuted its highest rollercoaster in July. Silverwood employed more than 800 people last summer.

Coeur d'Alene ranked third on the 2008 list of Best U.S. Cities for Doing Business, released by INC.com and Newgeography.com in July. The metro area is an attractive place to live with a low-cost, business-friendly environment. Jobs Plus,

the local economic development organization, helped Jaguar Manufacturing Inc. move to Hayden from Bend, Ore., in early 2008. The contract manufacturer of custom wiring harnesses and cables for electronic devices expects to hire 15 people soon.

The county is putting a lot of energy into long-run improvements to education and work force training. The proposed education corridor on the former DeArmond Mill site next to North Idaho College in Coeur d'Alene and the proposed professional-technical education campus near Rathdrum both moved closer to reality this fall.

The health care sector added about 750 jobs in 2008. The \$19 million Life Care Center in Post Falls celebrated its grand opening in October. The nursing home employs 130 people. Kootenai Health broke ground in August on a \$14.6 million, 21,000-square-foot cancer center in Post Falls. When the center opens in August, it will employ 20 people. The next major project for Kootenai Health is a \$30 million, 52,000-square-foot addition to its Coeur d'Alene hospital. The Kootenai Health Women's and Children's Center is expected to break ground in April and open in late 2010.

Construction employment fell about 10 percent in 2008. Residential construction, which began contracting in late 2006, continued to decline. Commercial construction slowed considerably as several major projects were completed. But several more will be under way in 2009. In Coeur d'Alene, the Riverstone development continues to add retail and office space. In Hayden, a Walgreens pharmacy is scheduled to open this fall, plans to build a Wal-Mart supercenter are moving forward and Discount Tire will open a 7,000-square-foot store with six service bays in early 2009. In Post Falls, a Wal-Mart supercenter and a Lowe's store are expected to break ground in early spring near Cabela's. Both could be open by Christmas. In addition, a Boys and Girls Club soon will be under construction next to the Post Falls library.

SHOSHONE COUNTY

The first half of 2008 promised to fulfill many long-term hopes in Shoshone County, but the second half dashed some of them. In the spring, silver prices rose above \$20 and buoyed hopes of reopening and expanding mining operations, which added 200 jobs between the first half of 2007 and the first half of 2008. With average annual paychecks near \$60,000, more mining jobs were boosting the valley economy, offsetting the slowdown in construction and real estate. Unfortunately, the fall brought bad news for the mining industry.

Sterling Mining Co. suspended silver production at the historic Sunshine Mine in Kellogg in September, laying off 90 workers, 60 percent of its work force there. In November, U.S. Silver Corp. laid off 45 workers and dismissed contractors that employed 65 more at the Galena Mine near Silverton. Now, there are concerns that Hecla may reduce employment or shut down the Lucky Friday mine near Mullan, where 250 people work.

The job losses in the mining industry pushed Shoshone County's seasonally adjusted unemployment rate from 5 percent in November 2007 to 12.2 percent in November 2008.

The region's tourism sector remained a source of new jobs. Silver Mountain, which enjoyed a good ski season last winter, opened on Dec. 18. Last spring, Silver Mountain Resort in Kellogg started construction on an 18-hole golf course near the gondola base, which is expected to open this fall. The Wallace Inn in downtown Wallace and the Baymont Inn near the Silver Mountain gondola base in Kellogg made major renovations. Silver Mountain Resort opened a video game arcade above Noah's Canteen at the gondola base at the end of 2007. In May, it opened the huge indoor Silver Rapids Waterpark. Lookout Pass Ski & Recreation Area on U.S. Highway 95 on the Idaho-Montana border set a new attendance record of roughly 63,000 last winter. Two former railways turned

into biking and walking trails — the Trail of the Coeur d'Alenes and Trail of the Hiawatha — continue to attract more visitors each year.

Despite the automobile industry's troubles, Dave Smith Motors, the county's largest employer, held its own in 2008. It employs nearly 400 in Kellogg.

AREA DEVELOPMENTS

BONNER COUNTY

- Schweitzer Mountain Resort was the first local ski area to open this season on Dec. 12. The resort spent a few weeks making its own snow to open. But soon Mother Nature added more than a couple dozen inches of powder. Although ski areas always hope to open by Thanksgiving, they make it only 25 percent of the time.
- A mid-December fire destroyed the clubhouse at The Idaho Club, an upscale golf and luxury home community at the former Hidden Lakes golf course. The 30,000-square-foot clubhouse — containing a pro shop, cart storage, restaurant, bar and deck overlooking the Pack River a few miles north of Sandpoint — opened in August with an 18-hole golf course designed by Jack Nicklaus. The building was fully insured and owners of the property intend to rebuild.
- President George W. Bush awarded Sandpoint inventor Forest Bird the Presidential Citizens Medal at a White House ceremony on Dec. 10. Fewer than 100 people have been honored since the medal's inception in 1969 for their exemplary service to the nation. Through his numerous inventions, Bird has contributed greatly to the fields of medicine and aviation, according to the National Inventors Hall of Fame, which inducted him in 1995. Bird is perhaps best known for inventing respiratory care ventilators that have saved thousands of lives.

BOUNDARY COUNTY

- A Moyie Springs company just ended its busiest time of the year. The Wreath Farm, owned by Travis and Julie Smith, sends handcrafted Christmas wreaths all over the world. Starting in October, it sent about 200 wreaths a day. Made of white pine, grand fir, cedar, bows, ribbons and pinecones, the wreaths smell like a Christmas tree because the evergreens are cut only a few hours before they are shipped.

KOOTENAI COUNTY

- Jungle Pizza, designed to delight children, opened in mid-December in Post Falls. With seating for 100, the restaurant includes video games, entertainment, arcade games, air hockey and candy machines with prizes. Pizza, calzone, stromboli sandwiches and an all-you-can-eat salad bar is served and it employs 30 people.

SHOSHONE COUNTY

- The Golden Chest Mine near Murray is beginning to show a profit 35 years after John Beasley, a former National Football League player, and 17 of his Minnesota Vikings teammates and coaches invested in it. For years, Beasley searched for ways to start mining there. In 1987, Newmont Mining gave the Golden Chest a try. After three years of exploration, it concluded that the mine could yield 250,000 ounces of gold. Newmont wasn't interested in anything that could yield fewer than a million ounces. Beasley continued to look for other ways to tap the mine's resources. In 2004, New Jersey Mining Co. expressed interest in leasing the deposits at the Golden Chest. That year New Jersey Mining found 1.6 million ounces of gold. In the four years since, Beasley's mine has been steadily preparing for the gold's removal, drilling and readying machinery. Using the company's state-of-the-art leach plant at its Kellogg ore mill, the Golden Chest can now mine the raw materials and forge its own gold bars.

- The Wallace Brewing Co. opened in the historic Coeur d'Alene Hardware building in downtown Wallace. Owned by Chase Sanborn, Dean Cooper, Herb Zanetti and Rick Magnuson, the microbrewery produces Rockhead hybrid lager, Jackleg Stout, Dirty Blonde Pale Ale and Red Light Wheat. A future product will be Orehouse Amber. The brewery currently employs three people. It has the potential to produce up to 3,000 kegs a year and plans to start selling to bars in the Silver Valley and Coeur d'Alene area before expanding to Moscow, Sandpoint and eventually the Spokane and Missoula markets. Its Orehouse Tasting Room is open Monday through Saturday.

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NORTH CENTRAL IDAHO

Clearwater, Idaho, Latah, Lewis and Nez Perce counties

2008 – THE YEAR IN REVIEW

CLEARWATER COUNTY

Job losses in 2008 were the worst for Clearwater County since 2000 when the Jaype mill closed. With U.S. housing starts falling to their lowest level since the 1980-82 recession, lumber mills and logging companies reduced employment by nearly 100. RF Coon Inc., one of the county's three largest logging companies, went out of business last spring, putting more than 40 people out of work.

In addition, the mills reduced hours or intermittently shut down. The latest was the Tri-Pro Forest mill at Konkolville, which laid off 60 of its 65 workers in December with no definite call back date. Those job losses rippled through the community, affecting retail and service jobs. In November 2007, Clearwater County's seasonally adjusted unemployment rate was 7 percent. Twelve months later, it had risen to 15.5 percent.

Federal and state government jobs provide some economic stability. The Army Corps of Engineers employs 45 people at Dworshak Dam, and the U.S. Fish & Wildlife Service has 45 at its hatchery. Average monthly employment with the U.S. Forest Service is 100. State Hospital North, the psychiatric hospital in Orofino, saw its employment increase from 90 in 2006 to 110 in 2008. The state prison in Orofino employs another 140.

Despite record-high gas prices last summer, the county's small tourism sector remained viable. Dworshak Dam and a prairie area near Weippe where the Lewis and Clark expedition first encountered the Nez Perce Tribe are the county's major tourism draws. Boating, hunting and fishing are the major activities.

Clearwater County Economic Development continues to encourage growth through:

- Increased activity at Dworshak Reservoir by expanding houseboat moorage. The organization is installing barriers to protect the Big Eddy Marina from waves.
- Its own efforts on many fronts to improve telecommunications. The organization persuaded Verizon to make \$3.5 million in improvements in the area by installing fiber-optic line from Moscow through Orofino to Weippe to improve cell phone reception, speed up Internet access and shorten the time it takes to restore power after an outage.
- Encouraging Phantom Jet Boats to move its manufacturing operations from Lewiston to Orofino's Industrial Park in April. In the fall, it won a government contract for 12 of its newest boats, the Musclejons, which can operate in as little as four inches of water.

IDAHO AND LEWIS COUNTIES

Troubles in the lumber industry and a slowdown in construction activity took a toll on Idaho and Lewis counties. Lewis County's seasonally adjusted unemployment rate rose from 2.1 percent in November 2007 to 4 percent in November 2008 while Idaho County's rate jumped from 5.4 percent to 10 percent.

In early 2007, wood products manufacturing employed 410 people in the two counties. Today, it employs fewer than 280.

Falling lumber prices forced Three Rivers Timber Co. to shut down its mill in Kamiah in November until lumber demand increases, idling 80 workers. Another 20 are likely to lose their jobs by February when lumber shipments are completed. A crew of 20 will remain, keeping the mill ready for a fast restart. Three Rivers entered into receivership because of outstanding debts at the end of 2008, making the mill's future more uncertain.

In September, Bennett Forest Industries, which owned the 150-employee mill in Grangeville, merged with Riley Creek Lumber, which owned three mills in the Idaho Panhandle to form Idaho Forest Group. In the long run the new company expects to increase sales to big-box stores and increase employment. But with the industry going through its roughest period since 1982, the Idaho Forest Group mill in Grangeville cut the work week from five days to four days in December.

