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DEAR FRIENDS

Congratulations—we all made it through an incredibly challenging and unique year. We experienced tremendous change in 2020 as we rode an economic rollercoaster through the ups and downs of COVID-19. In my lifetime, I have never seen any force that has been so globally impactful socially and economically. What we have found is this—companies that have found ways to adapt to new market conditions and meet their customers demands, for the most part, are those who have been successful and made it through the pandemic—many having banner years.

The reason I qualified with “most” is sometimes market conditions just shift too dramatically. Referencing the travel, hospitality, and food & beverage industries. In October in the United States, over 60,000 airline workers were laid off as a result of crushing COVID impact in the travel industry. Layoffs were necessary and airline industries are looking to circle the planes hoping for a quick resolve of COVID-19 and back to “a new normal.” This phrase, “a new normal” has been used way too much but it speaks to the fact that we will enter new standards with:

- **Infrastructure.** Internet importance has been even more pronounced as we have moved to virtual offices. Just like electrification changed our way of life, the internet is the digital highway for us to communicate and conduct business. Every region in the IDAHO KNOWLEDGE REPORT 2020 (IKR) has said that internet connectivity is a top priority.
- **Housing.** We know that Idaho continues to be one of the top growth states in the country. This growth continues to put pressure on several communities in Idaho as some areas have seen year-over-year housing prices grow at 21%.
- **Talent.** The demands of several innovative industries across Idaho demand science and innovative skills. To meet future demand, we must continue to build strong traditional and alternative educational pathways.
- **Immigration.** With COVID-19 and social unrest, specifically in some of the larger cities in the northwest and western US, we have seen immigration to Idaho from several areas—specifically California, Seattle, and Portland. Also, immigration has brought talent. Several open tech jobs in the state have had talent applicants from outside of Idaho looking to move to our state.
- **Capital and Entrepreneur Focus.** All six economic regions are looking to build entrepreneurial activity and increase capital investment to help companies in their regions grow.

At the heart of 2020 are two key points. First, the quality of life we have in Idaho is in high demand. Second, at the center of innovation and a strong ecosystem is the entrepreneur who is taking risk to build new products and services to meet customer demand. The risk taken is vital to the Idaho system and way of life. We must grow entrepreneur and intrapreneur support in Idaho.

We hope that 2021 will be a strong year for Idaho with innovation and building a stronger, more vibrant economy. While we grow innovation, we must keep the Idaho way of life at the heart of our focus—which helps us take care of each other and take care of the beauty of Idaho.

Keep INNOVATING,

Jay Larsen
President & Chief Executive Officer
Idaho Technology Council



“Before COVID-19, we were dealing with the opportunities and challenges of growth. Now, during the pandemic, we are dealing with the same issue. More and more people are moving to Idaho.”



The global pandemic has presented unprecedented challenges for our citizens and businesses. The year 2020 has been filled with uncertainty on many fronts, but one thing is clear - Idaho's economy is performing remarkably well, thanks in large part to Idaho businesses. They have demonstrated great resiliency and agility during the pandemic, and they have done an incredible job protecting workers and patrons.

Before COVID-19, we were dealing with the opportunities and challenges of growth. Now, during the pandemic, we are dealing with the same issue. More and more people are moving to Idaho.

The growth assures us we are doing a lot of things right - governing with responsibility, maintaining a high quality of life, and listening to businesses about what they need (and don't need) from government.

Our rapid growth also challenges political and economic leaders to help replace traditional jobs by supporting an ecosystem where our technology industry can thrive. A diversified economy is a strong economy, and our success as a state depends on the success of our knowledge-based businesses.

I appreciate the work of the Idaho Technology Council in assembling leaders in industry, education, and workforce development to meet the needs of a growing tech industry in Idaho. The Idaho Knowledge Report recognizes different parts of the state have different needs. Thank you to all those who participate in these efforts. I personally appreciate the time and talent you dedicate to developing strategies that result in industry-leading products and services right here in Idaho. Your work is creating more opportunity for the citizens of our great state.

Sincerely,

Brad Little
Governor of Idaho



Emsi Headquarters Moscow, Idaho

IDAHO'S TECH CLUSTER AND DISPERSING NATIONAL TALENT

Written by: Drew Repp

Last December Brookings released a report titled *The Case for Growth Centers: How to spread tech innovation across America*. The report's premise is that while the tech and innovation sector is responsible for so much job growth and prosperity, those benefits are greatly concentrated in a few coastal markets (Seattle, Boston, San Francisco, San Diego, and San Jose). And as the sector continues to grow, it isn't bringing the rest of the country along with it. That is, these metros' share of tech sector growth far outpaces other metros and regions. From 2005 to 2017, these five metros increased their share of the nation's total innovation employment from 17.6% to 22.8%, according to the report.

To combat this concentration (and the divergent path that much of the rest of the country is on), the authors propose designating eight to 10 new regional "growth centers" across the heartland. These centers (through a competitive process) would receive massive infusions of federal dollars towards R&D, workforce develop-

ment, urban placemaking, and business financing to go along with regulatory and tax benefits.

It's an interesting idea, the efficacy of which I'm sure can be debated. But the end goal is a worthy one, and much needed. But in the absence of such a program (and for those not selected were it to ever happen), how can states, regions, and communities capture more of the tech industry growth and recognize more of the benefits?

To a large degree Idaho has been succeeding at this. Using the same digital service industry cluster definition as Brookings, Idaho has added more than 4,600 tech jobs since 2010. That's 84% growth, which far exceeds the national growth rate of 59%. The compound annual growth rate (CAGR) for tech jobs in Idaho over that time is 6.3%. Additionally, individual metros have fared well. Unsurprisingly, the Boise MSA had 86% growth with a 6.4% CAGR. In the last five years, the Coeur d'Alene MSA has seen a 33% growth with a 5.8% CAGR.

The state's growth isn't merely due to the national or superstar city tech trends either. Competitive effect indicates how much of the job change within a given region is the result of some unique competitive advantage of the region. Competitive effect measures the job change that occurs within a regional industry that cannot be explained by broader trends. Over the last 10 years Idaho has added roughly 1,300 digital service jobs more than expected based on the national growth and its industry mix. Put another way, the state's tech industry is growing its competitive advantage.

There are various reasons for this growth and strength, but one is that the necessary workforce is attracted to opportunities and the quality of life here. The low cost of living is also eye-popping to those coming from major tech markets. Each year Emsi produces a Talent Attraction Scorecard that ranks how communities are doing in their effort to attract and develop talent. Idaho's four large counties (those over 100,000 in population) have each steadily risen in

OVER THE LAST 10 YEARS IDAHO HAS ADDED ROUGHLY 1,300 DIGITAL SERVICE JOBS MORE THAN EXPECTED BASED ON THE NATIONAL GROWTH AND ITS INDUSTRY MIX. PUT ANOTHER WAY, THE STATE'S TECH INDUSTRY IS GROWING ITS COMPETITIVE ADVANTAGE.

the rankings since 2016. Out of 601 large counties nationwide, Ada and neighboring Canyon counties have climbed to No. 14 from No. 77 and No. 67 from No. 113, respectively. Kootenai County has risen to No. 82 from No. 173, and Bonneville County to No. 138, up from No. 200.

As remote work has become more popular, it's become more common for workers to take their jobs with them as they escape major markets. Publications from The Wall Street Journal to local newspapers have profiled individuals and families moving to the likes of Boise, Denver, and Tulsa. According to American Community Survey data, 6.1% of Idaho's workforce was remote in 2019. This ties it with Arizona for the seventh highest percentage in the country.

But of all the things 2020 has been, its role as an accelerator will perhaps be one of its most lasting characteristics. The pandemic has made remote work ubiquitous and rapidly accelerated its rise and acceptance. Roles in tech, the creative industries, and other knowledge-based fields were already remote-capable, but until the pandemic many employers hadn't given their blessing to such employees working offsite. However, employers have now seen how effective and productive remote employees can be and it's easy to envision

people and companies sticking with the model as we move beyond the pandemic.

The most conclusive data (address changes on IRS tax returns and U.S. Census Bureau surveys) on migration isn't available yet. But data such as home searches on real estate platforms and USPS mail forwarding requests indicate that the pandemic has spurred a spike in migration out of large metros. This, combined with remote work's acceptance and the growing attractiveness of alternative markets, is a star alignment for Idaho. Already with existing momentum in growing the tech cluster, competitive cost of living and high quality of life, the state is now presented with a vastly larger pool of talent to access and keep fueling its tech sector. In short, capturing tech workers as they move on from superstar cities and major metros presents a unique opportunity for the tech and innovation scene in Idaho.

Of course, talent attraction is just one side of the talent development coin. The innumerable workforce, training, and education programs need to continually adapt to create the ecosystem to support tech and innovation talent. At Emsi, we believe one of the best ways to do this is to get employers, people, and educational programs all speaking the common

language of skills. It's why we are so invested in skills data; constantly experimenting and innovating with new tools to help people put their skills to work and businesses find the people they need. Welcoming, even actively recruiting, tech talent that goes on the move in the wake of COVID is a smart strategy. But organizations such as Idaho Technology Council and others will be wise to continue fostering the skills of its homegrown talent.

In a followup to their report in early March, The Case for Growth Center authors provided some additional data on the tech agglomeration occurring in coastal cities and concluded: "What is increasingly clear, though, is that tech-based growth will likely not diffuse out into America's up-and-coming mid-sized cities and small towns on its own." This may be true. But the authors had no way of knowing the deep and far-reaching implications of the pandemic that were on the horizon. While tech worker migration won't be substantial enough to evenly spread out tech cluster prosperity, it potentially could disperse a bit the primary need for tech and innovation: talent. As a result, Idaho, which is already up-and-coming, is in position to harness one of the few bright spots of 2020.



Drew Repp
Content Manager,
Community Insights, | Emsi



The J.R. Simplot Corporate Headquarters

CREATING AND PROTECTING INNOVATIONS DURING CHALLENGING TIMES

Written by: Vid Mohan-Ram

From an intellectual property point of view, the pandemic has quickened ingenuity. At the J.R. Simplot Company, for example, we accelerated our efforts this summer to make a new french fry batter adapted to the delivery food sector to help our restaurant customers transition from dine-in to delivery and take-out in response to COVID-19. Companies everywhere continue to put more and more effort in encouraging employees to be creative and voice their ideas, especially now.

On this point, a recent market valuation survey concluded that “COVID-19 has accelerated the trend of increasing [intangible asset market value] share *with intangible assets now commanding over 90% of the S&P500 market value*”¹. The surveyors say the increased reliance

A RECENT MARKET VALUATION SURVEY CONCLUDED THAT “COVID-19 HAS ACCELERATED THE TREND OF INCREASING [INTANGIBLE ASSET MARKET VALUE] SHARE WITH INTANGIBLE ASSETS NOW COMMANDING OVER 90% OF THE S&P500 MARKET VALUE”. THE SURVEYORS SAY THE INCREASED RELIANCE ON INTELLECTUAL PROPERTY AS A VALUE GENERATOR...

¹ Intangible Asset Market Value Study (<https://www.oceantomo.com/intangible-asset-market-value-study>) - Ocean Tomo is an intellectual property firm that provides various services centered on intellectual property assets.

on intellectual property as a value generator also holds true for the S&P Europe 350 index as well “with an increase from 71% in 2015 to 74% in 2020.”

Overall, that’s staggering news: it means that in 2020, this year of crisis, employee creativity is being tapped more than ever, everywhere. A few decades ago, company market value resided in land-ownings, brick-and-mortar facilities and other tangibles. The survey results underscore the importance the state of Idaho has in continuing to attract talented and creative minds. And correspondingly we need the legal community to continue to advise and educate the business and research sectors about how to turn that creativity into valuable assets – and consequently boost the economy.

Working under pressure can yield quick-paced, design-thinking-style ideas and prototypes. But with haste comes mistakes. In the context of IP, mistakes can be fatal. Patent rights and Trade Secrets can be wiped out by premature disclosure, use or commercial activity. Likewise, blueprints can be copied, brands counterfeited, and trademark-domain names taken, if timely steps aren’t taken ahead of production, marketing and sales. It is therefore crucial to have processes in place to identify and strategically decide what next steps, if any, to take, while under pressure to act quickly and to supply goods and services before risk losing out to a competitor.

The reason it is critical for business leaders to be cognizant about timing is because IP helps to protect ideas from unauthorized exploitation. When done timely, a perfected IP right gives its owner the powerful capability to legally exclude others

PATENT RIGHTS AND TRADE SECRETS CAN BE WIPED OUT BY PREMATURE DISCLOSURE, USE OR COMMERCIAL ACTIVITY. LIKewise, BLUEPRINTS CAN BE COPIED, BRANDS COUNTERFEITED, AND TRADEMARK-DOMAIN NAMES TAKEN, IF TIMELY STEPS AREN’T TAKEN AHEAD OF PRODUCTION, MARKETING AND SALES.

from making, using, or selling that idea, or prevent someone from misusing confidential information. For patented ideas, this legal monopoly is limited in time and it therefore behooves the patent owner to commercially exploit their legal rights while that monopoly exists. For ideas that are kept in-house as trade secrets, it’s critical for the owner to know how to keep prying eyes out and loose lips shut.

Not every idea however is protectable. A company must be aware of what IP rights are, and are not, available to them. This knowledge helps structure business plans and research strategies. Appreciating what the suite of IP rights looks like for your company helps prioritize your IP needs and establish your in-house practices. It also helps leadership appreciate external IP risks. Doing this IP housekeeping ahead of time makes a company all the more ready to act nimbly and trigger its IP options in a proactive and orderly way without adding complexity or anxiety

to what will naturally be a stressful operating environment during prolonged emergencies.

The Governor said in his address that “[A] diversified economy is a strong economy”². Along those lines then: a diversified company is a strong company. Specifically, from my IP law perspective, an Idaho company with a diversified portfolio of intangible assets and a sound understanding of its diverse suite of intellectual property rights, is a strong and formidable one – one that will remain so before, during – and after – any crisis.



Vid Mohan-Ram
Chief IP Counsel,
J.R. Simplot Company

REGION REPORTS



TOP 3 TRANSFORMATIVE INDUSTRIES AND SUMMARY

NORTHERN IDAHO

Region 1 - Top 3 Transformative Industries

HOSPITALITY, ADVANCED MANUFACTURING, AND HEALTH SERVICES



Northern
Region 1

The North Idaho region, composed of five rural counties, has an amazing capacity to transform and leap its economy forward. Over the last four decades, the region has more than doubled its population, going from 120,000 in 1980 to over 250,000 in 2020, with the greatest area of growth lying in the Coeur d'Alene/Post Falls area in Kootenai County (population 180,000). Its first transformational change happened nearly four decades ago, with its latest transformational leap just beginning.

HOSPITALITY.

Historically, a mining, timber, and agricultural region, North Idaho's first transformative industry is the hospitality industry. Without this transformation in the 80's, the Coeur d'Alene area would have remained a small, rural community with a limited economic base and declining population. Instead, the region moved forward to transform itself and catalyze an economic boom. The industry continues to be a major contributor and driver for the region's and state's economy today. In 2001, the industry accounted for 8% of the workforce in North Idaho; now it accounts for 11% of the total workforce, showing a shift of 3% in under 20 years, and signifying the second highest workforce shift in the region, second only to the health industry.

The dramatic urban renewal de-

velopments around the lake front in Coeur d'Alene including the Coeur d'Alene Resort, the City and McEuen Parks, Northwest Blvd, the Education Corridor, and Riverstone—have not only physically transformed the area and the region, they have also spurred an economic transformation that continues to this day. The strong growth of retail businesses, restaurants and services that followed contributed to the area's appeal to tourists, families, retirees, and businesses. Events sponsored by the Coeur d'Alene Chamber and its partner chambers across the region, ranging from the high school homecoming parades to the world-class IronMan competition, from local farmers markets to juried art shows, continue to attract people from across the globe to strengthen the

industry. The luxurious Coeur d'Alene Resort and its world-renowned floating green continues to bring visitors and conference attendees to the region and serves as the starting point for countless recreational opportunities throughout North Idaho.

As a bonus, the region sees this industry as a recruitment tool to attracting young professionals, as well as growing a Gig economy in the region. With the proliferation of 'work from home' options as a result of the global pandemic, we expect the region to become a hub for telecommuters, especially because of our proximity to the Seattle area and its large and growing high-tech sector. The region will continue to look beyond its current needs, and to dream big and pursue that dream with gusto!

ADVANCED MANUFACTURING/ AEROSPACE AND AVIATION SECTOR.

In parallel to growing the hospitality industry, in 1987, business and community leaders established Jobs Plus, Inc. (dba CdAEDC) to actively recruit small manufacturing businesses to help diversify and re-invigorate the economy. Since then, nearly 150 small businesses have been actively recruited to the region, creating well over 7,500 direct jobs and at least twice as many indirect jobs, while bringing in hundreds of millions of capital investment into the region. These actively recruited businesses are just a fraction of the existing business who have expanded and new businesses who have moved into the region to call North Idaho home.

Manufacturing accounts for 10% of the CdA MSA's workforce, and nearly 10% of the region's gross regional product. The industry includes a wide mix of manufacturers, from small suppliers of nuts and bolts to large multi-national companies that customize equipment from major OEMs (original equipment manufacturers). Examples of businesses include: Empire Airlines, Daher/Quest Aviation, Aerocet, Unitech Composites, Advanced Thermo Composites, Stan-Craft Aviation, Dauntless Air, Rocky Mountain Construction, Bayshore, GroundForce, Kochava, Pipl, Chief Architect, X-Craft, Rohini, Continuous Composites and many others. Together these companies produce and deliver specialized products

and services to industries, globally; while providing excellent wages and benefits, and good opportunities for skilled workers, locally.

The manufacturing industry's partnership with education –especially technical training–helps fuel the growth. Extremely receptive to industry needs, North Idaho College, has a 5-year old, state of the art, 100,000SF technical training center, that sits next to the Kootenai Technical Education Center focused on high school technical training for Kootenai County students. Both facilities were industry-led and community-supported. Constant innovation, evolutions in technology, and improving processes in the manufacturing industry ensures continued growth and makes this a good industry focus for developing technology skills in the workforce.

Over the last decade, the aerospace and aviation sector has grown significantly because of the region's proximity to Boeing in the Sea-Tac area, and the I90 transportation corridor that makes the joint CdA and Spokane MSAs a major part of the industry's supply chain. Four years ago, the inland NW established the I90 Aerospace Conference and Expo, attracting over 250 attendees, 50+ exhibitors, and speakers from Boeing, SpaceX, Bombardier, the Idaho and Pacific Northwest National Laboratories, and other OEMs and primary suppliers to the aerospace and aviation industry. With the exacting standards and precision machining employed by our companies, there is a large potential for growth by ex-

panding the supply chain to derivative industries. For example, medical device and aerospace manufacturing have parallels because they both have exacting standards; so, with the large demand for medical device manufacturing because of the pandemic, local businesses took advantage of the countless opportunities by pivoting and including medical manufacturing to their customer mix.

HEALTH SERVICES.

Most recently, transformational growth is happening in the region's health industry, spurred by major expansions and changes at our community-owned hospital, Kootenai Health (KH). Two of the objectives were to consolidate services across North Idaho and prevent health industry economic leakage, with the overall mission of providing a "comprehensive range of medical services to patients in north Idaho, eastern Washington, Montana and the Inland NW in several facility locations." The changes have created a comprehensive network of services all available within the region, supporting high wages and training, and further expansion opportunities.

In the last five years, Kootenai Health expanded the east wing, with a 100,000 SF expansion housing, NICU, a Family Birth Center, orthopedics and a new lobby; enlarged the facilities in Post Falls; upgraded the emergency department with state-of-the-art changes; and adopted the EPIC medical software to integrate information with its various clinic partners across the region. Just the soft-

ware adoption alone, created 80 new jobs in the hospital. Moreover, Kootenai Clinic's expanded services continue to allow residents to get top notch health care without having to leave home.

Overall, healthcare and social assistance jobs nearly doubled between 2001 and 2019, accounting for 7.2% of the workforce in 2001 to 11.2% in 2019, showing the highest workforce shift of 4% over the 19-year period amongst all industries. The expansion has fueled the growth of the health services industry, attracting more private providers in the region –particularly the area surrounding KH, and contributing immensely to increasing average wages in the area. Average wages at KH is nearly \$60,000 a year.

In addition to KH, Northwest Specialty Hospital (NWSH), physician owned private hospital; and Heritage Health (HH), a non-profit health facility making health care accessible and affordable for everyone, have also shown incredible growth. NWSH expanded its facility in Post Falls; and HH is currently looking for a larger facility. Northern Idaho Advanced Care Hospital, an Ernest Health System hospital providing long-term acute care; and the Panhandle Area Health District also saw increased patient loads.

The recent approval of the Health Corridor Urban Renewal District, surrounding Kootenai Health, will provide additional stimulus to create an even stronger health industry. The objective is to develop 259 acres around the hospital to spur economic development by attracting and clustering high-paying medical jobs and improving the area's infrastructure to boost growth in related sectors, both for vertical integration and horizontal supply chain options. The area is currently dotted with vacant lots, underutilized land, and deteriorating buildings. The plan is to attract medical service businesses into this area to create a medical center and hub for doctors, services, and specialties, further strengthening the region. As a bonus for the region's educational focus, this growth is expected to translate to additional health programs in our education system, thus furthering growth, and job opportunities for residents of the area.

SUMMARY

Underlying the region's transformational growth are the shifts in the use of technology, whether it's in the heritage industries of mining and timber or high-tech fields of advanced manufacturing or healthcare. The area's great fiber backbone (the IRON system that joins Idaho's universities with the Idaho National Laboratory) and the growth of related academic and technology programs at Idaho's universities and colleges along with nearby eastern Washington institutions has enabled industries in the region to grow –with available training ranging from basic coding to repair systems to cybersecurity and advanced programming. Support systems, including telecom companies that provide broadband to residences and businesses, have also furthered the growth in the region, with CARES funding allowing for "last mile" transmission in many rural areas. These changes continue to transform the labor pool in the region, requiring more training and resulting in significantly better wages.

Furthermore, North Idaho's job and population growth, combined with its prime location at the intersection of I90 and US 95, gives the region east-west and north-south access across the North American continent and beyond, supports continued growth in various industries, along with distribution and warehousing to service the growing northwest and Canadian southwest, and professional and financial support services and construction to keep up with the growth.

The North Idaho region is expected to continue to grow; and according to economist, the entire Pacific Northwest has withstood the ravages of the pandemic better than most regions. With vaccine availability in sight, projected growth in the work-from-home sector, and business shifts from urban to suburban, North Idaho expects continued transformational growth in the future.



SNAPSHOT STRENGTHS, CHALLENGES, VISIONARY GOALS

REGION 1

Gynii Gilliam, Jobs Plus Inc

Ryan Arnold, Regional Director of Entrepreneurship, North Idaho College

STRENGTHS:

Business Friendly Climate

With a mix of local and state tax incentives, responsive workforce educational programs to support businesses, and a focus on future-friendly infrastructure that supports business growth, North Idaho is a region that is highly attractive for businesses to start, expand, and relocate. In addition, due to the unique combination of North Idaho's independent and entrepreneurial spirit, mixed with a strong sense of community and support, North Idaho has become a catalyst for new innovations, companies, and ideas to flourish.

High quality of life/ outdoor lifestyle, environment.

North Idaho is known for its direct connection to the natural environment and the many outdoor recreational opportunities available for residents and visitors, as a four-season destination. With over a hundred lakes, three ski mountains, and access to two national forests, North

Idaho is a nationally recognized outdoor mecca for those looking for easy access to outdoor activities, wide-open spaces, and scenic vistas. Matched with local communities that support and invest in parks and active lifestyles, along with vibrant art and culture scenes, North Idaho is an increasingly popular choice for companies and employees alike who are looking for a strong work/life balance.

Access to Quality Healthcare and Services.

The quality of a community is intrinsically tied to its access to quality healthcare and health services, for which, North Idaho is widely recognized. Kootenai Health, a Mayo Clinic affiliated hospital, is the region's largest medical center, whose consistency is recognized nationally for the comprehensive and quality medical services it provides. Three other hospitals in the Coeur d'Alene/Post Falls area --Northwest Specialty Hospital, North Idaho Advanced Care Hospital, and Heritage Health, along with a host of rural clinics provide a host of comprehensive services for the region. Paired with the recent approval

of the city of Coeur D'Alene's Health Corridor Project, whose purpose is to greatly expand health services in the region, and the proximity to Spokane's health care services, including two new medical schools, North Idaho is well positioned to continue access to world-class healthcare services into the future.

CHALLENGES:

Affordable Housing.

As an attractive destination for lifestyle enthusiasts, retirees, and a strong workforce, North Idaho housing prices have continued to rise, making housing affordability a key challenge. COVID-19 accelerated the trend further, with more people moving into the area and housing prices rising over 11.4% in 2020. Municipal government and private industry have responded with sets of policies and efforts that have encouraged an increase in building stock to help reduce upward pressure on the housing market. This has included loosening restrictions and providing incentives for actions such as development infill, ADU's, and the "missing middle housing" which can encourage a wider range of housing stock for residents.

Competitive Wages.

In comparison to the US and even other Idaho regions, North Idaho's mean hourly wage is consistently below average, placing 41% of regional households in the ALICE (Asset Limited, Income Constrained, Employed) population or below the poverty line. In response, companies are increasing wages to be more competitive to neighboring WA's minimum wage hikes; even then, nearly 15,000 North Idahoans still commute to Washington border communities such as Spokane, where state policies create higher entry level wages that are higher. Organizations such as CdAEDC, United Way, Idaho Labor, and private employment services continue to bring attention to the issue and educate employers to develop programs to advance education, income and health programs in the region.

K-12+ Educational Investment.

Idaho continually ranks low on its investment in K-12 education in relation to other states, with implications in providing a competitive educational experience for our region's youth. In response, North Idaho continues to invest and support educational programs and opportunities that prepare students for future careers and industries. This includes STEM education programs such as makerspace GIZMO-CDA and the University of Idaho Dig'nIT program which trains young students in-demand skills such as computer coding. Additionally, North Idaho continues to partner with business and industry to address workforce needs, whether it's for more nurses or CNC machine operators; but, more work and programs are still needed to ensure a match between available workforce skills and industry needs.

VISIONARY GOALS:

Increased Economic Development Activity and Diversity.

North Idaho's long-term goal is to continue to diversify its economy by strengthening its economic base and creating new sectors. More specifically, the region is strengthening existing industries by working on programs and forums that help complete vertical and horizontal integration (supply chains) in its manufacturing, distribution, technology and health industries. Additionally, the region is collaborating to provide better support for entrepreneurial/business start-ups, remote work, and a strong Gig economy, whether it's through shared work spaces or shared equipment through NIC Ventures, Gizmo, Innovation Den, Bonners Ferry Business Center, PAC, SBDC and many others.

Educational Opportunities to Create a More Equitable Community.

As the region grows, our long-term goals include creating a more socially and economically equitable community. Continued investment in education is a way to elevate the community and provide various career pathways for all citizens. Building on the coordination between industry and education to keep alignment between workforce skills and business needs, along with ongoing investment in STEAM-based education and technical training are critical. Our local efforts in education and upskilling the current workforce, along with the large amount of in-migration ensures that business needs will be

met. North Idaho has a long history of supporting inclusionary efforts with groups like the human rights institute, but there is more work to be done to address social and economic inequality to ensure we remain welcoming to all.

Strong Future Growth Planning to Strengthen our Communities.

Our third 'visionary goal priority' is to ensure that we're addressing future growth. The Coeur d'Alene/Spokane MSA is in the top 25% of growing regions in the US. In order to stay ahead of this growth, the region is working on various projects that include comprehensive planning to address water and sewer needs, land use and zoning to address best use, last mile broadband for connectivity, transportation expansions to mitigate traffic over the next 20 years, along with ways to address housing and health needs for our growing population. Our goal is to balance this growth with environmental concerns to keep habitat intact in our various lakes, protect one of the largest underground aquifers serving both North Idaho and eastern Washington, and preserve the region's natural beauty. But it goes beyond that, our future also includes caring for the health of our citizens -from mental health resources to social services for the most vulnerable, to developing community trails for a healthy lifestyle. Our goal is to embrace the growth with strong future planning.

NORTH CENTRAL IDAHO

Region 2 - Top 3 Transformative Industries

WINE, CAREER AND TECHNICAL EDUCATION, FOREST PRODUCTS INDUSTRY



WINE

The Lewis-Clark Valley wine industry is transforming both the local economy as well as the Northwest wine scene. From its roots in the first vines planted in the 1870's, the newly formed LC Valley American Viticultural Area (AVA) now boasts 16 wineries, 9 vineyards, 306,000 total acres of land, and nearly 100 acres of locally grown grapes. As the LC Valley AVA progresses, it has the very real potential to transform the Valley into the leading wine destination in the Northwest.

The foundations of the local wine industry lie in the local geography and geology. The differing slopes and elevations within the AVA allow for a wide variety of grapes to be grown. The geology provides good planting areas that are easy to develop and contain air drainage characteristics that are ideal for grapes. The steep sides of the valleys provide

good frost protection. The soils hold water well and are rich in nutrients.

The wine industry is becoming more important to the region's employment numbers. While employment numbers are still relatively low compared to the region's leading employers, the local wineries and vineyards are now employing viticulturists, soil scientists, winemakers, sales professionals, event planners, property managers, and laborers to name just a few of the occupations.

Advances in plant and soil science have helped to build the LC Valley AVA. The winemakers in the region are extremely educated and knowledgeable about the latest science and technology. The married owners of the 2020 Northwest Winery of the Year, Clearwater Canyon Cellars, both have advanced degrees, one a masters in soil science, the other a PhD in food science. The industry now requires an advanced level of skill and knowledge to be successful.

CAREER AND TECHNICAL EDUCATION

The Career and Technical Education (CTE) providers in the region are transforming educational opportuni-

ties. The region is opening two new CTE facilities in 2020. One is part of the new Lewiston High School and is named the Neil DeAtley Career Technical Education Center. The other, located just a few hundred feet to the north, is the Schweitzer Career and Technical Education Center, part of Lewis-Clark State College's Technical & Industrial Division. Together, these two facilities will provide a path to careers and talent pipelines.

