# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>TABLE OF CONTENTS</td>
<td>2</td>
</tr>
<tr>
<td>CONTRIBUTORS</td>
<td>3</td>
</tr>
<tr>
<td>IDAHO TECHNOLOGY COUNCIL LETTER</td>
<td>4</td>
</tr>
<tr>
<td>INNOVATIVE GROWTH</td>
<td>6-7</td>
</tr>
<tr>
<td>PROFILE OF IDAHO</td>
<td>8-13</td>
</tr>
<tr>
<td>IDAHO’S SIX REGIONS</td>
<td>14-29</td>
</tr>
<tr>
<td>KEY DRIVERS</td>
<td>30-33</td>
</tr>
<tr>
<td>REGIONAL SNAPSHOT</td>
<td>34-68</td>
</tr>
<tr>
<td>ECONOMY</td>
<td>34-45</td>
</tr>
<tr>
<td>GOVERNANCE</td>
<td>46-49</td>
</tr>
<tr>
<td>PEOPLE</td>
<td>50-53</td>
</tr>
<tr>
<td>PLACE</td>
<td>54-59</td>
</tr>
<tr>
<td>SOCIETY</td>
<td>60-68</td>
</tr>
<tr>
<td>ACKNOWLEDGEMENTS</td>
<td>69</td>
</tr>
<tr>
<td>APPENDIX DATA</td>
<td>70-71</td>
</tr>
</tbody>
</table>
CONTRIBUTORS

CONTRIBUTING TEAM
Jay Larsen, Idaho Technology Council
Jason Haase, Idaho Technology Council
Craig Shaul, Idaho Department of Labor
Sam Wolkenhauer, Idaho Department of Labor
Kathryn Tacke, Idaho Department of Labor
Jan Roese, Idaho Department of Labor
Dr. Esther Eke, Idaho Department of Labor
Brian Husler, Idaho Department of Labor
Hope Morrow, Idaho Department of Labor
Carmen Achabal, Idaho Department of Commerce
Greg Hill, Idaho Policy Institute
Lantz McGinnis-Brown, Idaho Policy Institute
Mike Kerby, c308 Marketing
Alec Aja, c308 Marketing
Stephanie Cook, Idaho National Laboratory
Haydn Bryan, Idaho National Laboratory/Boise State
Suzie Dustin, HP
Jodi Olsen, HP

ADVISORS
Heidi Jarvis-Grimes, Idaho Technology Council
David Moore, Idaho Technology Council
Christina Slaughter, Idaho Technology Council
Jana Jones, University of Idaho
Dana Kirkham, Regional Economic Development Eastern Idaho
Steve Robertson, Ph.D., Louie Robertson Consulting
Russell Hancock, Joint Venture Silicon Valley
Andrew Beck, EverCommerce
Wendi Seacrest, Idaho Workforce Development Council
Amy Lientz, Idaho National Laboratory
Cheongsin Kim, Idaho Policy Institute
Angela Hemingway, Idaho STEM Action Center
Jennifer Swindell, Idaho Ed News
Randy Schrader, Idaho Ed News
Roger Quarles, J.K. and Kathryn Albertson Family Foundation
John Regetz, Bannock Development Corporation
Ethan Mansfield, Boise Valley Economic Partnership

THANK YOU TO ALL THE PEOPLE THAT CONTRIBUTED TO THE GREAT WORK THAT WENT IN TO BUILDING THE 2018 IDAHO KNOWLEDGE REPORT.
DEAR FRIENDS

Never in the history of Idaho is it as important to grow a knowledge based economy as today. We don’t know some of the technologies we will be utilizing five to ten years from now because they haven’t been invented or developed. The rate of innovation will change exponentially over the next decade and we must produce the next generation of products and services.

Idaho is at a crossroads. Kauffman Foundation and Milken Institute reports usually rank Idaho in the middle of the pack regarding technology and innovation. We either make significant strides towards growing technology and innovation in our state or we slide to mediocrity. Idaho has a great history with growing an innovative, knowledge based economy through advancing knowledge, information and high skill levels.

Top areas of focus for growing a knowledge based economy are:

• Improving how students are prepared to operate in a knowledge based economy. We must develop alternative education channels
• Capital networks are growing in Idaho and we must develop a stronger capital network
• Commercialization of ideas and getting products and services to market
• Stresses on infrastructure will continue as Idaho grows. Infrastructure requirements and planning with respect to transportation and housing will play a major role in future success
• Quality of life—the underpinning to growing a knowledge economy with community benefits: better health, more innovative, more educated.

The opportunities are here. The Idaho Knowledge Report 2018 provides the metrics on building a stronger, more innovative economy. This report allows us to measure success and identify prescriptive actions towards industries. We recognized the unique nature of each region in our state. To create change, the leadership to drive initiatives must be done by industry and local leaders.

Let’s work collectively to build a strong, more innovative Idaho.

Best,

Jay Larsen
President & Chief Executive Officer
Idaho Technology Council
BUILDING A KNOWLEDGE-BASED ECONOMY IS VITAL TO IDAHO’S LONG-TERM SUCCESS. INNOVATION AND TECHNOLOGY WILL INCREASINGLY DRIVE PRODUCTIVITY AND GROWTH IN OUR GREAT STATE.

C.L. “Butch” Otter, Governor
August, 2018
INNOVATIVE GROWTH

IDAHO GROSS DOMESTIC PRODUCT
(IN CURRENT DOLLARS)

Year

Dollars

$80,000

$70,000

$60,000

$50,000

$40,000

$30,000

$20,000

$10,000

0


All industry total

Data Source: BEA.Gov - interactive data application

IDAHO TOTAL NONFARM JOBS
(SEASONALLY ADJUSTED)

Year


Dollars

800,000

700,000

600,000

500,000

400,000

300,000

200,000

100,000

0

1939 1949 1959

1939 ALBERTSON’S FOUNDED

1949 IDAHO NATIONAL LAB FOUNDED

1957 BOISE CASCADE FOUNDED

1929 SIMPLOT COMPANY FOUNDED

1932 MORRISON KNUDSEN FOUNDED

1939-1970
NATURAL RESOURCE ECONOMY

1971-1978
BEST OF BOTH WORLDS: NATURAL RESOURCES AND MANUFACTURING

1978-1987
ERA OF TRANSITION FROM NATURAL RESOURCE TO TECHNOLOGY

1987-2001
IDAHO’S GOLDEN DECADE

2001-2010
HOUSING BUBBLE AND RECESSION

2010-NOW
TECH EXPANSION PERIOD

1932
MORRISON KNUDSEN FOUNDED

1939
ALBERTSON’S FOUNDED

1949
IDAHO NATIONAL LAB FOUNDED

1957
BOISE CASCADE FOUNDED

1973
HP COMES TO IDAHO WITH EMERGING PRINTING DIVISION

1977
HP BRINGS SECOND DIVISION (MEMORY AND STORAGE)

1978
MICRON FOUNDED

1990-1992
IDAHO AVOIDS NATIONAL RECESSION AS FAR AS JOB GROWTH AND UNEMPLOYMENT. LEADS TO ACCELERATION OF TECHNOLOGY IN IDAHO. MICRON EXPERIENCES STRONG GROWTH.

2000-2018
SIGNIFICANT TECH GROWTH WITH INDUSTRY PLATFORMS IN INTERNET OF THINGS, FINTECH, CYBERSECURITY, PROTECTION, ARTIFICIAL INTELLIGENCE, VIRTUAL REALITY, AUGMENTED REALITY, ADVANCED MANUFACTURING. SIGNIFICANT INVESTMENT IN CAPITAL HAS TAKEN PLACE.

1997
IDAHO REGARDED AS TECH HUB BY THE MILKEN INSTITUTE
TOTAL NONFARM GROWTH FROM 1990: IDAHO AND ITS SURROUNDING STATES

- Idaho
- Montana
- Nevada
- Oregon
- Utah
- Washington
- Wyoming
- US

1939-1970
- NATURAL RESOURCE ECONOMY
- SIMPLOT COMPANY FOUNDED

1971-1978
- BEST OF BOTH WORLDS: STRONG NATURAL RESOURCES AND GROWTH IN MANUFACTURING

1978-1987
- ERA OF TRANSITION FROM NATURAL RESOURCE TO TECHNOLOGY

1987-2001
- IDAHO'S GOLDEN DECADE

2001-2010
- HOUSING BUBBLE AND GREAT RECESSION

2010-NOW
- TECH EXPANSION PERIOD

1932
- MORRISON KNUDSEN FOUNDED

1939
- ALBERTSON'S FOUNDED

1949
- IDAHO NATIONAL LAB FOUNDED

1957
- BOISE CASCADE FOUNDED

1973
- HP COMES TO IDAHO WITH EMERGING PRINTING DIVISION

1978
- MICRON FOUNDED

1978-1987
- ERA OF TRANSITION FROM NATURAL RESOURCE TO TECHNOLOGY

1987-2001
- IDAHO'S GOLDEN DECADE

2001-2010
- HOUSING BUBBLE AND GREAT RECESSION

2010-NOW
- TECH EXPANSION PERIOD

2000-2018
- SIGNIFICANT TECH GROWTH WITH INDUSTRY PLATFORMS IN INTERNET OF THINGS, FINTECH, CYBERSECURITY, PROTECTION, ARTIFICIAL INTELLIGENCE, VIRTUAL REALITY, AUGMENTED REALITY, ADVANCED MANUFACTURING. SIGNIFICANT INVESTMENT IN CAPITAL HAS TAKEN PLACE.