Despite the U.S. recession, other manufacturers added 30 jobs between 2007 and 2008, pushing payrolls to 160. Those companies include Nezperce's Hillco Technologies, Ferdinand's Pacific Cabinets and Grangeville's Aqua Jet, Gem Chain Bar, Intermountain Machine and Idaho Sewing for Sports. In 2008, Advanced Welding and Steel built a 30,000-square-foot facility near the Idaho Forest Group mill in Grangeville, which will allow it to add a dozen employees in the next year or two.

Ida-Lew Economic Development continues its efforts to expand manufacturing, tourism and other jobs. Among the counties' development successes in 2008 were:

- Framing Our Community Inc., an economic development organization in Elk City that received national recognition for its forest restoration efforts.
- A \$350,000 new community center in Nezperce to replace the 97-year-old library.
- A \$213,000 U.S. Department of Agriculture Rural Development grant to provide broadband Internet service to the community. First Step Internet LLC of Moscow is setting up high-speed wireless Internet service now in Ferdinand.

Rising unemployment has accelerate plans to turn the Kamiah High School shop into a regional adult work force center, offering classes in high-skilled welding and machining. The Kamiah School District has formed a partnership with Lewis-Clark State College, Ida-Lew, Northwest Manufacturers Association and the Idaho Department of Labor so students and adults can take night classes and get additional marketable skills.

LATAH COUNTY

The recession has hurt Latah County in many small ways but has not inflicted a major wound. The county's seasonally adjusted unemployment rate more than doubled, from 2.3 percent in November 2007 to 4.7 percent in November 2008. Despite the increase, the county's rate remained considerably below the state rate of 5.7 percent and the national rate of 6.7 percent.

The University of Idaho, which provides one of every three jobs in the county, is a buffer in economic downturns. University enrollment rises with the unemployment rate. Enrollment rose to 11,791 this fall. The county also benefits from enrollment growth at Washington State University in Pullman, which hit a record 18,000 students. Although both universities are facing budget shortfalls and have frozen hiring, they probably will avoid large layoffs.

The U.S. financial crisis depressed construction employment by 13 percent below its 2007 level and pushed lumber prices to historic lows in 2008, forcing mills and loggers to cut 40 jobs or about 9 percent. In addition, Bennett Lumber Products in Princeton cut the work week for its 150 employees to 32 hours.

Other manufacturers and high technology companies added about three dozen jobs in 2008. Potting Shed Creations, which employs 50 in Troy to make handcrafted seed kits, was recognized by the U.S. Department of Commerce for expanding its international sales 80 percent. Inc. magazine's annual list of fastest growing private companies in the United States included Economic Modeling Specialists Inc., an economic consulting and Web-based software firm that employs more than 40 people in Moscow. Alturas Analytics and Anatech Labs, which tests pharmaceuticals, moved into a larger space at Alturas Technical Park. Another high-tech business needing more space was EcoAnalysts, whose 35 employees are experts on water quality. GoNano Technologies, which develops nanospring technologies for the clean-tech energy markets, is growing at the University of Idaho Business Technology Incubator.

High-tech represents the county's long-term potential to develop many spin-off businesses from the research conducted at the universities. The Latah Economic Development Council wants to create an education corridor between Moscow and Pullman.

Latah County residents also benefited from the growth of Schweitzer Engineering Laboratories in Pullman. About 500 of its 1,400 workers are Idaho residents. In 2008, the company added 300 jobs.

Retail and restaurant employment edged down slightly in 2008 as consumers reduced spending.

Mother Earth News named Moscow one of the "Great Places You've Never Heard Of," noting its large community of artists, the Lionel Hampton Jazz Festival and a civic can-do attitude.

NEZ PERCE AND ASOTIN COUNTIES

The Lewiston area's seasonally adjusted unemployment rate rose from 3.5 percent in November 2007 to 6 percent in November 2008, remaining below the national rate of 6.7 percent.

Paper manufacturing employment was stable in 2008, but there was a major change in ownership. Potlatch Corp. spun off the paper company in mid-December, turning over the Lewiston manufacturing plant it operated for more than 100 years and all other Lewiston operations — including the lumber mill — into a newly created company, Clearwater Paper. The change was not expected to affect the 1,700 employees in Lewiston.

Wood products manufacturing shed dozens of jobs and endured several intermittent shutdowns. In February, Bennett Lumber Products laid off nearly 50 people — almost half of the crew at its mill at the Port of Wilma across the Snake River from Clarkston. Potlatch's sawmill and cedar operations underwent several layoffs of a week or more.

The ATK ammunition plant in Lewiston had added 200 workers since 2006 to boost employment to nearly 900.

Deteriorating economic conditions and the high price of fuel and aluminum decreased the demand for boats, causing ThunderJet to lay off 30 employees and Renaissance Marine Group 22 workers. Both are in Clarkston. In the long run, jet boat builders expect to be a source of job growth in the Lewiston-Clarkston Valley.

Construction employment in 2008 ran about 10 percent below 2007 levels. The decline led Steelman-Duff, a road-building company in Clarkston, to close after 58 years in business.

Four of the counties' largest employers were slowly growing despite the recession. Lewis-Clark State College enrolled 3,940 students last fall, 9 percent more than a year earlier. In 2001, its enrollment was less than 3,000. About 800 people work at the school during the school year. St. Joseph's Regional Medical Center, with nearly 900 employees, continued to grow as the area's population grows and ages. The Regence BlueShield insurance center in Lewiston employs about 740 people. The Nez Perce Tribe, headquartered in Lapwai, employs 500 people at its headquarters and enterprises and another 220 people at its casino near Lewiston.

A new Nez Perce County Jail is slated for completion by February. The 61,674-square-foot complex also will house the sheriff's office and driver's license office.

In April, the Clarkston and Lewiston visitor bureaus merged to better promote the area. The new bureau is called the Hells Canyon Visitor Bureau and operates from the Clarkston Chamber of Commerce. The bureau opened a second visitor information center in downtown Lewiston last fall.

The Clearwater Economic Development Association has secured \$3.2 million in grants to build an industrial park at the Lewiston-Nez Perce County Regional Airport and improve taxiways. Several businesses have expressed interest in locating at the industrial park to be built on the southern edge of the airport. At full build-out, the park is expected to create about 250 jobs.

Wal-Mart started construction this fall on a 184,133-square-foot supercenter near Costco in Clarkston. The same day the Clarkston store opens this summer, the Lewiston Wal-Mart, which does not sell groceries, will close. Wal-Mart officials have expressed interest in finding a location for a supercenter in Lewiston.

COUNTY DEVELOPMENTS

CLEARWATER COUNTY

- Kim Hoffman recently opened a business that designs and prints brochures, catalogs, newsletters, advertising and direct mail. She hopes Hoffman Print Design in Orofino will contribute to the success of local businesses and organizations.

IDAHO AND LEWIS COUNTIES

- The recession is hurting even the most upscale businesses. The Flying B Ranch, the hunting lodge near Kamiah that hosts the rich and powerful, laid off 18 employees in December. In addition to offering hunting on its 5,000-acre ranch where it raises 80,000 birds a year, the Flying B holds exclusive outfitter rights to a vast tract of special permit areas in the Nez Perce and Clearwater national forests.

Flying B's parent company's main business is roof tile manufacturing, and that business is down by 78 percent. About one-third of the Flying B's business is entertaining roofing sales representatives. Its other customers are only down about 10 percent. Flying B still employs 37 people. The ranch hopes to recall the employees in 2009. It's already fully booked for next September, October and November.

- Laura Wiltse recently opened Crema Café in Grangeville. Featuring a wide array of espresso items and baked goods, it also serves soup and sandwiches.

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SOUTHWESTERN IDAHO

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

ECONOMIC OVERVIEW

The seasonally adjusted unemployment rate for the Boise-Nampa Metropolitan Area hit 5.9 percent in November, an increase of one-tenth of a point from October and the highest rate since July 1990 at the beginning of a national recession that barely affected Idaho. In November 2007, the metropolitan unemployment rate was 2.7 percent, underscoring the dramatic impact the current recession has had on the region. Since November 2007, 12,200 fewer people were employed and 9,600 more workers were without jobs. The five-county metro area has nearly 40 percent of the state's labor force but accounts for over 60 percent of the people no longer working statewide.

The other five southwestern counties outside the metro area have been hit hard as well. During November the 10-county region had the highest and the lowest county unemployment rates in the state. Adams County not only reported the highest rate at 17 percent but the largest increase from October, 5.8 percentage points. Owyhee County had the lowest rate at 2.4 percent and was the only county with a rate below 3 percent.

Nonfarm payroll jobs in the Boise-Nampa area decreased by 2,700 in November to 270,600, a 1 percent drop from October. Over the year, nonfarm jobs in the metro area fell 2 percent, or 5,500.

Goods-producing industries reported the majority of the job loss, dropping 2,500 from October and 5,300 from November 2007. The brunt was felt in construction and computer and electronics manufacturing with layoffs at Micron, MPC and Hewlett-Packard.

The dramatic loss in construction – 700 from October and 1,900 for the 12-month period – was a direct result of the national financial crisis.

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

Since November 2007 retail trade lost 2,700 jobs, and hiring for the holiday shopping season was minimal. October-to-November hiring was a signal – only 500 in 2008 compared to 1,500 a year earlier as retailers struggled with reluctant consumers interested only in bargains. The impact has been across the retail sector – automotive dealers and parts, home furnishing, electronics, building supplies, clothing and accessories and general merchandise. Mervyns, CompUSA and Linen's & Things were among the retailers to close before the holidays. The expansion of Walgreens helped offset some of the job loss.

Health care jobs have declined monthly since July to settle in November only slightly above the year-ago level with even hospital payrolls contracting. Consumers are becoming more cautious so if an illness is not life threatening, many are looking for other remedies or putting medical care on hold. This has left some health care facilities to curb hiring and cut hours. Mercy Medical Center in Nampa and St. Alphonsus Regional Medical Center in Boise have both announced layoffs due to rising bad debt and charity cases.

Another 500 jobs disappeared from the region's restaurants as budget-conscious consumers eat out less frequently. Over the past year a number of local restaurants have closed, and others have reduced staff. Waiters and waitresses are reporting that tips are down, another downside of the recession.

Government jobs rose fractionally from October as they did a year ago as modest increases in state and local administration offset an unusual loss in public schools from October, according to revised figures. But state and local

governments and public schools are looking for ways to cut their budgets in response to the recession and that will probably result in some job loss. The city of Nampa is exploring going to a four-day work week to save money without laying people off.