Lewiston High School and LC State both had good programs in CTE prior to the building of their new facilities, but both were significantly constrained by existing classrooms and capacities. New technology was difficult to place into old building frameworks and the result was programs that could not reach their full potential. The new construction will contain the technology and equipment needed by the students to be employable to area industries.

Partnerships with area employers has played a large role in the design of both the facilities and the courses that will be taught within them. The results will provide pipelines of qualified talent that will be ready to work for local employers. The DeAtley Center will

pull students at the high school level from all of Idaho Education Region 2, not just local Lewiston students. Thus, the more rural schools will have every chance to advance their students at a higher level of CTE instruction. The Schweitzer Center for LC State is set up to be a destination for CTE students from the entire Northwest and beyond. Such programs as CNC machining, industrial electronics technology, instrumentation, HVAC, and auto mechanics will be taught there. The building itself is set up as a “living textbook”, with many of the Center’s systems remaining visible to the students so they can view, trace and study such features as HVAC piping, electrical and cabling runs, and floor joists.

Local employers, especially manufacturing employers, have struggled to find and retain workers in the skilled trades. Both new facilities will allow local and regional students to find the path to quality careers while remaining close to home. Employers have traditionally had to leave the region to find enough qualified applicants for open positions in the trades. These new CTE centers and the innovation they represent will make a huge difference for local talent pipelines.

FOREST PRODUCTS INDUSTRY

The forest products industry in this region has used technology and innovation to ensure its local businesses will remain as industry leaders. Both Idaho Forest Group (IFG) and Clearwater Paper Corporation (Clearwater) have developed practices and products that have transformed the industry.

IFG has upgraded its Lewiston mill to include a CT log scanning system.

This system takes a cross sectional scan of the log, doing a full digital reconstruction and virtual grading. From this scan a 100% optimum cutting solution can be obtained based on the highest value of the final product. Size and position of any defects in the log can be determined and then processed. Each log can be maximized for the highest quality and resale. Systems like this one drive down the amount of unusable waste and drive up the value of each log entering the system.

Clearwater is the only paper mill in the State of Idaho. The Lewiston mill manufactures both tissue products and fine bleached paperboard products. The papermakers on the paperboard side of the business are constantly looking to optimize and improve their products. Their latest success is a new brand of cup stock paperboard called NuVo. Clearwater has traditionally used only virgin fiber in its paperboard, but it pivoted to meet the needs of its customers with NuVo, which contains 32% post-consumer recycled fiber. This allows customers to have the best of both worlds: a cup made from recycled fiber that still maintains the brightness and printability of virgin fiber. This new product is distinct within the industry.

While the technology involved in the transformations at both IFG and Clearwater do not necessarily increase the number of employees on the site, the innovations do ensure that both companies remain as leaders of their respective industries. This fact ensures the stability of the important jobs that form the basis of the manufacturing sector of Region 2, thus retaining the high-quality jobs within the LC Valley.

SUMMARY

Underlying the region’s transformational growth are the shifts in the use of technology, whether it’s in the heritage industries of mining and timber or high-tech fields of advanced manufacturing or healthcare. The area’s great fiber backbone (the IRON system that joins Idaho’s universities with the Idaho National Laboratory) and the growth of related academic and technology programs at Idaho’s universities and colleges along with nearby eastern Washington institutions has enabled industries in the region to grow –with available training ranging from basic coding to repair systems to cybersecurity and advanced programming. Support systems, including telecom companies that provide broadband to residences and businesses have also furthered the growth in the region, with CARES funding allowing for “last mile” transmission in many rural areas. These changes continue to transform the labor pool in the region, requiring more training and resulting in significantly better wages.

Furthermore, North Idaho’s job and population growth, combined with its prime location at the intersection of I90 and US 95, gives the region east-west and north-south access across the North American continent and beyond, supports continued growth in various industries, along with distribution and warehousing to service the growing northwest and Canadian southwest, and professional and financial support services and construction to keep up with the growth.

The North Idaho region is expected to continue to grow; and according to economist, the entire Pacific Northwest has withstood the ravages of the pandemic better than most regions. With vaccine availability in sight, projected growth in the work-from-home sector, and business shifts from urban to suburban, we expect continued transformational growth in North Idaho.



SNAPSHOT STRENGTHS, CHALLENGES, VISIONARY GOALS

REGION 2

Scott Corbitt, Valley Vision Economic Development Lewis-Clark Valley
Gina Taruscio, The Partnership for Economic Prosperity

STRENGTHS:

Access to Talent.

The region is fortunate to boast the 6th highest concentration of college graduates in America. These graduates come from the University of Idaho, Washington State University, Lewis-Clark State College and Walla Walla Community College's Clarkston, Washington campus. These schools provide graduates in both the technical and liberal arts to supply local employers with ready and qualified applicants. Combined with the recent advances in Career and Technical Education availability, Region 2 has access to talent that is unusual for a largely rural region with low population.

Natural Resources.

North Central Idaho is blessed with an abundance of natural resources that supports the local economy. From the fertile rolling hills of the Palouse to the forests on state, federal and private lands to the water flowing through the region in the Snake

and Clearwater Rivers to the soils and topography supporting the wine industry, the natural resources make Region 2 a unique location.

Transportation.

North Central Idaho's economy is supported by a multi modal system of transportation that includes air, ground, rail, and barge. The region contains two regional airports, major highways travelling both north-south and east-west, rail lines to take manufactured products to market and barge traffic on the Snake to connect the furthest inland seaport in the West with the opportunities across the Pacific and within the western states

CHALLENGES:

Availability of Broadband.

North Central Idaho is largely rural and access to world-class broadband is limited. The larger towns such as Moscow and Lewiston have above

average infrastructure, but no connectivity exists between the cities or into much of the more rural counties in the region. Currently there are pending projects and grant requests to help to solve this challenge.

Access to Capital.

North Central Idaho boasts the 6th highest concentration of college graduates in America. This level of education will bring with it an entrepreneurial attitude that can only be met with capital funds or angel investors. The region currently does not have a ready supply of investors to take advantage of this strength.

Affordable Housing.

While improving, North Central Idaho still lacks adequate affordable housing to support its workforce. Rental housing is scarce and entry-level homes are often out of reach for baseline employees. Recent arrivals from the west coast have created a real estate market with significantly increased home prices making first-time home buying difficult.

VISIONARY GOALS:

Access to Talent.

Utilizing the Talent Pipeline Management framework, North Central Idaho can create partnerships between employers and educators to provide specifically qualified candidates for employers. With the impending wave of retirements and the projected gap in available workers for open positions, these pipelines can ensure both a full team for businesses and an actively employed and qualified workforce.

Access to Capital.

North Central Idaho needs a source of funding and investment to assist the entrepreneurs who are developing the innovative ideas that will become the businesses of tomorrow. An innovation hub that contains an access to potential capital would create an avenue for economic growth within our current population. This hub could also serve as a home for remote workers already relocating within the region. The coming together of these different faces of business will create collaboration and opportunity.

Access to Property.

North Central Idaho is ready for an influx of technology companies to bolster the economy, but these moves are often prevented by the lack of availability of suitable commercial property. The goal is to free up suitable property to offer for sale or lease to these businesses looking to relocate.

SOUTHWESTERN IDAHO

Region 3 - Top 3 Transformative Industries

HEALTH CARE AND SOCIAL SERVICES, SCIENTIFIC & TECHNOLOGY, MANUFACTURING



HEALTH CARE AND SOCIAL SERVICES.

Long viewed as ripe for disruption, health care and social services are likely to be significant catalysts for transformation and innovation in southwestern Idaho - and throughout the state - as our region and the globe navigate historic times.

Hospitals and health systems have been transforming themselves for the past several years; mergers, acquisitions and consolidations have been slowed by the economics of the COVID-19 pandemic, but are not likely to cease. Care providers, who had been wading into telehealth before the pandemic, found themselves needing to accelerate their digital programs and services, and there is no turning back now. Questions will

have to do with strategic program design and investments.

Telehealth, in many respects, dovetails with considerations having to do with community and population health and historic inequities that these approaches can begin to address. In our part of the state and country, there are as well the unique considerations of rural areas and communities.

And there are the significant, and largely unknown, aftereffects to hundreds of people who have contracted COVID. Medical science continues to learn about this pernicious virus daily, and damage to hearts, lungs and neurological systems, among the lingering effects of this novel coronavirus, are expected to consume significant resources, even as many have lost jobs and employer-sponsored health insurance. The costs of health care must be addressed; hospitals and health systems that before the pandemic had moved vigorously into the value space are positioned more solidly to negotiate the uncertainties

of the global health crisis than those operating by way of more traditional models.

Finding answers, developing creative solutions and cultivating a workforce equipped to deliver those solutions while tackling the thorny problems of affordability are the challenges of our time - and our region - in health care. Answers are most likely to emerge through partnerships and collaborations; health care is likely to be, accordingly, an exciting industry to watch in the coming year and beyond.

INDUSTRY 4.0.

Combining emerging, connected and smart technologies to digitally transform industry. Industry 4.0 is fourth revolution that is based on data, connectivity, calculation power and technology combined with commercial solutions. It is an approach that uses advanced technologies to reinvent products and services from design and engineering to manufacturing support, accelerating opera-

tional efficiency and enterprise-wide growth. Less than 20% of businesses have realized the full impact of digital investments, enabling them to achieve cost savings and create growth. A mix of technologies could result in large cost savings for companies. The traditional value chain will pivot toward personalized experiences, products and services driven by innovative business models that result in new sources of revenue. Artificial Intelligence (AI), Internet of Things (IoT), Machine to Machine communication (M2M), connected hardware and embedded software are the power behind digital reinvention and enable increased automation, improved communication and self-monitoring, and productions of smart machines that can analyze and diagnose issues without the need for human intervention. Biggest trends are Smart Factory, Predictive Maintenance, 3D Printing, and Smart Sensors. Since connected machines collect a tremendous volume of data that can inform maintenance, performance and other issues, as well as analyze that data to identify patterns and insights that would be impossible for a human to do in a reasonable timeframe, Industry 4.0 offers the opportunity for manufacturers to optimize their operations quickly and efficiently by knowing what needs attention.

Steam, electricity and robots changed the previous industrial revolutions, now big data is a new resource identified as the 4th industrial revolution. Plenty of data is available in industries like the semiconductor industry, but only a fraction has been used because of resource limitations. Data was handled through engineers with calculation and statistical software, which drives a major bottleneck. With Big Data infrastructure and Machine Learning and AI, more and more data can be handled and

unprecedented insights generated. This increase of data calculation and connectivity is also leading to more gamification in many avenues from education to health. Speech recognition has new possibilities and potential in spaces that were previously unthinkable.

We are already seeing a shift in focus and skill sets needed for talent. Engineers need to understand how the data can improve their efficiency; IT members need to enable the engineers to access the data in an efficient manner. We are also experiencing an increase in data related jobs (data analyst, data architect, data scientist, data engineer) and a reduction of jobs with repetitive content. The exposure to data has never been larger. In many technology companies there are no jobs left that do not interface with data. Employees are gradually exposed to more data tools and are being trained to deal with that. Further, there is an evolution of the way people connect with data. No code and low code software enable a smooth connection even without coding skills. Think of it as an app on a smart phone where the coding happens behind the screen. The huge increases in the amount of data available, the connectivity of machines and tools and the accessibility of the data is driving significant transformation across many different sectors in our region.

MANUFACTURING

Manufacturing has the potential to transform the Idaho economy around two principles. First is in the creation of stable jobs that will fundamentally support the State by providing the platform for continued growth across all sectors. Specifically, this support will provide an income base that will drive the development of infrastructure, including communities, homes

and schools. This will in turn support Idaho's growing reputation as a great place to live and raise a family.

The second principle lies in the radical way manufacturing is changing, from process to systems, to materials and of course the skills and knowledge required of those making the change. These changes are being fueled by creative activities in science and engineering resulting in new technologies that are reinventing industry and creating new ones. And perhaps more importantly doing so in a way that is truly sustainable while preserving the natural beauty which is Idaho.

We already have a strong base from which our manufacturing base is growing including semiconductors, and food processing and agriculturally based product development, whether that be in specific foods (yogurt, sugar, potato, etc.) or in the creation of whole new industries such as breweries and wineries. These industries are growing from the great tradition of Idaho industries, as well as a highly productive workforce, and agile institutions of higher education supporting new, advanced manufacturing approaches and techniques through fundamental research as well as providing the all-important human resource. Our workers are ever-changing being equipped with the skills and knowledge necessary to be adaptive, having a questioning attitude, in addition to knowing the basics of their field.

SUMMARY

J.R. Simplot, Micron Technology, Hewlett Packard, and Albertsons Companies - these are legacy companies that shaped the Treasure Valley. Their leadership brought innovation and vision, along with a strong work ethic, that created a community of commerce and entrepreneurship for generations to come. Idaho's strong

agricultural roots feed the world, from Idaho to Vietnam, and continues to expand from food-processing to food research and development. With J.R. Simplot initially leading the way, the additional leadership and ingenuity of Dickinson's Frozen Food, Lamb Weston, and Agri Beef brought us companies with worthwhile commitment to their industry and communities.

What growth and new opportunities do we see for our region? Some examples include Albertsons Companies going public, along with the vigor of new innovators such as Kount, Truckstop.com, and Intuit. We have a fantastic opportunity in transforming the state's healthcare needs

with telehealth, connecting our rural areas to top-of-the-line medical care. 2020's COVID pandemic has had a major effect on business, commercial, medical, and educational innovation as we all continually change and adjust our actions to meet the disruptive demands placed on overall society due to the virus.

As our region grows, it brings a new generation of creativity, talent, and opportunities. The Idaho College of Osteopathic Medicine will help provide additional physicians to our state which has suffered from a shortage in relation to our overall population. Our universities and community colleges working hand-in-hand ensures education for our future lead-

ers. Trailhead and Venture College work together to assist the success of future entrepreneurs. Our region and state have always been resilient and it continues to be so as we grow our legacy industries, encourage new industries to locate here, and inspire a collective entrepreneurial spirit.



SNAPSHOT STRENGTHS, CHALLENGES, VISIONARY GOALS

REGION 3

Kim Kaine, Hawley Troxell

Beth Inek, Director Office of Economic Development City of Nampa

Charity Nelson, Boise Valley Economic Partnership (BVEP)

STRENGTHS:

Lifestyle.

Over the last several years the Boise Metro has been on a number national Best of Lists for places to live and access to outdoor recreation. Across the nine county region of Southwest this concept of lifestyle was identified as a growing strength in our efforts to grow an innovative economy. Natural resource amenities are represented across a diverse landscape of high

desert, valley plains and the Payette National Forest. This rich landscape presents opportunities for outdoor enthusiasts. Lifestyle also incorporates the ease of living in Southwest Idaho with an average commute time of just 18.4 minutes which is shorter than the US average of 26.4 minutes and ranks in the top 10 best commute times in the country based on 2017 Census data. The Shakespeare Festival, Freak Alley, Opera Idaho, and the Treefort Music Festival indicate a thriving art scene in the region as well. Lifestyle has become an important component in the race for

talent attraction necessary to drive an innovative economy. In the age of COVID-19 this attractive lifestyle has also impacted the attraction of individuals who are now able to bring their career with them in a relocation to Idaho.

Industry Clusters.

Innovative ecosystem, Research University, Entrepreneurship, Accessible government, business friendly. A strong innovative ecosystem has been growing in Southwest Idaho

over the last several decades. The early research and development conducted by the Simplot Company to transform the food industry and the innovation work at Micron are just two examples of the early days of this growing knowledge economy cluster that has spurred tremendous economic growth throughout Southwest Idaho. These firms not only were leaders in innovation in their industries but have also invested in the university systems that support the region. Boise State University has become a nationally recognized research university that feeds the entrepreneurial ecosystem of the region and supports the research and development efforts of industry. The accessibility of government officials from Mayors to the Governor's office creates a business friendly environment that is attractive to new industries. Idaho's knowledge economy will continue to thrive and grow with new entrants to the market and the next generation of companies.

Population growth, Immigration.

Throughout 2020 population growth has continued to be a source of strength for the region. Business Insider reported that Idaho had the largest net gain of population growth between March and August 2020 with a net gain of 194%. Meridian and the Boise Metro continue to be among the top 10 fastest growing areas by percentage in the country each year. The newly created opportunity for remote work and the attractiveness of the region is anticipated to continue to drive in-migration of talent to Southwest Idaho. This growth feeds the labor force profile of the region and enhances the opportunity for employers to continue to hire top talent even as unemployment rates remain low. Even as the region works to combat the economic impacts of COVID-19 both Nampa and Boise have been recognized by

WalletHub for their bounce back in employment levels between March and August.

CHALLENGES:

Skilled workforce and talent attraction

To meet needs of innovation economy - 73.3%, Education. From 2014 to 2019 employment in Region 3 grew by 19.1% (compared to 7.9% employment growth rate in the nation during that same period). While this increase in jobs is a critical element in our economic growth and health, it creates challenges for employers to find and employ workers with the right skills and abilities needed for their positions. Although our region shows education levels slightly higher than the national averages there are key areas where we do not have enough people with the required skills. The skilled trades are one such area in our Region. Both the construction and manufacturing industries are seeing significant growth but struggle to find talent with trades skills like equipment maintenance, CNC machining, HVAC, etc. We do have some good career technical education programs in our region aimed at producing this workforce but we need to see enrollment in these programs increase significantly at the high school and community college level.

As high technology companies continue to start and grow in our area we need even more talent with high levels of education and experience in fields like computer science and engineering. Similarly the growth of health care in Region 3 has also increased our need for highly skilled nurses.

Infrastructure/broadband.

Stable, robust internet service is no

longer a nicety but rather a necessity for both businesses and individuals. This is a challenge throughout our region but it looks different in urban versus rural areas. The Boise metro is well served with broadband. Multiple fiber loops run through the Valley allowing businesses to access the speed and service that they require. Similarly, individuals are able to access internet services with multiple carriers options. However, the costs of service are high, greatly disadvantaging lower income residents. This potentially vulnerable population has an even greater need for things like telehealth but may not have the opportunity to access it due to costs of service.

In more rural parts of Region 3 the broadband infrastructure does not exist or is not adequate to meet the needs of those areas. Our resort communities in particular struggle because of the influx of visitors. When 20,000 visitors arrive on any given weekend to McCall, Donnelly, Cascade, Yellowpine or New Meadows, broadband access plummets to accommodate visitors, leaving locals without critical access. The broadband infrastructure needs to be improved to meet not only the needs of the base population but also the visitor population.

Affordability of housing

continues to be a challenge for Southwestern Idaho. Although our cost of living remains slightly below the national average (currently at 98.4% for the Boise Metro) the cost of housing has risen significantly in the last year. Population growth is putting continued pressure on an already tight real estate market. As an example, from August of 2019 to August of 2020 the cost of a single-family home has increased by 12.7% and 21.6% respectively in our most populated counties, Ada and Canyon. Even though record numbers

of permits for single and multifamily houses are being issued, homes cannot be built quickly enough to meet the demand. This housing shortage is driving housing costs up at a rate that continues to outpace wage growth.

VISIONARY GOALS:

Broadband.

The impacts of COVID-19 have been far reaching across many sectors from everyday life to where and how we work. One of the great impacts has been in regard to seeing the effectiveness of the current broadband network across the region. As households are working to combine online learning and video conferencing for working from home; deficiencies in broadband have become more evident. There is also a growing discrepancy in the households that are able to afford and access larger data packages to support the needs of video streaming creating greater gaps in equitable opportunity. These discrepancies in access and affordability create challenges for households across the region for widespread implementation of telehealth, e-learning and business continuity. To adapt to the changing telecommunication needs of a growing knowledge economy in a post-COVID-19 era the region must seek ubiquitous, universal, uniform enterprise and residential access to future-proof high speed internet (broadband) for all citizens, entrepreneurs and businesses, regardless of location, income level or demographics.

Transportation.

Goal: Eighty percent of the residents in Region 3 have the ability to get to work, the places that they need to in order to meet their needs (medical facilities, grocery stores, etc.) and the places within the region that they recreate without using a personal vehicle.

Explain: More robust transportation systems continue to be a need. Today we are a region that relies extensively on personal vehicles (often large, gas guzzling ones) to get to all of the places that we need and want to go. There is a healthy bike commuting population but that is largely only possible for a small number of residents living in close proximity to our urban areas. The "commuter culture" coupled with our population growth is putting extreme pressure on infrastructure like roads and bridges. It is also furthering other concerns like parking in some cities, pollution and commute times. Today we have very limited public transportation options and they are largely focused only on access around the Boise Metro. To truly make revolutionary change in our region we need to think beyond just creating more bus routes from Caldwell to Boise. We need to figure out how we can take pressure off of all of our roads, even those that we often travel for fun. We need this not only so we can ensure workers can get to their jobs but also so we can extend the life of our roads that allow us easy access to amazing recreational opportunities.

Educational outcomes.

The innovation ecosystem growing within Southwest Idaho, as well as globally, is working to shift the future of industry and work. Just as in 1990 we could not have imagined the many skills and knowledge areas needed to support industry 4.0 it is hard to predict the exact skills and knowledge necessary for the next iteration of technology and development. Our region must work to break down silos to craft an education system that creates a future generation of creative critical thinkers who remain agile to meet the workforce needs of 2040. This shift will include mastery based education and the inclusion of computational thinking in all grade levels as a means of fostering the critical thinking and lifelong learning skills students will need in a dynamically shifting work environment over their careers.

Additionally our region must work to build a more inclusive and efficient short term tactical ecosystem for the needs of employers today. In continued support of meeting all skill level needs greater collaboration must take place between industry and education to create greater career readiness with high school students today and address the challenge of education attainment for students to continue on to post secondary and certification opportunities. The region is proud to continue to support the advancement of Boise State University into a distinguished research institution that will continue to support the growth and development of innovation within our Idaho companies.

SOUTH CENTRAL IDAHO

Region 4 - Top 3 Transformative Industries

TOURISM, FOOD PROCESSING, AGRICULTURE AND NATURAL RESOURCES



TOURISM

Tourism in Region IV has been and continues to be transformative for many reasons, including the dynamic evolution of the region and what tourism means as a social construct. Generational lifestyle changes have modified attitudes about tourism and recreation, including growing expectations of younger generations and the application of technology.

In the context of technology, tourism can be a function of big data and how the populace gathers and examines information. It is far easier to be found in this era than in times past. The region possesses remarkable assets in the way of hotels, restaurants, regional airports, not to mention a genuine authenticity and historical appreciation.

The tourism industry can be seasonal which in turn can be a challenge for workers to have steady work, and a steady income. As mentioned above, the overlay of technology means that certain jobs in the sector require a higher level of knowledge and/or tech skills than in the past, requiring that workers stay current and upskill themselves. The richness of the dynamic evolution of tourism adds potential for the entrepreneur.

FOOD PROCESSING.

The commercialization and critical mass of agricultural product processing has stirred a remarkable and obvious interest in food science and research in addition to the highly automated and sophisticated processors locating and expanding in the Magic Valley. Chobani CEO Hamdi Ulukaya has been quoted as saying that the region has the potential to be the "Silicon Valley of food science and research." Globally, the population is expected to grow by 2 billion in the next 30 years. Simply put, food

supply and production must increase to keep up with demand.

Processing of food relies on food production, and the region is a long-time high producing area, not only in Idaho, but in the United States (see below). Transportation, cold storage availability, low cost energy, and infrastructure are assets contributing.

The jobs in the food processing sector are increasing in sophistication and skill requirements. Throughout the COVID crisis, employment in the sector has remained strong and stable, with a few isolated exceptions. The nature of the work and demand has pushed average wages and benefits up, along with the expectations of highly technical skills.

AGRICULTURE AND NATURAL RESOURCES.

The visionary irrigation project that diverts the area's most valuable resource (water) from the Snake River to the open, rich fields is central to the success of agriculture in the southern parts of the region in par-

ticular. As family farms continue to dwindle and corporate farming takes over, the degree of sophistication of precision agriculture has taken hold. The use of GIS data, drones, and other ag tech continues to evolve. The University of Idaho Center for Agriculture, Food and the Environment (CAFE) project will drive the sector forward in remarkable ways.

The importance of water cannot be overemphasized as a fundamental building block of agriculture and natural resources. A renewed focus on sustainable methods and renewable energy provides another essential asset. There is a strong market for regional products, and the synergy with the processing sector is obvious. Transportation and logistics provide ready access to local and broader markets.

While nearly all employment and/or industry sectors in the region are impacted by the use of migrant labor, there is a history and tradition of this tactic concentrated in agriculture.

And likewise, the nature of the work becomes ever more technical: robotic dairies, GIS data to inform automated distribution of water and nutrients, animal sciences, use of drones for herd and field inspections. As family farming and exposure to agriculture as a job sector dwindles, so too does broad occupational interest in or understanding of agriculture.

SUMMARY

The Magic Valley was founded with agricultural roots and those roots are still strong today. The Magic Valley is considered “America’s most diverse food basket” and is home to one of the country’s largest dairy industries, the world’s largest trout producer, the world’s largest yogurt processing facility, and a whole host of other global producers and processors. The Magic Valley produces about ¼ of all Ag receipts in the state. This diversity has created a strong R&D sector around food science, workforce training programs and higher

education opportunities to support these industries, and infrastructure to support the growth these companies are continuing to experience.

These food sectors have remained strong even during recessions and are projected to continue to grow well into the future. With abundance in dairy production and available water for processing, the Magic Valley has the ability to assist existing businesses expand and welcome new companies to the region.

With the focus on food, the region has also developed a small supply chain cluster in packaging and plastics that have developed in part due to the food processing focus in the region. These other industries are essential to our existing food processors as well as serve as a great asset for future companies who are looking to come to the Magic Valley. Our transportation, shipping, and logistics sector has grown to support the growing food and agricultural sector in the region.



SNAPSHOT STRENGTHS, CHALLENGES, VISIONARY GOALS

REGION 4

Connie Stopher, Executive Director Southern Idaho Economic Development
Nate Murray, Twin Falls Urban Renewal
Todd Schwarz, College of Southern Idaho

STRENGTHS:

Food production Cluster.

The Magic Valley has been called the Silicon Valley of food. This is because we grow, produce, and innovate in ways that most communities cannot. From our workforce training that has a tremendous focus on food, to our growers who are constantly finding new efficiencies, to our processors who are creating new food products every year, our food production cluster is our most significant strength. Having a strong focus on food has also made us resilient in economic downturns and has aided in a consistent growth in jobs and investment.

Transportation/ Shipping.

One of the region's strengths is that we are ideally located along rail, and interstate and are home to two regional airports. Our regional airports have been critical in attracting visitors to the region to support our growing tourism industry as well as showing that we can be an ideal corporate location for growing businesses. Our shipping and trucking infrastructure has also been critical to showing that despite being rural, we can get goods and services to other parts of the country quickly, affordably, and efficiently.

Ag community.

While the Magic Valley has been growing, it still feels like a close-knit Ag community. The communities of the region have taken great care to ensure that valuable resources like

water and land have been well managed. Our smaller size and connectedness also means that there is easy and often direct access to decision makers, which is often uncommon in larger communities. This makes business growth easier and the process can often take less time. It also creates a very business friendly environment, with customized solutions from government and schools to meet the needs of expanding businesses. People know and support the businesses in the region and come together to help each other.

CHALLENGES:

Educational outcomes.

Drastically improve educational outcomes (go on rates, graduation rates, etc). Without better educational outcomes, it will be difficult to cultivate innovative technology because the talent pool will not have the skills to support these home-grown companies or to attract growing companies to the region. Education is the cornerstone to growing an innovative resilient economy. A skilled workforce is often one of, if not the top concern of businesses, both local and those looking to relocate. While we have incredible partnerships with the College of Southern Idaho to train workers and develop programs for employers, our K-12 system ranks so low in the nation and has such a gap in graduation rates, go on rates, and higher ed completion rates, that we are simply not creating a pipeline of skilled workers who are prepared for the future technological needs of employers. This starts with early childhood education and will require partnerships and support across sectors to achieve the kind of gains that are required to make a difference to

citizens and employers.

Communication Infrastructure.

Communication Infrastructure is essential for our current employers and a top concern for those relocating to the region. A lack of broadband and fiber will exclude communities from projects and will leave some behind. It is essential for the survival of communities to have adequate communication infrastructure to support their current industries and to have the ability to compete for future growth. With more people looking at working remotely, schooling remotely, and businesses considering moving from urban centers, it will be the communities who have investments in broadband and fiber who will be successful in growing and retaining jobs, particularly those who depend on technology.

Wealth Disparity.

Many of our efforts and focus is centered on providing better job opportunities, growing business/industry, and improving education outcomes. Many of the intended recipients of that work would be those who do not currently have access to these opportunities. There is wealth disparity in our region as well as inadequate representation of various socioeconomic groups, minorities, and women in decision making groups. Successful outreach to these groups will require greater communication, participation, and collaboration between those of us who are typically at the table and those who are not, but need to be.

VISIONARY GOALS:

Creating an Entrepreneurial Ecosystem.

One segment of the region that hasn't been developed is creating an Entrepreneurial Ecosystem. We need to create the infrastructure to support entrepreneurs and high growth companies. That includes communication infrastructure, space for innovation like incubators and research space. We also need to build out the education system to close skill gaps and to allow for innovative growth. An effort is currently underway to develop a food innovation center. This center would unite efforts between higher education, industry, and support systems to create a one-stop center for food entrepreneurs and businesses that need assistance with innovation, new products, commercialization, scaling up, and business support. The project is currently in the feasibility stage and hopes to have a facility complete in about two years. Current patterns include: College of Southern Idaho, University of Idaho, Dairy West, Utah State, Southern Idaho Economic Development, Region IV Development, and SBDC

growth in our R&D sectors supply chains and sustainability of our local businesses

Agriculture R&D Growth.