1977-1987
- ERA OF TRANSITION FROM NATURAL RESOURCE TO TECHNOLOGY

1978
- MICRON FOUNDED

1978
- MICRON FOUND

1984
- EXTENDED SYSTEMS, WITH ROOTS TO HP IS FOUNDED

1977
- HP BRINGS SECOND DIVISION (MEMORY AND STORAGE)
PROFILE OF IDAHO 2018
AN ECONOMIC OVERVIEW

A rich history of innovation has been a part of Idaho dating back to when Abraham Lincoln created the Idaho Territory which included much of the land that became Idaho, Montana and Wyoming. In 1868, Idaho was carved from the territory, and in 1890 admitted as the 43rd state. Just six years later, Idaho became the fourth state that gave women the right to vote.

Idaho is currently experiencing rapid urban growth and development. This growth has been accompanied by an influx and expansion of industry, which in turn is leading to an increasingly diversified workforce, and a rising demand for STEM skills. Idaho has one of the fastest growing technology sectors in the United States and has the fastest growing software industry as a percent of the states GDP. As the economy grows, wages, cost of living, quality of life and the conditions of the states infrastructure are becoming increasingly critical.

Idaho’s population is growing rapidly from births and migration from other states, especially in urban areas. According to the U.S. Census Bureau, Idaho is one of the fastest growing states in the U.S. in 2017, with a 2.2% population increase (36,917 new people). Idaho’s cities received the majority of this growth.

Idaho ranked 4th in the U.S. for employment growth in 2017 (Governing, BLS). Idaho’s technology industry growth ranked 5th in the nation, growing by 2.8% in 2017 (CompTIA). The Idaho Department of Labor projected this year that technology and healthcare will be the two leading job categories for the next ten years, with software/application developers and registered nurses topping the list. In addition, 4 of the top 26 jobs on the Hot Jobs list are related to advanced manufacturing. The emerging high tech trends are expected to realize a 45% growth in the next ten years as far as employment numbers, whereas traditional industry trends are only expected to grow 13%.

Idaho ranked 2nd in the U.S. for personal income growth in 2017 (Wall Street Journal). Idaho had a 5.3% increase in income in 2017, compared to a national average of 3.1%. Idaho’s computer parts manufacturing industry in particular saw wages increase by more than 15% from the previous year in the third quarter of 2017 (Wall Street Journal). The rapid growth of emerging tech industries brings with it higher wages. When looking at high tech job wages compared to all jobs, high-tech wages average $102,106. Whereas, all jobs average wages are $49,880.

HIGH-TECH WAGES AVERAGE $102,106. OVERALL, ALL JOBS AVERAGE WAGES ARE $49,880
Idaho’s educational system is taking active steps to meet economic demands for a technologically skilled workforce. According to the STEM Action Center, Idaho had 7,000 STEM jobs go unfilled in 2017, marking a significant need for increased STEM education in Idaho’s primary, secondary, and post-secondary education systems. In 2017, Idaho took steps to improve STEM educational offerings by passing legislation that will require every high school to offer at least one computer science course by 2020. This, along with several educational measures have earned recognition by Code.org (a global nonprofit dedicated to expanding access to computer science in schools), stating Idaho is one of the top states proactively addressing K-12 computer science education. Over the past few years the Idaho Legislature has appropriated over $2 million to increase computer science in Idaho’s K-12 system. Idaho has significantly increased the computer science pipeline as seen by the growth of computer science graduates at Boise State University, University of Idaho and Idaho State University. Five years ago, the Computer Science programs awarded 73 computer science degrees, and have graduated 169 in 2018 (Bachelors, Masters and Doctoral).

Idaho’s low cost of living is attractive for businesses and individuals from other states, but housing costs are increasing as demand for housing outstrips supply. According to Zillow, Idaho’s median home value per square foot increased by 8.2% in 2017, while home inventory decreased by 14.1%. The median sale price for a home in Ada County in 2017 was $243,625, while statewide it was $207,483, and nationwide it was $220,958.

Idaho’s stable, business-friendly financial position is encouraging business development. A significant portion of Idaho’s economic growth can be attributed to businesses moving to Idaho from out of state, in part to take advantage of the state’s financial position and ease of access to a pro business government (Idaho Department of Commerce, 2017 Idaho Investment Guide). Idaho benefits from organic business growth within the state as well, as many Idaho companies have grown to become industry leaders. In regards to access to capital, The Idaho Deal Flow Report 2017 indicated the technology and software industries represented 16% of the total number of deals, but received over 60% of the total dollar volume in the state totaling $2.4 billion.
**PROFILE OF IDAHO**

**MIGRATION**

Data Source: Census Bureau, 2016 5-Year Estimates

**FOREIGN BORN**

Data Source: Census Bureau, 2016 5-Year Estimates

**PUBLIC LAND AREA 2018**

**2018 REGIONAL POPULATION DISTRIBUTION**

Data Source: Census Bureau, 2016 5-Year Estimates
**IDAHO POPULATION**

Data Source: Census Bureau, 2017 Population Estimates

**JOB GROWTH: NUMBER OF JOBS WITH PERCENT CHANGED OVER PRIOR YEAR**

Data Source: Bureau of Economic Analysis, 2016
**PROFILE OF IDAHO**

### PER CAPITA PERSONAL INCOME

![Graph showing per capita personal income over years from 2006 to 2016 for USA and Idaho.]

- **Data Source:** Bureau of Economic Analysis, 2016

### ETHNIC ORIGIN

![Bar chart showing ethnic origin percentages for Idaho.]

- **Data Source:** Census Bureau, 2017 Population Estimates
EDUCATIONAL ATTAINMENT

Data Source: Census Bureau, 2016 5-Year Estimates
Population and growth in Idaho has its greatest concentration in its southwestern region. Employment has grown by 24% over the past eight years. The population growth has been matched with the technology sector growing rapidly. This region, with Boise at its core, is where Idaho has grown both by the largest amount and at the fastest rate. Agriculture and natural resource industries have been the primary drivers of its economy historically, and still play a major role in the region’s economy to this day.

Innovative pioneers like JR Simplot, Joe Albertson and Harry Morrison were among the first to make Southwestern Idaho their home. In the 1970’s a tech hub emerged when Hewlett Packard located two divisions in Boise and Micron Technology was founded. From this foundation, Southwest Idaho has added new industries to the region. Web based business stands out as a major growth sector, including information services, online cloud storage, and retrieval services. Virtual reality, online content publishing and broadcasting, Saas, E-Commerce, cyber security, software development, and IT services and consulting are also growing rapidly. Online stores are demonstrating above average growth and are developing concentrations of activity in Southwest Idaho which are increasingly competitive nationally.

The tech sector represents 9% of the jobs in this region with anticipated growth of 48% over the next 10 years according to the Idaho Department of Commerce. Salaries in the high-tech area for Southwest Idaho are $113,570, 10% higher than the state average of high-tech earnings at $102,106.

Today, Southwestern Idaho continues to develop these industries through a diverse community of homegrown and imported businesses.
SHARE OF STATE TECH JOBS

- State Tech Jobs
- Regional Tech Jobs

44% 56%


TECH JOBS IN REGION

- Other Jobs
- Tech jobs

9% 91%


INCOME

- < $15K
- $15K-$100K
- $100K-$150K
- $15K-$35K
- $35K-$75K
- $75K-$100K
- $50K-$75K
- $35K-$50K
- $15K-$50K
- $75K

23%
15%
20%
7%
12%
11%
12%
15%
12%

Data Source: Bureau of Economic Analysis, 2016

SHARE OF TOTAL EMPLOYMENT

- Rest of the State
- Southwestern Idaho

54% 46%

**SOUTHWESTERN IDAHO AVERAGE EARNINGS**


**SOUTHWESTERN IDAHO EMPLOYMENT**

EASTERN IDAHO

Eastern Idaho has a robust and diverse economy. A thriving agricultural industry is the foundation of the region which includes major crops like potatoes and barley. Eastern Idaho companies, Great Western Malting, Anheuser Busch and InteGrow contribute to Idaho’s ranking as the #1 malt barley producing state in the nation. This region is also known as the Eastern Idaho Innovation Corridor focusing on science, technology, and clean energy industries. In 2017, Eastern Idaho saw six new business and three expansion announcements in these industries accounting for over $1.74 billion in capital investment and generating over 2,000 direct and indirect jobs. This growth is fueled by the presence of Idaho National Laboratory, the nation’s lead nuclear energy R&D facility. Couple this with the other federal installations; Department of Homeland Security, the US Navy, Department of Energy, and Department of Defense. The region generates breakthrough technologies in energy, nuclear research, treatment and clean-up, cyber security, and supercomputing. In 2016 DOE granted a site use permit to NuScale to build the world’s first Small Modular Reactor (SMR), a $1.8 billion project employing thousands during construction and adding 350 permanent jobs.