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

Southwestern Idaho Unemployment Rates, Seasonally Adjusted			
Area	Nov 2008	Oct 2008	Nov 2007
STATEWIDE	5.7	5.3	2.7
Boise-Nampa Labor Market Area	5.9	5.8	2.7
Counties			
Ada	5.0	5.2	2.3
Adams	17.0	11.2	6.6
Boise	7.1	6.5	3.3
Canyon	7.9	7.1	3.5
Elmore	6.1	6.2	3.6
Gem	7.9	7.5	3.2
Owyhee	2.4	3.0	1.5
Payette	7.1	5.7	3.8
Valley	11.3	9.9	4.4
Washington	7.0	5.3	3.7
Cities			
Boise	5.7	5.3	2.5
Caldwell	8.7	8.2	3.8
Meridian	6.0	5.3	2.7
Nampa	7.8	7.5	3.4

AREA DEVELOPMENTS

BOISE-NAMPA AREA

- Building Materials Holding Corp. will move its corporate headquarters from San Francisco to Boise in January. The company provides building materials and construction services to residential contractors. With the severe downturn in that sector, the company is reducing its operations and administrative support functions through the move to Boise. The holding corporation has two components – BMC West, which distributes building materials and manufactures building components and SelectBuild, which provides construction services to high-volume home builders.
- The city of Nampa received a grant from Capital Matrix to provide Internet access to the public in the downtown historic district. The goal is to increase economic development and generate new jobs by creating a Wi-Fi zone with free public access. With the grant, businesses can purchase additional equipment at a minimal cost to upgrade the Internet service level in their buildings.
- MPC Computers in Nampa closed Dec. 29, just weeks after filing for bankruptcy. Of its remaining 198 employees, 147 were laid off immediately and 51 will remain until the company assets are liquidated. MPC, formerly one of Nampa's largest employers, manufactured personal computers, laptops and servers for home use, government and educational use. The company was founded in 1991 as part of Micron Electronics and then sold in 2001. It gained nationwide recognition as the sponsor of the Humanitarian Bowl in 2005 and 2006. In 2005 the company merged with software-maker Hyper-space Communications, expecting access to more investors and capital. That didn't happen, and layoffs began in late 2005. Again the company tried to improve its bottom line by acquiring the professional computing division of Gateway Computers in 2007. The move was intended to increase revenue but once again did not meet the company's expectations.

- The College of Western Idaho received \$2.5 million from the J.A. and Kathryn Albertson Foundation. The money will be used to establish a needs-based scholarship program for the new community college. CWI will open for classes in January.
- Mercy Medical Center announced in early December that 71 workers will be laid off and another 34 will work reduced hours. A significant downturn in patient volume, rising levels of uninsured workers and family members, declining reimbursements from some payers, bad debt and increased charity care were blamed. The laid off employees will receive separation packages based on years of service and employment status. The hospital also plans to reduce expenses by cutting compensation for its senior officials, sharing positions with sister facilities and aggressively managing operation expenses. The 152-bed hospital was founded in 1917 by The Sisters of Mercy and is currently owned by Catholic Health Initiatives.
- Canyon County commissioners voted unanimously on Dec. 1 to allow packaged liquor sales on Sunday at the three state-run and three contract stores in the county. The state stores will be open for five hours on Sundays. Canyon County, which has the third highest liquor sales in the state, is the 28th county to allow Sunday sales.
- Ewephoria and Fabrique celebrated their grand reopening in downtown Nampa. The two businesses had to relocate because of structural problems at their previous locations. Ewephoria specializes in yarns and fabrics, many with unique origins. Fabrique offers quilting supplies, fabrics, books and a professional staff.
- The Idaho Small Business Development Center and the Idaho Hispanic Chamber of Commerce have formed a unique partnership. The aim of the new partnership is to enhance the success of existing Hispanic businesses and assists in the creation of new ventures in the Treasure Valley. The center's staff at Boise State University will include a business consultant to advise and provide training programs for Hispanic businesses.
- McDonald's opened its rebuilt restaurant in Caldwell and launched its new McCafe espresso drinks in mid-December. The restaurant features a new look inside and out with contemporary seating, artwork of local landmarks, flat-screen TVs, wireless Internet access and a Redbox movie rental kiosk. The new indoor play space includes musical instruments and a top-a-shot basketball game. The McCafe menu features made-to-order espresso drinks prepared with freshly-ground beans and steamed milk, including a variety of lattes, mochas and cappuccinos. The restaurant employs 80, up from 60 before it was rebuilt.
- Firebird Raceway in Emmett earned National Hot Rod Association Track of the Year honors recently for the first time in the track's 41-year history. Firebird also received the National Dragster Contributor of the Year award and was recognized for winning the Division 6 Summit E.T. Finals over 10 northwest tracks during the Labor Day weekend.
- On a very cold winter day in December, a small group of people gathered to officially open the South Island Bridge. The 92-foot-long bridge over the south channel of the Payette River connects the Gem Island Sports Complex to downtown Emmett.
- STP Concrete became the first business to turn dirt at the Shadow Butte Industrial Park in Emmett. Owners Steve and Brenda St. Pierre were the first to purchase land at the industrial park five years ago. One of the stipulations for the low per-acre price was adding jobs – not just relocating them.

The STP expansion will add three to five employees to the current staff of 15. This spring, the St. Pierre's plan to relocate their Meridian corporate office to Emmett. The Meridian site will stay open as a satellite yard, and the two-year-old plant in Garden Valley will continue operating with work dispatched from Emmett.

- Russell and Heidi Wolfe opened the Homedale Discount Store in December in conjunction with the Homedale Holidays Parade. The store is stocked with discounted name-brand canned goods, snacks and other household staples. Aquarius Design, which also just opened in Homedale, offers a mix of handmade jewelry, crystal, vintage lamps, candles, locally made Buttercup Soaps and fabric. Owner Cyndi Smith markets her ingenuity for turning recycled materials into jewelry and housewares.
- The Idaho Pizza Co. opened in Fruitland in mid-December. The franchise has nine other locations in southern Idaho. Many of the pizzas are named after locations in Idaho, such as the Sun Valley Veggie, Garden Valley Delight, Sawtooth Special and the Idaho Supreme. The building is hard to miss – it is shaped like a big, red barn with a white silo. The pizza is handmade and prepared daily. The menu also includes handmade sandwiches and a salad bar.
- St Luke's Mountain States Tumor Institute in Fruitland's Dominican Health Services center is building a new radiation treatment vault facility. The radiation treatment machine will be one of only five in the state. The institute offers comprehensive cancer treatment, medical and radiation oncology with a staff of three medical oncologists, a radiation oncologist, a radiation nurse practitioner and medical nurse oncology practitioner. The center also has a social worker and an integrated medicine program that offers massage and general exercise for patients.
- McCall Jewelry Co. is downtown McCall's newest business. Founded by Erica McDougall, a graduate gemologist and certified jewelry appraiser, and George Seeds, the store has a full line of jewelry and watches. It also designs custom jewelry for any occasion and has a complete line of engagement, wedding and anniversary rings.
- Despite its financial challenges, Tamarack Resort opened in mid-December, recalling groomers, lift operators, housekeeping staff, phone operators, front desk staff, ski instructors, sports desk staff, retail staff, restaurant staff, ticket sellers, bartenders and ski patrol to get the 2008-2009 ski season going. Trees were removed to widen ski runs. Cutoff trails so that skiers can access other ski runs were also created since last winter. Tamarack joined the region's other ski resorts, Brundage and Bogus Basin, in opening. The season began for all resorts in mid-December and has seen great snow since.
- A new specialty business opened in downtown Weiser in early December. Comic Books & Cards, run by Richard Ankarberg and Sharon Martone, is stocked with 50,000 selections. Just ask and Ankarberg probably has it or can get it. He has been in the comic book business since the late 1980s but recently relocated to Weiser from Auburn, Wash.

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SOUTH CENTRAL IDAHO

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

COUNTY DEVELOPMENTS

TWIN FALLS COUNTY

- Glanbia Foods Inc., an Irish-based cheese manufacturer, continued showing its creativity starting last summer with a cash fuel allowance for employees commuting over 20 miles to work and cash incentives for those who carpool. Then executives descended on the Department of Labor's Magic Valley Office just before Christmas, handing out a brick of cheese with a hundred dollar bill attached to 20 job seekers to help them at a money-draining time of year. The company has received Ireland's annual Business & Finance Award, given for excellence in performance and management as determined by the country's business and finance leaders. Glanbia employs more than 600 workers in Twin Falls, Gooding and Lincoln counties.
- Café Rio Mexican Grill and Smokin' Cowboys Barbeque will co-locate in the building previously occupied by Hart's Diner on the major street through Twin Falls. Café Rio is well-established in Salt Lake City while Cowboy Joe's opened its original barbeque restaurant in Jerome. Both expect to open this winter.
- A new retail complex, Villa Shops, is under construction near the Twin Falls post office. Owners Bob and Lori Ward will relocate their existing active wear store there. A dry cleaner and retail beauty products store also plan to locate in the complex, which is near business and government offices and the College of Southern Idaho.
- The Twin Falls Health Initiative Trust awarded over \$500,000 to 12 of the 21 applicants promoting health care in Twin Falls County. The trust was negotiated as part of the county's sale of the local hospital to St. Luke's. Interest earned on the \$20 million trust is used to promote health care. Among the larger awards in 2008 were \$105,000 to the Mustard Tree Community Wellness Clinic; \$84,012 to Twin Falls County; \$70,000 to South Central Head Start and \$50,502 to Family Health Services.
- Two businesses closed their doors in late 2008, but neither was a victim of the recession. Pioneer Floors in Buhl folded after the city revived its policy of ticketing vehicles parked for longer than two hours. Pioneer Floors still has its store in Twin Falls, where seven Buhl employees and the inventory were moved. Kruzers, the quintessential Twin Falls nightclub, closed when the partnership dissolved. The club had several outdoor concerts last summer that brought big names to the area such as Neal McCoy, Great White and Bowling for Soup. The 6,100-square-foot building on five acres is for sale. It is located in the downtown Urban Renewal Area.

GOODING COUNTY

- Converting methane gas from dairy manure into natural gas is moving closer to reality in south central Idaho. Minneapolis-based Cargill Inc. has a 2.25 megawatt generator at the Dry Creek Dairy south of Hansen, and Andgar Corp. of Ferndale, Wash., built a 1.5 megawatt generator at the Big Sky Dairy in Gooding where operations are scheduled to start early this year. One megawatt of electricity will power 500 homes. Another five permits for digesters were awarded in 2008. Experts maintain that 100,000 cows produce enough natural gas to heat 10,000 homes, and there are nearly 1 million heads of cattle in south central Idaho. That is more than enough to provide natural gas to heat all 65,000 homes in the region.