Our region has been focused on agriculture since it was originally founded. That focus has resulted in huge growth in agriculture industries and food clusters. We are now on the precipice of moving into the 21st Century of Agriculture- This includes growth in our R&D sectors, innovation in sustainability around water, waste, production, and processing. Part of that new growth includes branding ourselves as best in the world at food, and as the Silicon Valley of food. While we know that we are the best in the world at food, it's important for our future growth for the rest of the world to know that too.

Supply chain and sustainability of our local businesses. The recent COVID pandemic has raised issues with supply chains and sustainability of our local businesses during global disruptive events. To be proactive, rather than reactive to these types of events, we would want to look at reshoring or attracting businesses that are essential to our local supply chain. This would include cluster analysis and attention to the resilience needed to sustain future events that can destabilize our local economy.

SOUTHEASTERN IDAHO

Region 5 - Top 3 Transformative Industries

ADVANCED MANUFACTURING (INCLUDES ENERGY), INFORMATION TECHNOLOGY (IT)/ CYBERSECURITY, AGRICULTURE



ADVANCED MANUFACTURING

Advanced Manufacturing industries conduct significant R&D and employ a disproportionate number of STEM workers. The highly talented workforce and the industry's natural propensity for research make it transformative. The number of patents held by businesses in this sector is an added indication of the innovative nature of this cluster. ON Semiconductor in Pocatello, for instance, holds a number of patents for this innovative design methods in computer component manufacturing. JR Simplot has a growing list of over 70 US patents demonstrating their commitment to innovation and to the creation of valuable intellectual property. SPUDNIK, a leading farm equipment manufacturer in Blackfoot, has demonstrated the ability to bring products from design to mar-

ket. They currently hold patents for a number of specialty harvesters and seed potato cutting systems which are being designed and developed for international and domestic markets.

COVID-19 has led to significant disruptions affecting nearly every aspect of the global economy and supply chain and has called for a reset - a pivot - across all sectors. While supply chain shocks have uncovered operational vulnerabilities, they have also presented transformative opportunities for manufacturing and supply chain leaders. Through advances in technology and new ways of working, larger businesses like Premier Technology and ON Semiconductor, and even smaller startups like Inergy Solar have adapted quickly while remaining viable and operational. Each are leaders in modeling adaptation and transformation - demonstrating how to reimagine and rebalance operations during a pandemic.

Large employers that fall under the advanced manufacturing sector include ON-Semiconductor, Monsanto/Bayer, JR Simplot, SPUDNIK, and

Premier Technology.

Outside of the big players, the advanced manufacturing sector has also provided a breeding ground for smaller startups to thrive. One of such is Inergy Solar. Inergy Solar is the leader in consumer portable power with a strong focus to provide the world with affordable solar power.

Advanced Manufacturing is an essential part of Southeastern Idaho's economy. Approximately 5 percent of all jobs in the region are tied to this industry cluster, many of which pay well above the average wage for the region (average wage of advanced manufacturing jobs in Southeastern Idaho is \$66,200, which is almost double the regional average wage of \$38,000). Advanced Manufacturing is also a top contributor to the regional GDP. In 2019, advanced manufacturing contributed about \$775M, roughly 12 percent of regional GDP. (Source: Idaho Dept. of Labor; EMSI).

The location quotient is a measure of industry job concentration in a given area relative to national levels. A location quotient equal to 1

indicates that the concentration in a particular region is equal to national concentration levels. A number greater than 1 indicates that there is a higher concentration of the occupation relative to the nation and hints at a specialization of that occupation in the given region. The concentration of advanced manufacturing jobs in Southeastern Idaho is 18% higher than national levels and higher than every other region in the state.

REGION LOCATION QUOTIENT

Region 1	0.87
Region 2	0.47
Region 3	1.10
Region 4	0.35
Region 5	1.18
Region 6	0.28

(Source: EMSI)

Many of the high paying jobs are concentrated outside the region's metro area (Bannock County) - in Caribou, Bingham and Power counties - and thus provides a much-needed boost to the rural economy.

INFORMATION TECHNOLOGY (IT)/CYBERSECURITY

Information Technology is all about the use and transfer of information. IT has transformed the way we do business, the way we live, as well as how we communicate with others. When viewed from a high-level academic perspective, IT can be used to find cures for diseases, run computer modeling and simulation applications, and controls to protect vital systems from cyberthreats. As information technology becomes more widespread, cybersecurity grows in importance. The field is a very dynamic one as it responds to the ever-changing nature of cyberattacks.

Southeastern Idaho's IT/Cybersecurity space has grown exponentially. In the fall of 2019, the Federal Bureau of Investigation (FBI) and its partners at the Department of Justice held a ribbon cutting ceremony of the FBI's new data center in Pocatello.

This new data center optimizes infrastructure, information, and services through the consolidation of over 100 data centers through the Department of Justice to strengthen the cybersecurity posture for the Department of Justice components. The new data center not only enhances collaboration and information sharing, but it also executes advanced analytics as the epicenter for activities in Washington, D.C.

Additionally, with the onset of COVID-19, medical centers like the Portneuf Medical Center had to quickly pivot to e-visits and tele-visits. In less than two weeks, we hit a critical juncture where healthcare providers had to streamline processes and offer personalized care through online interaction. With electronic record management tools and other healthcare IT solutions, Portneuf Medical had the ability to continue to provide exceptional healthcare while maintaining and accessing health records through electronic systems in order to quickly review and evaluate a patient's health status - from anywhere - allowing providers to make informed decisions about a patient's health needs and provide the care required. Through information technology, the storage of health data also allows patients to easily review and update their personal information, which keeps them engaged as a key player in their own health plan.

Lastly, with the vast amounts of data moving across online systems, along with the systems required for storage, daily transactions, and exchange and use of data, banking institutions like the Idaho Central Credit Union (ICCU) are on the cutting-edge of using cybersecurity systems to protect their customers personal information and data from cyberthreats.

Defining this industry is notoriously difficult as it cuts across a number of sectors from manufacturing, to healthcare to banking and finance. More standardized definitions of an

IT cluster such as the Purdue IT Cluster imply the Southeastern Idaho IT/Cybersecurity space is relatively small. Recent development, however, point to a huge potential for growth in this cluster. With the recent expansion of the Federal Bureau of Investigation (FBI) Southeastern Idaho has become well positioned to be a global leader for Cybersecurity. Small cybersecurity companies have already begun to migrate into the area, since the announcement of the data center - Buchanan and Edwards and ECS Federal.

Othe large employers like the Portneuf Medical Center and the Idaho Central Credit Union are not primarily IT/cybersecurity companies as their prime function but are key players in the development of this industry cluster.

This cluster is perfectly suited for entrepreneurs and small businesses. Employers that traditionally fall within the IT/Cybersecurity cluster are typically small establishments with less than 5 employees. Buchanan and Edwards, and ECS Federal, are two of the larger of these small businesses to crop up the last year. ECS Federal brought 60 high-paying technical jobs to Pocatello and Buchanan and Edwards plans to hire up to 80 employees. These businesses are anchored by the presence of major players that provide the market for the cluster to thrive.

In the last few years, job ads for computer/network/cybersecurity specialists have ranked high in the top regional job openings by volume. A surge in labor demand is a good indicator of the bright outlook of this industry cluster.

As more personal and business information is stored on devices, networks, and "the cloud", cyberthreats are becoming way to frequent and personal information continues to be compromised. People across the globe depend on the internet, and that dependency is what is making cybercriminals strong. Every orga-

nization, small and large, will be required to advance their cybersecurity systems. New facilities, like the FBI's new data center, brings together experts to assess infrastructure security, cyber forensics, and detection threats to provide real-world technical solutions and innovations to safeguard, protect, and prevent against threats.

AGRICULTURE

AGRICULTURE is one of the oldest industries in the world and one that has undergone significant transformation in its workforce composition over generations from a workforce comprising primarily of household/unpaid family members to one dominated by hired labor. A declining supply of farm workers in recent years has accelerated automation of work traditionally done by manual labor and agriculture is rapidly being transformed into a tech precision industry. The industry has seen advances in machinery, enhancements in seed production, and development of smart irrigation systems. Most recent, artificial intelligence (AI) has come into play, along with other emerging technologies, to further increase yields, improve the efficiencies of watering crops, and build sustainability and resilience across crop cultivation.

Automation and Robotics are becoming commonplace even in the food processing industry. Great Western Malting in Pocatello, for instance, is fully automated. The business has been noted for efforts to improve their manufacturing process. They were awarded the Association of Washington Business' 2018 Manufacturing Excellence Award for Green Manufacturing, in recognition of a series of conservation efforts that collectively achieved a 98 percent reduction in the company's water usage.

Agriculture in Southeastern Idaho is dominated by crop production - primarily potatoes, sugar beets, bar-

ley, and hay - accounting for 1,300 covered jobs in the region. Livestock and dairy contribute approximately 600 jobs in the region. Additional noncovered employment by, for example, migrant seasonal farmworkers make agriculture a dominant sector in the region.

Agriculture feeds into, and is supported by, a dominant Food Processing Industry with large food processors in the area that include Basic American Foods, Amy's Kitchen, Lamb Weston, Golden Valley Natural and Great Western Malting. Agriculture and Food Processing combined account for close to 5,000 covered jobs in Southeastern Idaho - about 8 percent of total covered employment in the region. Agriculture in Southeastern Idaho also benefits greatly from the innovations arising from a thriving farm equipment manufacturing industry driven largely by SPUDNIK in Blackfoot.

The region has a strong domain expertise in Agriculture. The location quotient of the section in Southeastern Idaho is 4.9 - a concentration of ag jobs that is nearly 5 times the national average. When we consider total agricultural employment - both covered and non-covered, the region's agricultural sector alone boasts over 9,000 jobs concentrated mainly in Bingham, Power and Franklin Counties. (Source: Idaho Department of Labor Agricultural Employment Estimates).

Food processors like Basic American Foods, Amy's Kitchen, Lamb Weston, and Golden Valley Natural combined contribute approximately 3,000 jobs to the local economy.

Large manufacturers are developing precision controls that make use of satellite imagery and vehicle-to-vehicle connections to improve the efficiency of field equipment. The world's largest fertilizer distributors now offer both fertilizing agents and software that analyzes field data to help farmers determine where to apply their fertilizers and in what quan-

tity. Other examples include offering farmers innovative products that make use of technology and data to improve decision making and thereby increase yields and profits, and data collected by autonomous tractors will seamlessly flow to computer controlling irrigation devices, which in turn will be able to use weather-station data to optimize irrigation plans.

Agriculture, one of the world's oldest industries, finds itself at a technological crossroads. The success and sustainability of one of the oldest industries may well depend on technology transformation, and those that embrace it at the outset may be best positioned to thrive in agriculture's connectivity-driven future.

SUMMARY

Southeastern Idaho's economic roots encompasses a strong history of agriculture and manufacturing, along with the railroad being the first economic driving factor in Pocatello. The healthcare sector has grown over the last decade to become a dominant player in the regional economy. Currently, the healthcare sector accounts for approximately 15% of all jobs in the region. Additionally, Idaho State University has strengthened its partnership efforts between industries and the university to better align workforce needs in the community and strengthen the pipeline to disseminate knowledge and provide inputs to problem solving. Lastly, the region remains focused on increasing activities to better prepare Southeastern Idaho's future workforce. In support of these efforts, K-12 programs and activities have been developed to include: The Construction Combine Program, Your Fit Program, Young Einstein Projects, Bengal STEM Days, and Growing Together Program.

In recent years, Southeastern Idaho has experienced strong job growth. With one Metropolitan Statistical Area (MSA) - the thriving city

of Pocatello – and a large and thriving Native American Reservation, strong federal programs, a booming healthcare industry, a stable and sustainable agriculture industry, an advanced manufacturing and energy industry to build from, a four-year university and two-year College of Technology, Southeastern Idaho is uniquely positioned to take advantage of economic opportunities generated within itself and along with

surrounding communities.

Southeastern Idaho’s strengths reside in the following areas: Advanced Manufacturing, Agriculture, Banking & Finance, Energy, Healthcare, Information Technology (Cybersecurity), and Outdoor Products & Recreation. “Cluster” economic activity is not a new concept and is recognized globally as a method of expanding and diversifying local economies. “Targets” represent segments of an economy

where competitive advantages exist, prospects for future growth are greatest, and return on investment is highest. It makes sense that regions strategically target sectors with the greatest potential to create new jobs, raise incomes, and create ecosystems where industry and business flourish as they complement existing workforce, research capabilities, infrastructure, and other resources.



SNAPSHOT STRENGTHS, CHALLENGES, VISIONARY GOALS

REGION 5

Teresa McKnight, Regional Economic Development for Eastern Idaho (REDI)
Mark Willden, Idaho Central Credit Union
Shane Hunt, Idaho State University

STRENGTHS:

Education.

Southeastern Idaho is within range of several large institutions of higher education that bring 50,000 students to the area every semester (i.e. Idaho State University (ISU) in Pocatello, University of Idaho joint University Place Campus in Idaho Falls, the College of Eastern Idaho (CEI) in Idaho Falls, and Brigham Young University-Idaho (BYU-I) in Rexburg. Each of these institutions play a leading role in educating and training Idaho’s future workforce to support the region’s growing targeted industries. The region is well recognized for its hard-working and dedicated workforce.

Affordable cost of Living/Quality of Life.

The Southeastern Idaho economy has an array of assets, inexpensive land, a favorable regulatory climate, low taxes, abundant resources, a ready workforce, great colleges and universities, and a low cost of living. Southeastern Idaho’s tax revenues come from a balanced mix of income, sales, property and corporate taxes without unfairly burdening a specific sector. Idaho’s state and local government debt per capita is one of the lowest in the nation. CNBC ranks Idaho #4 for cost of doing business based on the state tax climate, state sponsored incentives, and cost of wages. Southeastern Idaho also has some of the lowest electricity rates in the nation due to abundant production from the state’s hydroelectric generation facilities along the Snake River. The region has a growing wind, solar, and biofuel industry. The Williams Northwest Pipeline brings natural gas to the region. The median home value for Bannock County is lower than the state and the nation with a value of \$168,200, as of 2018.

Five Large Federal Programs.

The region is uniquely positioned with the presence of five federal programs: Department of Energy (DOE), Department of Defense (DOD), United States Navy, Homeland Security, and the Federal Bureau of Investigation (FBI). Southeastern Idaho is also located in close proximity to the leading nuclear research facility, Idaho National Laboratory.

CHALLENGES:

Transportation.

As our region continues to grow through expansion of existing businesses, recruitment of new businesses, and professionals, our region lags behind in getting people to their designated job sites outside

the community in which they live. In addition, CEO's require the ability to fly in and out of Eastern Idaho's airports - usually within the same day. Lack of any type of a good public transportation system in the region, along with lack of an international airport will continue to hinder the region's recruitment efforts and the ability for national and international companies to even consider Southeastern Idaho as an area for expansion and/or relocation.

Housing.

Our region has experienced fast growth - even during a pandemic. Housing continues to be an issue in our region. New and existing homes have been purchased sight-unseen. In addition, new homes are being purchased before excavation even begins. Also, due to growth in several organizations (i.e. the FBI), and several federal contractors working in partnership with the FBI expanding in Southeastern Idaho, we are seeing an uptick of young professionals moving into the region. These professionals are looking for similar housing they left behind on the east and west coasts, which means, they are seeking flats, condos, townhomes, and upscaled apartments rather than single family housing. This is an area Southeastern Idaho lags behind in housing options for young single professionals. Two major housing developments, Northgate District in Pocatello and the New Day District in Chubbuck, are currently underway which once completed would do much to alleviate the chronic housing shortage in the region.

Access to Capital.

Southeastern Idaho has seen an uptick of entrepreneurial and start-up activities. With the increase of activities within the nuclear and cybersecurity sectors, as well as the increase

in research activities at Idaho State University, finding required capital to bring new ideas and innovations to market can be challenging. This activity is new to Southeastern Idaho but not new to other states. States adjacent to Southeastern Idaho have experienced the same challenge. As the region continues to grow these activities, we know we will see more interest from Angel and Venture Capital Investors. Our current challenge is finding the capital in the interim until we reach the volume that will increase levels of interest that will result in higher capital investment interests in our region

VISIONARY GOALS:

Energy & Cybersecurity.

ENERGY: Be a resource that represents the interests of the energy industry and energy partners and narrow the gap between employers' demands for a highly skilled workforce and higher education's ability to supply work-ready graduates. Also, continue to build on the cutting-edge research platform that allows business, researchers, and the scientific community to strengthen collaboration efforts to create new waves of integrated energy systems.

CYBERSECURITY: Be a resource and convener to industry and labor to help drive workforce development initiatives and coordinate resources with industry and labor to set the direction.

Also, continue to fuel innovation and be on the cutting-edge of developing cybersecurity systems in a fast-paced digital world.

Strengthen the Entrepreneurial Spirit.

Strengthen the entrepreneurial spirit

in the Region and Establish a Region 5 STEM Seed Fund to Promote Entrepreneurial Ideas and Startups. In Fall 2019, REDI brought leaders to the table to maximize entrepreneurship success and fuel growth and viability in Southeastern and Eastern Idaho through streamlined collaboration, services, shared facilities, and mentorship - The Eastern Idaho Entrepreneurship and Incubation Alliance (EI2). In July 2020, REDI held a kick-off event to introduce EI2 leaders to regional entrepreneurs. REDI will continue to:

- Cultivate a culture to quickly and efficiently move ideas to market
- Host startup competitions
- Strengthen and/or develop new incubation and accelerator programs
- Identify and recruit investors
- Bring additional mentors into EI2

Strengthen Integration Efforts

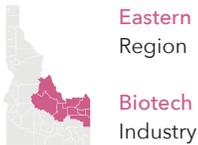
Strengthen Integration Efforts Between Business, Industry, Government, and Idaho State University to Attract and Develop High Paying Jobs in the Region

- Embrace the concept that the region serves as a "living lab" and the university as a "research and development resource".
- Identify real-world problems to be solved in our region and provide a proper setting for innovative discussions and engagement to take place between university and regional business and community leaders.
- Align people and resources and meet on a consistent basis with university and regional employers to discuss issues and resolutions, including student attraction and hands-on real-world learning experiences.
- Strengthen opportunities for students to move into full-time positions with Southeastern Idaho companies upon graduation - providing competitive wages to keep students from leaving our region (reduce the "Brain Drain" in Southeastern Idaho).

EASTERN IDAHO

Region 6 - Top 3 Transformative Industries

ENERGY, CYBERSECURITY/ CYBERTECHNOLOGY, HEALTHCARE



ENERGY.

Eastern Idaho's focus on energy and science continues to be transformative not only for the region, but for the state and nation as well. Projects in the pipeline for the coming decade include siting of the world's first Small Modular Reactor (SMR) facility, support deployment of commercial micro-reactors, and establish leadership for the Versatile Test Reactor. Eastern Idaho is the go-to place that will supply the energy industry with the talent, expertise, vendors, and infrastructure needed to support global market needs.

Idaho Falls is a place where private companies can come and gain access to the technical expertise and infrastructure necessary to develop, test, and demonstrate energy designs, as well as materials, fuels, and other technologies. Energy innovation has been the reason many energy industries have chosen Eastern Idaho as home.

Idaho National Laboratory leads re-

search energy production challenges with contributions in energy transmission, energy security, renewable energy integration, transportation transformation, water utilization, energy critical materials, biomass feedstock assembly, and advanced manufacturing.

The region's economy was mostly agriculturally focused until the Atomic Energy Commission opened the National Reactor Testing Station in 1949. This led to many energy firsts occurring at the Idaho National Laboratory site. INL is the home of the first use of nuclear energy for commercial power, the home of the new nuclear Navy, and now home to the first small and micro nuclear reactors. 70 years later in 2019, INL was named the Nuclear Innovation Research Center, where its' history of leading first in kind energy technologies will continue.

The Idaho National Laboratory, Fluor Idaho, and their associated contractors and partners, are the largest employers in Eastern Idaho. In that context, it is difficult to overstate the importance of the Department of Energy's footprint in the region. It is an economic driver, and the quantity and quality of jobs that are created

bring technical and specialized talent to the region, which spurs additional economic development in all other areas. The wages offered are also higher than average, increasing the region's median wage, and attracting more talent to the communities.

CYBERSECURITY/ CYBERTECHNOLOGY

Cybersecurity/cybertechnology is a transformative industry for Eastern Idaho because it in one way or another affects almost every business and industry operating. From healthcare and banking, to precision agriculture and advanced manufacturing, Eastern Idaho companies are creating and using cybertechnology in ways to deploy their products and services that are transforming the landscape.

Cybertechnology foundations in Eastern Idaho are not vastly different from cybertechnology foundations in other areas of the country. As computing and communications device usage and demand grew, the ability to provide products and services, as well as hire and properly train staff to fill needed roles also grew. The advantage Eastern Idaho has is access to a national laboratory with a focus on cybertechnology, as well as myriad regional higher education institu-

tions with programs and curriculum to train current and next generation workforce groups.

Joint cybersecurity programs offered through higher education institutions to working professionals is one way this industry contributes to employment progression and workforce skillset improvement. Ultimately, nearly every business will need staff devoted to cyber technology management, and job opportunities are endless as the industry continues to grow and transform.

HEALTHCARE.

Eastern Idaho houses four major hospital facilities, a Cancer Center, a Burn Center, and a Cardiac Center as well as hundreds of supporting diagnostic facilities, medical laboratories, outpatient facilities, and medical support businesses. These healthcare industry businesses work to operate more efficiently, and often at a lower cost to patients, through the utilization of state-of-the-art innovation and technology.

Region 6 has established itself as a healthcare hub not only for East-

ern Idaho, but for Southern Montana and Western Wyoming. The focus of the healthcare industry is to provide comprehensive care for all needs, without requiring patients travel to Salt Lake City for healthcare services or specialties.

Employment opportunities abound for individuals seeking healthcare related professions in Eastern Idaho. Surrounded by education institutions that offer competitive and highly rated nursing and pre-med programs, the opportunities are endless for job seekers looking to progress in their career. Residency programs, internships, and robust variety of available positions make Eastern Idaho an attractive option for securing a high-paying, fulfilling, and quality career in a community that believes in providing service with integrity and professionalism.

SUMMARY

Eastern Idaho celebrates agricultural roots, beginning as a sparsely populated area of cattle and sheep ranchers. Agriculture remains a fundamentally important part of East-

ern Idaho's economy and way of life, with area farmers producing annual crops of potatoes, wheat, barley, quinoa, sugar beets, and more. Livestock production include dairy, beef, sheep, and pork.

The Atomic Energy Commission opened the National Reactor Testing Station in 1949, and this led to many energy firsts for the region occurring at the Idaho National Laboratory site. Both agriculture and energy remain engrained in the region's roots and are stable, long-term components of the economy.

Additional roots include a growing healthcare sector, tourism, advanced manufacturing, and cyber technology. The region has become a post-secondary education corridor, known for education institutions that have the ability to be nimble and adaptive to industry needs. Currently, over 50,000 students attend college in Eastern Idaho each semester, making postsecondary institutions an important stable and long-term component of the region.



SNAPSHOT STRENGTHS, CHALLENGES, VISIONARY GOALS

REGION 6

Teresa McKnight, Regional Economic Development for Eastern Idaho (REDI)

Mark Willden, Idaho Central Credit Union

Shane Hunt, Idaho State University

STRENGTHS:

Education.

Talent is Eastern Idaho's greatest strength. Two major universities and strong industry collaborations help the region prepare an emerging workforce for Idaho and the global economy. Idaho State University (ISU) in Pocatello, Brigham Young University-Idaho (BYU-I) in Rexburg, the ISU and University of Idaho joint University Place campus in Idaho Falls, and the College of Eastern Idaho (CEI) community college bring 50,000 students to the area every semester. The Center for Advanced Energy studies (CAES), Idaho National Laboratory (INL) Cybercore Integration Center, and Collaborative Computing Center also play lead roles in training Idaho's future technology and energy workforce.

Federal Department Contracts/Programs.

The presence of federal departments, contracts, and programs brings limitless possibilities to East-

ern Idaho. The United States Department of Energy, Department of Defense, and Department of Homeland Security have strong footprints in our communities and provide many opportunities to the businesses and workforce. Potential partnerships, collaboration between industry and education institutions, and national leadership are other areas of strength and benefit.

Innovation (R&D).

Beginning in 1949, and through development and operation of 52 original test reactors, INL built the R&D Foundation that helped establish the commercial nuclear energy industry in the United States and around the world. Those innovations continue today as the laboratory works with industry to develop and deploy the next generation of nuclear reactors. That includes the NuScale small modular reactor, which is scheduled to be built on the INL 890 square-mile desert site and which could begin producing 720 megawatts of carbon-free electricity for the Utah Associated Municipal Power Systems (UAMPS) once operational. These innovations also include 2-to-

20-megawatt microreactors, which could be used to power remote communities, industrial operations, and military installations. Working with the private sector, INL is a world leader in electric vehicle battery testing, evolutions in battery storage, and advancements in medical isotope technology.

CHALLENGES:

Public-private partnerships.

Public-private partnerships come in a variety of forms as a cooperative arrangement between government entities and private businesses and corporations. Typical partnership projects are long term in nature and work to complete a goal or provide a service to a population. Eastern Idaho has executed some successful and beneficial public-private partnerships, but there is space and opportunity for more. Identifying those opportunities, fostering interest, evaluating capital, and achieving follow-through continue to be a challenge.

Infrastructure. Because Eastern Idaho is a world leader in energy re-

search, cybersecurity, and broader clean energy research, it consistently receives visitors from throughout the nation and around the globe. As more private-sector companies emerge with global customers, they face the challenge of having the ability to quickly and efficiently get where they need to go. In addition, with more companies recruited to Eastern Idaho, CEO's will require the ability to fly in and out of Eastern Idaho airports the same day. Lack of an international airport in the region will prove increasingly inconvenient until it becomes debilitating.

Access to Capital.

Eastern Idaho has innovation in its DNA—from the development of the commercial nuclear energy industry to major advances in electric vehicle batteries, cybersecurity and agriculture. With a unique asset in INL, and the federal government encouraging commercialization of national laboratory research, the private sector in Idaho has unrivaled opportunities to produce products borne of innovation and capable of changing our nation's energy and security future. Finding the capital to bring these innovations to the marketplace can be challenging. Additionally, as a state, Idaho does not have as many "tools in the toolbox" when it comes to economic development incentives in comparison to neighboring states. Financial incentives, tax reductions, or infrastructure assistance are unavailable or difficult for developers to obtain, at times making projects cost prohibitive or impossible to complete.

VISIONARY GOALS:

Eastern Idaho Cybersecurity Epicenter.

Eastern Idaho can become a Cybersecurity epicenter. With areas of focus both in IT, (network systems management), and OT (physical world components), both the human and physical sides of cybersecurity are being assessed, strengthened, and taught. Financial asset protection from banking institutions is critical; energy system work including generation and transmission is industry leading; communications security in 5G and wireless network arenas is ongoing; entrepreneurship in every area is happening. Eastern Idaho will be a cybersecurity epicenter through training, education, research and development, and leadership. Monetization opportunities will be available; companies and partners will thrive.

Energy Innovation and Sustainability.

Eastern Idaho leads the nation in energy innovation and sustainability. In 10-15 years, the vision is that NRIC, microreactors, advanced reactor demonstrations, biofuels, microgrids, batteries, and smart-grids will be present, contributing, and growing in our communities. Energy storage capabilities will increase, industry production collaborations will strengthen, and entrepreneurship will be contributing and thriving.

Artificial Intelligence and Advanced Manufacturing.

Eastern Idaho is an innovative basket, with advanced manufacturing and artificial intelligence as strong contributors to the overall success and future vision. There is more research and training happening per capita in Eastern Idaho than in other areas. BYUI, CEI, ISU, and Uofl will have the ability to educate and supply every business with an AI/data scientist expert. Entrepreneur risk will be high, with new equipment created, adaptations introduced, and robotics designed and operated. Companies such as Idaho Steel, Melaleuca, Idahoan, Basic American Foods, Nonpareil, Anheuser-Busch, American Mills, INL, RBDC, Good-to-Go and others will impact the region and nation through exportation of both products and knowledge. GIS, fire science, informatics, and broad data analytics will be increasingly created and utilized. Banking and finance, precision agriculture, and healthcare will be high users who lead the way with cluster impacts and adaptations.

SYNERGIES IN REGIONS 5&6

ITC 2020 Knowledge Report - Conclusion Outline for Regions V and VI

Prepared by Teresa McKnight, CEO of REDI

In the past, Region V and Region VI have been recognized as two independent regions - Region V as Southeast Idaho and Region VI as East Idaho. With the second largest workforce in the state, and the fourth and fifth largest cities in Idaho (Idaho Falls and Pocatello), a shift has occurred. Civic and community leadership have come together to strengthen collaboration and partnerships through Regional Economic Development for Eastern Idaho (REDI). REDI works in full collaboration with city, county, university, business, industry, and community leaders to promote the assets, strengths, and opportunities of the region.

REDI drives a regional framework and vision to propel growth, support regionalism, and strategically align requirements for a strong economy that is adaptable and able to sustain long periods of economic growth, mitigate periods of economic decline, and build upon the strengths of Eastern Idaho.

REDI promotes regional business retention, expansion, and recruitment to targeted areas that strengthen Eastern Idaho's economy. REDI

brings together business, industry, city, county, academic, and community leaders to capitalize on Eastern Idaho's assets through investment, accelerated job growth, diversification of Eastern Idaho's economy, workforce skillset matchmaking, and enhancement of research and entrepreneurial capabilities to meet the needs of a fast-paced global economy.

With five fast growing federal programs in Eastern Idaho - the Department of Energy (DOE); Department of Defense (DOD); United States Navy - Naval Reactors Facility (NRF); Federal Bureau of Investigation (FBI); and Homeland Security, along with national and international recognition that Eastern Idaho is home to the largest DOE Site (Idaho National Laboratory), home to the Collaborative Computing Center, and home to the Cybercore Integration Center, it comes as no surprise why professionals, private corporations, and government organizations are relocating to Eastern Idaho.

Along with Eastern Idaho's growing federal programs, the region has witnessed growth in student enroll-

ment at Eastern Idaho's Universities and Colleges with 49,567 students enrolled each semester (i.e. Idaho State University, University of Idaho Satellite Campus, College of Eastern Idaho, and Brigham Young University-Idaho).