The Eastern Idaho region is a medical hub that serves the growing need for medical services for patients in several states. Within a 40 mile radius, Eastern Idaho houses three major modern hospitals, a cancer center, and cardiac center as well as hundreds of supporting diagnostic facilities, medical laboratories, outpatient facilities and medical support businesses. Eastern Idaho has a well-established education sector including two major universities and a community college. Idaho State University (ISU) and Brigham Young University-Idaho combined host over 30,000 students from around the world. 81% of residents in Eastern Idaho’s City of Rexburg are under the age of 30 with the average age of 22, making it the highest concentration of millennial talent in Idaho. The newly formed College of Eastern Idaho works directly with industry to meet workforce needs.

Manufacturing, construction, professional and business services, and new technologies drive the East-
ern Idaho economy. Melaleuca, Inc. is a billion dollar enterprise centered in Idaho Falls. The expansion of compliance software and services company NAVEX Global, and the relocation of Iteris, Inc. from California to eastern Idaho are examples of economic opportunities and job creation in the region. Due to Eastern Idaho’s projected population growth, its niche in clean energy, and proximity to Idaho National laboratory, new industries are constantly developing.

Eastern Idaho’s population growth has been robust and is expected to continue to grow rapidly into the next decade. This growth comes from a mixture of steady birth rates and a mass influx of in-migrants. Retirees and those looking for new opportunities are drawn to Idaho’s quality of life.

IN 2016 DOE GRANTED A SITE USE PERMIT TO NUSCALE TO BUILD THE WORLD’S FIRST SMALL MODULAR REACTOR (SMR), A $1.8 BILLION PROJECT EMPLOYING THOUSANDS DURING CONSTRUCTION AND ADDING 350 PERMANENT JOBS.

Data Source: Bureau of Economic Analysis, 2016

INCOME


SHARE OF TOTAL EMPLOYMENT

EASTERN IDAHO


EASTERN IDAHO AVERAGE EARNINGS


EASTERN IDAHO EMPLOYMENT

NORTH CENTRAL IDAHO

North Central Idaho continues to rely on its natural resources for many of the jobs that drive its economy. Wood and paper product manufacturing, logging, forest management (including the U.S. Forest Service), and transportation firms that carry logs, lumber, paper and wood chips are the region’s traditional mainstay. More than 9% of all payroll workers are in this category. Over time, professional jobs especially in fish and wildlife management, habitat restoration, and the paper and lumber industries have increased, while traditional blue collar jobs have declined. A rapidly growing metal fabrication industry, including ammunition makers, firearms manufacturers, jet boat builders, machine shops, and foundry and equipment manufacturers has taken hold in this region.

The rapid growth of equipment manufacturing has led to an increase in STEM jobs in that industry, which now accounts for about 7% of all payroll jobs. Higher education, The University of Idaho in Moscow and Lewis-Clark State College in Lewiston provides 12% of all payroll jobs in North Central Idaho. These institutions employ a growing number of STEM research and education experts. In addition, this industry has created many high-tech jobs by producing research that has resulted in new firms.

Tourism is also an important industry, providing about 10% of all payroll jobs in North Central Idaho, but it remains technologically unsophisticated. The fast growing health care industry employs 13% of all payroll workers and is another source of many STEM jobs.

A RAPIDLY GROWING METAL FABRICATION INDUSTRY

TECH JOBS IN REGION

<table>
<thead>
<tr>
<th>Other Jobs</th>
<th>Regional Tech Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>96%</td>
<td>4%</td>
</tr>
</tbody>
</table>


SHARE OF TOTAL EMPLOYMENT

<table>
<thead>
<tr>
<th>Rest of the State</th>
<th>Northern Idaho</th>
</tr>
</thead>
<tbody>
<tr>
<td>87%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Northern Idaho’s economy was historically built on the region’s abundant natural resources, including agriculture, logging and associated forest products, and mining in the Silver Valley. Over time, the region’s low cost of living and rich natural beauty have transformed Northern Idaho. The region’s population has exploded, more than doubling since 1990. Kootenai County is a rapidly growing community and a destination for both retirees and families looking to leave high cost west coast cities.

As Northern Idaho has grown, it has cultivated a variety of growing high-tech industries. The region is home to a dynamic group of aerospace manufacturers. Quest Aircraft, which manufactures finished single prop aircraft at its facility in Sandpoint. Empire Aerospace, which overhauls and maintains its airliner fleet in Coeur d’Alene, and a variety of component manufacturers, who produce products ranging from seaplane floats to electronic components. Northern Idaho’s vibrant aerospace sector has helped support other advanced manufacturing industries, including plastics manufacturers that support hundreds of employees producing advanced thermoplastic composites as well as a drone manufacturer, Xcraft.
**TECH JOBS IN REGION**

- **Other Jobs**: 95%
- **Regional Tech Jobs**: 5%


**SHARE OF TOTAL EMPLOYMENT**

- **Rest of the State**: 87%
- **Northern Idaho**: 13%


**SHARE OF STATE TECH JOBS**

- **State Tech Jobs**: 91%
- **Regional Tech Jobs**: 9%


**INCOME**

- $<15K$: 10%
- $15K-$35K$: 17%
- $35K-$50K$: 20%
- $50K-$75K$: 10%
- $75K-$100K$: 11%
- $100K-$150K$: 5%
- $150K-$249K$: 13%
- $250K-$399K$: 13%
- $400K+$: 24%

*Data Source: Bureau of Economic Analysis, 2016*
SOUTH CENTRAL IDAHO

Agriculture traditionally drove most of the eight counties in South Central Idaho. In response to increased demand for crops to feed dairy cows and demand from a growing food processing sector, agricultural jobs have continued to increase over the last 17 years by 56%, or 2.7% per year, double that of all industry jobs in the region. Four of the five counties with the highest agricultural market production in the state, are all in South Central Idaho: Cassia, Twin Falls, Gooding and Jerome counties.

Agricultural jobs have continued to increase over the last 17 years by 56%, or 2.7% per year

Manufacturing, particularly food processing, but also plastics, harvesting equipment, R.V. trailers and box makers, has also become a solid employment source in the region over the last 17 years. The container and box making industry makes products to fill the needs of food processors and online retailers.

Dairy product manufacturing facilities are typically stainless steel, computer-controlled environments. Workers skilled in the mechanical, electrical, hydrological and programming fields run dairy plant controls and valves. These workers are critical to keeping plants going by troubleshooting problems and working to schedule predictive/preventative maintenance.

Warehousing and transportation is another industry closely tied to agriculture. The number of state of the art warehouses is growing in South Central Idaho. DOT Foods, a re-distributor of food to small grocers and convenience stores, built a regional warehouse in Burley. Newcold, a Netherlands based company, is building a 25 million cubic foot warehouse that will need only 80 workers, due to automated features such as robotic arms that pick, move, and pack food items.
**SHARE OF STATE TECH JOBS**

- State Tech Jobs
- Regional Tech Jobs

- **95%**
  - 5%


**INCOME**

- **27%** $15K-$35K
- **12%** $35K-$50K
- **20%** $50K-$75K
- **17%** $75K-$100K
- **12%** $100K-$150K
- **8%** $150K+$
- **4%** < $15K

Data Source: Bureau of Economic Analysis, 2016

**SOUTH CENTRAL IDAHO EMPLOYMENT**

- **2016**
- **2026 projected**

**Number Employed**

- COGNITIVE-COMPLEX
- COGNITIVE-Routine
- MANUAL-COMPLEX
- MANUAL-Routine

SOUTHEASTERN IDAHO
Southeastern Idaho has a fairly diverse economy. About 1 in 5 jobs are concentrated in goods-producing industries including agriculture and agriculture related manufacturing, mining, and high-tech semi-conductor component manufacturing. Service sector jobs are largely dominated by state and local government jobs supported by the presence of Idaho State University and the Shoshone-Bannock Tribes. The region also has a growing healthcare industry to support the region’s rapidly growing population. Additionally, the region’s logistics sector is expanding with the development of the Frigitek cold stargaze project, which will support food and agriculture processing.

The construction industry in the region has grown significantly since the last recession. In the past year, construction grew by 4.8%, four times faster than the average regional industry growth. This growth can be attributed to a number of ongoing and recently completed construction projects. Some of which include ongoing expansions at the Idaho Central Credit Union and the FBI data center in the region’s largest community, Pocatello - Chubbuck.

This FBI expansion project holds a lot of promise for the region as it has the potential to expand the region’s professional and business services sector. The expansion project is expected to bring in an additional 350 information technology and 150 administrative and operations jobs once completed. Additionally, jobs brought in by supporting services companies are moving into the area.

FBI EXPANSION WILL BRING IN AN ADDITIONAL 350 INFORMATION TECHNOLOGY AND 150 ADMINISTRATIVE AND OPERATIONS JOBS
Three specific projects have the potential to bring more high-tech jobs into the region. Premier Technology has already begun a $15 million expansion in the city of Blackfoot, in Bingham County. Another project is a proposed walkable-bikeable community in Pocatello - Chubbuck, the Northgate - Siphon Road Development. This development is expected to bring 10,000 residential units, a shopping and retail district, commercial and industrial sites, and an IT park supporting 6,000 high paying IT jobs. The third project is the new eCobalt Solutions plant, which will process ore from their new mine in Salmon, Idaho and convert it into components for lithium batteries that will power products from flash lights to cars.
Over the past decade, the Idaho Technology Council has conducted over 20 focus groups throughout the state to identify the needs of companies in Idaho. The top opportunity has always been to find and develop talent. Also, every industry utilizes technology to implement products or services, for optimization, or for manufacturing.