- The Gooding Recreation District and Gooding Memorial Hospital partnered with the Idaho School for the Deaf and the Blind to restore the school's indoor pool. The district will now have access to the pool for recreation and swimming lessons while the hospital can use the pool for aqua therapy. The recreation district will manage the pool.
- The Gooding Memorial Hospital has announced that the new hospital will open later than planned in 2010. The bonds to finance the project were pulled off the market due to high interest rates, which would have increased the financing costs by 10 percent on the \$30 million in bonds.

BLAINE COUNTY

- Idaho BioScience, a division of California-based Santa Cruz Biotechnology Inc., is Ketchum's newest business, adding diversity to the local economy. The company is a leader in medical research into reagents and antibodies used by institutions such as the National Institute of Health. A reagent is "a test substance that is added to a system in order to bring about a reaction or to see whether a reaction occurs." This new division in Ketchum will focus on technology development and product innovation. Santa Cruz Biotechnology was founded by John Stephenson, who has been coming to Sun Valley for more than 20 years and owns a house in Ketchum. The area's highly educated work force was a draw for the company. The Census Bureau estimates that over 70 percent of the Blaine County population has at least some college education. The company currently has 23 employees, most hired locally, and the work force could double in the near future.
- Sun Valley Resort owner Earl Holdings sent Happy New Year greetings to the community with dollar-a-gallon gas prices at its Sinclair station. The favorable pricing was available from 8:00 a.m. to 4:30 p.m. on New Year's Day. The Sun Valley resort is the largest employer in Blaine County.
- The Blaine County School District's foundation is lending \$10,000 to another teacher for a down payment on a home. The loan comes from the Teacher Magnet Fund, which was created to persuade teachers to remain with the district and live in a community where affordable homes are scarce. This is the third teacher loan made by the fund. The teachers will not be required to pay back the loan if they remain with the district for five years.
- Mountain Rides Transportation Authority signed an agreement with Sun Valley Co. for \$160,000 to buy two new buses that will run between Sun Valley Village and Warm Springs and River Run lodges. Service will also be provided to peripheral areas of Ketchum for routine functions such as medical appointments. The former bus service provided by Sun Valley Lodge has been terminated, and the new routes began in late November.
- Jamie Lee Curtis signed her new book at Iconoclast Books in Ketchum. This is the actress's eighth children's book titled "Big Words," and she drew a big crowd that stretched through the bookstore. The book includes words and definitions that were earlier banned from her children's books because they were considered too big for the audience. Jamie Lee Curtis has been a frequent Christmas visitor to Sun Valley.
- The city of Sun Valley donated a fire pumper to the city of Carey. The fire engine uses compressed air foam to fight fires, which conserves water and reduces clean up and damage. Engine 60 was recently used on the Castle Rock Fire and the blaze that destroyed Dirty Little Roddy's and Whiskey Jacques last September. Engine 60 has even traveled to fight fires in California, Lowman, Stanley and northern Idaho. The city of Carey accepted the donation with a mini-parade as the engine rolled into town.

- Craters of the Moon National Monument is once again open this winter for educational snow shoeing and Nordic skiing. The winter trail is groomed and offers seven miles on a looping track with hilly terrain around volcanic cones and through volcanic fields. Wildlife abounds even in the snow and colder temperatures. The admission cost is waived during the winter, and students are encouraged to attend. There are 30 pairs of snowshoes available for their use, and ranger volunteers are there to guide groups.



Winter scenes from Craters of the Moon National Monument. *Photos courtesy of the National Park Service.*

MINI-CASSIA

- A new funeral home in Rupert offers an innovation. Morrison Funeral Home & Crematorium can provide the option of a Webcast to family and friends who cannot attend the service. The Webcast is password restricted to protect privacy. In the past, cremation services were only offered in Jerome and Twin Falls. The funeral home is run by the owner without staff and focuses on lower cost services.

LINCOLN COUNTY

- Voters in the Shoshone School District rejected a \$7.5 million bond in November. The bond proceeds would have financed a variety of improvements on existing school buildings. The bond would have increased taxes about \$141 a year on a home valued at \$100,000.

COMMERCIAL CONSTRUCTION DRIVES INDUSTRY IN 2008

With the construction industry taking a huge hit across the state and nation, it is intriguing that Twin Falls city building permits show 2008 as a banner year for commercial construction. In contrast, there was little activity on the residential side. In fact, single family permits in 2008 approached the level of 2000, falling to just 193 compared to 168 eight years earlier. Residential construction peaked at a record 664 permits in 2005.

Although residential construction typically uses more workers than commercial projects, the decline in area construction jobs has not been as dramatic as the decline in housing permits. Construction jobs fell from 2,460 in September 2007 to 2,320 in September 2008, a decline of less than 6 percent, while construction sector wages were up over 6 percent from summer 2007 to summer 2008. This indicates both the greater experience or skill level required for commercial construction and the likelihood that projects, depending on their financial backing, required higher-than-average construction wages for the region. Higher wages for fewer jobs may also indicate that stronger operators have forced weaker competitors from the market, concentrating the remaining jobs in the hands of the most able workers.

There was a jump of 206 percent in the value of commercial construction while the number of permits rose a mere 25 percent. This indicates larger and higher grade projects compared with 2007. Some examples would include the Holiday Inn Express, the College of Southern Idaho Health and Science building, a new Wal-mart, and the new \$220 million hospital being built by St. Luke's Magic Valley Regional Medical Center along with other medical, government and multi-tenant office buildings. Construction is projected to drive job and wage growth in south central Idaho based on long-term projections developed by the Idaho Department of Labor. The average annualized growth for construction from 2006-2016 is 2.4 percent while jobs overall in south central Idaho will grow at just 1.6 percent. See table on page 29..

The depth of commitment by individual investors and developers, both local and national – close to \$150 million in 2008 – reflects optimism about the future in Twin Falls. And that total does not include infrastructure projects that are financed by the Idaho Transportation Department or others that do not require a building permit.

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Building Permits Records for Twin Falls

Permit Type	December 2008			Cumulative January to December 2008		
	# Permits	Est. Cost	Fees	# Permits	Est. Cost	Fees
Residential New Construction Single Family	2	\$387,380	\$2,727	193	\$28,049,989	\$218,280
Multi-Family	0	\$0	\$0	6	\$932,323	\$7,016
# of units	0			12		
Manufactured Homes	1	\$1,200	\$41	11	\$332,996	\$4,893
Residential Additions/Remodels	9	\$132,430	\$1,949	221	\$2,433,136	\$33,731
Residential Miscellaneous	1	\$19,060	\$276	44	\$740,026	\$9,277
Commercial New Construction	2	\$1,460,055	\$11,355	74	\$147,153,824	\$805,453
Commercial Additions/Remodels	9	\$235,113	\$4,147	138	\$9,362,137	\$107,814
Commercial Miscellaneous	9	\$58,852	\$778	107	\$817,836	\$12,217
TOTALS	33	\$2,294,090	\$21,273	794	\$189,822,267	\$1,198,681

Permit Type	December 2007			Cumulative January to December 2007		
	# Permits	Est. Cost	Fees	# Permits	Est. Cost	Fees
Residential New Construction Single Family	18	\$3,361,612	\$24,033	258	\$35,100,468	\$277,985
Multi-Family	1	\$219,367	\$1,492	9	\$1,804,140	\$12,576
# of units	2			10		
Manufactured Homes	0	\$0	\$0	9	\$103,287	\$2,251
Residential Additions/Remodels	8	\$274,548	\$2,758	241	\$2,537,976	\$33,820
Residential Miscellaneous	2	\$63,216	\$688	55	\$686,083	\$9,799
Commercial New Construction	4	\$1,365,253	\$13,045	59	\$48,033,826	\$304,874
Commercial Additions/Remodels	6	\$223,000	\$3,028	116	\$10,210,081	\$104,830
Commercial Miscellaneous	7	\$62,445	\$495	116	\$523,239	\$6,079
TOTALS	46	\$5,569,441	\$45,539	863	\$98,999,100	\$752,214

SOUTHEASTERN IDAHO

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

ECONOMIC TRENDS

November's seasonally adjusted unemployment rate jumped four-tenths of a point in the Pocatello metropolitan area from October to 4.7 percent. The metro area's civilian labor force shrank by 1,700 from October to November, accentuating the modest increase of 100 in the ranks of the unemployed. The unemployment rates for southeastern Idaho overall and the individual counties were nearly two percentage points higher than a year earlier. The table below shows the year to year differences in unemployment rates and employment numbers by each county in southeastern Idaho. However, while all the counties reported unemployment was up, only Oneida and Bear Lake counties showed an increase in the number of people with jobs. Most attribute the increase in workers to slower economic times, which may be delaying college for some younger people while more members of households are working to meet financial obligations.

Table 1: Southeastern Idaho Unemployment Rates Compared by County

	Nov 2007 (benchmarked)		Nov 2008 (forecast)			
County/Area	Total # Employed	Unemploy- ment Rate	Total # Employed	Unemploy- ment Rate	# Change	% Increase
Bannock	39,998	2.5%	38,287	4.7%	-1,711	2.2%
Bear Lake	2,971	2.3%	3,051	4.3%	80	2.0%
Bingham	20,583	2.0%	20,411	4.0%	-172	2.0%
Caribou	3,291	2.4%	3,210	5.0%	-81	2.6%
Franklin	6,687	1.5%	6,586	3.2%	-101	1.7%
Oneida	2,337	1.6%	2,430	3.5%	93	1.9%
Power	3,773	3.8%	3,612	7.2%	-161	3.4%
Region	79,640	2.3%	77,587	4.4%	-2,053	2.1%
State of Idaho	736,903	2.7%	717,393	5.0%	-19,510	2.3%

The decline in employment followed the loss of over 1,200 jobs in the metropolitan area. The majority of the job losses were on the service side of the economy, which posted declines in every private sector but financial services – a total of 370 from October and over 1,600 from a year earlier. Pessimistic retailers made little use of temporary workers for the Christmas shopping season while some manufacturers reduced their use of temporary workers on their production lines.

On the production side, there were 460 fewer construction jobs than in November 2007, a reduction of nearly 22 percent. Total manufacturing jobs were down only slightly as limited gains in other components muted the impact of significant layoffs by two pre-built home manufacturers.