Lastly, with 8 key medical facilities, recognition as a regional mega center for agriculture, and seven top producing clusters (i.e. Advanced Manufacturing, Agriculture, Banking & Finance, Energy, Healthcare, Information Technology (Cybersecurity), Outdoor Products & Recreation), leadership recognizes the powerhouse of bringing together Region V and Region VI to promote the strength of 15 counties working together to transform the old way of doing business and removing divisional lines. Doing so, showcases the strength of working in full collaboration to enhance the region's competitive advantage and achieve a truly bright future - together.

This is Eastern Idaho!

EXECUTIVE SUMMARY



2020 IDAHO KNOWLEDGE REPORT - SUMMARY AND RECOMMENDATIONS

The Idaho Technology Council, the voice of the State's technology industry, is pleased to present the third annual IDAHO KNOWLEDGE REPORT (IKR). The information included here indicates new and broadening runways, identified by metrics and VISION TEAMS located throughout the six economic regions. The information discusses transformative industries and outlines proven trajectories that will help support and grow businesses within Idaho's knowledge-based economies. Innovation and entrepreneurship play a vital role with Idaho's economy and ability to adapt to economic change and opportunity, especially with the current pandemic. May you take this knowledge and turn it to advantage.

WHY IDAHO? Over the past year we have seen unprecedented challenges and changes resulting from COVID19 and social shifts. In the midst of this change, Idaho is still one of the fastest growing states and has shown resilient industries in food production, precision agriculture, energy, technology, and manufacturing. Idaho continues to be 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. This is supported by strong migration of people into our state specifically to escape pandemic concerns and other social issues that are straining larger cities and regions. 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. Idaho has shown great resilience and has had some amazing

success stories in 2020 with an IPO with Albertsons Companies and two of the largest tech financial deals with a local grown companies Clearwater Analytics and Cradlepoint. Idaho has experienced strong transformation with traditional companies and the tech industry is resilient. The State of Idaho is experiencing strong tax receipts and will have one of the top surpluses in state history. The future of Idaho's knowledge-based economy is dependent on the continued success of the visionary entrepreneurs growing their companies and pivoting to meet customer demand in challenging times. WHY THE 2020 IKR? This year's IKR focuses on growing transformative industries in Idaho and each of its economic regions. We have VISION TEAMS in each of the six economic regions focused on how to measure and grow innovation in their region. Each region identifies historically the most transformative

industries, strengths and challenges facing their region, and define vision goals that will continue to grow innovation. Each region has unique business characteristics and also has common opportunities with other regions in Idaho. Why is this Important? For Idaho to be the most innovative state in the union, we need to identify the transformative industries, understand our strengths and weaknesses, and have big vision goals that will catapult us into the future. This can only be done via last mile delivery of economic application in each region and having big visionary goals. These local leaders who have an on-the-ground perspective know their region's strengths, challenges, and are also in the best position to establish long-term vision goals for their region.

PROFILE OF IDAHO

In 2006, Battelle wrote a report for the Idaho Department of Commerce called **IDAHO'S TECHNOLOGY PLATFORMS: BUILDING ON THE STATE'S CORE COMPETENCIES**.

The report emphasized three priority areas:

- Building Idaho's R&D base
- Developing infrastructure to support entrepreneurs and start-up companies
- Marketing Idaho's technology assets.

The report from 2006 by Battelle, the company that runs the Idaho National Laboratory, is focused on the same areas today that were areas of focus then. The foundation of a knowledge economy is entrepreneur's that are building companies that make products and services that meet customer demands today and into the future. As we build these products and services, we are conducting R&D that is necessary to build new products and services. Idaho has benefited 14 years later

as we have built on findings of the core competencies only to see a remarkable shift to technology driven companies. While you compare the identified Idaho Core Competencies in 2006, you will find that the growth of these companies had software and computing technologies at their base—which have grown significantly since 2006 and are having amazing contributions to Idaho's economy. Idaho has one of the fastest growing tech and software sectors in the United States.

STRATEGIES FOCUSED ON:

- Skilled Workforce
- R&D excellence
- Commercialization
- Entrepreneurial culture
- Infrastructure
- Image

PRIORITIES:

- Building R&D base
- Developing infrastructure to support entrepreneurs and start-up companies
- Marketing Idaho's technology assets

CORE COMPETENCIES:

- Ag/Biosciences
- Imaging
- New Materials/Nanotechnology
- Power/Energy

TECHNOLOGY PLATFORMS:

- Alternative Electric Power
- Bio-based Fuels and Products
- Ecological Health

From Battelle Report 2006: Idaho's Technology Platforms: Building on The State's Core Competencies



IDAHO CORE COMPETENCIES

RELEVANT CLUSTERS

POWER/ENERGY

- Alternative Energy and Fuels (High)
 - Engines and related devices (Medium)
 - Sensors, voltage regulators, and related electrical instruments (Low)
 - Thermal devices (Low)
-

AGRICULTURE/BIOSCIENCES

- Ag-Biosciences (High)
 - Biochemistry/molecular biology (High)
 - Biomedical (High)
 - Climatology and earth sciences (Medium)
-

NEW MATERIALS/NANOTECHNOLOGY

- Advanced materials coatings & related applications (High)
 - Metallochemistry & power metallurgy (High)
 - Semiconductors, memory, & other computer components (Medium)
-

IMAGING

- Imaging (High)

TRANSFORMATIVE INDUSTRIES IN IDAHO

AGRICULTURE AND FOOD PROCESSING

Agriculture and food processing continue to be amazing drivers of the Idaho economy. The concept of supply chains from farming to food production has been a major strength of Idaho's economy. Every region has strengths in this area with the Magic Valley leading the way over the past decade with significant growth in the food production segment. The area is being known as the Silicon Valley of Food Production for the country.

TECHNOLOGY AND INNOVATION.

Over the past decade, high tech has grown 61% in Idaho, according to the Idaho Department of Commerce. This has fueled Idaho to have one of the fastest growing tech sectors in the United States. Idaho also has the fastest growing software industry as a percent of the states GDP.

RENEWABLE ENERGY.

Idaho was built on energy production with many of its roots in renewable energy such as hydro energy production. Morrison Knudsen, founded in 1912, was one of the largest engineering and construction companies in the world, helping build monster projects like the Hoover Dam and several dams in Idaho to assist with irrigation and power production. From those roots, we had the Idaho National Laboratory (the only national lab named after a state) start in 1949 and helped pave the way for nuclear research and development and the development of several other energy areas. Nearly a decade ago, the Center for Advanced Energy Studies was founded through a partnership with INL and the Idaho

Legislature to have Idaho research institutions partner with INL on renewable energy research. Each year CAES accounts for approximately \$30 million in research funding.

TOURISM.

Tourism is the third largest industry in Idaho- growing faster than those states that surround Idaho. Tourism has been significantly impacted by COVID-19. We will be measuring the impact in the 2021 **IDAHO KNOWLEDGE REPORT** specifically since people are not flying to other tourist destinations, they are visiting areas that are easy to access by car. We also have a keen eye on the virtual workforce and already see significant growth and shifts in this area.

HOW WOULD YOU DESCRIBE YOUR CURRENT ECONOMY AND FUTURE ASPIRATIONS?

Idaho's economic roots.

Over the past several decades, Idaho's economic roots have shifted to technology based industry platforms. Agriculture and natural resource industries have made significant efficiencies based on new innovations with precision agriculture and advanced manufacturing. The impact of COVID-19 will help emphasize supply chains in vital areas as food production and materials. This will continue to play strong to Idaho's economic roots.

An economic foundation for Idaho has been many companies focused on gained efficiencies through technology. Over the past twenty years

we have had some amazing companies develop products and services that are based on roots from other companies in Idaho. For instance, Cradlepoint was just acquired by Ericsson for \$1.1 billion. Tracing Cradlepoint founders, they go back to the Boise HP site. The growth of Idaho's tech sector can be tied to the 1970s when Micron was founded and HP located two divisions in Idaho. Because of these economic roots, computing based technology companies span many different platforms like IoT/Mobility, eCommerce, AI/Analytics, Cybersecurity, FinTech, AgriScience, Renewable Energy, Bio-Tech, and more.

IDENTIFY 3 TOP STRENGTHS

Stability and Predictability.

Idaho has streamlined regulation and has strong business demographics with low taxes, low cost of energy, access to water, balanced state budget, solid financial health, and strong fiscal spending. We also see the Idaho Team approach to land and other issues. Business leaders and others have direct access to Idaho's governor and other legislators and municipal government officials.

Influx of funding and talent.

Over the past decade Idaho has been the recipient of funding from some of the strongest funding sources on the planet. While capital has been growing in Idaho, we need to keep growing early stage capital. Boise State University has seen growth from 20 computer science

grads in 2012 to 135 last year and three years, the start of a computer science PhD program. Information received from human resource professionals tell us that the influx of talent is shifting as several people want to move to Idaho and so applicants for open jobs has increased specifically from individuals out of state.

Quality of Living in Idaho and Team Idaho Approach.

2020 has brought challenges to our nation with a pandemic that has had significant impact on our health and economy. Also, there have been several social issues that are rocking the fabric of larger cities across the country. Idaho has had to work to manage the pandemic and while doing this we have experienced some tremendous growth in several areas like the technology sectors, food production, and several other areas.

IDENTIFY 3 CHALLENGES

Broadband and Infrastructure.

One of the major shifts from COVID-19 has been the focus on working remote. The virtual office is common and has created a new normal today and into the future. A Broadband Task Force was formed by Governor Little focused on answering broadband demands across Idaho, specifically in rural Idaho. Broadband demand and utilization will continue to increase significantly as video platforms are optimized. We will see significant utilization of telemedicine and other applications

that will require more bandwidth. A Knowledge economy demands highly connected communities with strong broadband options both urban and rural. This will be a major focus for 2021. We also know that travel has been significantly impacted because of COVID-19 and will measure the impact of travel and virtual connectivity. We will measure how COVID-19 has shifted ground and air transportation demand.

Education.

Idaho has performed and had some good results with its education system, like having the highest ACT scores than any state that surrounds Idaho. We need to improve go on rates and alternative education opportunities. During COVID-19, education has been challenged with virtual mediums. There will be a new normal with education as we find the balance between virtual and face-to-face learning. We need to have strong vision on education and not decrease higher education spending like we have over the past two years.

Shared Vision.

We have identified a need to have cohesive vision on Idaho's direction and efforts statewide. A shared vision amongst industry, economic development, education, and government will help unite efforts specifically around how to differentiate Idaho and the keys to innovation.

THREE VISIONARY GOALS

Make Idaho the SMARTEST STATE in the Union.

Have specific plans regarding having Idaho—The STATE of INNOVATION, showing that Idaho is not only a leader in natural resource industries, but a leader in technology. We will show applied education in Idaho's education systems and show that education is tied closely with Idaho's transformative industries.

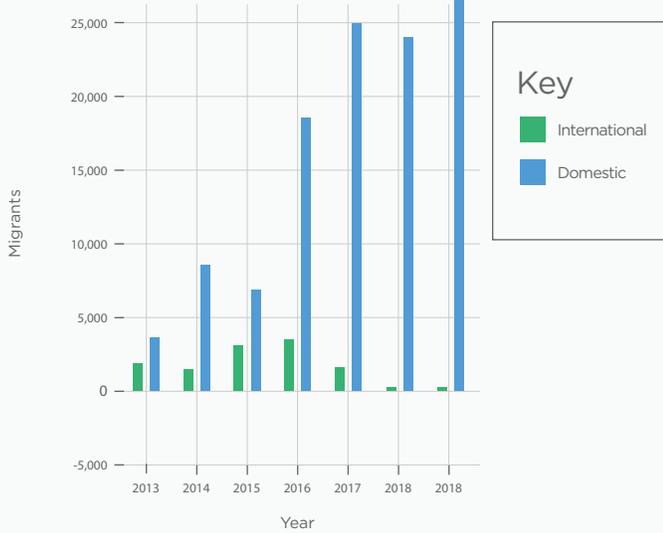
The necessity to focus on Idaho's Last Mile.

Idaho is only as strong as the local economies driven in each region. These regions need to find industry strengths and points of differentiation that will help them compete.

Robust Transportation and Broadband Highways.

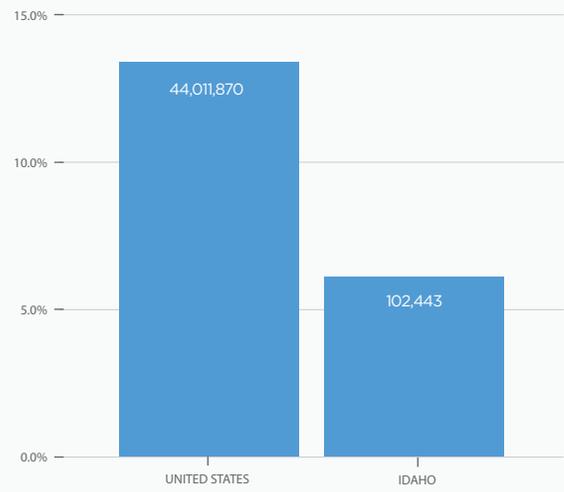
Investments must be made to build stronger transportation systems and broadband infrastructure. Utah is a example as they received the largest federal transportation infrastructure investments since 1950 when they improved their transportation system before the Olympics in 2002. Utah has used this as a launch point to continue to build its transportation system.

MIGRATION



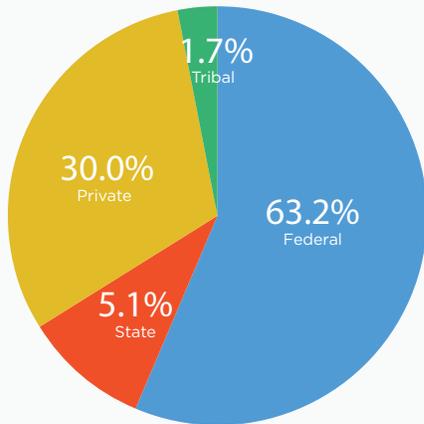
Data Source: Census Bureau, 2016 5-Year Estimates

FOREIGN BORN



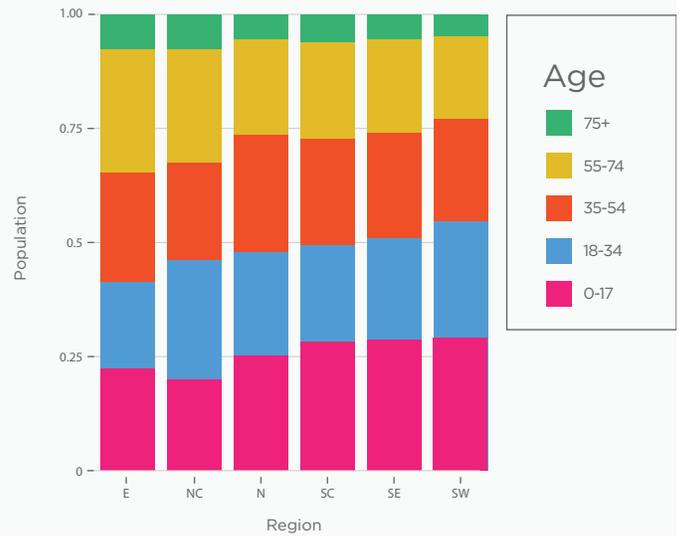
Data Source: Census Bureau, 2016 5-Year Estimates

PUBLIC LAND AREA 2019



Data Source: Idaho Department of Lands

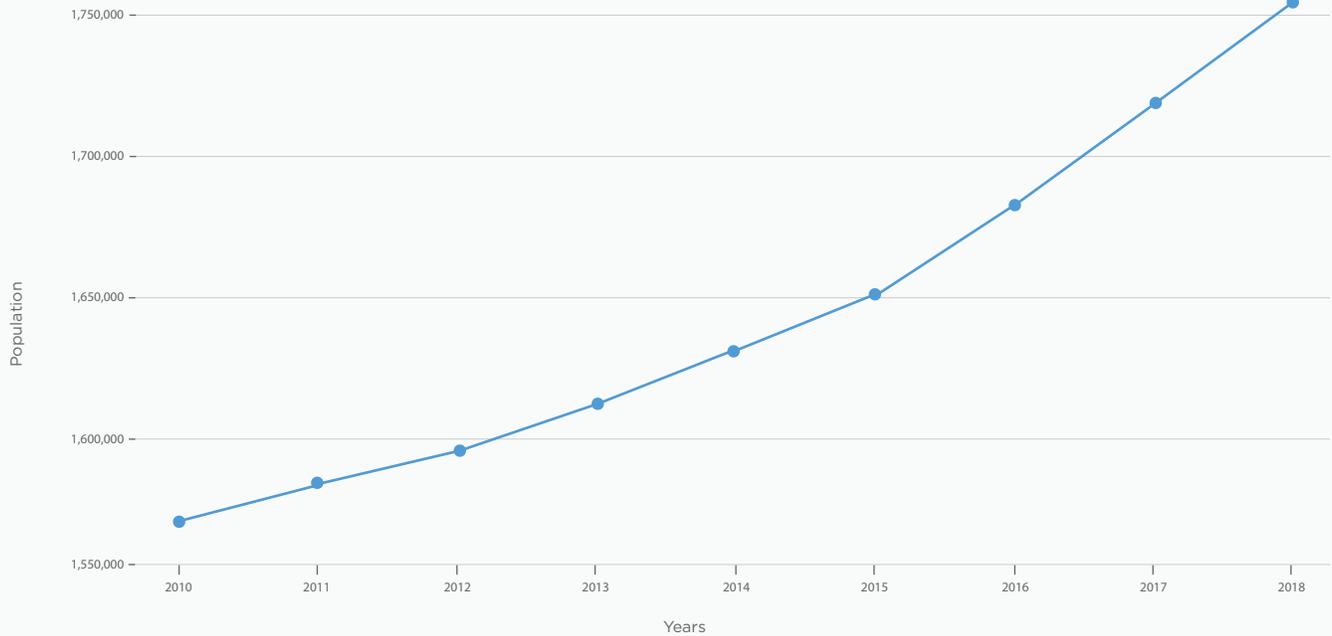
REGIONAL POPULATION DISTRIBUTION



Data Source: Census Bureau, 2016 5-Year Estimates

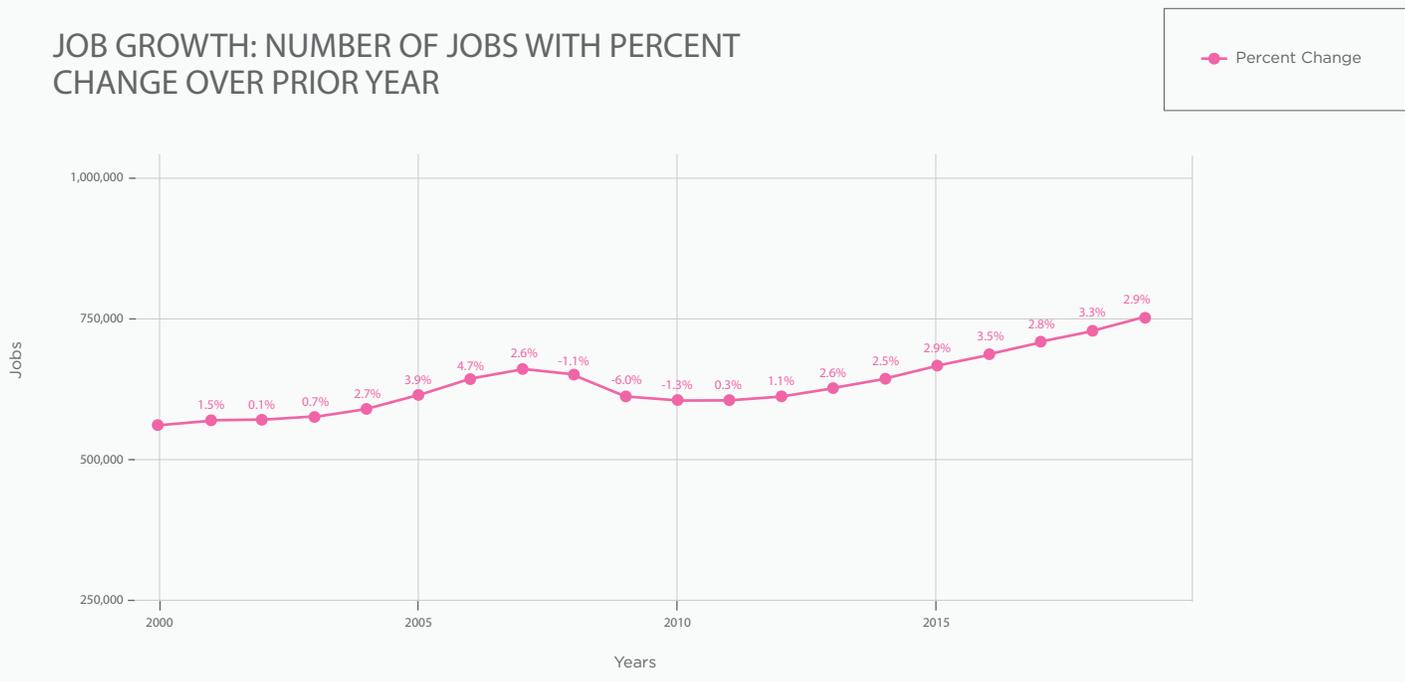


IDAHO POPULATION



Data Source: Census Bureau, 2017 Population Estimates

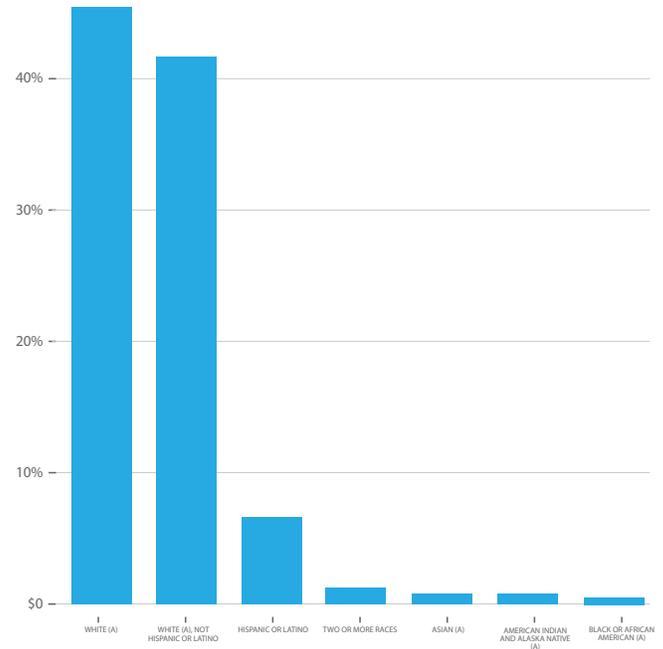
JOB GROWTH: NUMBER OF JOBS WITH PERCENT CHANGE OVER PRIOR YEAR



Data Source: Bureau of Economic Analysis, 2018

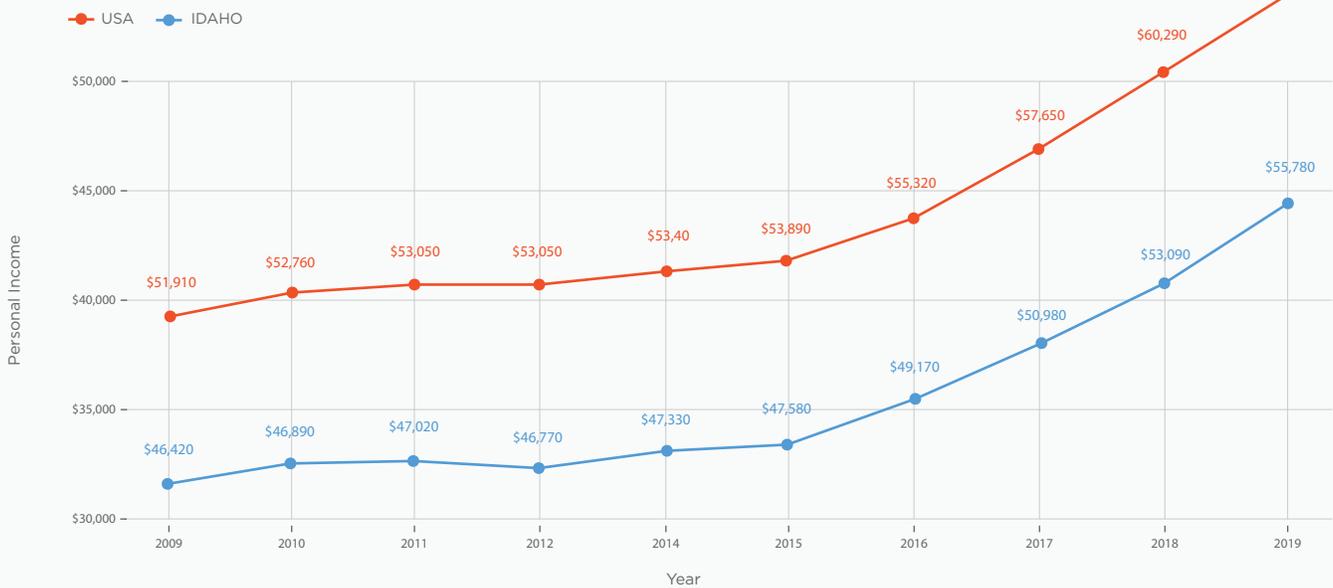
MOST REGIONS IN IDAHO SAW A CLEAR INCREASE IN THE NUMBER OF HOUSEHOLDS EARNING \$50 THOUSAND DOLLARS PER YEAR OR MORE...