Emerging Industries in Idaho are forecast to grow 21% in the next 10 years while traditional industries will grow 14%. Traditional industries such as food manufacturing, agriculture support, electronics manufacturing, wood products and mining continue to be strong in Idaho. However, emerging industries such as electrical equipment manufacturing, information (cloud/SaaS) services, beverage manufacturing, data processing and advanced manufacturing bring with them more rapid growth and higher wages.

Driving Talent

Regarding the hottest jobs, five of the six regions in Idaho have software application at or near the top of the list. With the rapid demand for software positions in Idaho, coupled with one of the fastest growing software industries per capita in the United States, we must have a strong Computer Science (CS) pipeline. In the United States, approximately 70% of all new STEM jobs are software application positions. Here is what is going on with software training:

K-12 Computing Technology

Several accomplishments have taken place over the past five years— from making CS count towards a math or science credit towards high school graduation (Idaho was the 13th state to pass this legislation) to requiring that CS be offered at all high schools. These accomplishments have drawn national recognition from Code.org regarding the tremendous work we have done in Idaho. This is just the start. With keen demand for software and computing talent we need to increase:

- Professional development for teachers. Over the past four years, hundreds of teachers in K-8 have been trained with Code.org curriculum and programs like “I DO CODE” where Boise State University has received National Science Foundation grants to train high school teachers in Idaho. These programs are essential as we grow CS.
- Continue to work on curriculum with existing and emerging technologies.
- In a knowledge based economy, having robust internet bandwidth is imperative. Organizations like the Idaho Education Technology Association
are focused on continued improvement of bandwidth to schools. Plans to bring higher bandwidth to our state with specific focus on rural areas is a must.

- Approximately three years ago, the Idaho legislature formed the Idaho STEM Action Center. Through the STEM Action Center, millions of dollars have been and are being appropriated to further CS and other STEM initiatives. These funds are designed to help schools implement programs in their districts and must be continued.

**Higher Education**

Higher Education needs to continue to grow computer science and engineering programs to address software talent required by industry. Having strong industry advisory boards is essential to obtain the needs of industry. University of Idaho and Boise State have grown their computer science programs significantly. Over the past five years, Boise State has grown from 10 faculty to approximately 27 and University of Idaho added 8 new faculty head count nearly two years ago and has significantly expanded its program to Coeur d’Alene. Idaho State University has an amazing cybersecurity program that provides talent for several federal agencies.

- We must continue to scale our Idaho university computer science programs and make sure programs have stackable credits which allows students the flexibility to plug into programs to enhance their knowledge and skill. Industry must work closely with our universities to connect with technology evolution in areas as cybersecurity, IoT, AI, VI, AR, data analytics, and more. Because of programs like “I Do Code” at Boise State University, we are training more high school teachers to teach computer science in Idaho schools.

**Alternative Paths**

With the high demand for software professionals, we need to continue to build alternative paths for those that want to shift to software.

- Several paths are being created by Idaho Community Colleges and other alternatives with private sector companies.
- The Idaho Department of Labor and the Idaho Technology Council have been developing tech apprentice programs to help create a stronger entry talent pipe line within software, testing/Quality, web development, and cyber security.

- Strong efforts to work with regional leaders and community colleges and to solve workforce demands in manufacturing. Building apprentice programs will also assist the talent demands.

- Earnings in high-tech jobs in Idaho are $102,106 vs. $49,880 for all Idaho jobs. The average in the United States is $123,063 while all jobs in the US are $65,369. Idaho needs to grow more sophisticated, technology jobs that will help drive the economy and provide a stronger tax base for Idaho and its communities.

**ACCESS TO CAPITAL**

During 2017, approximately $2.4 billion was invested in Idaho companies through mergers and acquisitions, private placement, and public offers. Nearly 61% of these investments were made in technology and software companies. Idaho companies have received major investments from some of the top venture firms in the United States over the past 10 years. Here is what we must do to build a stronger, more connected capital network:

- Continue to measure Idaho deal flow which provides metrics and information regarding: industry sectors, areas of the state, providers of capital, investment partners.
- Idaho needs to look for additional sources of capital. The ITC Capital Connect group is looking for an Idaho sponsored fund that helps grow companies specifically in the emerging company space.
- Idaho should look at a state backed fund to help accelerate the access to capital and bring more capital investors from outside of Idaho.
- Continue to look for emerging companies in the tech space.

**TECH2MARKET**

Idaho is recognized as one of the top performing states regarding patents per capita and has a strong history of innovation in traditional and tech industries. The foundation of the tech industries began in the 1970s when HP located two divisions in Idaho and
Micron started. From these two tech giants, several companies have spun out with the commercialization of several products and services. What we have learned:

- We need to keep the start-up engine in Idaho strong. We experienced Idaho’s Golden Decade in the 90s resulting from work that started in the 70s. Companies that begin in the early 2000s have now grown and Idaho is reaping the benefits of these outstanding tech companies that are producing products and services that are world class. You can measure the strength of a state's economy based on its early stage/start-up community.
- Continue to strengthen the relationship of start-ups and our university system. Our university system has started new programs like Colleges of Innovation and Design, Integrated Research and Innovation Center, Venture College, and other places to help students incubate ideas.
- Mentoring programs and incubators need to be developed in a stronger fashion throughout Idaho. Organizations like Small Business Development Center, INL initiatives, TechHelp, Trailhead, Venturecapital.org, the Idaho Technology Council Tech2Market Committee, and others are helping drive innovation and connections and the confluence of technology.
- Programs like the Idaho Global Entrepreneurial Mission (IGEM), must continue to be developed to help early stage research and intellectual property get to market.
- Work closely with capital initiatives as there is a strong overlap.
- Each economic region is unique and has micro industry shifts within the region. Economic Development entities must work to optimize industry strengths and help get products and services to market based on those strengths. A concerted effort to build industry strengths will continue to connect Idaho.

### TECH SECTORS AND IDAHO CORE COMPETENCIES

Over the past century, Idaho has had strong growth from agriculture/natural resource sectors, manufacturing, retail, high-tech bolstered by memory and printing, and tourism.

### Advanced Manufacturing

Manufacturing is one of the top industry segments in Idaho accounting for 11.5% of the states GDP at $8.3 billion in 2017. A main strength of Idaho’s economy is its ability to make products. Advanced manufacturing is the use of innovative technologies and methodologies for improved competitiveness in the manufacturing sectors. Idaho must continue to build the talent pipeline to manufacturing segments as food processing, computer and electronics, metal fabrication, wood and paper, and chemical manufacturing. All regions have strong advanced manufacturing industries—all in unique areas. For instance, South-central has major food production focus. This focus has made Idaho one of the top three milk producing states behind California and Wisconsin. North Idaho has growth in the aerospace industry which has propelled the industry 400% year over year. This is lead by companies such as Quest Aircraft Company and Empire Airlines.

Continued focus on talent and differentiation on material science to help production and to help make products, stronger, faster, and smaller. Innovation and investment in new technology, improved processes, and management methods are improving manufacturing of products and driving advanced manufacturing within each of the six regions in Idaho.

### Software Development

Software and Computing Technology as shown by the Idaho Hot Jobs analysis, one of the top demand jobs in all but one region is a software application developer. As the world becomes more mobile with the Internet of Things, cloud services demand continues to grow, and emerging technologies with artificial intelligence expands with analytics, virtual reality; the...
demand for new products and services as well as the growth in traditional industries will continue to propel software in Idaho’s knowledge economy. This area is fundamental to the Idaho economy and shows why Idaho has the fastest growing software industry as a percent of the state’s gross domestic product. Regional approaches to growing north Idaho and eastern Idaho’s software communities are taking place with Meet Up groups and other areas of focus. We anticipate that technology will be the top industry in Idaho by 2025.

IDAHO IS ONE OF THE FASTEST GROWING SOFTWARE INDUSTRIES PER CAPITA IN THE UNITED STATES

AgriScience & Natural Resources
According to a study by UI ag economists, the state’s agricultural sector is directly and indirectly responsible for 14% of Idaho’s total GDP, 1 in every 7 jobs (128,200 total ag jobs) and 20% of total economic output ($27.8 billion). We must continue to find ways to grow the agriculture space and look for synergies around research. The Magic Valley continues to be an extraordinary area focused on agriculture and manufacturing. Several research facilities are located in the Twin Falls area focus on product development. While Idaho is a richly abundant natural resource state, we are feeling the push and pull of changes with urban and rural living.

Energy & Power
Major shifts in energy and power have taken place over the past decade. In Idaho and the region, power costs are some of the lowest in the nation.

Idaho has tremendous assets the Idaho National Laboratory being a multi billion dollar national laboratory and we have a state coalition with the Center for Advanced Energy Research to help find solutions to a variety of energy issues like storage and efficiency.