AVERAGE EMPLOYMENT, WAGES IN POCATELLO METRO, 2005-2007

The Census Bureau does much more than count Americans every 10 years. One of the most recognized services is called the American Community Survey, which provides annual estimates of much of the same demographic and industry information collected every 10 years in the official headcount. Until 2007, the annual estimates were provided only for the states and population areas of 65,000 or more. But late last year, the Census Bureau released estimates for areas with populations of 20,000 or higher, which include the Pocatello metro area. These data are a three-year average – 2005 through 2007. Table 2 on page 31 summarizes the employment by industry and by sex along with the me-

Table 2: Average Employment, Earnings for Pocatello Metropolitan Statistical Area by Industry, Sex 2005-2007

Industry	Total Employed	Median Earnings	Male	Female
Agricultural, Forestry, Fishing and Hunting	929	\$27,891	87%	13%
Mining	61	\$15,911	100%	0%
Construction	2,623	\$28,060	93%	7%
Manufacturing	4,032	\$29,637	70%	30%
Wholesale Trade	1,220	\$28,776	76%	24%
Retail Trade	5,084	\$15,760	53%	47%
Transportation and Warehousing	2,353	\$37,409	85%	15%
Utilities	192	\$64,318	91%	9%
Information	704	\$15,462	41%	59%
Finance and Insurance	1,868	\$30,000	45%	55%
Real Estate and Rental	571	\$26,505	52%	48%
Professional and Scientific and Technical Services	1,576	\$34,694	55%	45%
Administrative and Support and Waste Management Service	1,879	\$15,734	56%	44%
Educational Services	5,098	\$26,959	34%	66%
Health Care and Social Service	5,164	\$22,249	25%	75%
Arts, Entertainment and Recreation	479	\$17,334	53%	47%
Accommodation and Food Service	2,985	\$9,967	35%	65%
Other Service Except Public Administration	1,586	\$16,443	50%	50%
Public Administration	1,941	\$39,015	52%	48%
Totals and Averages	40,345	\$23,152	53%	47%

dian earnings in each sector for the Pocatello area. Employers use this information to determine the available work force and approximate wages. In the metro area health care and social services, retail trade and educational services all employed over 5,000 and were so close in number that none was the clear job leader. But educational services was the clear leader of this group in terms of median wages, paying \$4,700 a year more than health care, which paid \$6,500 more than retail. The industry paying the highest wage was utilities, and workers in the accommodations and food services industry were the lowest paid.

COUNTY DEVELOPMENTS

BANNOCK COUNTY

- Positron Systems Inc. says it may expand. The Boise-based business has a location in the Idaho Accelerator Center in Pocatello, which conducts nondestructive testing of materials.
- A Ruby Tuesday restaurant has opened in Pocatello. The new eatery employs about 85, most part time. Ruby Tuesday's new store offers a new menu which features fresh quality meats.
- The Idaho State Police will close the Pocatello dispatch center July 1. The center's 11 employees will be offered jobs at either the Meridian or Coeur d' Alene offices.
- Ash Grove Cement plant in Inkom laid off 44 of its 68 employees. The cut-back eliminates production of clinker material, a major component of cement. However the local plant will continue to make a finished cement product with clinkers shipped in from other areas.
- A Utah-based helicopter pilot training school is expanding to the Pocatello Regional Airport. Utah Helicopter decided to expand beyond schools in Spanish Fork and West Jordan because of the number of students they had from southern Idaho. Demand for pilots is growing as older "Vietnam Era" pilots retire. The company expects initial enrollment of about 20 students.

- A local manufacturer of steel storage-racks, Frazier Industrial Co., discontinued its night shift. Company officials would not speculate about the duration of the shift reduction. The cut back is believed to be the result of the national recession.

BINGHAM COUNTY

- The new Shoshone-Bannock casino will be named Sage Hill Travel Center. The casino is scheduled to open this spring and will have 100 new gaming machines, a convenience store, a 30-seat café and a trucker's lounge.

CARIBOU COUNTY

- U.S. Magistrate Mikel Williams has refused to stop the expansion of the J.R. Simplot Co.'s Smoky Canyon Mine. William's decision allows Simplot to begin preparing the site for mining phosphate. Company officials believe the process will take about 18 months and work will get started as soon as weather allows.

FRANKLIN COUNTY

- Franklin County commissioners have organized a committee of 13 to research the options for a new jail. The committee has six months to recommend a plan for housing inmates in a cost effective way.
- Groll Family Fitness is enlarging its fitness center in Preston by 12,000 square feet. The addition will include a 25-meter indoor swimming pool, a racquet ball area and three offices for auxiliary enterprises. Possible tenants include a physical therapy business, a sandwich shop and perhaps an insurance or real estate office.

ONEIDA COUNTY

- The Kwik Stop in Malad was recently recognized by Idaho Lottery Director Jeff Anderson as the top seller of lottery tickets in Idaho. Together Oneida and Franklin counties sell 10 percent of all lottery tickets in Idaho.
- A committee appointed by the Oneida County Commission reported the development of horse riding trails is progressing smoothly and meetings with national U.S. Forest Service representatives have been encouraging. Committee members believe there will be economic benefits to the county as people from elsewhere come to ride the trails. And local residents will benefit from having scenic trails, which will be open to all types of non-motorized traffic.

POWER COUNTY

- LS Power based in New York has expressed interest in locating a gas-fired power plant in southeastern Idaho. One of the sites being considered is located in eastern Power County. Company officials are in the early stages of site selection, and the earliest expected date to have construction completed is 2013. Such a power plant is expected to produce between 100 and 600 megawatts of power and construction costs would exceed \$100 million.
- Stokes Fresh Food Market is buying the Cardinal Food Market in Aberdeen. The new owners plan to spend about \$200,000 remodeling the store to include a bakery and expanded deli. In addition Stokes intends to extend the so-called "Costco policy" in its Burley store to Aberdeen. Under that agreement with Costco, Stokes sells Costco's top 100 products at the same cost to its customers with no need for Costco membership.

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EAST CENTRAL IDAHO

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

ECONOMIC OVERVIEW

November's nonfarm payrolls in the Idaho Falls metropolitan area fell to their lowest level since November 2003, down over 1,300 from the previous month and almost 3,500 from November 2007. Construction, professional and business services, education and health care suffered the bulk of the losses as the national recession forced eastern Idaho businesses to trim budgets and cautiously wait the start of a recovery.

To look at it positively, the number of jobs in construction, education and health care dropped back to their November 2005 level before the residential construction frenzy hit the area. When eastern Idaho's housing boom began, infrastructure was improved, commercial development increased and zoning laws were changed to keep up with the growth. Now that the bubble has burst, the area finds itself with plenty of homes at still elevated values in a market with fewer buyers. Realtors are waiting for the market to pick up again, but the return of the construction sector to the more sustainable levels of the pre-bubble era is a good sign in the long run.

Overall, lower consumer demand and employers who have tightened budgets either by necessity or in wariness about the future have cut into the job total. When the national economy pulls out of the recession and consumer/employer confidence returns, job levels are more likely to reflect those of 2003 to 2005 before starting to rebound.

AREVA'S PERMITTING PROCESS SUBJECT OF DECEMBER HEARING

Over 300 people packed December's hearing on the process AREVA must go through to win approval for construction of a uranium enrichment plant 18 miles west of Idaho Falls. The hearing held by the Nuclear Regulatory Commission explained the procedure and began the job of assessing public acceptance of the French company's proposal.

Speakers during the 90-minute hearing all favored the plant and read letters or shared their approval with commission members. Among those speaking to the commission was retiring U.S. Senator Larry Craig, who has been an active and powerful voice for Idaho's nuclear programs while in Congress for 26 years. Notable was the Mayor's Youth Advisory Council. Over 20 teenagers representing the council attended, selecting two to declare their firm conviction that this business was an excellent choice for the area and for their futures. Afterward, commission members said it was the first time such a youth group had addressed any of their sessions.

While this meeting was only informational, the huge show of public support let commissioners know this was a priority for eastern Idaho. When one speaker asked everyone in the audience who supported the plant to stand, everyone did. There were no comments against the facility.

AREA DEVELOPMENTS

BONNEVILLE COUNTY

- North Wind Inc. of Idaho Falls has received a \$3 billion, five-year contract from the U.S. Air Force to perform environmental cleanup at Air Force bases around the world. The company will clean up hazardous waste such as gasoline, asbestos and chemicals. It will not include nuclear waste cleanup. North Wind has 18 offices nationwide.
- The Haven, an Idaho Falls temporary shelter for families, has been given land next to the shelter and \$60,000. The Haven plans to build a commu-

nity center and another set of apartments that will nearly double its capacity. The community center will be 3,300 square feet and will feature an exercise room, classroom and teaching kitchen. More parents will be able to complete their GEDs while their children play in an adjoining room. Eastern Idaho Community Action Partnership, which runs the Haven, has applied for a community development block grant to help cover the estimated project cost of \$380,000 to \$420,000. Completion of the center is set for 2010 if the grant is received. Without the grant, the center would still be built but construction would be delayed.

BUTTE COUNTY

- The Idaho Science Center was recently opened in Arco just across from Pickles Place. This museum was in the works for many years. It showcases a 70-ton steel sail that belonged to the nuclear submarine USS Hawkbill. This represents the tens of thousands of sailors trained on a nuclear submarine at the Idaho National Laboratory over the last half century. The museum highlights the development of nuclear power. Arco was the first community in the world to be lit by nuclear power so the museum has been a dream of the town for some time. The museum also has a World War I Mark 14 torpedo and many historical documents.

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Conversion from Analog to Digital TV – Feb. 17, 2009

On Feb. 17, 2009, all full-power TV stations will cease to broadcast analog programming. This transition to digital television will enable more efficient use of the nation's airwaves, providing new advanced wireless services and increased public safety services. To mark this historic transition, the U.S. Census Bureau has assembled a sampling of statistics from its publications about television and the television industry.

110 million — The number of households with a television set in 2006, compared with 76 million households in 1980.

98.2% — Percent of all households with a television set in 2005, which is unchanged since 1999.

\$273 million — Estimated sales for analog televisions in 2007, down from \$5.8 billion in 2003.

\$26.3 billion — Estimated sales for digital TV sets and displays in 2007, up from \$8.7 billion in 2003.

73.2 million — The number of households with cable television in 2006. Two-thirds of households with a TV have cable.

1,704 — The projected average number of hours an individual (12 and older) will spend watching television in 2008. That comes out to 4.7 hours of TV watching per day. In 2000, the average number of hours spent watching TV was 1,502, or 4.1 hours per day.