ETHNIC ORIGIN



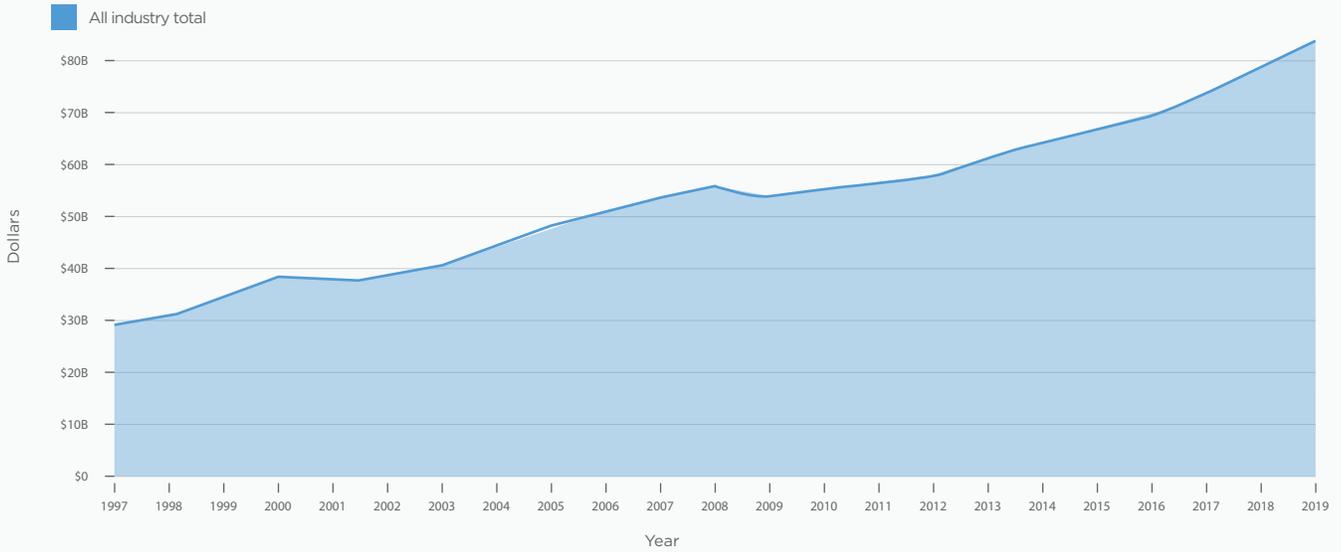
Data Source: Census Bureau, 2016 5-Year Estimates

MEDIAN HOUSEHOLD INCOME



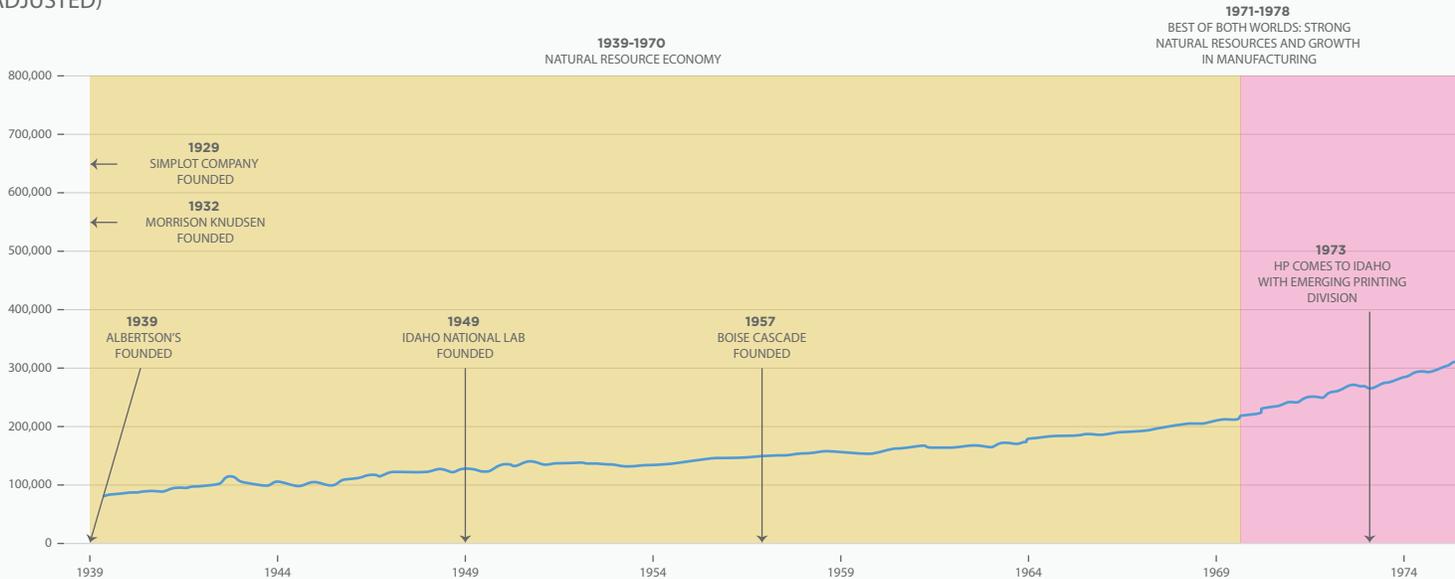
Data Source: Bureau of Economic Analysis, 2017

IDAHO GROSS DOMESTIC PRODUCT (IN CURRENT DOLLARS)



Data Source: BEA.Gov - interactive data application

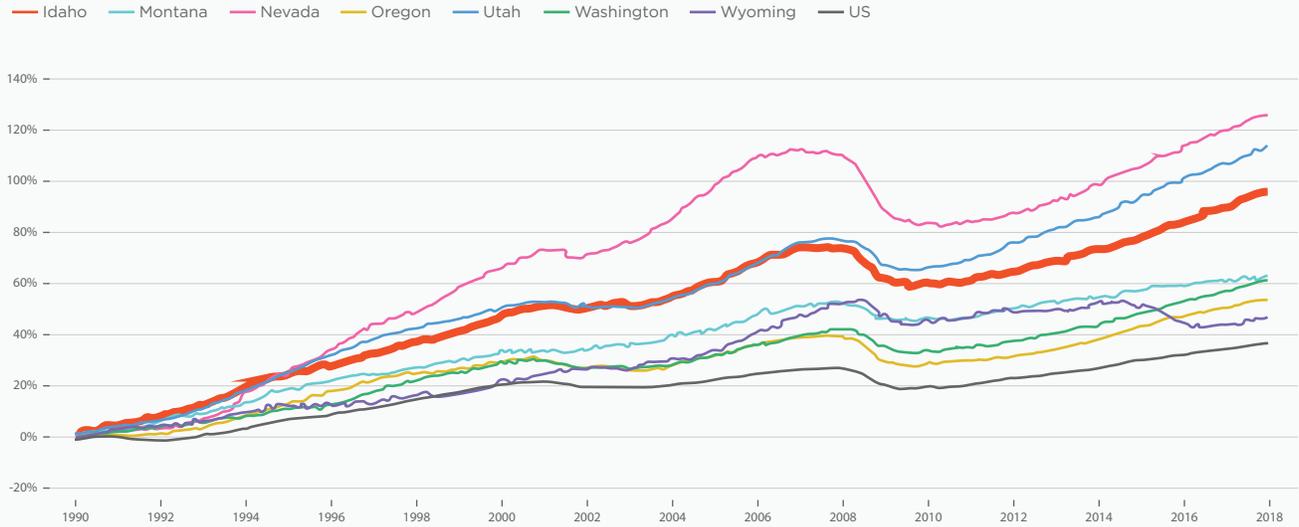
IDAHO TOTAL NONFARM JOBS (SEASONALLY ADJUSTED)



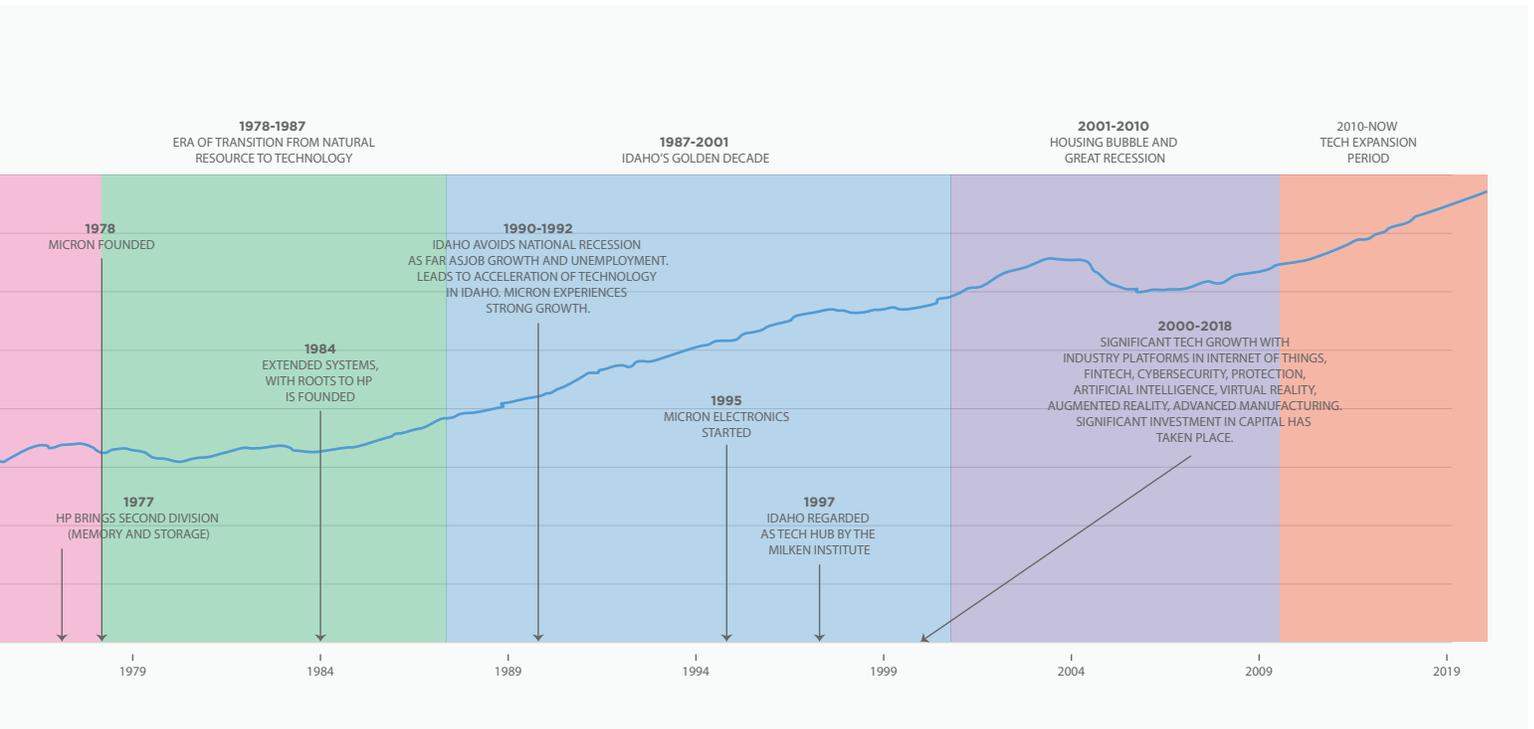
Data Source: Idaho Department of Labor



TOTAL NONFARM JOB GROWTH FROM 1990: IDAHO AND ITS SURROUNDING STATES



Data Source: Idaho Department of Labor



DEAL FLOW

NORTHERN

23 Total Deals		Amount
Bonner	5	\$46.10M
Bounry	1	Undisclosed
Kootenai	17	\$214.48M

NORTH CENTRAL

5 Total Deals		Amount
Idaho	3	12.99M
Latah	1	Undisclosed
Nez Perce	1	Undisclosed

EASTERN

14 Total Deals		Amount
Bonneville	5	\$15.96M
Clark	1	\$1.00M
Lemhi	3	\$48.88M
Madison	4	\$6.88M
Teton	1	\$0.19M

SOUTHEASTERN

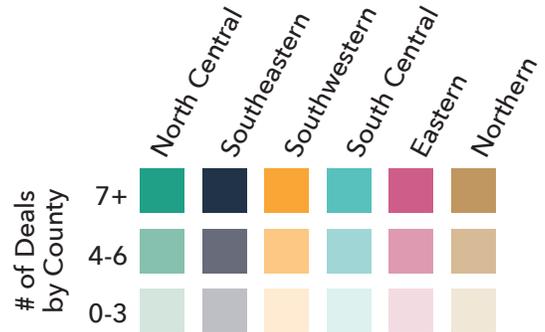
4 Total Deals		Amount
Bannock	3	Undisclosed
Power	1	Undisclosed

SOUTHWESTERN

99 Total Deals		Amount
Ada	86	\$3.85B
Canyon	6	\$146.40M
Owyhee	4	\$37.06M
Payette	2	Undisclosed
Valley	1	\$19.90M

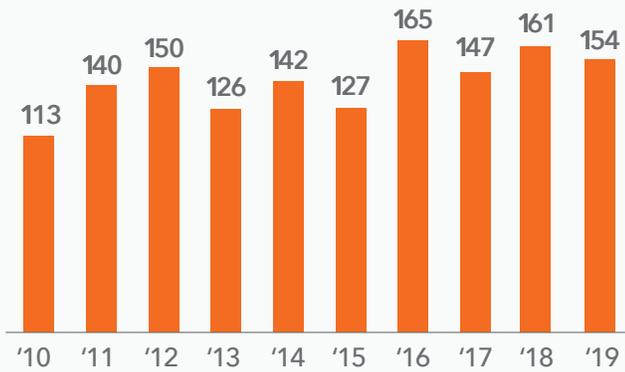
SOUTH CENTRAL

9 Total Deals		Amount
Blaine	5	\$11.64M
Twin Falls	3	Undisclosed
Jerome	1	Undisclosed



The deal flow report highlights Idaho companies that are starting, growing, and thriving. A key part of their success is access to capital, which the deal flow report captures.

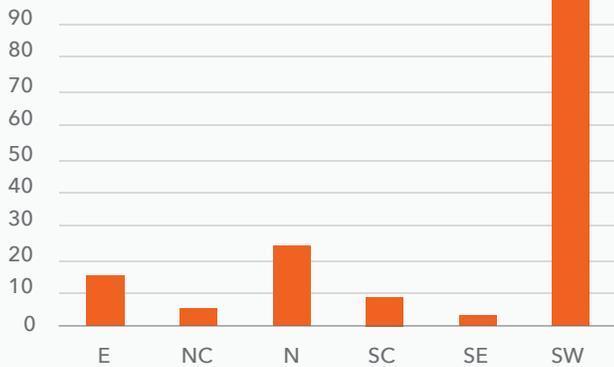
NUMBER OF DEALS



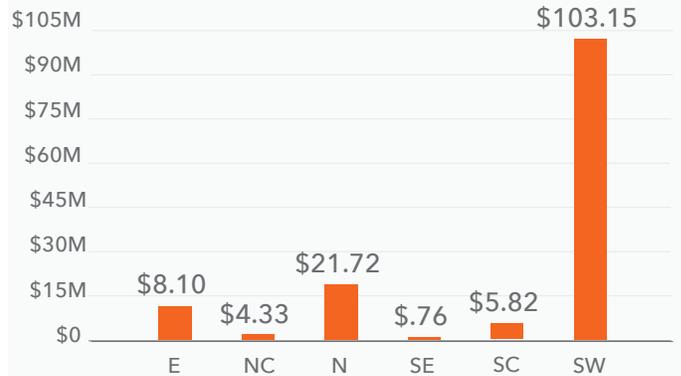
\$TOTAL VOLUME (BILLIONS)



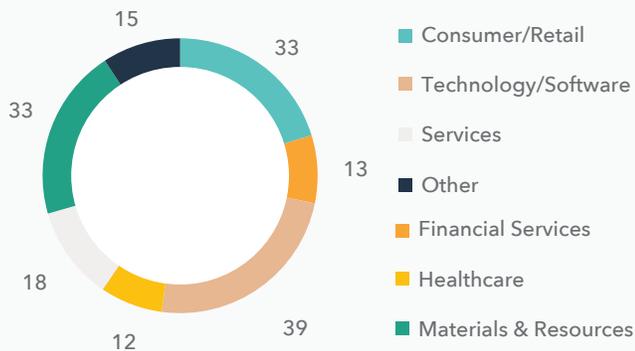
DEAL COUNT (BY REGION)



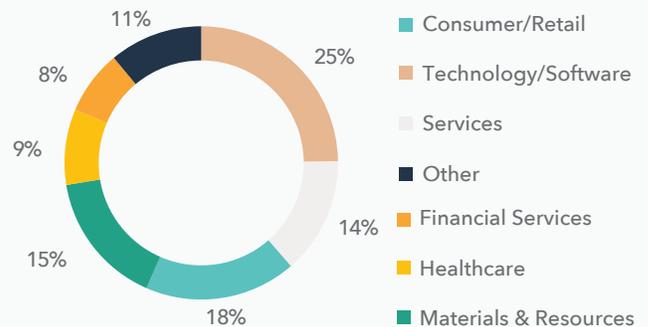
AVERAGE DEAL AMOUNT (BY REGION; MILLIONS)



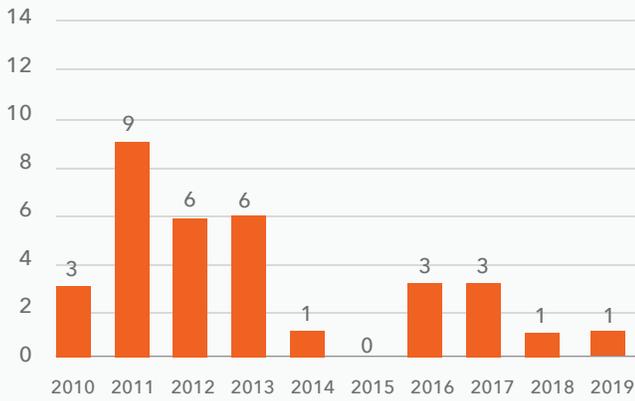
NUMBER OF DEALS (BY INDUSTRY - #)



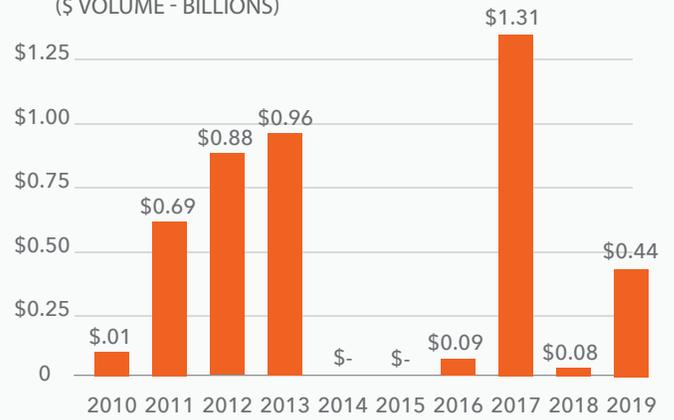
TOTAL DEAL VOLUME (BY INDUSTRY - %)



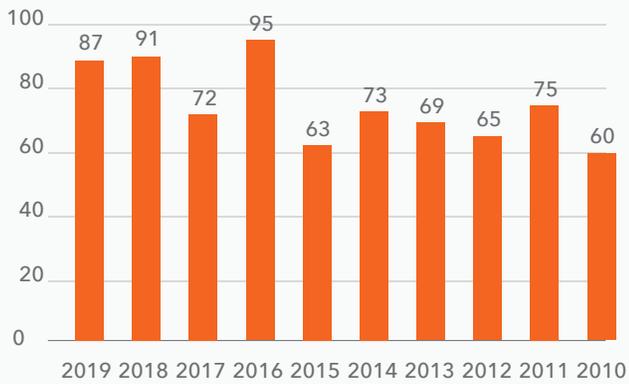
PUBLIC OFFERINGS (NUMBER OF DEALS)



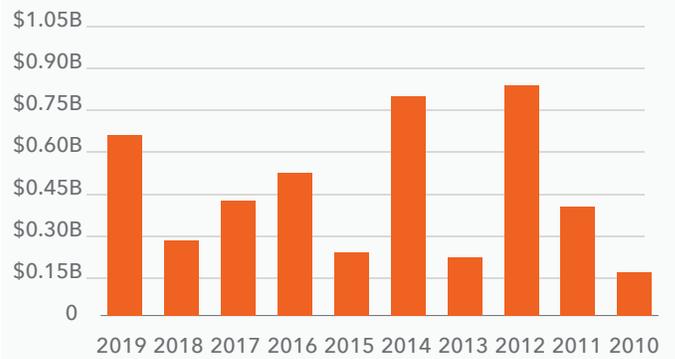
PUBLIC OFFERINGS (\$ VOLUME - BILLIONS)



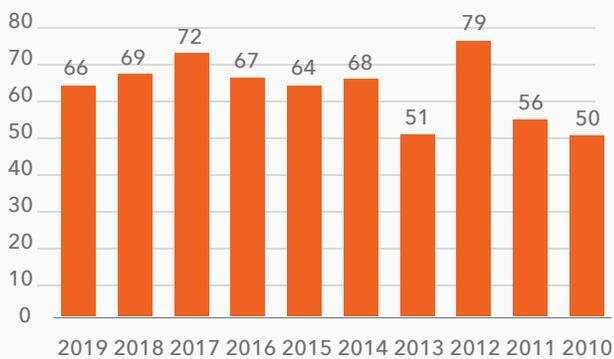
PRIVATE PLACEMENT (NUMBER OF DEALS)



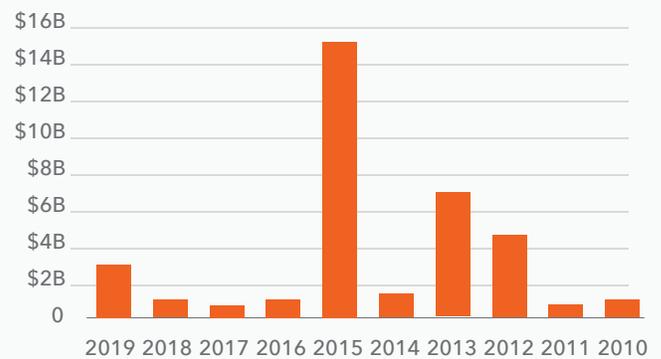
PRIVATE PLACEMENT (\$ VOLUME - BILLIONS)



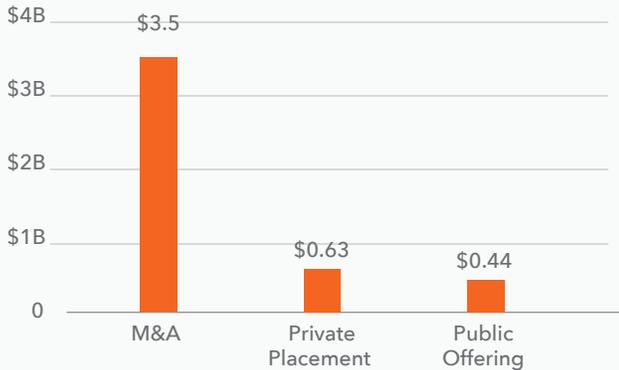
MERGERS & ACQUISITIONS (NUMBER OF DEALS)



MERGERS & ACQUISITIONS (\$ VOLUME - BILLIONS)

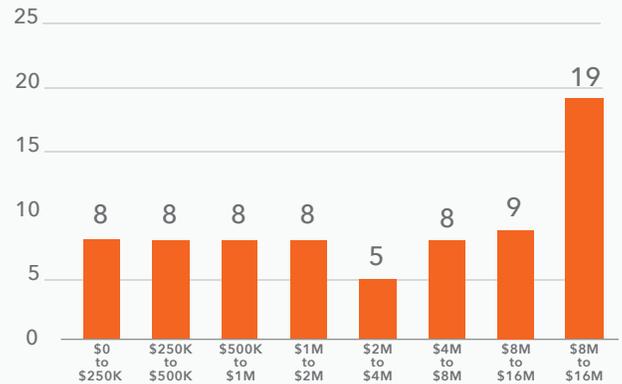


AVERAGE DEAL AMOUNT (BY DEAL TYPE)



2019 DEAL SIZE DISTRIBUTION

*this graph shows the distribution for deals with disclosed amounts



CONSISTANT PERFORMERS

OF YEARS A COMPANY HAD A TRANSACTION IN THE DEAL FLOW REPORT SINCE 2010



DEAL FLOW DISCLAIMER

We have used commercially reasonable efforts to collect and publish accurate and reliable information in the Deal Flow Report. However, readers should understand that the information contained herein has been collected from several different sources and not all of the information contained in this publication has been independently verified, substantiated, or audited. Accordingly, we make no representation or warranty as to the accuracy, reliability, adequacy, or completeness of the information contained herein. Readers should also understand that this publication does not necessarily contain an exhaustive list of all transactions completed during 2019 in the State of Idaho because many transactions were confidential, not made public and/or were not reported. Inclusion in this publication of the logos of companies that completed transactions during 2019 does not imply endorsement or sponsorship of or ownership by trademark holder.

Sources used in compiling the 2019 Deal Flow Report

- Capital IQ (PE/VC database)
- Pitchbook (PE/VC database)
- PrivCo (PE/VC database)
- Idaho Reg D Filings
- SEC Form C Filings
- Company Press Releases
- Direct Contact of Idaho Companies

Special thanks to Brigham Young University and the Marriott School of Business for supporting the 2019 Idaho Deal Flow Report through an internship partnership.:

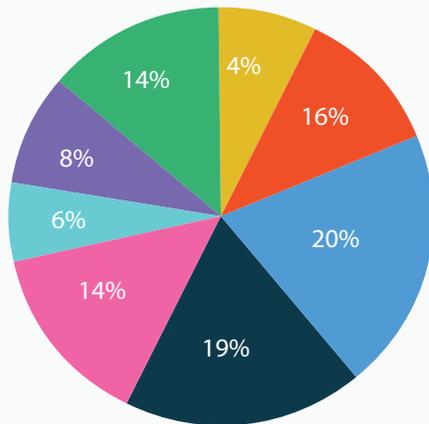
Adam Hurd
Jordan Hurd
Coltin Barney
Madeleine Arnold
Hillary Mason
Ammon Thornton

Quinn Clay
Jacob Nae'ole
Hayden Bergeston
Jack Taggart
Chris Fleckenstein
Haley Bledsoe

ECONOMY

SHARE OF EMPLOYMENT (2018 DATA)

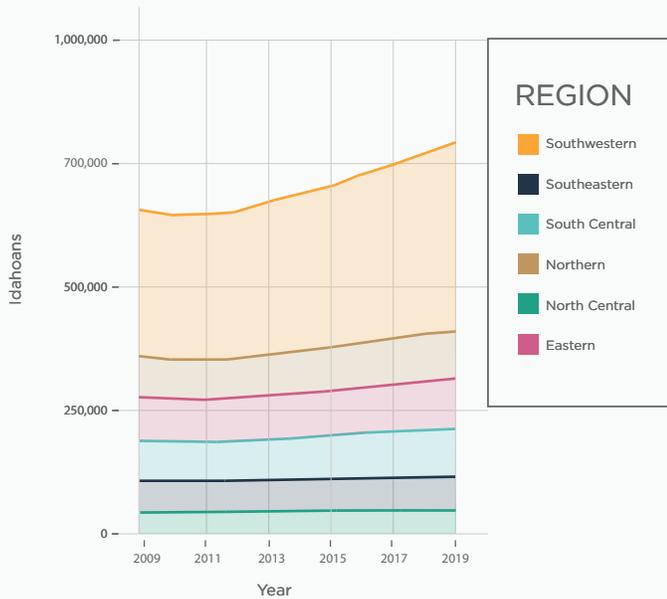
- Consumer Services
- Education
- Government
- Healthcare
- Natural Resources
- Production
- Trade, Transportation, Utilities
- Professional and Financial Services



Data Source: Bureau of Labor Statistics,

IDAHO CONTINUED ITS STRONG GROWTH AND REACHED NEW HEIGHTS IN 2018 WITH A NEW TOTAL AVERAGE OF 737,300 NON-FARM JOBS. IT WAS A SLIGHTLY STRONGER YEAR OF GROWTH WITH 3.1 PERCENT INCREASE FROM 2017 TO 2018 COMPARED TO 3.0 PERCENT FROM 2016 TO 2017.

IDAHO EMPLOYMENT



Data Source: Bureau of Labor Statistics

MEDIAN HOUSEHOLD INCOME BY REGION - 2019



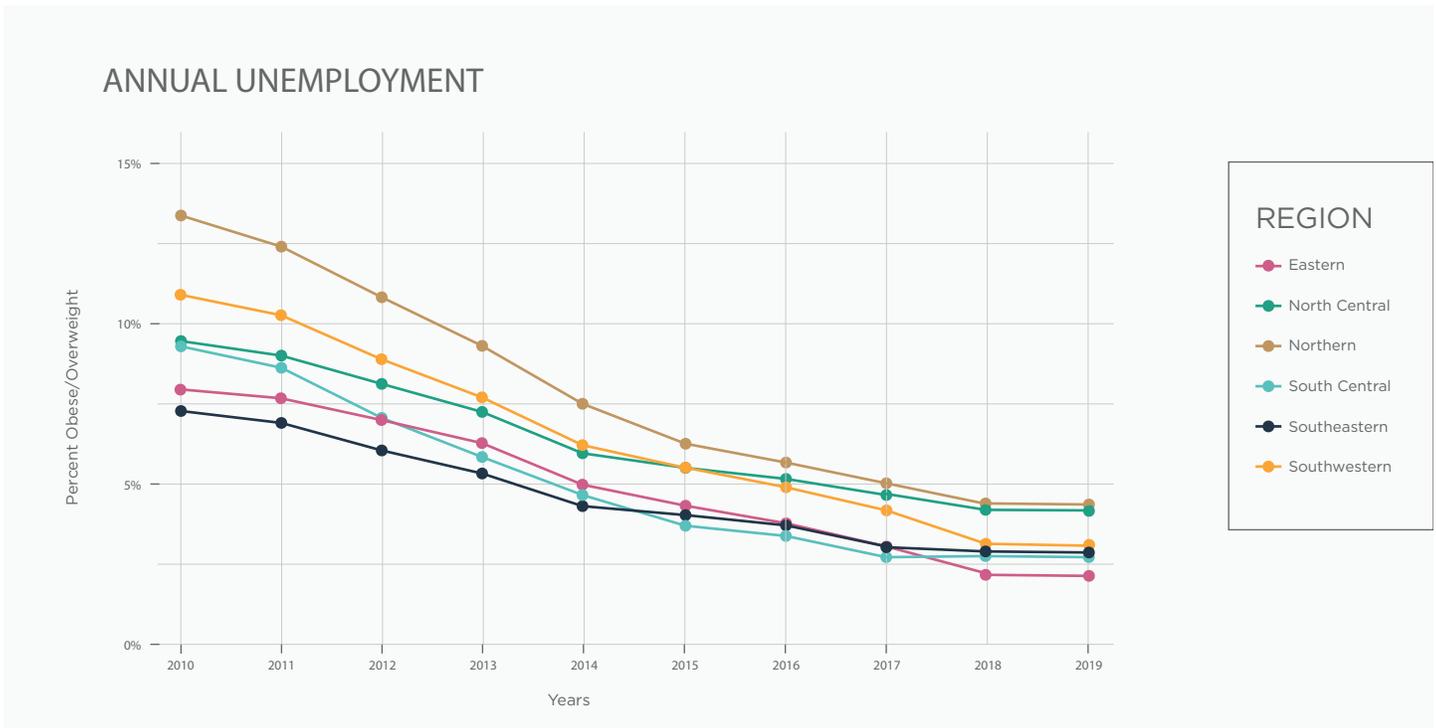
Data Source: Census Bureau, 2016 5-Year Estimates

EMPLOYMENT

Idaho's unemployment rate was close to 3 percent in February before the economic challenges created by COVID-19. Unemployment at the peak of the economic shutdown nearly hit 16% and significantly impacted businesses in the hospitality, travel, and restaurants industries. We have seen steady decreasing unemployment since May. We have seen several industry sectors make strong pivots based on the pandemic. Idaho's economy continues to show strengths with food production, precision agriculture, computing technologies, natural resources, and advanced manufacturing. By the year 2025, we estimate that technology will be the largest industry in Idaho. Median household income is not as high as the U.S. average, but is increasing at about the same rate as the U.S. average. Idaho saw an increase in the number of patents issued, reversing a long general trend of declining numbers of patents issued.

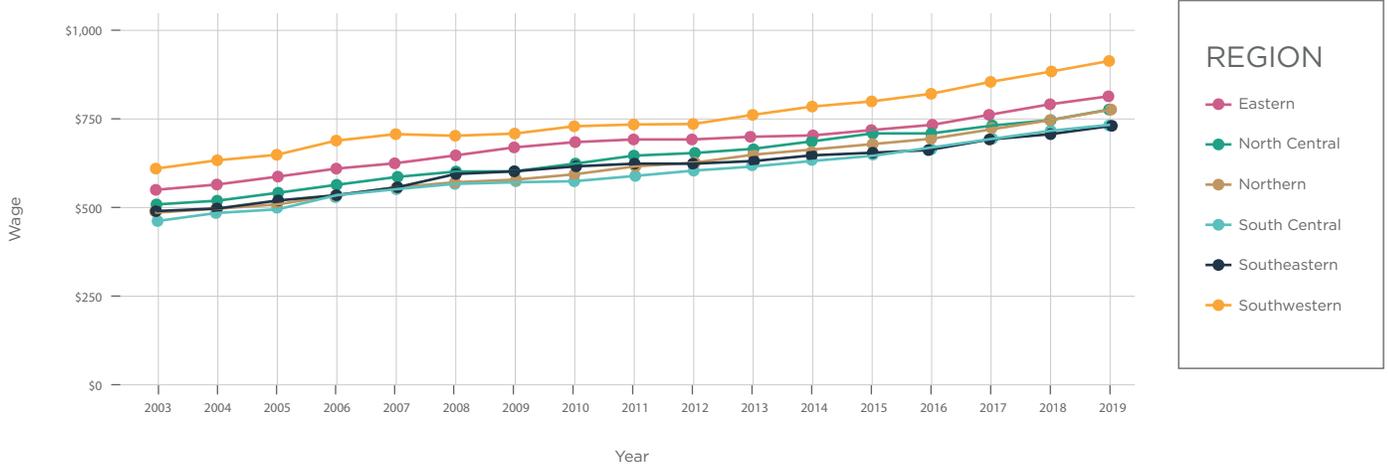
Why is this important?