INFRASTRUCTURE
Infrastructure demands in Idaho over the next decade will help determine the quality of life for Idaho residence. Here are the three areas of focus:

• Tech infrastructure which includes internet bandwidth and data storage. As demands for connectivity and mobility continue to explode with the implement of existing and new technologies, continue pressure on mobile technologies and cloud services and data centers grow. Strategies to grow tech infrastructure throughout Idaho’s regions and communities will in a large measure determine a regions success.

• Factories and commercial real estate will be a big part of expansion. With region focus, niches will continue to be developed in advanced manufacturing and the shortage of commercial real estate is hampering expansion and growth.

• Several communities have housing shortages that are restricting growth and talent attraction.

• Transportation and finding effective ways to deal with traffic congestion will be critical in the urban areas of Idaho.

The data gathered within this report and the hours of analysis have indicated that Idaho is accelerating rapidly into a knowledge based economy. Jobs that are considered cognitive and complex are not only becoming more abundant, but also encompass the fastest growing emerging industries. These jobs have tremendous value to the state as well as the local communities. Developing talent, access to capital and tech to market commercialization are recognized as the three key drivers that will continue to push Idaho’s economic advancement.
Idaho’s employment rate has been increasing steadily in all regions, and most notably in the Southwestern part of the state. Since 2010, Idaho has added 82,000 new jobs. Job growth has recovered since a dip during the recession of 2008, and has surpassed pre-recession levels. Between 2015 and 2016 Idaho saw a 3.5% increase in jobs (23,127 new jobs), marking its fastest rate of job growth since 2006. The Southwestern region saw the most growth between 2010 and 2017 at 22%, followed by the Northern, South Central, and Eastern regions, which all saw between 13% and 14% growth over the same time period. In 2017, Idaho had the 7th fastest growing GDP in the U.S. Idaho’s three largest industries by GDP were real estate, rental and leasing; government; and manufacturing. Areas that Idaho needs to continue to focus on include workforce development and innovative entrepreneurship.

**IDAHO HAS ADDED 82,000 NEW JOBS SINCE 2010**

**Why is this important?**
A strong and stable labor pool is the backbone of a robust economy. Idaho’s labor force is its strongest economic asset, and can be expected to grow through increased workforce development.
ECONOMY

ANNUAL UNEMPLOYMENT


TOTAL EMPLOYMENT BY TIER

Data Source: Bureau of Labor Statistics
**PERCENT OF TOTAL EMPLOYMENT BY TIER**

- **Tier 1 Occupations**: Leadership and STEM jobs
- **Tier 2 Occupations**: Sales, teachers, administrative, manufacturing, and production
- **Tier 3 Occupations**: Food service, protective services, retail positions, and personal care

**REGION**
- Eastern
- North Central
- Northern
- South Central
- Southeastern
- Southwestern

Data Source: Bureau of Labor Statistics
INCOME
Idaho’s per capita personal income has been increasing steadily since the recession. Although median individual and household income both rank below the national average, the cost of living in Idaho also remains lower than the national average, which provides workers with stronger purchasing power. Computer and mathematical jobs currently rank among the highest paying occupational categories in Idaho, with a median wage of $30.69.

Why is this important?
Both income and cost-of-living play a role in attracting skilled labor to Idaho, and in keeping skilled laborers in Idaho long-term. Like employment growth, per capita income growth is a sign of a strong and stable economy. Employees and job seekers are benefiting from the economic growth, and in turn are more able to contribute to further this trend. For this reason, reducing poverty rates can represent an opportunity for additional long-term growth.
POVERTY STATUS

Data Source: Census Bureau, 2016 5-Year Estimates

MEDIAN HOUSEHOLD INCOME

Data Source: Census Bureau, 2016 5-Year Estimates
ECONOMY

CHANGE IN THE NUMBERS OF HOUSEHOLDS BY INCOME CATEGORY

Data Source: Census Bureau

MEDIAN PAY BY OCCUPATIONAL CATEGORY

Data Source: Bureau of Economic Analysis, 2016
ECONOMY

INNOVATION & ENTREPRENEURSHIP

Idaho ranks high among its western mountain state peers for patents awarded yearly. We are leading Wyoming, Montana, and Nevada. Nationwide, Idaho had the 12th highest number of patents awarded per capita in 2017 (24/7 Wall Street).

Idaho’s thriving business environment is also very supportive for entrepreneurs trying to create new start-ups. According to the Kauffman Foundation, Idaho experienced a 48.6% rate of startup growth in employment over the previous 5 years.

Why is this important?

Increased innovation can further bolster job growth by contributing to a strong and sustainable local job market. In addition, innovation helps to keep the market moving forward toward new sources of growth and value, preventing stagnation.

NUMBER OF FIRMS WITHOUT PAID EMPLOYEES AS A TOTAL OF FIRMS

Data Source: US Census Bureau 2012 Survey of Business Owners
**NUMBER OF PATENTS EACH YEAR (BY STATE)**

Data Source: US Patent and Trademark Office

**KEY**
- Red: Firms with paid employees
- Yellow: Firms without paid employees
2017 TOTAL DEALS BASED ON DOLLAR AMOUNT BY INDUSTRY SECTOR ($2.4 BILLION)

- Materials/Resources: 11.2%
- Tech/Software: 60.5%
- Consumer/Retail: 13.3%
- Healthcare: 4.4%
- Agriculture: 4.8%
- Other: 5.8%


2017 TOTAL NUMBER OF DEALS BY INDUSTRY SECTOR (147 TOTAL DEALS)

- Materials/Resources: 37%
- Tech/Software: 47%
- Consumer/Retail: 23%
- Healthcare: 14%
- Agriculture: 7%
- Other: 19%


$ VOLUME–AREA (BILLIONS)

- Southwestern Idaho
- Northern Idaho
- Eastern Idaho
### PRIVATE PLACEMENT—NUMBER OF DEALS

<table>
<thead>
<tr>
<th>Year</th>
<th>Deals</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>70</td>
</tr>
<tr>
<td>2011</td>
<td>62</td>
</tr>
<tr>
<td>2012</td>
<td>73</td>
</tr>
<tr>
<td>2013</td>
<td>76</td>
</tr>
<tr>
<td>2014</td>
<td>72</td>
</tr>
<tr>
<td>2015</td>
<td>63</td>
</tr>
<tr>
<td>2016</td>
<td>97</td>
</tr>
<tr>
<td>2017</td>
<td>73</td>
</tr>
</tbody>
</table>

Data Source: Idaho Technology Council Deal Flow Report

### PRIVATE PLACEMENT—$ VOLUME (BILLIONS)

<table>
<thead>
<tr>
<th>Year</th>
<th>$ Volume (Billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1.46</td>
</tr>
<tr>
<td>2011</td>
<td>0.4</td>
</tr>
<tr>
<td>2012</td>
<td>0.8</td>
</tr>
<tr>
<td>2013</td>
<td>0.2</td>
</tr>
<tr>
<td>2014</td>
<td>0.17</td>
</tr>
<tr>
<td>2015</td>
<td>0.22</td>
</tr>
<tr>
<td>2016</td>
<td>0.55</td>
</tr>
<tr>
<td>2017</td>
<td>0.43</td>
</tr>
</tbody>
</table>

Data Source: Idaho Technology Council Deal Flow Report

### AVERAGE DEAL SIZE BY REGION (MILLIONS)

- **Region**: S, N, E, Average
- **Average Deal Size**: $22.68, $3.82, $10.02, $16.34

Data Source: Idaho Technology Council Deal Flow Report

### $ AVERAGE DEAL SIZE BY DEAL TYPE (MILLIONS)

- **Private Placement**: $6.00
- **Public**: $59.00
- **M & A**: $36.79

Data Source: Idaho Technology Council Deal Flow Report
CITY FINANCES
Charges for services make up an increasing proportion of average revenue among Idaho cities. However, property taxes remain the primary source of revenue. Intergovernmental revenue and sales taxes are the two smallest revenue sources, although both have also increased. Total revenues have increased steadily, as have total expenses. Average revenues and expenses in 2012 were nearly double what they were in 1997. Reliable data is not yet available for the years after 2012, so it is not yet possible to tell how Idaho’s cities have continued to recover financially from the recent recession.

AVERAGE REVENUES AND EXPENSES IN 2012 WERE NEARLY DOUBLE WHAT THEY WERE IN 1997

Why is this important?
As Idaho’s cities manage a growing population, they are faced with both increased expenses and increased revenues. Cities are challenged to maintain a stable balance between the two while upholding service levels for more people. Property taxes tend to make up the most consistent revenue stream, but other revenue streams may pose more opportunity for innovation.

CIVIC ENGAGEMENT
Residents aged 45 to 64 years old make up the largest sector of Idaho’s voting age population, followed by those between the ages of 30 to 44. People aged 18 to 29 years old make up the third largest sector, followed by those over the age of 65. Voters in Eastern and Southeastern Idaho tended to participate more in elections, which those in Southwestern and South Central Idaho tended to participate the least. Participation in midterm and primary elections has decreased somewhat since 2008, while participation in the general election has remained stable.
Why is this important?
Civic engagement helps to ensure that government remains representative of its constituents. A higher level of civic engagement is associated with a higher quality of life within a community. Furthermore, participation in political systems helps to act as a measure of public confidence in those systems. Voter engagement represents an opportunity for Idaho to connect with its residents in order to develop policies and make political decisions that further the best interests of the state as a whole.