\$364.79 — The projected average amount consumers will spend on cable and satellite TV in 2009. In 2000, the average amount was \$173.58.

\$41.17 — The average monthly basic cable rate in 2006, up from \$6.50 in 1975.

For more information on the conversion from analog to digital TV, visit the following sites: www.dtv2009.gov and www.ntia.doc.gov

State of Idaho Data

November 2008 Labor Force (preliminary) compared to November 2007 data
(continued on next page).

Seasonally Adjusted Data	Nov 2008				Nov 2007			
	Civilian Labor Force	# Unem-ployed	% Unem-ployed	Total Employment	Civilian Labor Force	# Unem-ployed	% Unem-ployed	Total Employment
STATE OF IDAHO	760,685	43,292	5.7	717,393	757,086	20,183	2.7	736,903
COUNTIES								
ADA (1)	196,379	9,883	5.0	186,496	199,197	4,547	2.3	194,650
ADAMS	1,995	339	17.0	1,656	1,844	121	6.6	1,723
BANNOCK (8)	40,088	1,800	4.5	38,287	41,019	1,021	2.5	39,998
BEAR LAKE	3,187	136	4.3	3,051	3,042	71	2.3	2,971
BENEWAH	4,449	700	15.7	3,749	3,884	221	5.7	3,663
BINGHAM	21,262	852	4.0	20,411	21,007	424	2.0	20,583
BLAINE (5)	14,010	687	4.9	13,322	13,703	308	2.2	13,395
BOISE (1)	3,801	270	7.1	3,531	3,810	125	3.3	3,685
BONNER	21,989	1,524	6.9	20,465	20,438	633	3.1	19,805
BONNEVILLE (6)	49,587	1,722	3.5	47,865	51,562	836	1.6	50,726
BOUNDARY	4,167	464	11.1	3,703	3,766	238	6.3	3,528
BUTTE	1,549	62	4.0	1,487	1,398	29	2.1	1,369
CAMAS (5)	622	31	4.9	592	613	18	2.9	595
CANYON (1)	85,513	6,742	7.9	78,770	85,223	3,008	3.5	82,215
CARIBOU	3,380	170	5.0	3,210	3,374	82	2.4	3,291
CASSIA (2)	9,946	420	4.2	9,526	9,782	263	2.7	9,519
CLARK	507	46	9.1	461	492	18	3.7	474
CLEARWATER	3,250	504	15.5	2,746	3,028	211	7.0	2,817
CUSTER	2,227	163	7.3	2,064	2,234	101	4.5	2,133
ELMORE	11,445	700	6.1	10,745	10,946	396	3.6	10,550
FRANKLIN	6,806	220	3.2	6,586	6,787	99	1.5	6,687
FREMONT (9)	6,787	339	5.0	6,449	6,793	168	2.5	6,625
GEM (1)	7,523	595	7.9	6,927	7,465	235	3.2	7,230
GOODING	8,839	304	3.4	8,535	8,490	154	1.8	8,336
IDAHO	7,156	715	10.0	6,441	6,819	369	5.4	6,451
JEFFERSON (6)	10,973	420	3.8	10,553	11,387	202	1.8	11,184
JEROME (10)	10,106	451	4.5	9,655	10,036	215	2.1	9,821
KOOTENAI (3)	72,075	4,856	6.7	67,219	70,534	2,118	3.0	68,416
LATAH	17,336	821	4.7	16,516	16,508	380	2.3	16,128
LEMHI	3,904	344	8.8	3,559	3,782	179	4.7	3,603
LEWIS (4)	1,694	67	4.0	1,627	1,665	35	2.1	1,629
LINCOLN	2,455	208	8.5	2,247	2,379	77	3.2	2,303
MADISON (9)	16,664	498	3.0	16,166	16,843	233	1.4	16,610
MINIDOKA (2)	9,287	436	4.7	8,850	9,132	289	3.2	8,843
NEZ PERCE (7)	18,615	902	4.8	17,714	19,035	499	2.6	18,536
ONEIDA	2,518	88	3.5	2,430	2,375	38	1.6	2,337
OWYHEE (1)	4,664	112	2.4	4,552	4,824	73	1.5	4,751
PAYETTE	10,563	752	7.1	9,811	10,421	395	3.8	10,026
POWER (8)	3,894	282	7.2	3,612	3,923	150	3.8	3,773
SHOSHONE	6,458	787	12.2	5,671	5,555	275	5.0	5,279
TETON	4,545	159	3.5	4,386	4,170	82	2.0	4,089
TWIN FALLS (10)	38,038	1,761	4.6	36,277	37,745	844	2.2	36,902
VALLEY	5,360	608	11.3	4,753	5,136	225	4.4	4,911
WASHINGTON	5,073	354	7.0	4,720	4,884	179	3.7	4,705
ASOTIN WA (7)	10,603	854	8.1	9,749	10,549	539	5.1	10,010

* In thousands

State of Idaho Data

November 2008 Labor Force (preliminary) compared to November 2007 data
(continued from previous page).

Seasonally Adjusted Data LABOR MARKET AREAS	Nov 2008				Nov 2007			
	Civilian Labor Force	# Unem- ployed	% Unem- ployed	Total Employ- ment	Civilian Labor Force	# Unem- ployed	% Unem- ployed	Total Employ- ment
BOISE CITY-NAMPA MSA (1)	297,879	17,602	5.9	280,276	300,520	7,989	2.7	292,531
BURLEY MicSA (2)	19,232	856	4.5	18,376	18,913	552	2.9	18,362
COEUR D'ALENE MSA (3)	72,075	4,856	6.7	67,219	70,534	2,118	3.0	68,416
GRANGEVILLE SLMA (4)	8,850	783	8.8	8,068	8,484	404	4.8	8,080
HAILEY SLMA (5)	14,632	718	4.9	13,914	14,316	326	2.3	13,991
IDAHO FALLS MSA (6)	60,560	2,142	3.5	58,419	62,949	1,038	1.6	61,911
LEWISTON MSA (7)	29,218	1,756	6.0	27,462	29,584	1,038	3.5	28,546
POCATELLO MSA (8)	43,982	2,082	4.7	41,899	44,942	1,171	2.6	43,771
REXBURG MicSA (9)	23,451	837	3.6	22,615	23,636	401	1.7	23,235
TWIN FALLS MicSA (10)	48,144	2,212	4.6	45,932	47,782	1,059	2.2	46,723
CITIES								
BOISE	112,034	6,333	5.7	105,701	113,447	2,886	2.5	110,561
CALDWELL	17,726	1,548	8.7	16,179	17,585	661	3.8	16,923
COEUR D' ALENE	23,049	1,473	6.4	21,576	22,639	631	2.8	22,009
IDAHO FALLS	27,666	1,141	4.1	26,525	28,717	546	1.9	28,171
LEWISTON	15,436	753	4.9	14,684	15,816	387	2.4	15,429
MERIDIAN	31,718	1,896	6.0	29,822	32,072	878	2.7	31,194
NAMPA	37,280	2,892	7.8	34,388	37,231	1,262	3.4	35,969
POCATELLO	28,152	1,242	4.4	26,910	28,879	705	2.4	28,173
TWIN FALLS	21,415	1,038	4.8	20,376	21,227	454	2.1	20,772
United States*	154,616	10,331	6.7	144,285	153,828	7,181	4.7	146,647

* In thousands

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

State of Idaho Data — Nonfarm Payroll Jobs

% change from

BY PLACE OF WORK	Dec 2008*	Nov 2008	Dec 2007	Last Month	Last Year
Nonfarm Payroll Jobs**	629,600	642,800	659,000	-2.1	-4.5
GOODS-PRODUCING INDUSTRIES	104,300	110,000	119,400	-5.2	-12.6
<i>Natural Resources & Mining</i>	3,900	4,300	4,600	-9.3	-15.2
Logging	1,800	1,900	1,800	-5.3	0.0
Mining	2,100	2,400	2,800	-12.5	-25.0
Metal Ore Mining	1,200	1,200	1,100	0.0	9.1
<i>Construction</i>	42,700	46,700	49,500	-8.6	-13.7
<i>Manufacturing</i>	57,700	59,000	65,300	-2.2	-11.6
Durable Goods	36,400	37,200	40,900	-2.2	-11.0
Wood Product Manufacturing	6,000	6,400	7,500	-6.3	-20.0
Sawmills & Wood Preservation	1,800	1,900	2,400	-5.3	-25.0
Veneer & Engineered Products	1,100	1,200	1,400	-8.3	-21.4
Other Wood Product Manufacturing	3,100	3,300	3,700	-6.1	-16.2
Fabricated Metal Product Manufacturing	4,700	4,600	4,700	2.2	0.0
Machinery Manufacturing	2,800	2,800	3,100	0.0	-9.7
Computer & Electronic Product Manufacturing	12,000	12,600	15,000	-4.8	-20.0
Transportation Equipment Manufacturing	3,000	3,100	3,500	-3.2	-14.3
Other Durable Goods	7,900	7,700	7,100	2.6	11.3
Nondurable Goods	21,300	21,800	24,400	-2.3	-12.7
Food Manufacturing	14,200	14,300	15,600	-0.7	-9.0
Fruits & Vegetable Preserving & Specialty	7,200	7,200	7,800	0.0	-7.7
Paper Manufacturing	1,600	1,600	1,700	0.0	-5.9
Printing & Related Support Activities	1,800	1,800	1,900	0.0	-5.3
Chemical Manufacturing	2,400	2,400	2,300	0.0	4.3
Other Nondurable Goods	1,300	1,700	2,900	-23.5	-55.2
SERVICE-PROVIDING INDUSTRIES	525,300	532,800	539,600	-1.4	-2.7
<i>Trade, Transportation, & Utilities</i>	128,700	129,500	136,500	-0.6	-5.7
Trade	108,400	109,300	114,900	-0.8	-5.7
Wholesale Trade	26,600	26,900	28,300	-1.1	-6.0
Wholesalers, Durable Goods	12,800	12,700	13,100	0.8	-2.3
Wholesalers, Nondurable Goods	11,300	11,400	12,100	-0.9	-6.6
Retail Trade	81,800	82,400	86,600	-0.7	-5.5
Motor Vehicle and Parts Dealers	12,000	12,300	12,500	-2.4	-4.0
Building Material and Garden Equipment	8,500	8,900	9,000	-4.5	-5.6
Food & Beverage Stores	12,600	12,600	12,900	0.0	-2.3
General Merchandise Stores	18,100	18,300	18,800	-1.1	-3.7
Transportation, Warehousing, & Utilities	20,300	20,200	21,600	0.5	-6.0
Utilities	2,000	2,000	2,100	0.0	-4.8
Transportation & Warehousing	18,300	18,200	19,500	0.5	-6.2
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,800	9,000	9,600	-2.2	-8.3
<i>Information</i>	11,400	11,400	11,100	0.0	2.7
Telecommunications	4,100	4,200	4,000	-2.4	2.5
<i>Financial Activities</i>	30,800	31,800	32,400	-3.1	-4.9
Finance & Insurance	22,800	23,100	23,600	-1.3	-3.4
Real Estate & Rental & Leasing	8,000	8,700	8,800	-8.0	-9.1
<i>Professional & Business Services</i>	76,000	80,200	82,800	-5.2	-8.2
Professional, Scientific, & Technical	32,100	32,600	33,700	-1.5	-4.7
Scientific Research & Development	7,700	7,600	5,800	1.3	32.8
Management of Companies & Enterprises	7,000	7,000	7,800	0.0	-10.3
Administrative & Support & Waste Management	36,900	40,600	41,300	-9.1	-10.7
Administrative & Support Services	36,200	39,600	39,100	-8.6	-7.4
<i>Educational & Health Services</i>	76,600	76,600	76,500	0.0	0.1
Educational Services	8,100	8,200	8,900	-1.2	-9.0
Health Care & Social Assistance	68,500	68,400	67,600	0.1	1.3
Hospitals	16,800	16,800	16,900	0.0	-0.6
<i>Leisure & Hospitality</i>	58,600	59,600	62,100	-1.7	-5.6
Arts, Entertainment, & Recreation	7,900	7,800	7,900	1.3	0.0
Accommodation & Food Services	50,700	51,800	54,200	-2.1	-6.5
Accommodation	8,900	8,900	8,800	0.0	1.1
Food Services & Drinking Places	41,800	42,900	45,400	-2.6	-7.9
<i>Other Services</i>	18,800	18,700	19,500	0.5	-3.6
<i>Total Government</i>	124,400	125,000	118,700	-0.5	4.8
Federal Government	12,600	12,800	12,000	-1.6	5.0
State & Local Government	111,800	112,200	106,700	-0.4	4.8
State Government	30,900	31,100	30,200	-0.6	2.3
State Government Education	15,200	15,500	14,900	-1.9	2.0
State Government Administration	15,700	15,600	15,300	0.6	2.6
Local Government	80,900	81,100	76,500	-0.2	5.8
Local Government Education	42,300	42,400	41,000	-0.2	3.2
Local Government Administration	35,200	35,300	32,200	-0.3	9.3
Local Government Tribes	3,400	3,400	3,300	0.0	3.0