We must continue to see strong industry platforms that are producing and creating jobs. We have seen several indicators from the pandemic which point to strong labor pools migrating to Idaho.



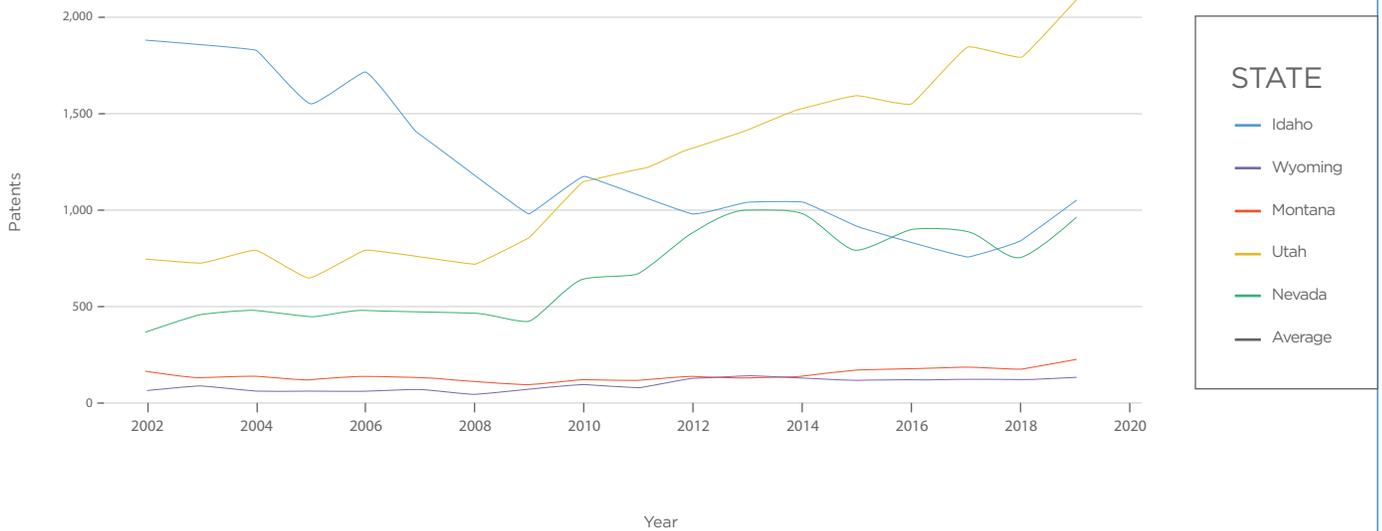
Data Source: Bureau of Labor Statistics

AVERAGE WEEKLY WAGES



Data Source: Bureau of Labor Statistics, 2017 State Occupational Employment and Wage Estimates

NUMBER OF PATENTS EACH YEAR (BY STATE)



Data Source: US Patent and Trademark Office

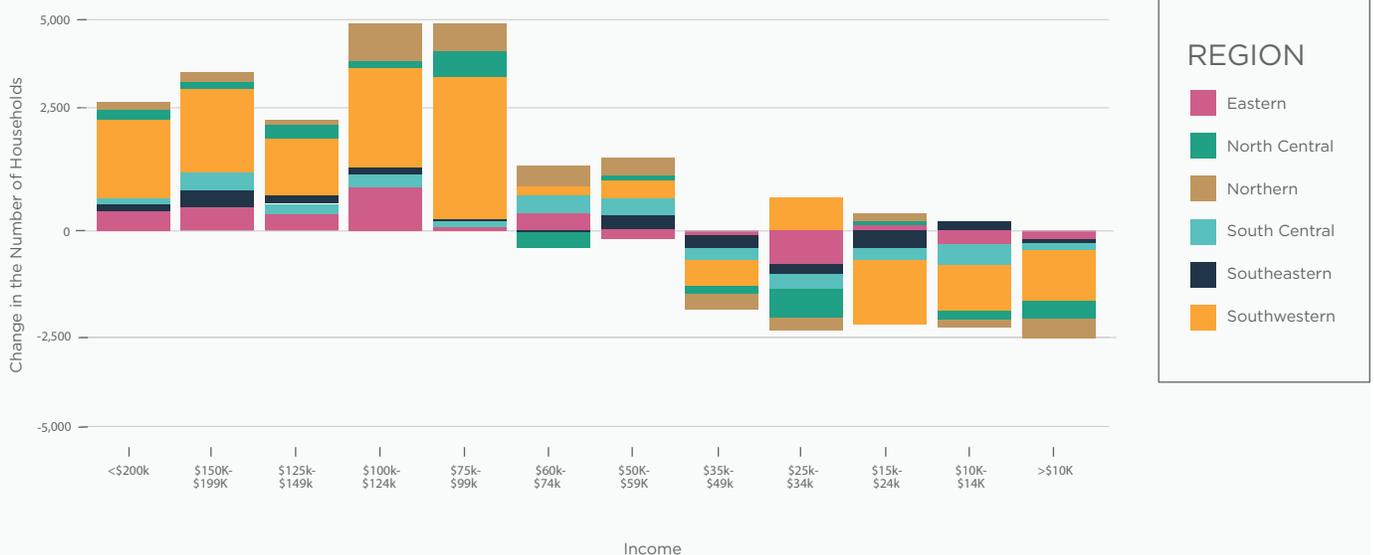
INCOME

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. Livability has ranked Boise as the most "livable" city in the U.S. in 2019 and several other communities in Idaho were on the top 100 list. We see strong personal income rise but the cost of housing, in some areas, has increased year over year by 21%. This key indicator related to cost-of-living is putting pressure on the Idaho quality of life. Most regions in Idaho saw a clear increase in the number of households earning \$50 thousand dollars per year or more, while they saw a corresponding decrease in the number of households making less than \$50 thousand per year. This may be a sign of economic growth, but it may also suggest that some places in Idaho are becoming more difficult for low-income households. Computer and mathematical jobs continue to rank among the highest paying occupational categories in Idaho.

Why is this important?

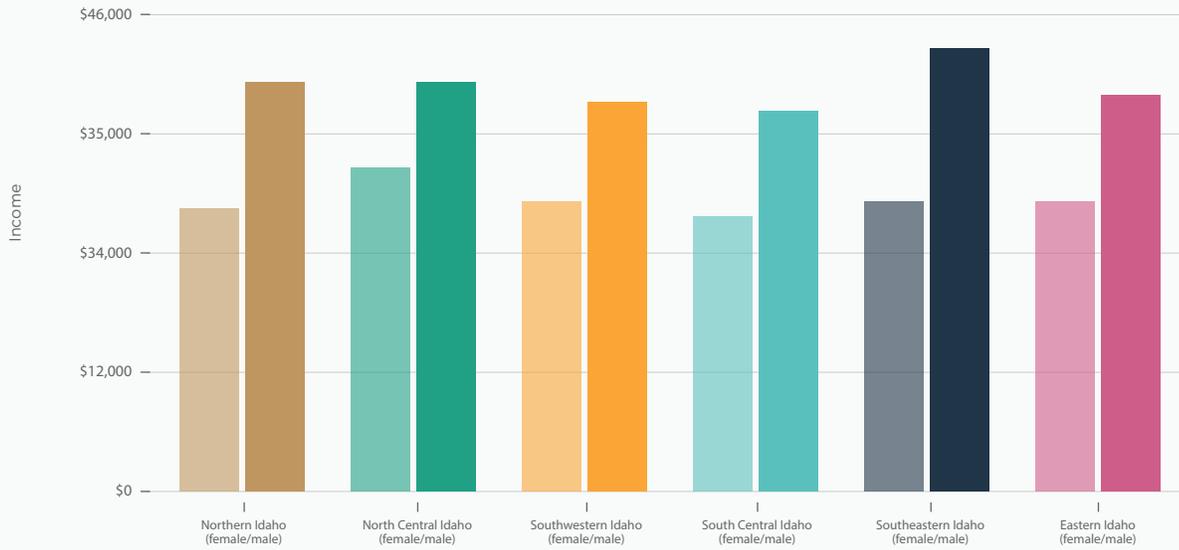
Both income and cost-of-living play a role in attracting skilled labor to Idaho, and in keeping skilled laborers in Idaho long-term. We are seeing strong income growth and challenges with cost of living increases specifically in the housing space.

CHANGE IN THE NUMBERS OF HOUSEHOLDS BY INCOME CATEGORY (2018-2019)



Data Source: U.S. Census Bureau, American Community Survey

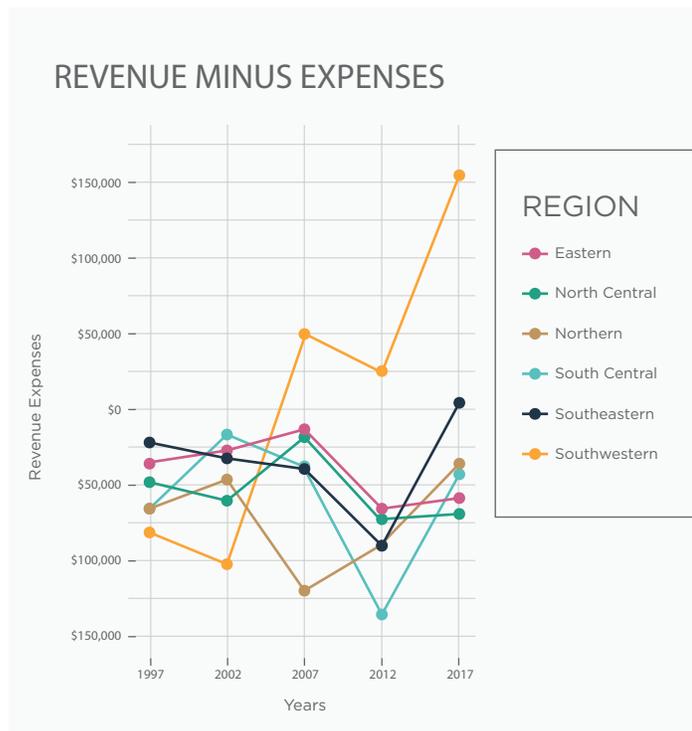
AVERAGE INCOME BY GENDER - 2019



Data Source: U.S. Census Bureau, American Community Survey

GOVERNANCE

CITY REVENUES HAVE INCREASED IN ALL REGIONS SINCE 2012 - MARKING SIGNS OF FULL RECOVERY FROM THE RECESSION OF 2008.



Data Source: Government Finance Database developed by Pierson, Hand, and Thompson (2015) based on the Census Bureau's original fiscal data.

CITY FINANCES

City revenue has increased across Idaho, with charges for services making up an increasing proportion of average revenue. 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.

* 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 maintaining service levels. Property taxes tend to make up the most consistent revenue stream, but other revenue streams may pose more opportunity for innovation.

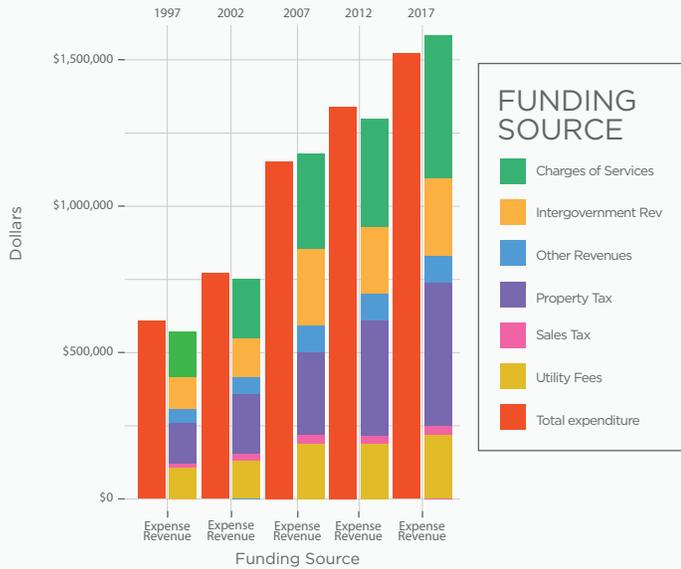
CIVIC ENGAGEMENT

Voter participation has increased significantly in 2020 primary and general elections, pointing to a more engaged electorate. Idaho saw unusually high participation in its 2018 midterm elections, while general election participation in 2016 was in line with past trends.

Why is this important?

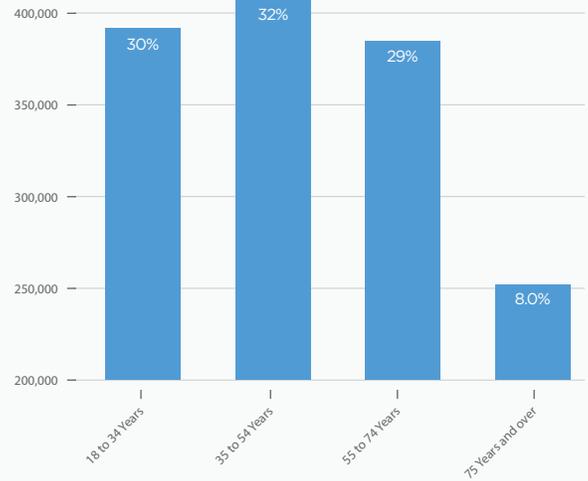
Civic engagement helps to ensure that government remains accountable to its constituents. A higher level of civic engagement is associated with a higher quality of life within a community. Furthermore, participation in political systems helps to act as a measure of public confidence in those systems. Voter engagement represents an opportunity for Idaho to connect with its residents to develop policies and make political decisions that further the best interests of the Idaho.

CITY FINANCES—REVENUES BY SOURCE & EXPENSES



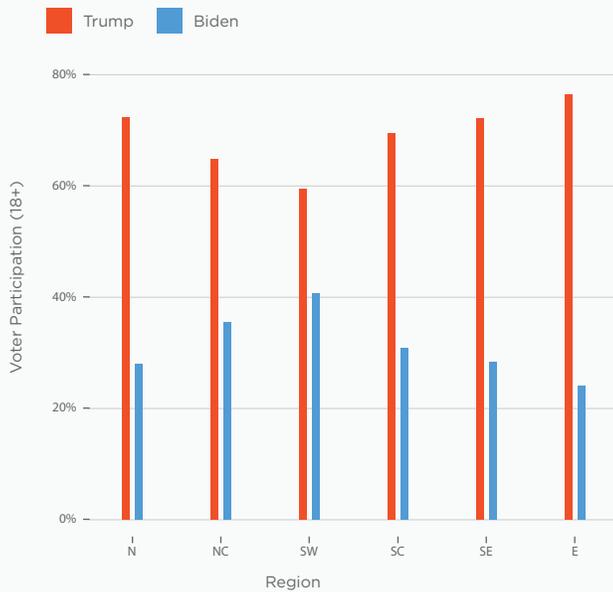
Data Source: Government Finance Database developed by Pierson, Hand, and Thompson (2015) based on the Census Bureau's original fiscal data.

VOTING AGE POPULATION



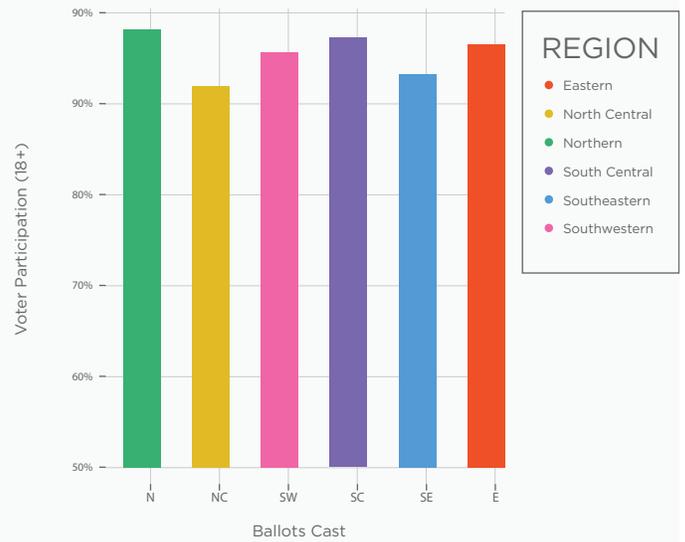
Data Source: Idaho Secretary of State

2020 VOTER SHARE



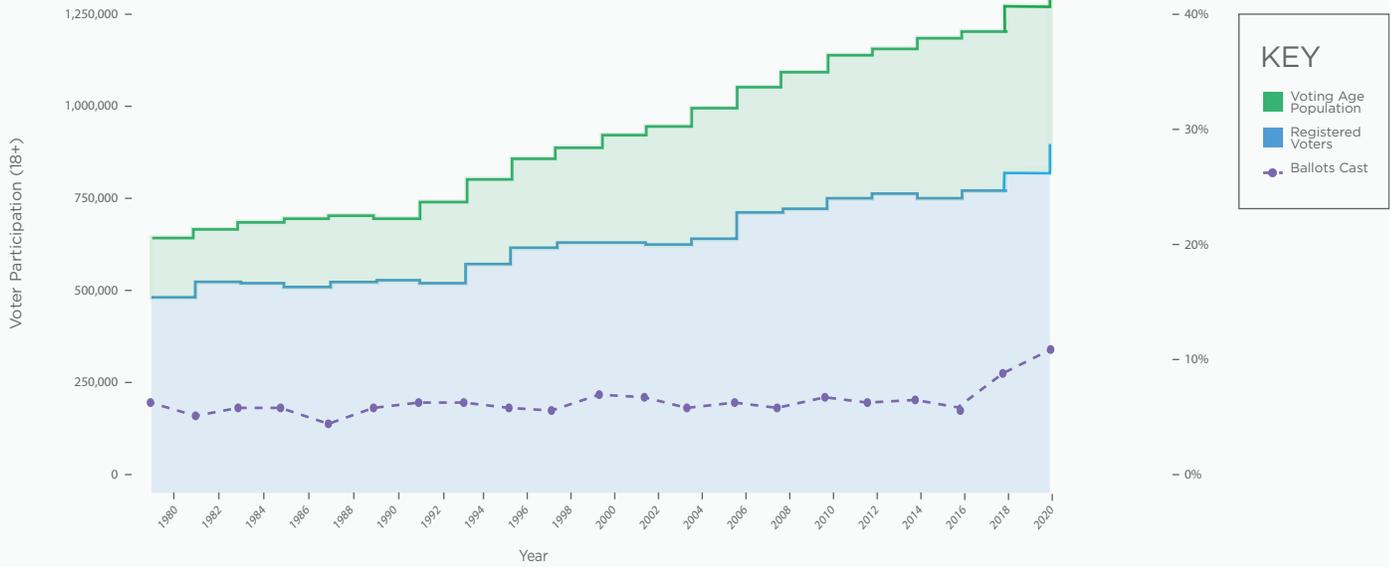
Data Source: Idaho Secretary of State

REGIONAL VOTER PARTICIPATION



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

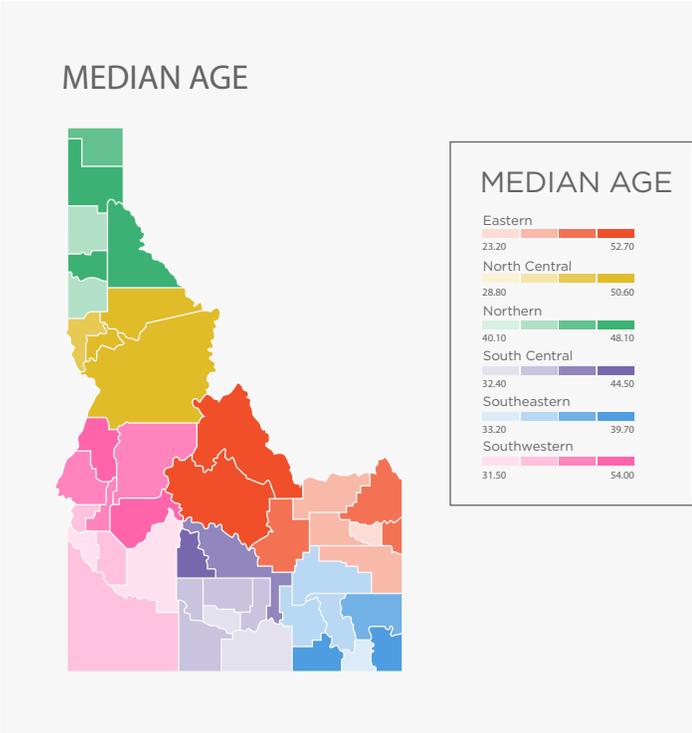
PEOPLE

Idaho is one of the fastest growing states in the U.S. since 2010, along with many of its Western peers. This rapid growth can be attributed primarily to migration, with rates of natural increase (new births exceeding deaths) decreasing slightly in recent years. Population growth increased in 2019, over 2018. Annual births increased slightly, reversing a three-year slight declining trend. Regarding natural increase, Idaho is home to a relatively young population with a robust birth rate, and a large household size. Regarding migration, Idaho has seen growth resulting from pandemic issues and social unrest. We will have more specific information in the 2021 IKR. 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, there has been 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 low cost of operation, has made Idaho into an attractive spot for business, which in turn promotes further economic growth. 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 an increasingly complex set of skills from their workers, technological skills ranking among the most important of these, urbanization, along with expanding educational systems, helps to facilitate a supply for this demand. Like other states that have experienced such growth, the state of Idaho now faces several 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.

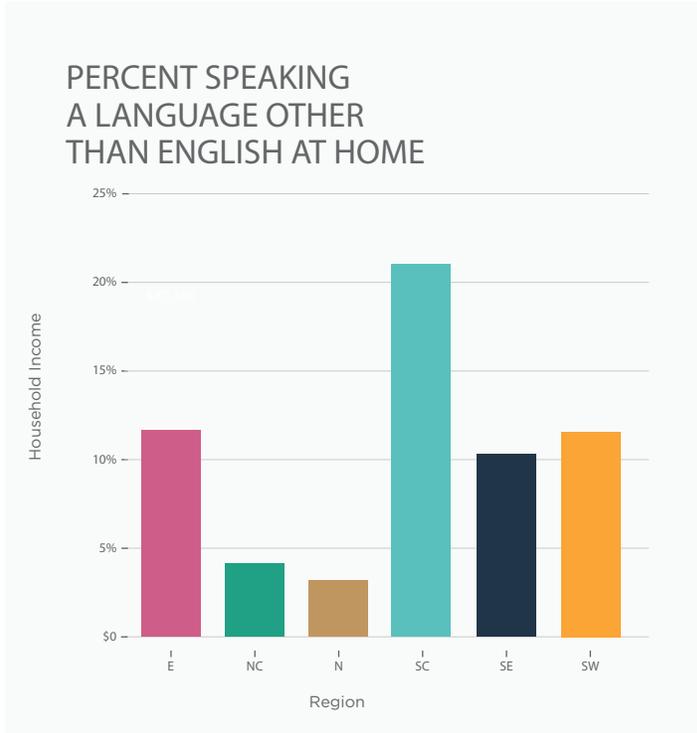


MEDIAN AGE



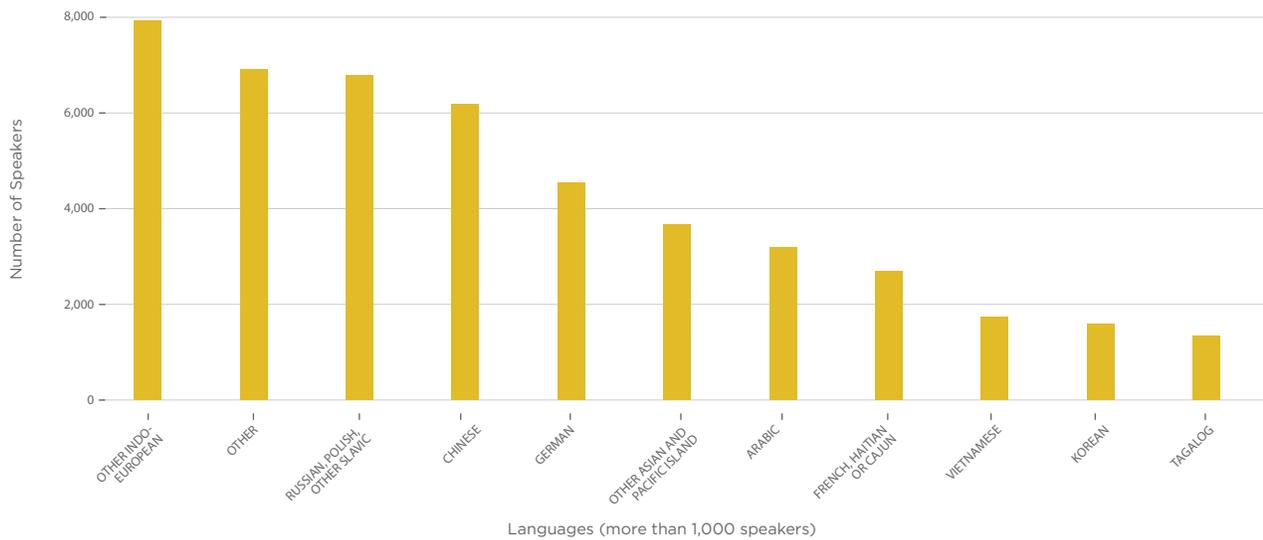
Data Source: Census Bureau, 2017 Population Estimates

PERCENT SPEAKING A LANGUAGE OTHER THAN ENGLISH AT HOME



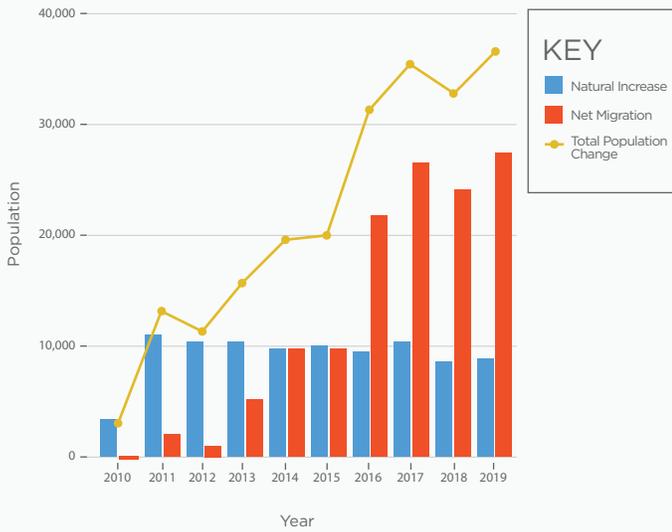
Data Source: U.S. Census Bureau, American Community Survey

NON-ENGLISH SPEAKERS WITH MORE THAN 1000 SPEAKERS (OTHER THAN SPANISH) - 2018



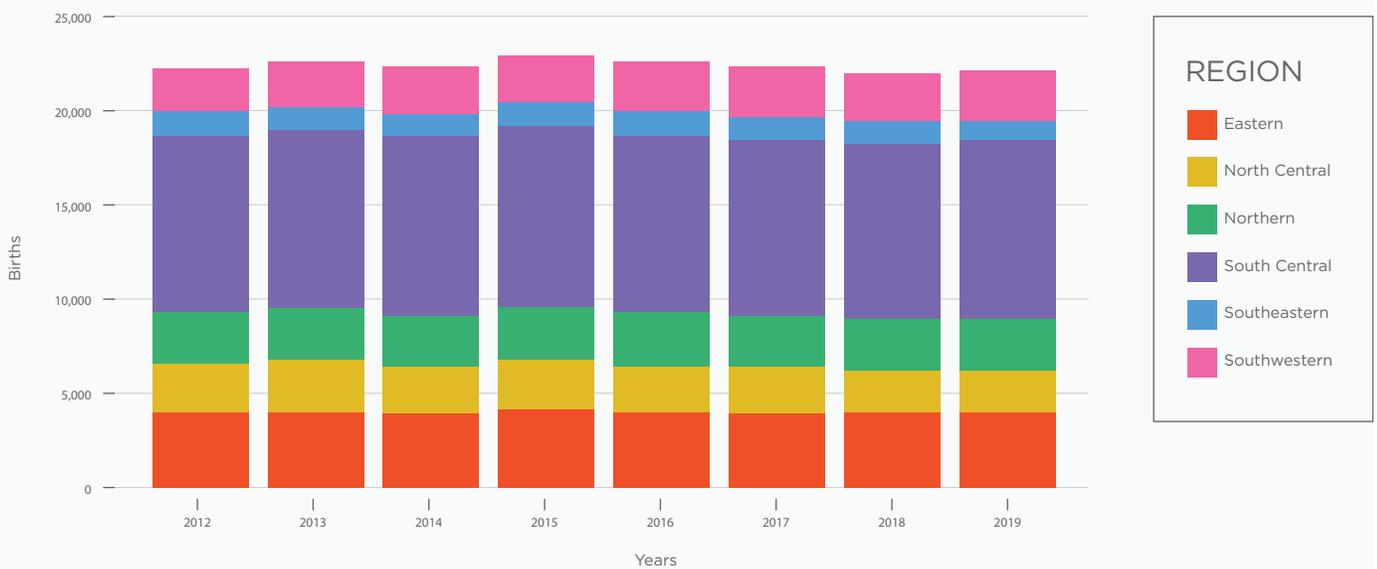
Data Source: Census Bureau, 2016 5-Year Estimates