45 TO 64 YEARS OLD MAKE UP THE LARGEST SECTOR OF IDAHO’S VOTING AGE POPULATION

![VOTING AGE POPULATION](image)

Data Source: Idaho Secretary of State

### 2016 VOTER SHARE

<table>
<thead>
<tr>
<th>Region</th>
<th>Trump</th>
<th>Clinton</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>NC</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>N</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>SC</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>SE</td>
<td>25%</td>
<td>75%</td>
</tr>
<tr>
<td>SW</td>
<td>0%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Data Source: Idaho Secretary of State

### REGIONAL VOTER PARTICIPATION

![REGIONAL VOTER PARTICIPATION](image)

REGION
- Eastern
- North Central
- Northern
- South Central
- Southeastern
- Southwestern

Data Source: Idaho Secretary of State
VOTER PARTICIPATION IN PRIMARY ELECTIONS

Data Source: Idaho Secretary of State

VOTER PARTICIPATION IN GENERAL ELECTIONS

Data Source: Idaho Secretary of State
PEOPLE
Idaho has consistently ranked among the fastest growing states in the U.S. since 2010, along with many of its Western peers. This rapid growth can be attributed both to natural increase and migration, with migration growing to become the majority share of growth in most recent years.

Regarding natural increase, Idaho is home to a relatively young population. Idaho has a median age of 35.7, compared to a U.S. median age of 37.7. Idaho also has a robust birth rate. Regarding migration, Idaho has seen new residents move in for a number of reasons, ranging from its environmental beauty, to its low cost-of-living, to its rapid job growth.

Both natural increase and migration have also contributed to Idaho’s increasing urbanization. As both Idaho natives and migrants from other states move to Idaho’s cities to pursue economic and educational opportunities, they have seen an explosion of growth and development.

Why is this important?
With this rapid growth comes change, and with change comes opportunity. Idaho’s population is becoming larger and more diverse, expanding the skills and strengths of its workforce. This expansion, along with a rapid GDP growth and a low cost of business operation, has made Idaho into an attractive spot for business, which in turn promotes further economic growth (Wall Street Journal).

Increasing urbanization, a relatively new phenomenon in Idaho, also contributes to economic growth by concentrating available human resources into an easily accessible area for business. As businesses demand and increasingly complex set of skills from their workers, technological skills ranking among the most important of these. Urbanization, along with expanding educational systems, also helps facilitate a supply for this demand.

Like other states that have experienced such growth, the state of Idaho now faces a number of new potential opportunities to shape the direction of its future growth through policy and promotion. Idaho’s population growth has helped to bring economic opportunities to the forefront, such as business development, education, innovation, housing, and transportation. How Idaho responds to these opportunities will undoubtedly influence future growth patterns.
**MEDIAN AGE**

<table>
<thead>
<tr>
<th>Region</th>
<th>2017 Age</th>
<th>2016 Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern</td>
<td>23.20</td>
<td>23.30</td>
</tr>
<tr>
<td>North Central</td>
<td>28.80</td>
<td>29.00</td>
</tr>
<tr>
<td>Northern</td>
<td>32.40</td>
<td>32.50</td>
</tr>
<tr>
<td>South Central</td>
<td>33.20</td>
<td>33.30</td>
</tr>
<tr>
<td>Southeastern</td>
<td>33.50</td>
<td>33.55</td>
</tr>
<tr>
<td>Southwestern</td>
<td>31.50</td>
<td>31.55</td>
</tr>
</tbody>
</table>

Data Source: Census Bureau, 2017 Population Estimates

**NON-ENGLISH SPEAKERS**

- **Other**: 40147 (25.2%)
- **Spanish**: 119097 (74.8%)

Data Source: Census Bureau, 2016 5-Year Estimates

**ANNUAL BIRTHS**

<table>
<thead>
<tr>
<th>Year</th>
<th>Eastern</th>
<th>North Central</th>
<th>Northern</th>
<th>South Central</th>
<th>Southeastern</th>
<th>Southwestern</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>2013</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>2014</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>2015</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>2016</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
</tbody>
</table>

Data Source: Census Bureau, 2017 Population Estimates
PLACE
The housing market is very strong in Idaho. Since 2011, home prices and home sales have both risen sharply, while home inventory has fallen at a similar pace. Increasingly more residential building permits have also been granted during this time. Multi-family units have made up around 20 to 30% of new residential units being built each year.

**SINCE 2011, HOME PRICES AND HOME SALES HAVE BOTH RISEN SHARPLY, WHILE HOME INVENTORY HAS FALLEN AT A SIMILAR PACE.**

Housing burden (the percentage of people paying more than 30% of their incomes toward housing costs) ranges from 35 to 50% among homeowners across Idaho, and has decreased in all Idaho regions since 2013, when there was a peak. Among renters, housing burden has remained more even, between 30 and 45% over this time period. Housing affordability (calculated as the ratio of median family income to median home price) increased from 2010 to 2014. Then, started to level off or decrease in many regions from 2014 to 2016.

**Why is this important?**
Housing is a vital supporting factor for a growing workforce. If houses are not available, or affordable, economic growth can be limited. Idaho’s housing market has been a primary source of growth to date, and can continue to be in the future. A decreasing home inventory signals an opportunity to stimulate new housing development, which can play an important role in maintaining a healthy balance between median home prices and median family income, reducing housing burden, and stimulating further economic growth.
TRANSPORTATION

The large majority of Idahoans drive to work. The number of vehicle miles driven per capita across the state has remained stable since 2007, though increasing slightly in 2015 and 2016. Gas prices have also remained stable over time, although they dipped significantly in 2015 and 2016. Mean travel times have consistently increased across most regions, but remain relatively low.

Numbers of cross county commuters in Idaho have stayed about the same. Transit ridership has remained the same or decreased in most regions. The percent of people who commute by bicycle has decreased in the majority of Idaho’s regions.

Why is this important?
Traffic congestion and commuter safety can affect the economy by wasting employee time, increasing shipping costs, and creating schedule delays. Currently, commuters in Idaho face reasonable travel times and safe travel in general, but urban areas are seeing an increase in mean travel times, creating stress and highlighting the need for transportation planning and development. Increasing numbers of cross county commuters can also represent increasing numbers of rural and suburban Idahoans commuting to urban centers for employment opportunities. As Idaho grows, these figures represent more opportunities to enhance Idaho’s transportation capacity.

ELECTRICITY PRICES (CENTS/KWH)

Data Source: Moody’s Economy.com

BIKE ACCIDENTS

Data Source: Idaho Transportation Department
Data Source: American Community Survey, 1 year estimates from the Census Bureau

Data Source: Zillow
MEDIAN PRICE TRENDS

Data Source: Zillow

HOME SALE TRENDS

STATE

Data Source: Zillow

AVERAGE HOUSEHOLD SIZE

REGION

Data Source: American Community Survey, 1 year estimates from the Census Bureau

PERCENTAGE OF MULTIGENERATIONAL HOUSEHOLDS

REGION
VACANCY RATES

Data Source: U.S. Federal Housing Finance Agency

RESIDENTIAL BUILDING PERMITS

Data Source: Retrieved from Rand State Statistics and originated from the Census Bureau
SOCIETY
PREPARING FOR ECONOMIC SUCCESS

Math and reading proficiency scores among Idaho students have increased from 2015 to 2017. This is remarkable when recognizing that Idaho’s public school districts, particularly those in and around cities, have also seen rapid enrollment growth over the last 15 years. In addition, Idaho public schools have seen an increase in ethnic diversity, particularly from Hispanic or Latino students, corresponding with an increase in English Language Learners (ELL). Idaho’s high school graduation rates, as well as college go-on and graduation rates, remain an absolute priority as Idaho moves forward.

Idaho’s urban areas have significantly better access to the internet, including faster download speeds, than its rural areas. This means that urban students and employees have better access to technological learning and working tools than their rural counterparts.

Why is this important?

Math and reading proficiency scores are directly connected to a student’s ability to succeed, both in higher education and in the workforce. In addition, the ability to provide these skills to students with diverse backgrounds is connected with a stronger overall workforce. As Idaho’s economy continues to grow and evolve toward cognitive and complex industries, and skilled jobs begin to take up a larger percentage of the labor market, universities, colleges, and technical schools will continue to play an important role in meeting this demand.

Furthermore, as online learning tools become more important in public education, access to internet can play a significant role in student’s success. Internet availability can also increase worker productivity and flexibility. In particular, improved internet access would allow rural workers to potentially increase their participation in the workforce through decreased transportation times and increased work-from-home opportunities. Continued deployment of high-speed internet remains a priority in rural areas.

URBAN STUDENTS AND EMPLOYEES HAVE BETTER ACCESS TO TECHNOLOGICAL LEARNING
PERCENT OF CHILDREN AGE 3-4 NOT ENROLLED IN ANY TYPE OF SCHOOL

EDUCATIONAL ATTAINMENT BY RACE

Data Source: State Board of Education
**DEGREES BY TYPE PER YEAR**

Data Source: National Center for Education Statistics Custom Data Files

**COLLEGE ENROLLMENT BY EDUCATION TYPE**

Data Source:

**EDUCATIONAL ATTAINMENT**

Data Source: State Board of Education

**4TH GRADE MATH PROFICIENCY**
ARTS AND CULTURE
Idaho’s arts and culture industry is expanding rapidly. Idaho ranked among the top 10 states for both value added growth and employment growth. These measures, provided by the Bureau of Economic Analysis, point to a growing industry, with significant potential for increased added value to Idaho’s economy in the near and distant future.