*Preliminary estimate ** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State of Idaho Data — State Economic Indicators

	Nov 2008	Oct 2008	Nov 2007	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	760,700	759,500	757,100	0.2	0.5
Unemployment	43,300	40,200	20,200	7.7	114.4
Percent of Labor Force Unemployed	5.7	5.3	2.7		
Total Employment	717,400	719,300	736,900	-0.3	-2.6
<i>Unadjusted</i>					
Civilian Labor Force	759,100	761,500	757,300	-0.3	0.2
Unemployment	42,000	35,300	19,300	19.0	117.6
Percent of Labor Force Unemployed	5.5	4.6	2.6		
Total Employment	717,100	726,200	738,000	-1.3	-2.8
U. S. UNEMPLOYMENT RATE⁽²⁾					
	6.8	6.6	4.7		
U.S. CONSUMER PRICE INDEX⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	207.3	212.2	205.9	-2.3	0.7
All Urban Consumer (CPI-U)	212.4	216.6	210.2	-1.9	1.1
AGRICULTURE					
Agriculture Employment	41,650	51,020	41,250	-18.4	1.0
Operators	9,740	9,740	9,740	0.0	0.0
Unpaid Family	360	360	360	0.0	0.0
Hired Workers	31,550	40,920	31,150	-22.9	1.3
UNEMPLOYMENT INSURANCE					
<i>Claims Activities</i>					
Initial Claims ⁽³⁾	20,657	14,860	13,383	39.0	54.4
Weeks Claimed ⁽⁴⁾	90,588	62,429	48,944	45.1	85.1
<i>Benefit Payment Activities⁽⁵⁾</i>					
Weeks Compensated	71,022	49,812	31,573	42.6	124.9
Total Benefit \$ Paid	18,524,208	12,860,064	9,544,613	44.0	94.1
Average Weekly Benefit Amount	\$260.82	\$258.17	\$302.30	1.0	-13.7
Covered Employers	51,276	51,164	51,398	0.2	-0.2
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$202,022,281	\$193,143,647	\$124,556,302	4.6	62.2

(1) Preliminary estimate

(2) Source: U.S. Bureau of Labor Statistics

(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 2008*	Oct 2007	Nov 2007	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	72,070	70,150	70,530	2.7	2.2
Unemployed	4,860	4,650	2,120	4.5	129.2
% of Labor Force Unemployed	6.7	6.6	3.0		
Total Employment	67,210	65,500	68,410	2.6	-1.8
<i>Unadjusted</i>					
Civilian Labor Force	72,150	70,990	71,010	1.6	1.6
Unemployed	4,380	3,680	1,890	19.0	131.7
% of Labor Force Unemployed	6.1	5.2	2.7		
Total Employment	67,770	67,310	69,120	0.7	-2.0
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	57,710	58,490	57,450	-1.3	0.5
<i>Goods-Producing Industries</i>					
Natural Resources & Mining	450	460	510	-2.2	-11.8
Construction	5,580	5,740	5,920	-2.8	-5.7
Manufacturing	4,650	4,620	4,900	0.6	-5.1
<i>Wood Product Manufacturing</i>	770	770	930	0.0	-17.2
<i>Other Manufacturing</i>	3,880	3,850	3,970	0.8	-2.3
<i>Service-Providing Industries</i>					
Trade, Transportation, & Utilities	11,220	11,180	11,530	0.4	-2.7
<i>Wholesale Trade</i>	1,610	1,650	1,510	-2.4	6.6
<i>Retail Trade</i>	8,590	8,480	8,840	1.3	-2.8
<i>Transportation, Warehousing & Utilities</i>	1,020	1,050	1,180	-2.9	-13.6
Information	960	960	960	0.0	0.0
Financial Activities	3,120	3,160	3,120	-1.3	0.0
Professional & Business Services	6,060	6,080	6,050	-0.3	0.2
Educational & Health Services	6,040	6,020	5,810	0.3	4.0
Leisure & Hospitality	7,780	8,300	7,300	-6.3	6.6
Other Services	1,450	1,520	1,440	-4.6	0.7
Government Education	3,720	3,720	3,640	0.0	2.2
Government Administration	5,740	5,760	5,380	-0.3	6.7
Government Tribes	940	970	890	-3.1	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.

North Central Idaho Data

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

	Nov 2008*	Oct 2008	Nov 2007	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	29,220	28,810	29,580	1.4	-1.2
Unemployment	1,760	1,630	1,040	8.0	69.2
% of Labor Force Unemployed	6.0	5.7	3.5		
Total Employment	27,460	27,180	28,540	1.0	-3.8
<i>Unadjusted</i>					
Civilian Labor Force	28,940	28,560	29,450	1.3	-1.7
Unemployment	1,570	1,480	910	6.1	72.5
% of Labor Force Unemployed	5.4	5.2	3.1		
Total Employment	27,370	27,080	28,540	1.1	-4.1
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	27,450	28,140	27,930	-2.5	-1.7
<i>Goods-Producing Industries</i>	4,540	4,830	4,880	-6.0	-7.0
Natural Resources & Mining	190	190	230	0.0	-17.4
Construction	1,320	1,460	1,290	-9.6	2.3
Manufacturing	3,030	3,180	3,360	-4.7	-9.8
<i>Wood Product Manufacturing</i>	350	530	570	-34.0	-38.6
<i>Paper Manufacturing</i>	1,120	1,110	1,130	0.9	-0.9
<i>Other Manufacturing</i>	1,560	1,540	1,660	1.3	-6.0
<i>Service-Providing Industries</i>	22,910	23,310	23,050	-1.7	-0.6
Trade, Transportation & Utilities	5,510	5,690	5,680	-3.2	-3.0
<i>Wholesale Trade</i>	510	580	660	-12.1	-22.7
<i>Retail Trade</i>	3,830	3,900	3,820	-1.8	0.3
<i>Utilities</i>	90	90	90	0.0	0.0
<i>Transportation & Warehousing</i>	1,080	1,120	1,110	-3.6	-2.7
Information	360	360	410	0.0	-12.2
Financial Activities	2,080	2,060	2,140	1.0	-2.8
Professional & Business Services	1,880	1,880	1,580	0.0	19.0
Education & Health Services	4,180	4,280	4,350	-2.3	-3.9
Leisure & Hospitality	2,520	2,660	2,640	-5.3	-4.5
Other Services	1,050	1,050	1,080	0.0	-2.8
Government Education	2,620	2,620	2,490	0.0	5.2
Government Administration	1,970	1,970	1,990	0.0	-1.0
Government Tribes	740	740	690	0.0	7.2