POPULATION CHANGE



Data Source: U.S. Census Bureau, American Community Survey

ANNUAL BIRTHS



Data Source: Census Bureau, 2017 Population Estimates

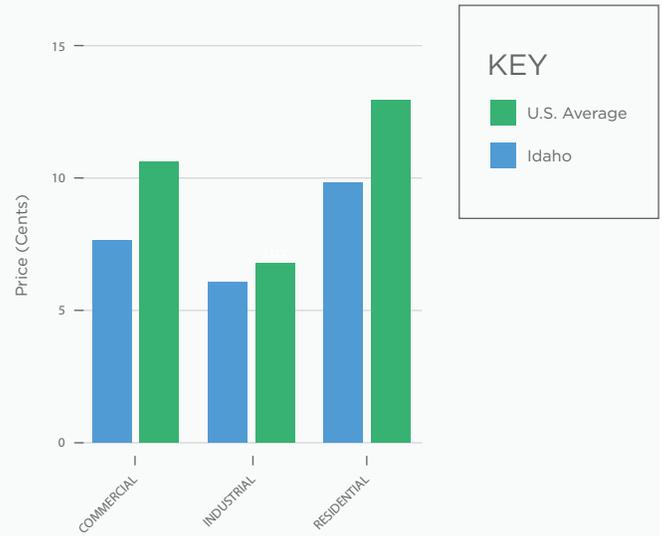
PLACE

RENTAL AFFORDABILITY



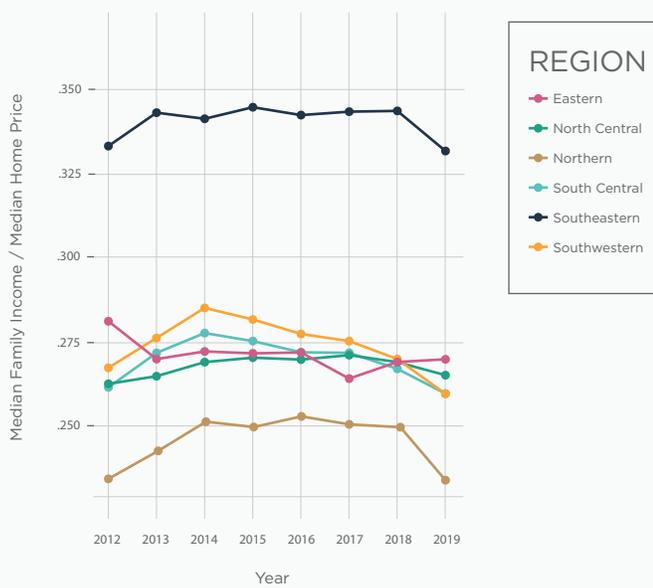
Data Source: Census Bureau, American Community Survey, 5 Year Estimates

ELECTRICITY PRICES (2019 CENTS/KWH)



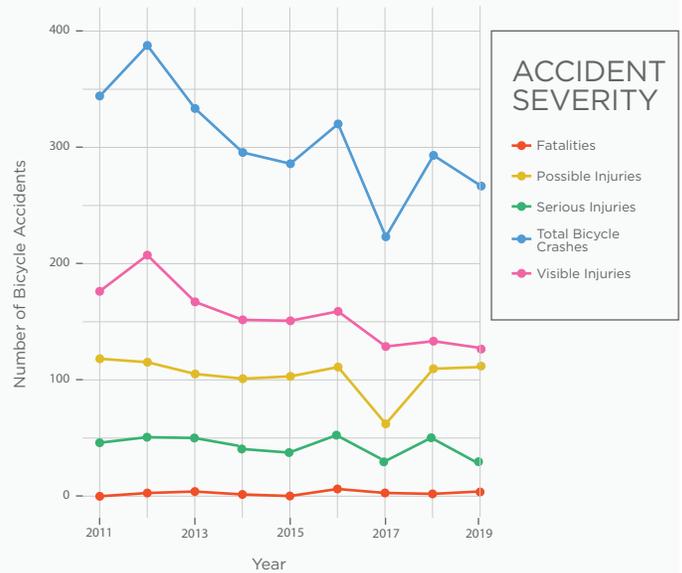
Data Source: Moody's Economy.com

HOUSING AFFORDABILITY



Data Source: Census Bureau, American Community Survey, 5 Year Estimates

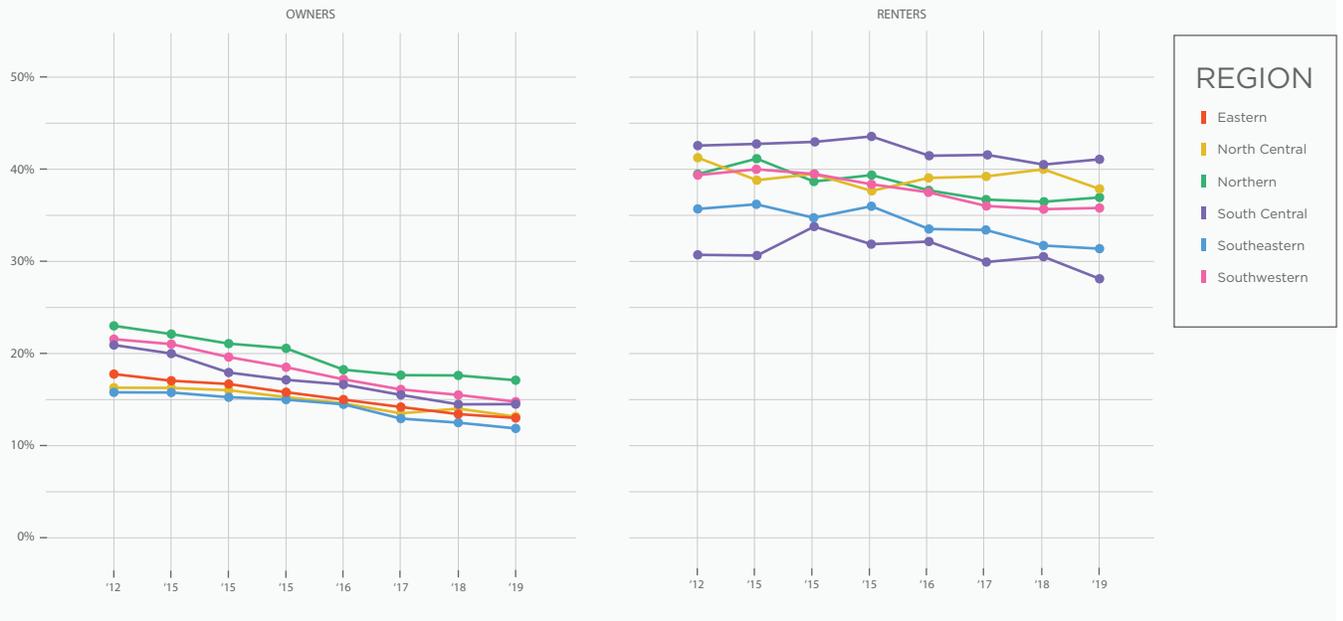
BIKE ACCIDENTS



Data Source: Idaho Transportation Department

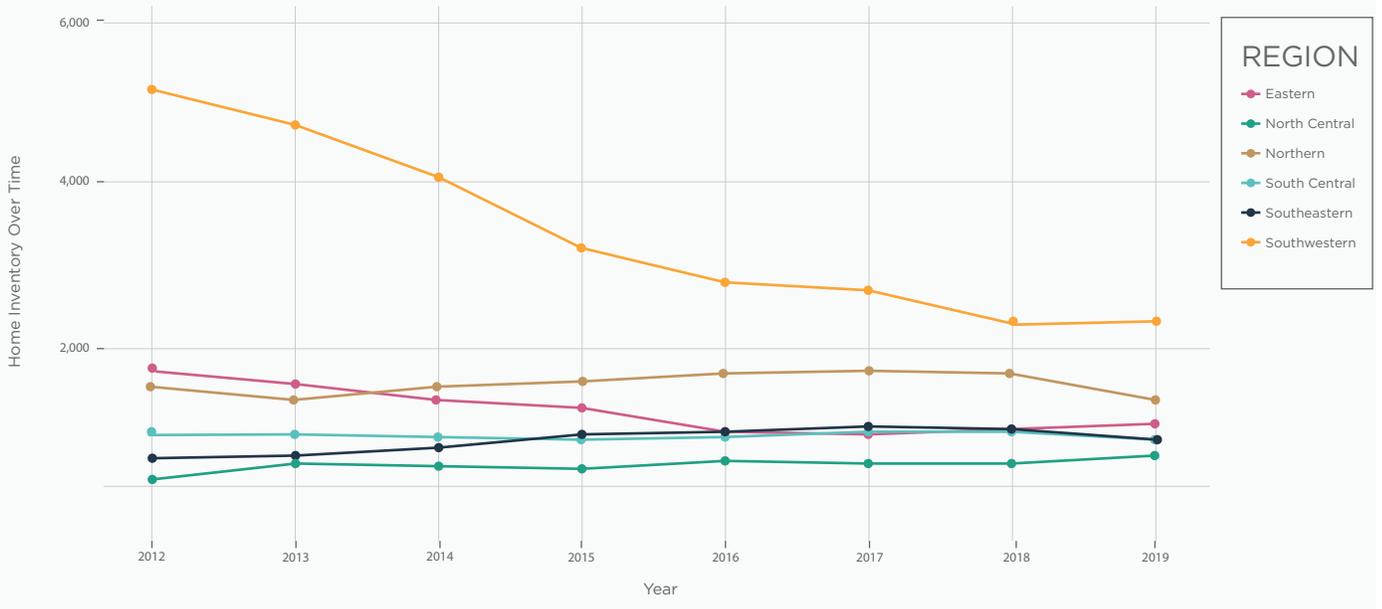


HOUSING BURDEN



Data Source: American Community Survey, 5 year estimates from the Census Bureau

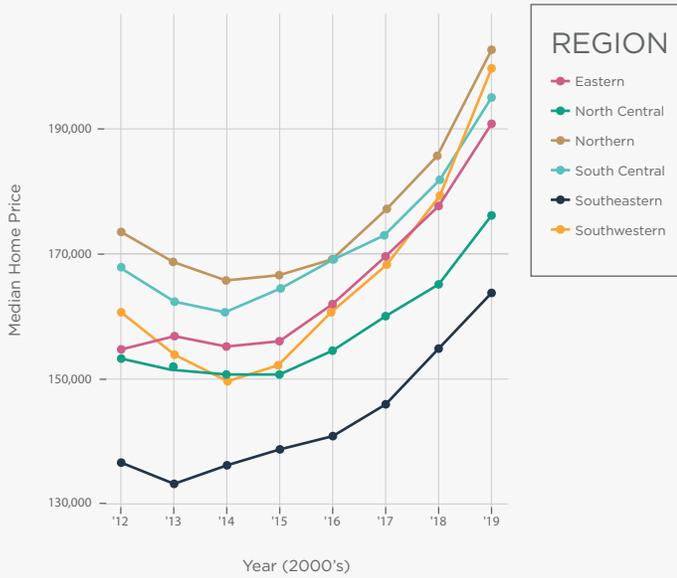
HOME INVENTORY TRENDS



Data Source: Census Bureau, American Community Survey, 5 Year Estimates

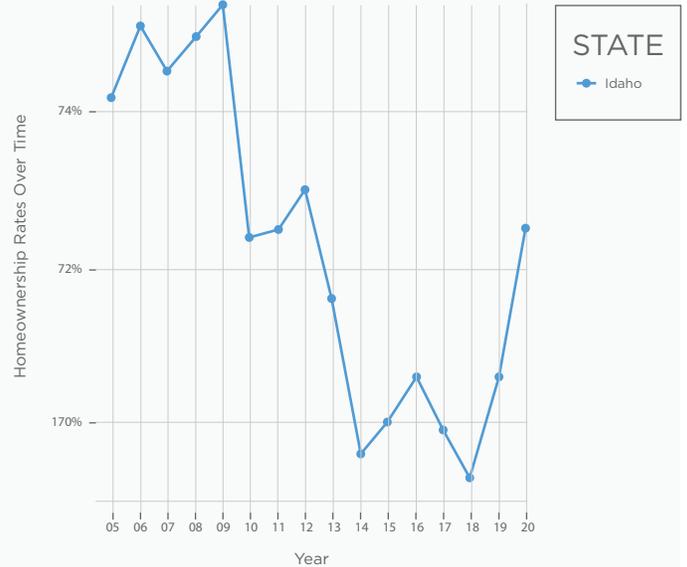


MEDIAN HOME PRICE TRENDS



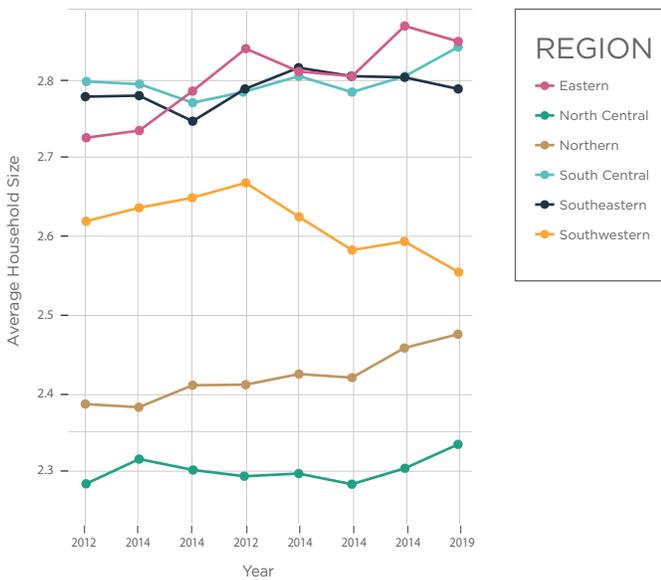
Data Source: Census Bureau, American Community Survey, 5 Year Estimates

HOMEOWNERSHIP RATES



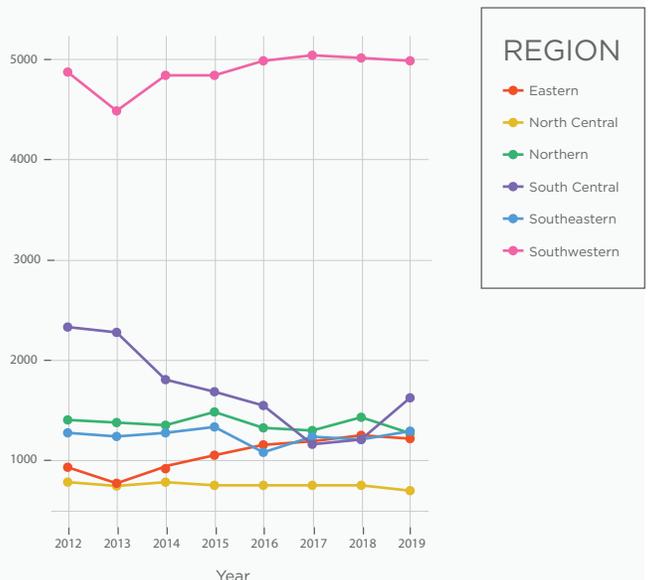
Data Source: Census Bureau, Quarterly Vacancy and Homeowner Rates by State

AVERAGE HOUSEHOLD SIZE



Data Source: U.S. Census Bureau, American Community Survey

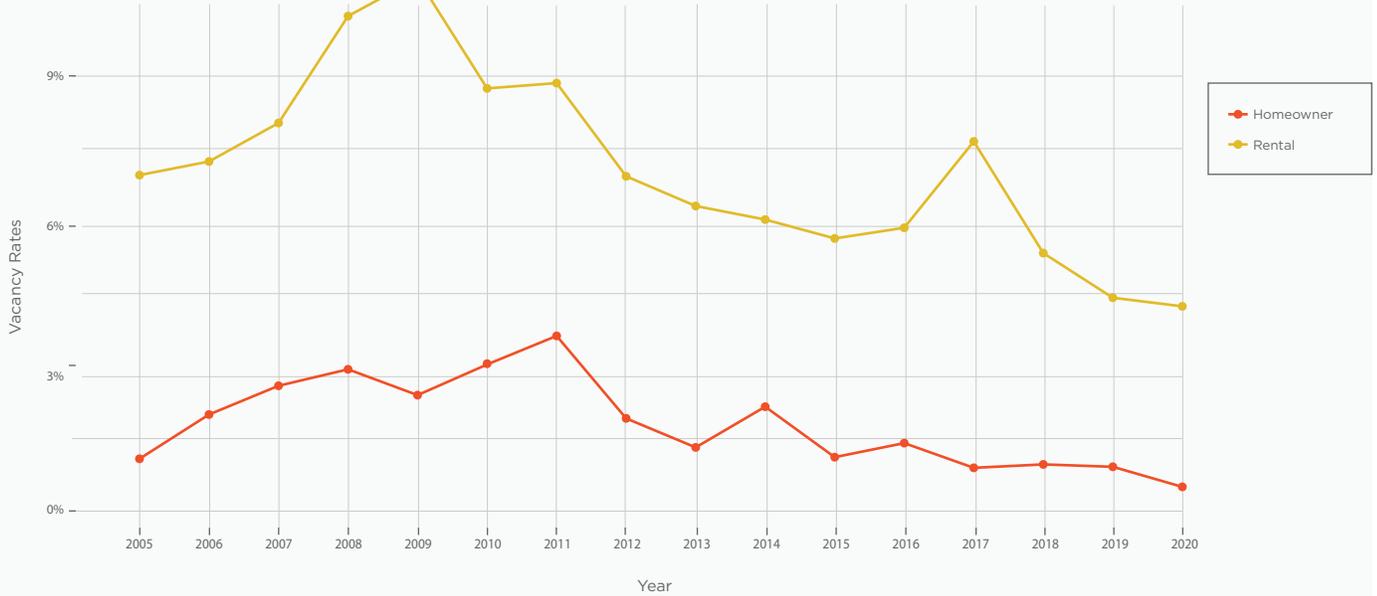
GRANDPARENTS RESPONSIBLE FOR GRANDCHILDREN



Data Source: American Community Survey, 5 year estimates from the Census Bureau

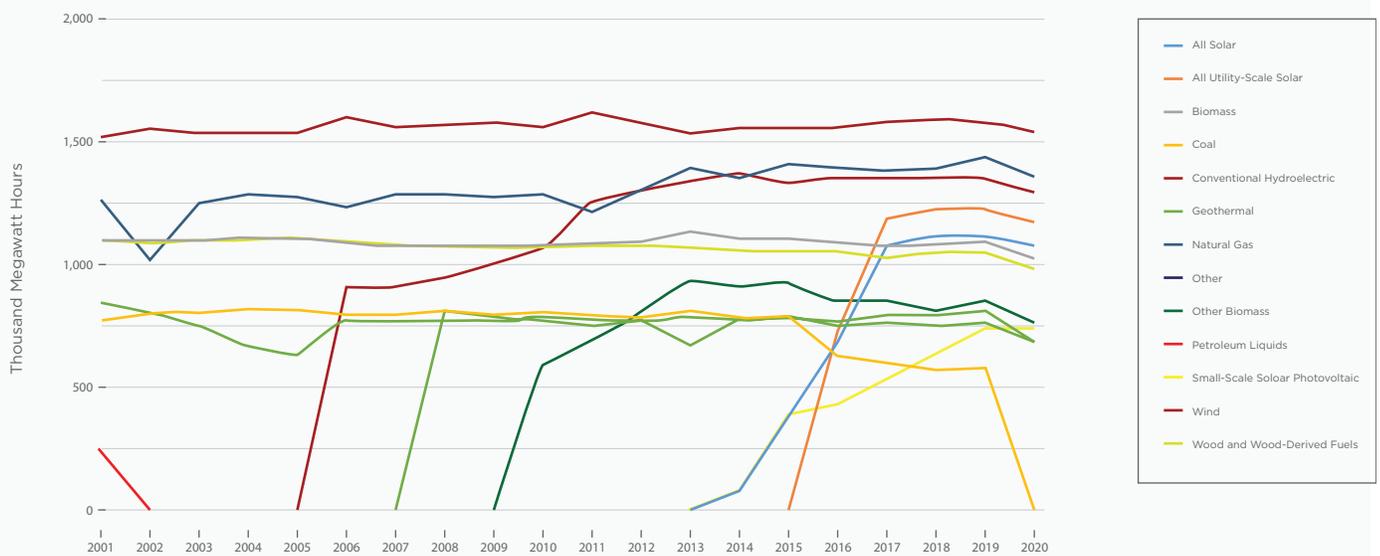


VACANCY TRENDS



Data Source: U.S. Federal Housing Finance Agency

ELECTRICITY GENERATION (MAJOR SECTORS)



U.S. Energy Information Administration

HOUSING

The housing market is strong in Idaho. Since 2011, home prices and home sales have both risen sharply, while home inventory has fallen at a similar pace. This trend did level out somewhat in 2017 but has grown significantly over the past 12 months. Certain areas in Idaho have experienced 21% year-over-year growth in housing. Home sale and rental prices continue to rise sharply among all regions and home types in Idaho, while available rental and sale inventory has been decreasing, making it more difficult for median income households to afford housing. However, other cost of living indicators, such as electricity costs, remain low relative to the U.S. average. Increasingly more residential building permits have also been granted during this time - 2018 saw more building permits issued than any year since 2006, pre-recession. Multi-family units have made-up around 10 to 20 percent of new residential units being built each year. Across Idaho's regions, average household size has generally remained stable or increased slightly over this same period. Housing affordability (calculated as the ratio of median family income to median home price) increased on average from 2010 to 2014, and has remained stable from 2014 to 2018.

Why is this important?

Housing is a vital supporting factor for a growing workforce. If houses are not available, or affordable, then community 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 and reducing housing burden.

TRANSPORTATION The large majority of Idahoans drive to work. The number of vehicle miles driven per capita across the state have increased steadily since 2013, following a decrease in gas prices during this same period. Mean travel times have consistently increased across most regions since 2013 but remain relatively low. The number of cross-county commuters have stayed about the same. Transit ridership has remained the same or decreased in most counties. The percent of people who commute by bicycle remained stable between 2015 and 2017. The number of statewide bicycle crashes dropped significantly between 2016 and 2017. 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 travels in general, but as Idaho grows, the following figures represent more opportunities to enhance Idaho's transportation capacity

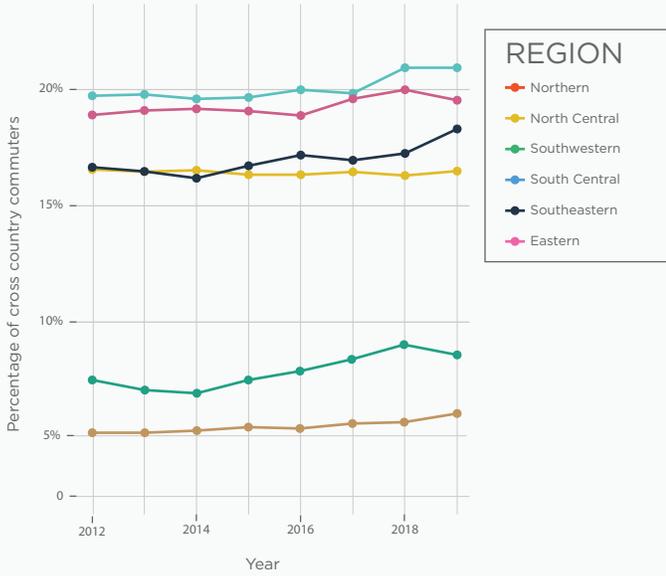
TRANSPORTATION

The large majority of Idahoans drive to work. The number of vehicle miles driven per capita across the state have increased steadily since 2013, following a decrease in gas prices during this same period. Mean travel times have consistently increased across most regions since 2013 but remain relatively low. Commuting and work travel has been significantly impacted from COVID-19. Since most people are now working remotely, transportation in our cities and flights has been reduced. Remote working impacts will be felt for years to come. Transit ridership has remained the same or decreased in most counties. The percent of people who commute by bicycle remained stable between 2015 and 2018. The number of statewide bicycle crashes dropped significantly between 2016 and 2017.

Why is this important?

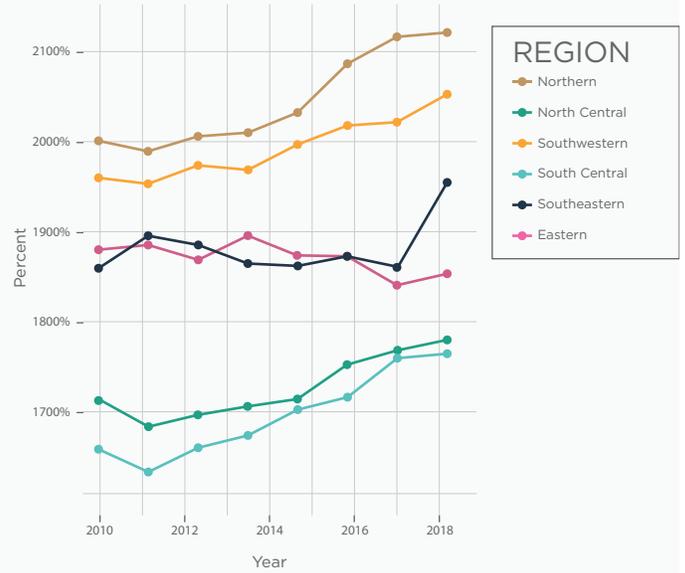
Traffic congestion and commuter safety can affect the economy by wasting employee time, increasing shipping costs, and creating schedule delays. Currently, commuters in Idaho face reasonable travel times and safe travels in general, but as Idaho grows, the following figures represent more opportunities to enhance Idaho's transportation capacity. Transportation has been disrupted in 2020 and the impacts on society moves locally, nationally, and internationally has changed.

CROSS COUNTRY COMMUTERS



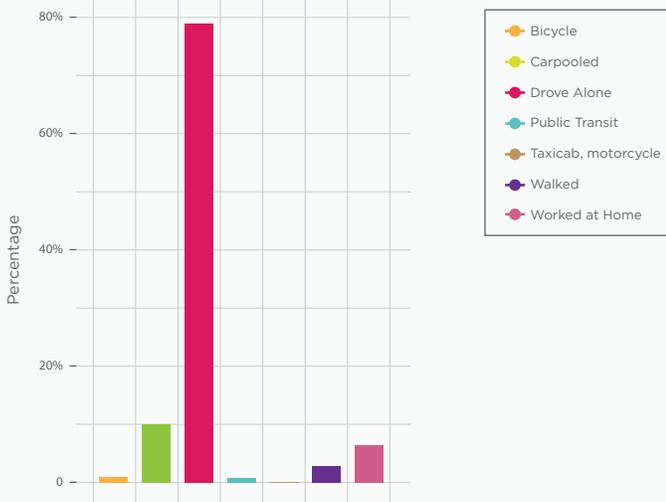
Data Source: Census Bureau , American Community Survey

MEAN TRAVEL TIME TO WORK



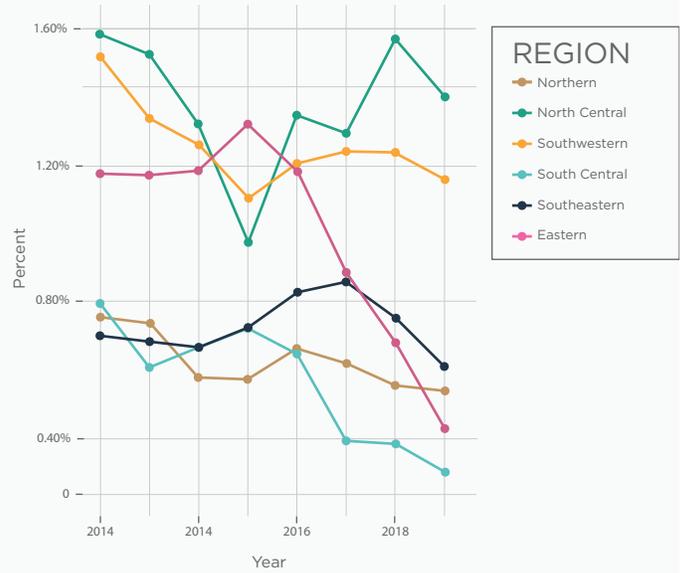
Data Source: Census Bureau , American Community Survey

MEAN TRAVEL TIME BY REGION



Data Source: Census Bureau , American Community Survey

PERCENT WHO BICYCLE TO WORK



Data Source: Census Bureau , American Community Survey

SOCIETY

QUALITY OF HEALTH

With the pandemic, the health of Idaho's citizens has been of primary importance. Also, the healthcare delivery system has had to adapt to COVID-19. Idaho's adult obesity rate increased between 2016 and 2018, while its overweight percent remained the same. Older adults and children were more likely to receive flu shots than younger adults. People aged 18 to 49 were least likely to be vaccinated. Idaho's rate of residents with health insurance follows a similar pattern, with children under 18 and adults over 55 being significantly more likely to have health insurance than younger adults. People aged 18 to 24 were least likely to be insured.

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 emergencies.

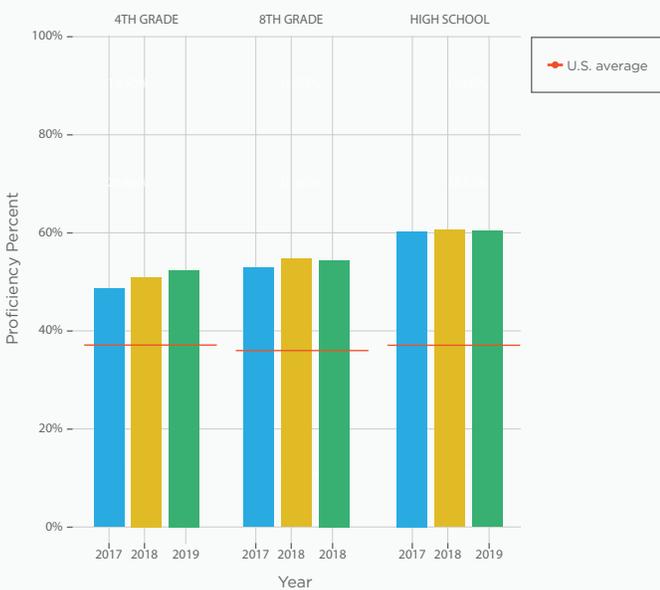
SAFETY

Idaho's overall crime rate, as well as its violent crime rate, decreased steadily across regions from 2010 to 2015, and has remained stable since. Likewise, Idaho's number of public safety officers has increased across regions since 2002, 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.

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. With the social issues that have been facing our nation with law enforcement, Idaho needs to maintain a strong relationship between its citizens and those that defend their communities. 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.