Why is this important?
Idaho’s arts and culture industry acts as both a business generator and an attractor for people considering Idaho as a place to work and live. Idaho residents have access to performing arts centers which provide access to major performances from around the world. The arts and culture industry also encompasses advertising, promotion, and design. These industries stimulate economic growth and development, and provide employment opportunities. Furthermore, arts and culture enhance quality of life by providing a sense of community, creativity and expression for residents.

Data Source: Americans for the Arts
QUALITY OF HEALTH
Idaho’s adult obesity rate decreased from 29.6 to 28.6 % between 2013 and 2015. However, adolescent obesity increased from 9.6 to 11.1 % during this same period.

The percent of Idaho adults vaccinated for seasonal flu decreased from 66.2% to 64.2% between 2013 and 2015. Older adults and women were more likely to receive flu shots than younger adults and men. Idaho’s age ratios for residents with health insurance changed little during this time, but adults aged 18 to 24 and adults over the age of 75 remained less likely than other adults to have health insurance.

Why is this important?
Medical costs and overall resident health can have a significant impact on the economy by affecting workforce productivity and labor participation. Individuals without health insurance are less likely to receive ongoing treatment, making them more vulnerable to medical issues and emergencies, and increasing the associated cost burden.

Data Source: Idaho Division of Public Health

OVERWEIGHT AND OBESE ADOLESCENTS
(GRADE 9-12)

Data Source: California Health Interview Study

FLU VACCINATIONS BY REGION 2012-2018

Data Source: Idaho Division of Public Health
**IDAHO OBESITY RATE BY GENDER**

(Over 18)

Data Source: California Health Interview Study

**INSURED BY AGE GROUP 2016**

Data Source: ACS
SAFETY

Idaho’s overall crime rate, as well as its violent crime rate, has decreased steadily across regions since 2010. Likewise, Idaho’s number of public safety officers has increased across all regions since 2002, in order to accommodate the safety needs and demands of a growing populace. Idaho maintains a sound reputation for public safety, and crime rates support this reputation when compared with national rates.

IDAHO MAINTAINS A SOUND REPUTATION FOR PUBLIC SAFETY, AND CRIME RATES SUPPORT THIS REPUTATION WHEN COMPARED WITH NATIONAL RATES.

Why is this important?
Public safety is vital for a sense of community. Public fear has a detrimental impact on economic growth and stability by pushing people and businesses away from the area. Idaho’s public safety officers have done an exemplary job of maintaining a sense of public safety, and Idaho’s local governments have been wise to increase numbers of officers as populations increase.
**VIOLENT CRIMES BY TYPE**

- **Region**: E, NC, N, SC, SE, SW
- **Crime Type**: Assault, Manslaughter, Murder, Rape, Robbery

Data Source: IPI data: retrieved from Rand State Statistics and originated from FBI.

---

**PUBLIC SAFETY OFFICERS**

- **Region**: Eastern, North Central, Northern, South Central, Southeastern, Southwestern

Data Source: Retrieved from Rand State Statistics and originated from the Census Bureau.
ACKNOWLEDGEMENTS

Special thanks for the financial support as well as work provided by:

Battelle Energy Alliance
Idaho STEM Action Center
c308 Marketing
Idaho Technology Council

Thank you for the support and work provided by the following organizations:

Idaho Department of Labor
Idaho Department of Commerce
Idaho Policy Institute
Idaho Economic Development Association and its members
HP
Boise State University-Idaho policy Institute
## APPENDIX DATA

### TOP 50 HOT JOBS IN IDAHO

<table>
<thead>
<tr>
<th>RANK</th>
<th>TITLE</th>
<th>2016</th>
<th>2026</th>
<th>GROWTH %</th>
<th>WAGES</th>
<th>STEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Software Developers, Applications</td>
<td>2027</td>
<td>2639</td>
<td>30.2%</td>
<td>$41.19</td>
<td>STEM</td>
</tr>
<tr>
<td>2</td>
<td>Registered Nurses</td>
<td>1380</td>
<td>17045</td>
<td>29.3%</td>
<td>$30.79</td>
<td>STEM</td>
</tr>
<tr>
<td>3</td>
<td>Medical and Health Services Managers</td>
<td>1873</td>
<td>2357</td>
<td>25.8%</td>
<td>$40.00</td>
<td>STEM</td>
</tr>
<tr>
<td>4</td>
<td>Construction Managers</td>
<td>1507</td>
<td>1891</td>
<td>25.5%</td>
<td>$37.30</td>
<td>STEM</td>
</tr>
<tr>
<td>5</td>
<td>Nurse Practitioners</td>
<td>659</td>
<td>890</td>
<td>35.1%</td>
<td>$48.96</td>
<td>STEM</td>
</tr>
<tr>
<td>6</td>
<td>Physician Assistants</td>
<td>616</td>
<td>818</td>
<td>32.8%</td>
<td>$47.89</td>
<td>STEM</td>
</tr>
<tr>
<td>7</td>
<td>Health Specialties Teachers, Postsecondary</td>
<td>801</td>
<td>1033</td>
<td>29.0%</td>
<td>$35.45</td>
<td>STEM</td>
</tr>
<tr>
<td>8</td>
<td>Information Security Analysts</td>
<td>515</td>
<td>671</td>
<td>30.3%</td>
<td>$39.39</td>
<td>STEM</td>
</tr>
<tr>
<td>9</td>
<td>Pharmacists</td>
<td>1564</td>
<td>1825</td>
<td>16.7%</td>
<td>$58.42</td>
<td>STEM</td>
</tr>
<tr>
<td>10</td>
<td>Industrial Machinery Mechanics</td>
<td>2376</td>
<td>2927</td>
<td>23.2%</td>
<td>$25.26</td>
<td>STEM</td>
</tr>
<tr>
<td>11</td>
<td>Market Research Analysts and Marketing Specialists</td>
<td>1408</td>
<td>1798</td>
<td>27.7%</td>
<td>$24.18</td>
<td>STEM</td>
</tr>
<tr>
<td>12</td>
<td>Physical Therapists</td>
<td>887</td>
<td>1120</td>
<td>26.3%</td>
<td>$36.86</td>
<td>STEM</td>
</tr>
<tr>
<td>13</td>
<td>Loan Officers</td>
<td>2776</td>
<td>3339</td>
<td>20.3%</td>
<td>$26.59</td>
<td>STEM</td>
</tr>
<tr>
<td>14</td>
<td>Respiratory Therapists</td>
<td>603</td>
<td>912</td>
<td>51.2%</td>
<td>$27.12</td>
<td>STEM</td>
</tr>
<tr>
<td>15</td>
<td>Healthcare Social Workers</td>
<td>599</td>
<td>751</td>
<td>25.4%</td>
<td>$26.92</td>
<td>STEM</td>
</tr>
<tr>
<td>16</td>
<td>Industrial Engineers</td>
<td>1111</td>
<td>1282</td>
<td>15.4%</td>
<td>$43.28</td>
<td>STEM</td>
</tr>
<tr>
<td>17</td>
<td>Occupational Therapists</td>
<td>426</td>
<td>534</td>
<td>25.4%</td>
<td>$39.73</td>
<td>STEM</td>
</tr>
<tr>
<td>18</td>
<td>Administrative Services Managers</td>
<td>1491</td>
<td>1726</td>
<td>15.8%</td>
<td>$32.24</td>
<td>STEM</td>
</tr>
<tr>
<td>19</td>
<td>Diagnostic Medical Sonographers</td>
<td>304</td>
<td>411</td>
<td>35.2%</td>
<td>$36.29</td>
<td>STEM</td>
</tr>
<tr>
<td>20</td>
<td>Management Analysts</td>
<td>1758</td>
<td>2026</td>
<td>15.2%</td>
<td>$31.11</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Heavy and Tractor-Trailer Truck Drivers</td>
<td>12279</td>
<td>14747</td>
<td>20.1%</td>
<td>$19.08</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Accountants and Auditors</td>
<td>4193</td>
<td>4800</td>
<td>14.5%</td>
<td>$28.30</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Cost Estimators</td>
<td>1136</td>
<td>1337</td>
<td>17.7%</td>
<td>$26.49</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Interpreters and Translators</td>
<td>2034</td>
<td>2676</td>
<td>31.6%</td>
<td>$17.27</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Training and Development Specialists</td>
<td>1131</td>
<td>1342</td>
<td>18.7%</td>
<td>$25.30</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Radiologic Technologists</td>
<td>901</td>
<td>1108</td>
<td>23.0%</td>
<td>$26.42</td>
<td>STEM</td>
</tr>
<tr>
<td>27</td>
<td>Nursing Instructors and Teachers, Postsecondary</td>
<td>257</td>
<td>335</td>
<td>30.4%</td>
<td>$31.58</td>
<td>STEM</td>
</tr>
<tr>
<td>28</td>
<td>Maintenance Workers, Machinery</td>
<td>899</td>
<td>1118</td>
<td>24.4%</td>
<td>$20.85</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Health Educators</td>
<td>551</td>
<td>666</td>
<td>20.9%</td>
<td>$25.70</td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products</td>
<td>6348</td>
<td>7260</td>
<td>14.4%</td>
<td>$24.86</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Surgical Technologists</td>
<td>669</td>
<td>844</td>
<td>26.2%</td>
<td>$22.80</td>
<td>STEM</td>
</tr>
<tr>
<td>32</td>
<td>Sales Engineers</td>
<td>203</td>
<td>245</td>
<td>20.7%</td>
<td>$45.22</td>
<td>STEM</td>
</tr>
<tr>
<td>33</td>
<td>Operations Research Analysts</td>
<td>418</td>
<td>523</td>
<td>25.1%</td>
<td>$29.59</td>
<td>STEM</td>
</tr>
<tr>
<td>34</td>
<td>Cardiovascular Technologists and Technicians</td>
<td>350</td>
<td>460</td>
<td>31.4%</td>
<td>$28.46</td>
<td>STEM</td>
</tr>
<tr>
<td>35</td>
<td>Speech-Language Pathologists</td>
<td>432</td>
<td>528</td>
<td>22.2%</td>
<td>$34.56</td>
<td>STEM</td>
</tr>
<tr>
<td>36</td>
<td>Secondary School Teachers, Except Special and Career/Technical Education</td>
<td>5055</td>
<td>5810</td>
<td>14.9%</td>
<td>$23.04</td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>Real Estate Sales Agents</td>
<td>884</td>
<td>1076</td>
<td>21.7%</td>
<td>$21.57</td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>Bus and Truck Mechanics and Diesel Engine Specialists</td>
<td>1701</td>
<td>2058</td>
<td>21.0%</td>
<td>$18.81</td>
<td></td>
</tr>
<tr>
<td>39</td>
<td>Financial Analysts</td>
<td>414</td>
<td>492</td>
<td>18.8%</td>
<td>$33.69</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>Social and Community Service Managers</td>
<td>937</td>
<td>1112</td>
<td>18.7%</td>
<td>$23.65</td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Insurance Sales Agents</td>
<td>1475</td>
<td>1750</td>
<td>18.6%</td>
<td>$20.94</td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>First-Line Supervisors of Production and Operating Workers</td>
<td>3814</td>
<td>4338</td>
<td>13.7%</td>
<td>$25.72</td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>Education Administrators, Postsecondary</td>
<td>998</td>
<td>1157</td>
<td>13.9%</td>
<td>$36.85</td>
<td></td>
</tr>
<tr>
<td>44</td>
<td>First-Line Supervisors of Mechanics, Installers, and Repairers</td>
<td>2551</td>
<td>2898</td>
<td>13.6%</td>
<td>$27.68</td>
<td></td>
</tr>
<tr>
<td>45</td>
<td>Physicians and Surgeons, All Other</td>
<td>1136</td>
<td>1301</td>
<td>14.5%</td>
<td>$56.46</td>
<td>STEM</td>
</tr>
<tr>
<td>46</td>
<td>Managers, All Other</td>
<td>1296</td>
<td>1466</td>
<td>13.1%</td>
<td>$38.18</td>
<td></td>
</tr>
<tr>
<td>47</td>
<td>Middle School Teachers, Except Special and Career/Technical Education</td>
<td>2623</td>
<td>3013</td>
<td>14.9%</td>
<td>$24.18</td>
<td></td>
</tr>
<tr>
<td>48</td>
<td>Elementary School Teachers, Except Special Education</td>
<td>7408</td>
<td>8504</td>
<td>14.8%</td>
<td>$21.52</td>
<td></td>
</tr>
<tr>
<td>49</td>
<td>Web Developers</td>
<td>831</td>
<td>1008</td>
<td>21.3%</td>
<td>$22.43</td>
<td>STEM</td>
</tr>
<tr>
<td>50</td>
<td>Operating Engineers and Other Construction Equipment Operators</td>
<td>2203</td>
<td>2557</td>
<td>16.1%</td>
<td>$20.88</td>
<td></td>
</tr>
</tbody>
</table>
### AVERAGE EARNINGS PER JOB (2017)