*Preliminary estimate

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

Southwestern Idaho Data

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

	Nov 2008*	Oct 2007	Nov 2007	% Change	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	297,900	292,600	300,500	1.8	-0.9
Unemployment	17,600	16,900	8,000	4.1	120.0
% of Labor Force Unemployed	5.9	5.8	2.7		
Total Employment	280,300	275,700	292,500	1.7	-4.2
<i>Unadjusted</i>					
Civilian Labor Force	295,000	291,400	297,500	1.2	-0.8
Unemployment	18,400	15,500	8,200	18.7	124.4
% of Labor Force Unemployed	6.2	5.3	2.8		
Total Employment	276,600	275,900	289,300	0.3	-4.4
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	270,600	273,300	276,100	-1.0	-2.0
GOODS-PRODUCING INDUSTRIES					
<i>Natural Resources & Construction</i>					
Construction	19,900	20,700	21,900	-3.9	-9.1
<i>Manufacturing</i>					
Durable Goods	19,600	20,300	21,500	-3.4	-8.8
Wood Product Manufacturing	26,800	28,500	30,100	-6.0	-11.0
Fabricated Metal Products Mfg.	20,200	21,800	23,200	-7.3	-12.9
Machinery Manufacturing	2,200	2,200	2,400	0.0	-8.3
Computer & Electronic Manufacturing	1,600	1,600	1,500	0.0	6.7
Transportation Equipment Mfg.	1,100	1,100	1,200	0.0	-8.3
Other Durable Goods	10,900	12,100	13,400	-9.9	-18.7
Nondurable Goods	2,100	2,100	2,300	0.0	-8.7
Food Manufacturing	2,300	2,700	2,400	-14.8	-4.2
Printing & Related Support Activities	6,600	6,700	6,900	-1.5	-4.3
Other Nondurable Goods	4,800	4,900	4,800	-2.0	0.0
Textile, Apparel, & Leather Goods Mfg.	700	700	800	0.0	-12.5
Chemical & Allied Product Mfg.	1,100	1,100	1,300	0.0	-15.4
SERVICE-PROVIDING INDUSTRIES					
<i>Trade, Transportation, & Utilities</i>					
Trade	223,900	224,100	224,100	-0.1	-0.1
Wholesale Trade	53,900	53,600	55,900	0.6	-3.6
Wholesalers, Durable Goods	45,500	45,100	48,000	0.9	-5.2
Wholesalers, Nondurable Goods	12,800	12,900	12,600	-0.8	1.6
Retail Trade	7,300	7,300	7,200	0.0	1.4
Food & Beverage Stores	3,900	3,900	3,900	0.0	0.0
General Merchandise Stores	32,700	32,200	35,400	1.6	-7.6
All Other Retail Trade	4,600	4,600	4,700	0.0	-2.1
Transportation, Warehousing, & Utilities	7,300	7,000	7,800	4.3	-6.4
Utilities	20,800	20,600	22,900	1.0	-9.2
Transportation & Warehousing	8,400	8,500	7,900	-1.2	6.3
Information	700	700	700	0.0	0.0
Finance & Insurance	7,700	7,800	7,200	-1.3	6.9
Real Estate & Rental & Leasing	5,100	5,000	4,800	2.0	6.3
Professional & Business Services	2,200	2,200	1,400	0.0	57.1
Administrative & Support & Waste Mgmt.	13,800	13,800	14,000	0.0	-1.4
Educational & Health Services	10,100	10,100	9,900	0.0	2.0
Leisure & Hospitality	3,700	3,700	4,100	0.0	-9.8
Other Services	38,700	39,700	40,600	-2.5	-4.7
Professional, Scientific, & Technical	13,700	13,700	12,600	0.0	8.7
Management of Companies & Ent.	5,500	5,600	5,800	-1.8	-5.2
Administrative & Support & Waste Mgmt.	19,500	20,400	22,200	-4.4	-12.2
Educational & Health Services	35,000	35,000	34,400	0.0	1.7
Leisure & Hospitality	3,300	3,200	2,800	3.1	17.9
Other Services	31,700	31,800	31,600	-0.3	0.3
Hospitals	10,200	10,300	10,400	-1.0	-1.9
Arts, Entertainment, & Recreation	23,000	22,900	24,800	0.4	-7.3
Accommodation & Food Services	1,800	1,800	3,000	0.0	-40.0
Accommodation	21,200	21,100	21,800	0.5	-2.8
Food Services & Drinking Places	2,300	2,400	2,400	-4.2	-4.2
Other Services	18,900	18,700	19,400	1.1	-2.6
Total Government	8,300	8,300	7,000	0.0	18.6
Federal Government	46,100	45,800	42,600	0.7	8.2
State & Local Government	6,400	6,400	5,900	0.0	8.5
State Government	39,700	39,400	36,700	0.8	8.2
Local Government	14,400	14,400	13,900	0.0	3.6
State Government Education	4,900	5,000	5,000	-2.0	-2.0
State Government Administration	9,500	9,400	8,900	1.1	6.7
Local Government	25,300	25,000	22,800	1.2	11.0
Local Government Education	15,800	16,500	14,100	-4.2	12.1
Local Government Administration	9,500	8,500	8,700	11.8	9.2

* Preliminary estimate

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

South Central Idaho Data

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

	Nov 2008*	Oct 2007	Nov 2007	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	48,140	47,770	47,780	0.8	0.8
Unemployment	2,210	1,990	1,060	11.1	108.5
% of Labor Force Unemployed	4.6	4.2	2.2		
Total Employment	45,930	45,780	46,720	0.3	-1.7
<i>Unadjusted</i>					
Civilian Labor Force	48,930	48,600	48,720	0.7	0.4
Unemployment	2,130	1,810	1,000	17.7	113.0
% of Labor Force Unemployed	4.4	3.7	2.1		
Total Employment	46,800	46,790	47,720	0.0	-1.9
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	40,040	40,030	40,340	0.0	-0.7
<i>Goods-Providing Industries</i>					
Natural Resources & Mining	60	60	50	0.0	20.0
Construction	2,180	2,180	2,360	0.0	-7.6
Manufacturing	4,510	4,650	4,690	-3.0	-3.8
<i>Food Manufacturing</i>	2,610	2,800	2,600	-6.8	0.4
<i>Other Manufacturing</i>	1,900	1,850	2,090	2.7	-9.1
<i>Service-Providing Industries</i>					
Trade, Transportation & Utilities	10,170	9,990	10,500	1.8	-3.1
<i>Wholesale Trade</i>	1,960	1,930	1,970	1.6	-0.5
<i>Retail Trade</i>	5,800	5,700	6,040	1.8	-4.0
<i>Utilities</i>	160	160	160	0.0	0.0
<i>Transportation & Warehousing</i>	2,250	2,200	2,330	2.3	-3.4
Information	620	610	680	1.6	-8.8
Financial Activities	1,640	1,720	1,750	-4.7	-6.3
Professional & Business Services	4,850	5,110	4,980	-5.1	-2.6
Educational & Health Services	5,350	5,390	5,290	-0.7	1.1
Leisure & Hospitality	3,170	3,100	2,990	2.3	6.0
Other Services	1,520	1,540	1,400	-1.3	8.6
Government Education	3,800	3,450	3,340	10.1	13.8
Government Administration	2,170	2,230	2,310	-2.7	-6.1

*Preliminary estimate

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

Southeastern Idaho Data

Pocatello MSA Labor Force & Employment Bannock and Power counties

	Nov 2008*	Oct 2008	Nov 2007	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	43,980	45,660	44,940	-3.7	-2.1
Unemployment	2,080	1,980	1,170	5.1	77.8
% of Labor Force Unemployed	4.7	4.3	2.6		
Total Employment	41,900	43,680	43,770	-4.1	-4.3
<i>Unadjusted</i>					
Civilian Labor Force	43,350	44,180	44,400	-1.9	-2.4
Unemployment	2,010	1,880	1,120	6.9	79.5
% of Labor Force Unemployed	4.6	4.3	2.5		
Total Employment	41,340	42,300	43,280	-2.3	-4.5
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	38,020	38,700	40,220	-1.8	-5.5
<i>Goods-Producing Industries</i>					
Natural Resources & Mining	20	20	30	0.0	-33.3
Construction	1,640	1,880	2,100	-12.8	-21.9
Manufacturing	3,520	3,590	3,610	-1.9	-2.5
<i>Food Manufacturing</i>	1,430	1,430	1,360	0.0	5.1
<i>Fabricated Metal Product Manufacturing</i>	230	230	190	0.0	21.1
<i>Machinery Manufacturing</i>	100	110	80	-9.1	25.0
<i>Other Manufacturing</i>	1,760	1,820	1,980	-3.3	-11.1
<i>Service-Providing Industries</i>					
Trade, Transportation & Utilities	7,040	7,190	7,760	-2.1	-9.3
<i>Wholesale Trade</i>	1,420	1,420	1,370	0.0	3.6
<i>Retail Trade</i>	4,480	4,550	4,850	-1.5	-7.6
<i>Utilities</i>	50	50	40	0.0	25.0
<i>Transportation & Warehousing</i>	1,130	1,180	1,500	-4.2	-24.7
Information	680	700	760	-2.9	-10.5
Financial Activities	2,130	2,070	2,110	2.9	0.9
Professional & Business Services	4,630	4,720	5,330	-1.9	-13.1
Educational & Health Services	3,370	3,470	3,380	-2.9	-0.3
Leisure & Hospitality	3,780	3,870	3,680	-2.3	2.7
Other Services	1,000	1,050	1,220	-4.8	-18.0
Government Education	5,730	5,750	5,950	-0.3	-3.7
Government Administration	4,480	4,390	4,290	2.1	4.4

*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.

East Central Idaho Data

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

	Nov 2008*	Oct 2008	Nov 2007	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	60,560	63,650	62,950	-4.9	-3.8
Unemployment	2,140	2,070	1,040	3.4	105.8
% of Labor Force Unemployed	3.5%	3.3%	1.6%		
Total Employment	58,420	61,570	61,910	-5.1	-5.6
<i>Unadjusted</i>					
Civilian Labor Force	60,040	63,830	62,430	-5.9	-3.8
Unemployment	2,290	1,990	1,090	15.1	110.1
% of Labor Force Unemployed	3.8%	3.1%	1.8%		
Total Employment	57,750	61,830	61,340	-6.6	-5.9
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	48,800	50,130	52,370	-2.7	-6.8
<i>Goods-Producing Industries</i>	7,310	7,830	8,460	-6.6	-13.6
Construction & Natural Resources	4,140	4,530	5,040	-8.6	-17.9
Manufacturing	3,170	3,300	3,420	-3.9	-7.3
<i>Food Manufacturing</i>	920	910	880	1.1	4.5
<i>Fabricated Metal Product Manufacturing</i>	290	300	260	-3.3	11.5
<i>Machinery Manufacturing</i>	150	150	170	0.0	-11.8
<i>Other Manufacturing</i>	1,810	1,940	2,110	-6.7	-14.2
<i>Service-Providing Industries</i>	41,490	42,300	43,910	-1.9	-5.5
Trade, Transportation & Utilities	12,700	12,540	13,610	1.3	-6.7
<i>Wholesale Trade</i>	3,240	3,200	3,710	1.3	-12.7
<i>Retail Trade</i>	7,930	7,740	7,980	2.5	-0.6
<i>Utilities</i>	50	50	50	0.0	0.0
<i>Transportation</i>	1,480	1,550	1,870	-4.5	-20.9
Information	1,440	1,450	1,280	-0.7	12.5
Financial Activities	2,140	2,200	2,190	-2.7	-2.3
Professional & Business Services	4,980	5,310	5,300	-6.2	-6.0
Educational & Health Services	6,500	6,770	7,330	-4.0	-11.3
Leisure & Hospitality	4,280	4,380	4,960	-2.3	-13.7
Other Services	1,910	2,080	1,950	-8.2	-2.1
Government Education	3,730	3,700	3,740	0.8	-0.3
Government Administration	3,810	3,870	3,550	-1.6	7.3

*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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