STUDENTS SCORING PROFICIENT OR ABOVE ON ISAT ELA

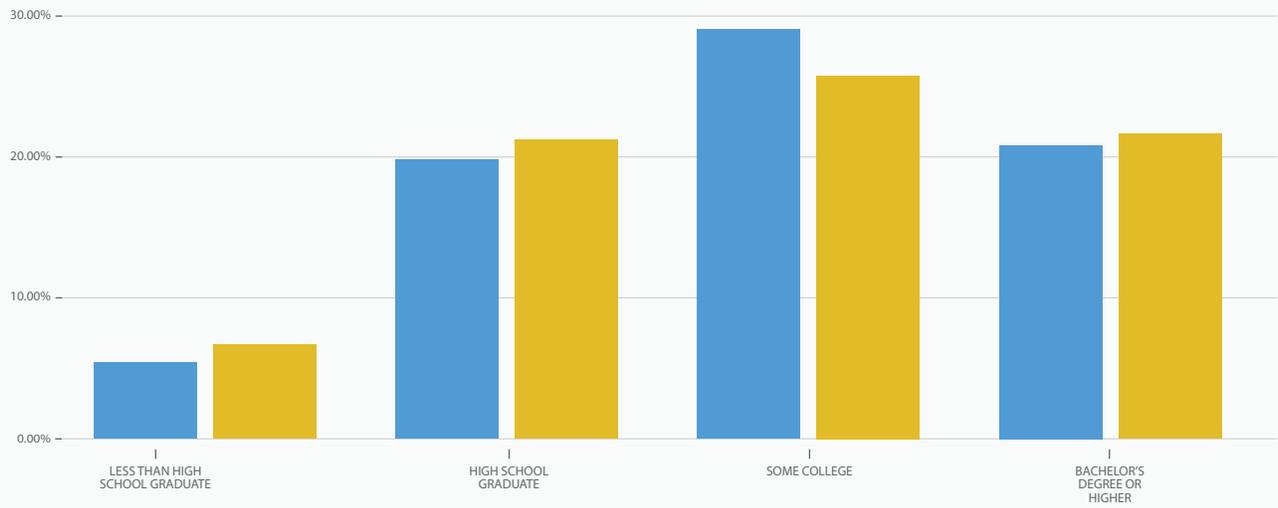


Data Source: Idaho State Board of Education



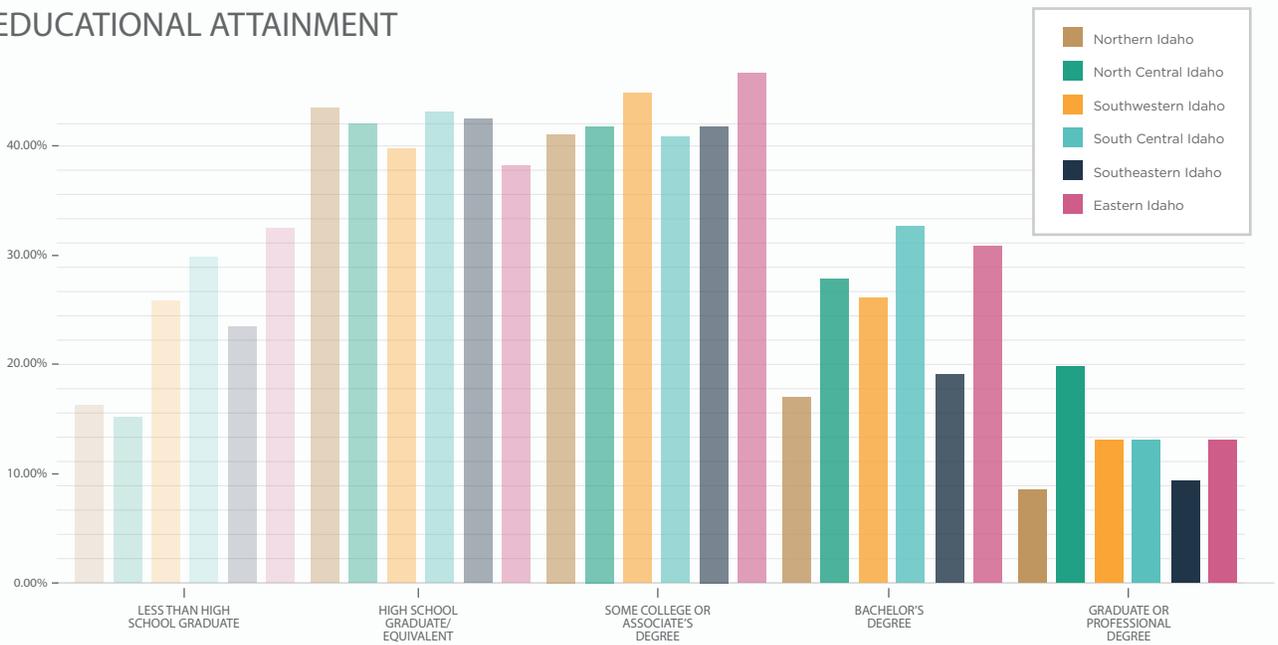
EDUCATIONAL ATTAINMENT

Male Female



Data Source: U.S. Census Bureau, American Community Survey

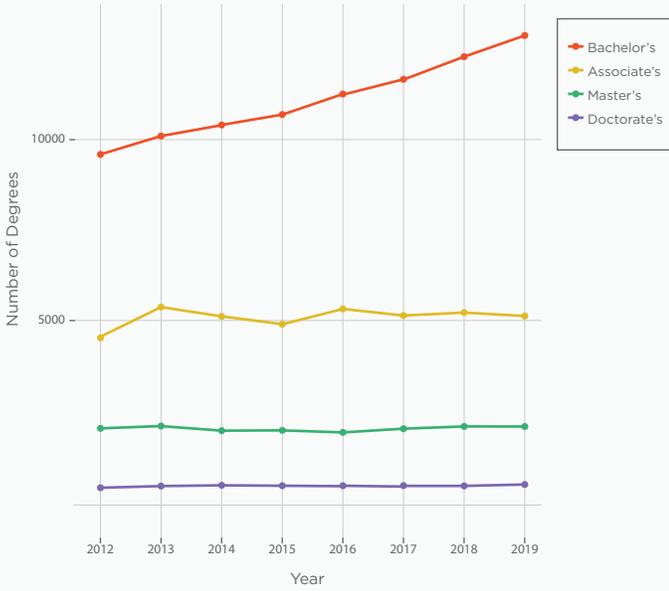
EDUCATIONAL ATTAINMENT



Data Source: Census Bureau, 2016 5-Year Estimates

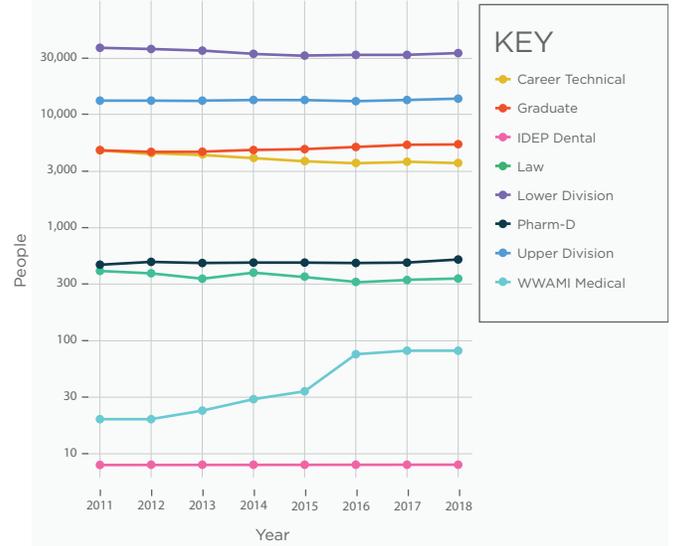


DEGREES BY TYPE PER YEAR



Data Source: National Center for Education Statistics Custom Data Files

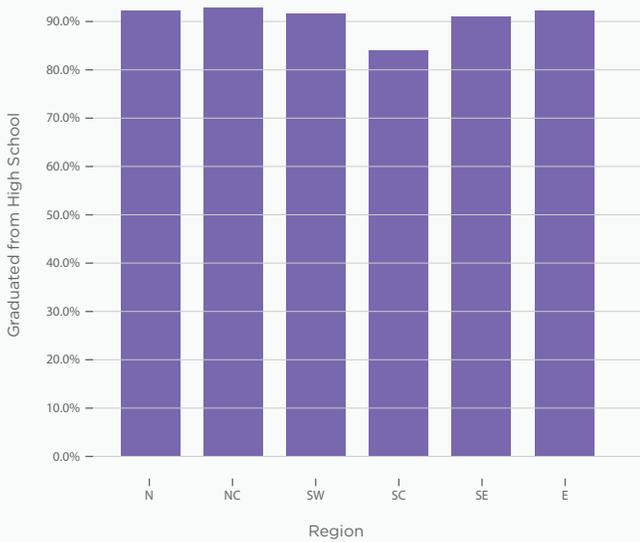
COLLEGE ENROLLMENT BY EDUCATION TYPE



Data Source: Idaho State Board of Education

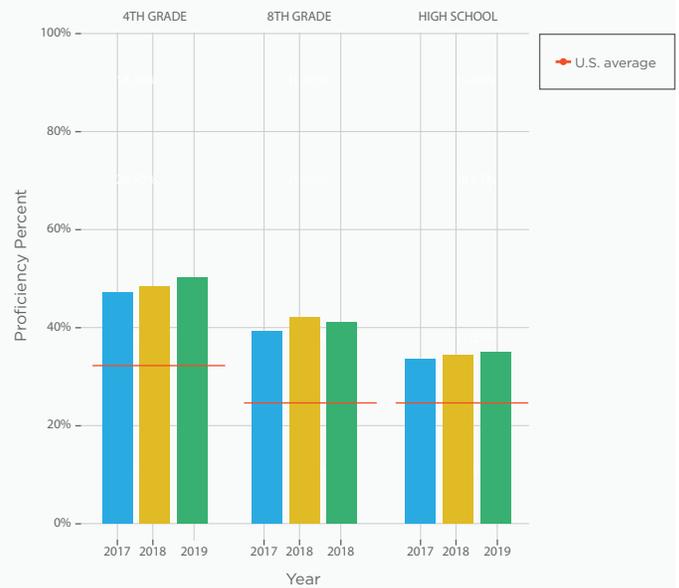
EDUCATIONAL ATTAINMENT

High School Graduate as % of Population over 25



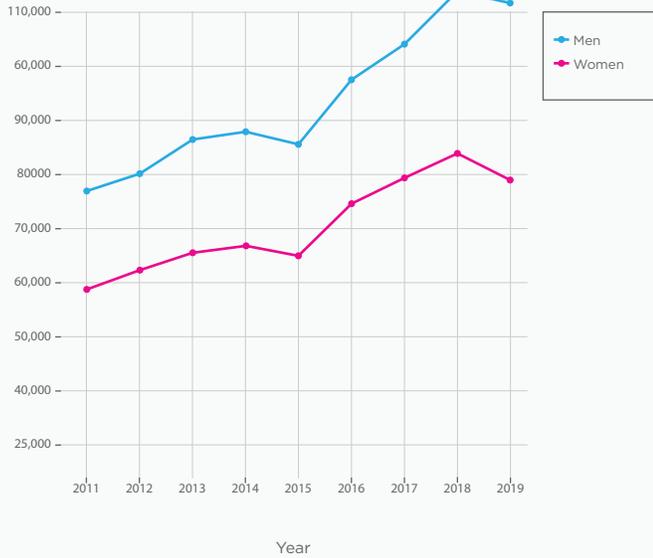
Data Source: Idaho State Board of Education

MATH PROFICIENCY



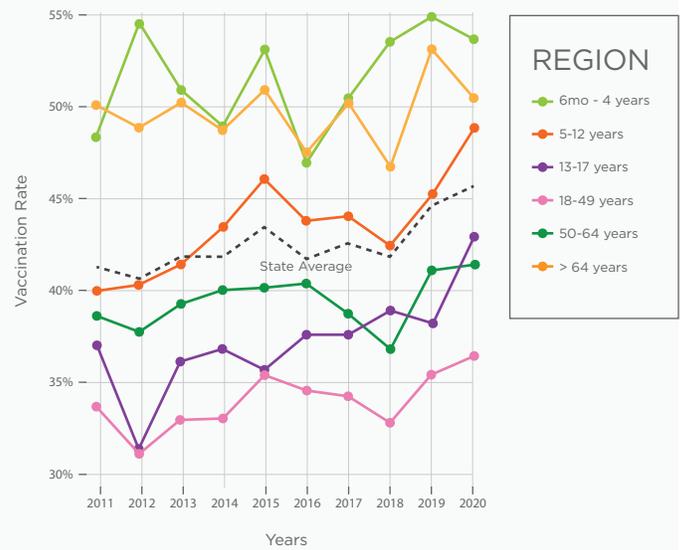
Data Source: Idaho State Board of Education

COLLEGE STUDENTS IN IDAHO BY GENDER



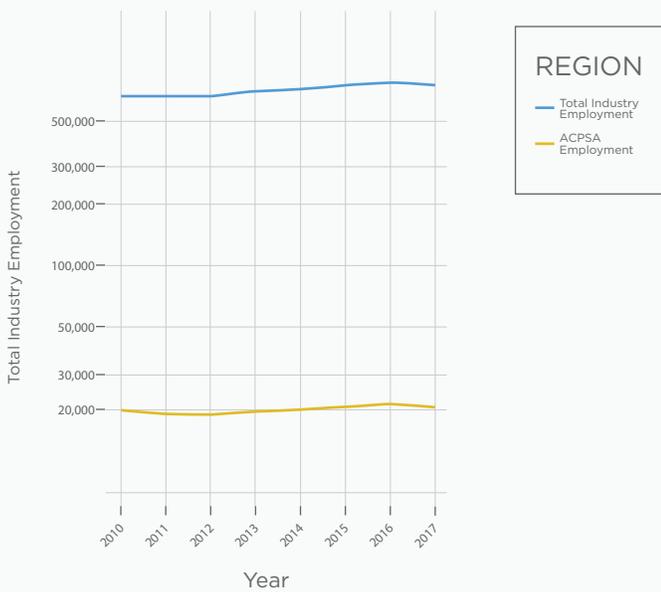
Data Source: Idaho State Board of Education

FLU VACCINATIONS



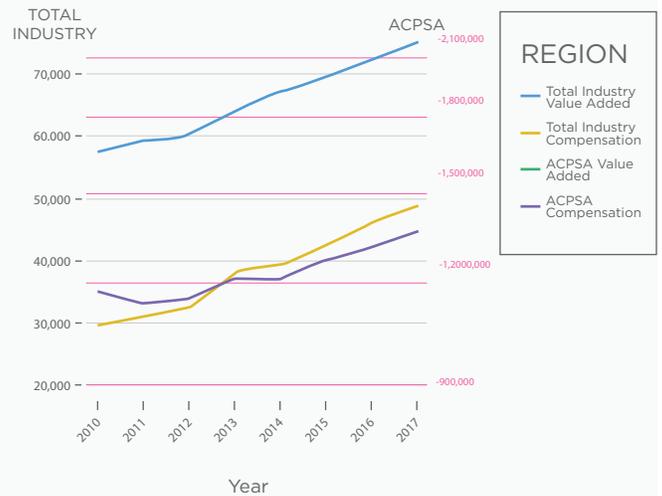
Data Source: Center for Disease Control and Prevention (CDC)

ARTS EMPLOYMENT



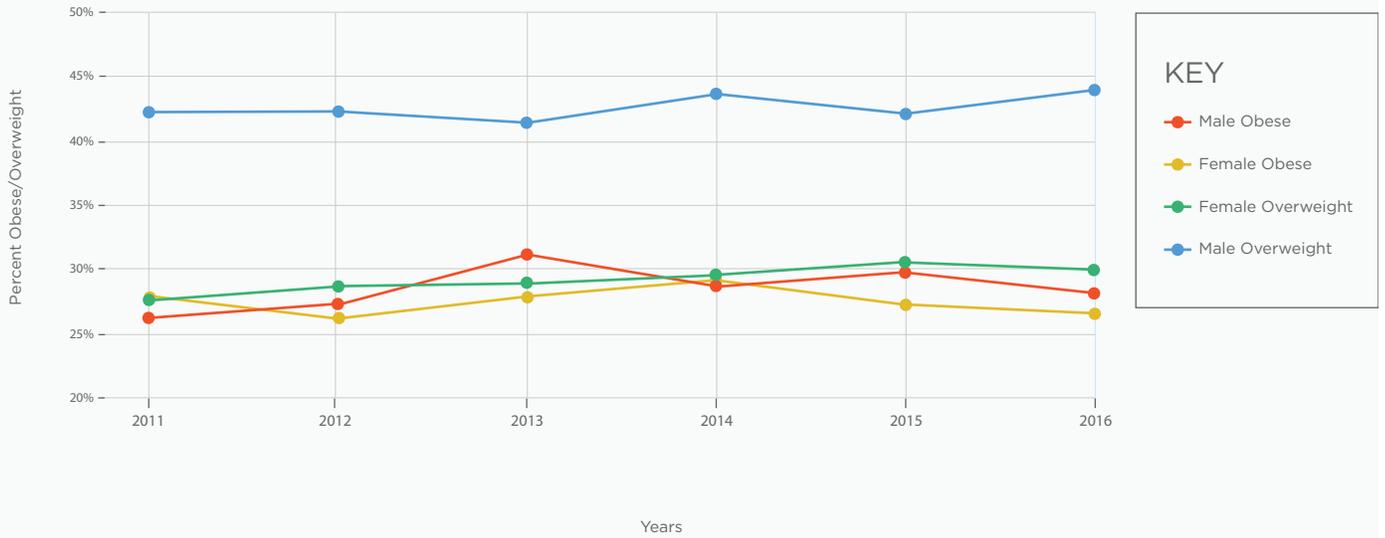
Data Source: Americans for the Arts

ARTS INDUSTRY VALUE ADDED AND COMPENSATION (LOG OF 1000S OF DOLLARS)



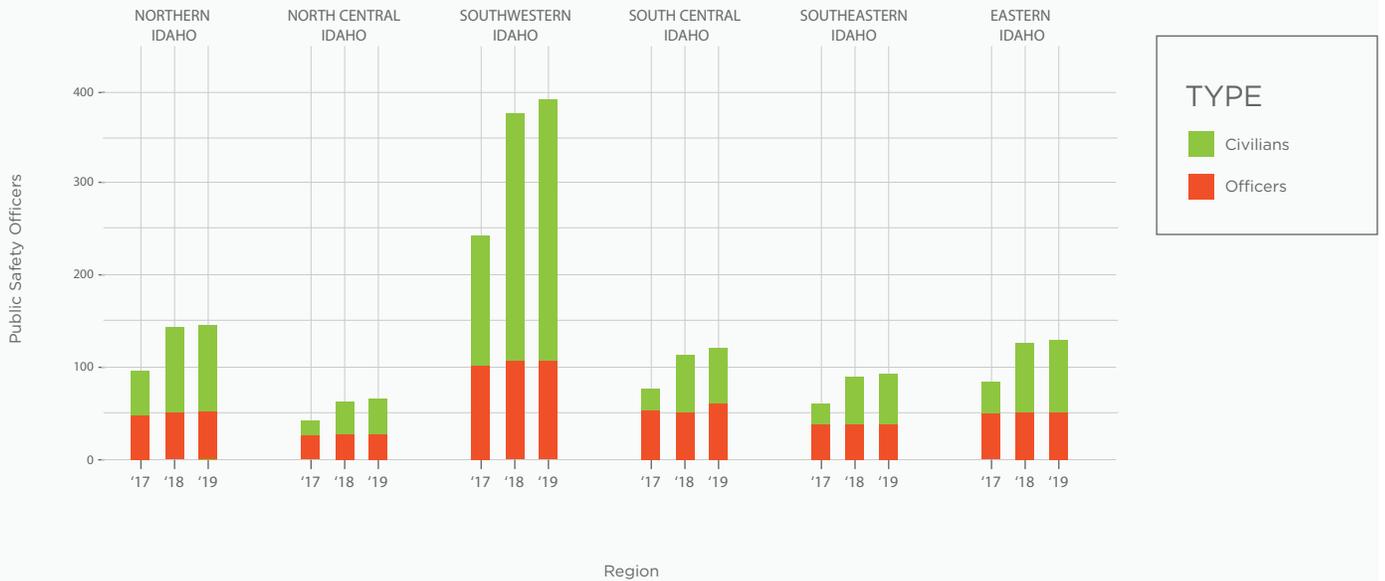
Data Source: Americans for the Arts

IDAHO OBESITY RATE BY GENDER (OVER 18)



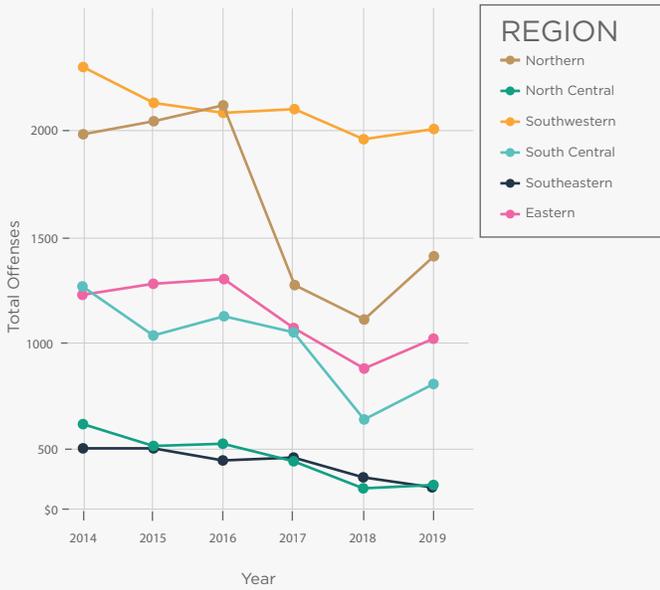
Data Source: California Health Interview Study

PUBLIC SAFETY EMPLOYEES



Data Source: FBI Uniform Crime Reporting

ALL CRIMES



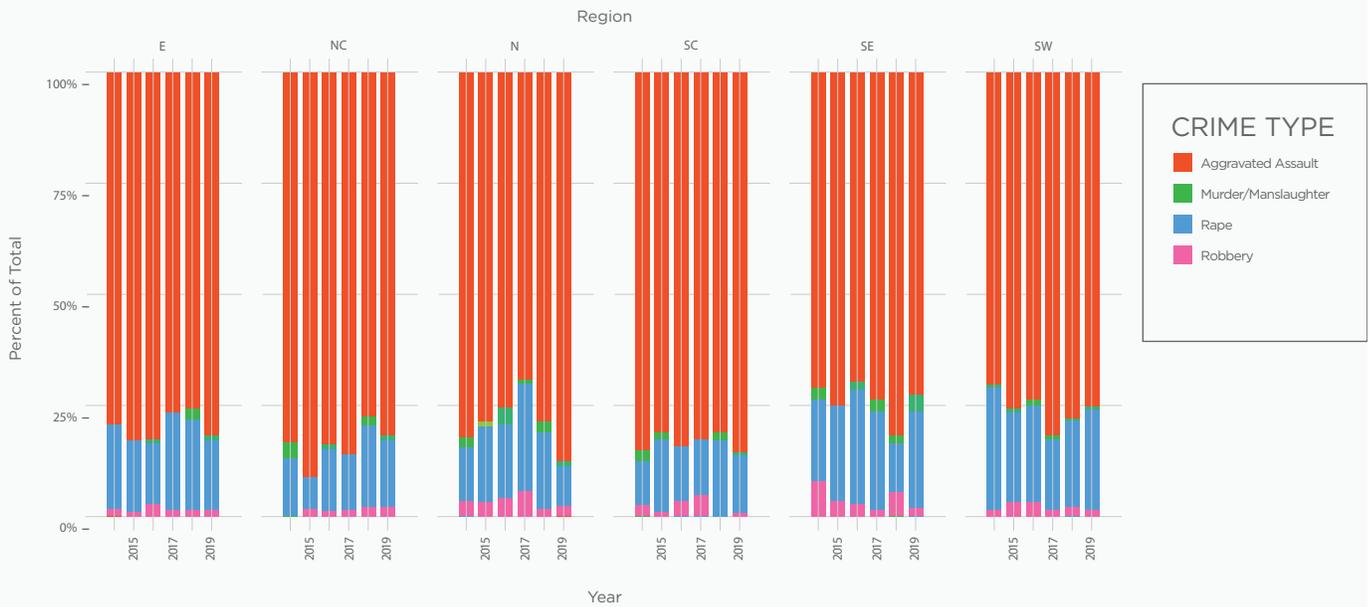
Data Source: FBI Uniform Crime Reporting

VIOLENT CRIMES



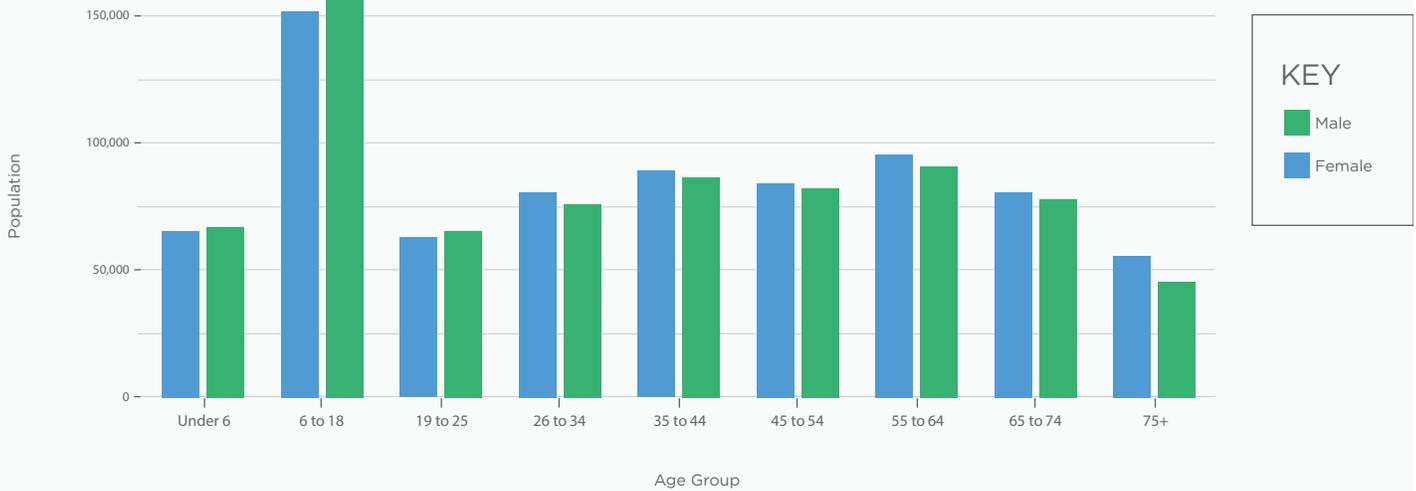
Data Source: FBI Uniform Crime Reporting

VIOLENT CRIMES BY TYPE



Data Source: FBI Uniform Crime Reporting

INSURED BY AGE GROUP 2019



Data Source: American Community Survey



**START.
GROW.
THRIVE.**

www.idahotechcouncil.org

WHAT IS THE ITC?

A member-driven organization committed to the success of Idaho's technology ecosystem.

The ITC fosters growth, champions innovation and provides value for members through Professional Networks, Government Relations, Talent Development and Sector Promotion. By bringing together industry, education and government leaders, we are the convener for great collaborations and experiences that make our state stronger and more vibrant.



**“IF YOU WANT SOMETHING
NEW, YOU HAVE TO STOP
DOING SOMETHING OLD.”**



Peter F. Drucker

BENEFITS TO MEMBERS

- Drive outcomes in growing a knowledge-based economy through initiatives of our industry-lead Committees
- Influence change in our three focus areas: attracting talent, increasing capital, and developing the commercialization of ideas
- Receive discounts on event and conference attendance, including our flagship conferences, events, peer-to-peer forums, and ITC leadership round-tables throughout the Gem State
- Talent initiatives related to software computing technologies and advanced manufacturing
- Opportunities to network with other members, nationally recognized thought leaders, and civic officers
- Serve as the collective voice of the technology ecosystem
- Provide a nexus for capital

THANK YOU TO OUR PARTNERS

Gold



Silver



Bronze

- | | | |
|---------------------------|--------------------|-------------------------|
| BBSI PEO | In Time Tec | PayneWest Insurance |
| Bingham Memorial Hospital | Intermax Networks | Premier Technology, Inc |
| Boise Cascade | KeyBank | Scentsy |
| Buckner Company | Konexus | Sorenson Capital |
| COVR | Lumen | United Heritage |
| Cradlepoint | Microsoft | University of Idaho |
| Healthwise | New Horizons Boise | Verified First |
| Idaho State University | | |



WHY IDAHO

Idaho is 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. In fact, Idaho has a long history as the home of some of America's greatest business success stories.

VISION IDAHO and 2019 IDAHO KNOWLEDGE REPORT COMMITTEE

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Global View Advisors

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EMSI

Amy Lientz
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Megan Ronk
Idaho Power

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Truckstop.com

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Mike Kerby
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Idaho Technology Council

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Craig Shaul
Idaho Department of Labor

Christina Slaughter
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Darci Yarrington
Idaho Technology Council

TECH2MARKET CHAIRS

Derik Ellis
SMHeuristics

Kaz Lawler
Emerson

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North Idaho College

Gynii Gilliam
Jobs Plus Inc

Region 2
North Central Idaho

Scott Corbitt
Valley Vision

Gina Taruscia
P.E.P.

Region 3
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Beth Inek
City of Nampa

Kim Kaine
Hawley Troxell

Charity Nelson
BVEP

Mitch Mooney
ON Semiconductor

Andrew Mentzer
W.C.M.E.D.C.

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Will Goodman
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Nate Murray
Twin Falls Urban Renewal

Todd Schwarz
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Connie Stopher
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Wendolyn Holland
Holland Consulting

Susan Potucek
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Nate Murray
Twin Falls Urban Renewal

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Burley Econ. Dev.

Harry Griffith
Sun Valley Econ. Dev.

Jan Roeser
IDOL

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South Eastern Idaho

Shane Hunt
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Teresa McKnight
REDI

Mark Wilden
Idaho Central Credit Union

Sean Luangrath
iEnergy

Region 6
Eastern Idaho

Rick Aman
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