<table>
<thead>
<tr>
<th>Region</th>
<th>TECH JOBS</th>
<th>ALL JOBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idaho</td>
<td>$102,106</td>
<td>$49,880</td>
</tr>
<tr>
<td>Northern</td>
<td>$75,467</td>
<td>$46,061</td>
</tr>
<tr>
<td>North Central</td>
<td>$67,996</td>
<td>$47,590</td>
</tr>
<tr>
<td>Southwestern</td>
<td>$113,570</td>
<td>$53,554</td>
</tr>
<tr>
<td>South Central</td>
<td>$82,496</td>
<td>$43,403</td>
</tr>
<tr>
<td>Southeastern</td>
<td>$88,304</td>
<td>$44,750</td>
</tr>
<tr>
<td>Eastern</td>
<td>$76,822</td>
<td>$47,726</td>
</tr>
<tr>
<td>United States</td>
<td>$123,063</td>
<td>$65,369</td>
</tr>
</tbody>
</table>

### REGIONAL TRENDS

<table>
<thead>
<tr>
<th>Region</th>
<th>2010 JOBS</th>
<th>2018 JOBS</th>
<th>CHANGE</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idaho</td>
<td>666,065</td>
<td>795,626</td>
<td>129,561</td>
<td>19.5%</td>
</tr>
<tr>
<td>Northern</td>
<td>83,629</td>
<td>97,094</td>
<td>13,465</td>
<td>16.1%</td>
</tr>
<tr>
<td>North Central</td>
<td>45,050</td>
<td>47,826</td>
<td>2,776</td>
<td>6.2%</td>
</tr>
<tr>
<td>Southwestern</td>
<td>296,527</td>
<td>367,871</td>
<td>71,344</td>
<td>24.1%</td>
</tr>
<tr>
<td>South Central</td>
<td>86,477</td>
<td>100,789</td>
<td>14,312</td>
<td>16.6%</td>
</tr>
<tr>
<td>Southeastern</td>
<td>62,924</td>
<td>69,041</td>
<td>6,117</td>
<td>9.7%</td>
</tr>
<tr>
<td>Eastern</td>
<td>87,246</td>
<td>102,243</td>
<td>14,997</td>
<td>17.2%</td>
</tr>
<tr>
<td>United States</td>
<td>137,918,676</td>
<td>156,893,765</td>
<td>18,975,089</td>
<td>13.8%</td>
</tr>
</tbody>
</table>

### HIGH TECH

<table>
<thead>
<tr>
<th>Region</th>
<th>2010 JOBS</th>
<th>2018 JOBS</th>
<th>CHANGE</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idaho</td>
<td>38,945</td>
<td>46,747</td>
<td>7,802</td>
<td>20.0%</td>
</tr>
<tr>
<td>Northern</td>
<td>3,647</td>
<td>4,601</td>
<td>954</td>
<td>26.2%</td>
</tr>
<tr>
<td>North Central</td>
<td>1,246</td>
<td>1,682</td>
<td>436</td>
<td>35.0%</td>
</tr>
<tr>
<td>Southwestern</td>
<td>24,821</td>
<td>28,134</td>
<td>3,313</td>
<td>13.3%</td>
</tr>
<tr>
<td>South Central</td>
<td>2,106</td>
<td>2,576</td>
<td>470</td>
<td>22.3%</td>
</tr>
<tr>
<td>Southeastern</td>
<td>3,160</td>
<td>4,113</td>
<td>953</td>
<td>30.2%</td>
</tr>
<tr>
<td>Eastern</td>
<td>2,813</td>
<td>3,038</td>
<td>225</td>
<td>8.0%</td>
</tr>
<tr>
<td>United States</td>
<td>10,831,766</td>
<td>13,135,849</td>
<td>2,304,673</td>
<td>21.3%</td>
</tr>
</tbody>
</table>

### COGNITIVE COMPLEX BY REGION

<table>
<thead>
<tr>
<th>Region</th>
<th>2016 GROWTH</th>
<th>2026 GROWTH</th>
<th>GROWTH RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern</td>
<td>8913</td>
<td>10797</td>
<td>21.1%</td>
</tr>
<tr>
<td>North Central</td>
<td>4074</td>
<td>4529</td>
<td>11.2%</td>
</tr>
<tr>
<td>Southwestern</td>
<td>41275</td>
<td>49859</td>
<td>20.8%</td>
</tr>
<tr>
<td>South Central</td>
<td>6520</td>
<td>7683</td>
<td>17.8%</td>
</tr>
<tr>
<td>Southeastern</td>
<td>6645</td>
<td>7613</td>
<td>14.6%</td>
</tr>
<tr>
<td>Eastern</td>
<td>9897</td>
<td>104463</td>
<td>5.7%</td>
</tr>
<tr>
<td>United States</td>
<td>77324</td>
<td>90944</td>
<td>17.6%</td>
</tr>
</tbody>
</table>
Consistently ranked by The Wall Street Journal, Kiplinger’s, Forbes and others as one of the top 10 locations for business and family in the U.S., Idaho is the ideal setting for companies in search of an affordable, pro-business environment and a superior quality of life for employees and prospective employees.