



South Central Idaho

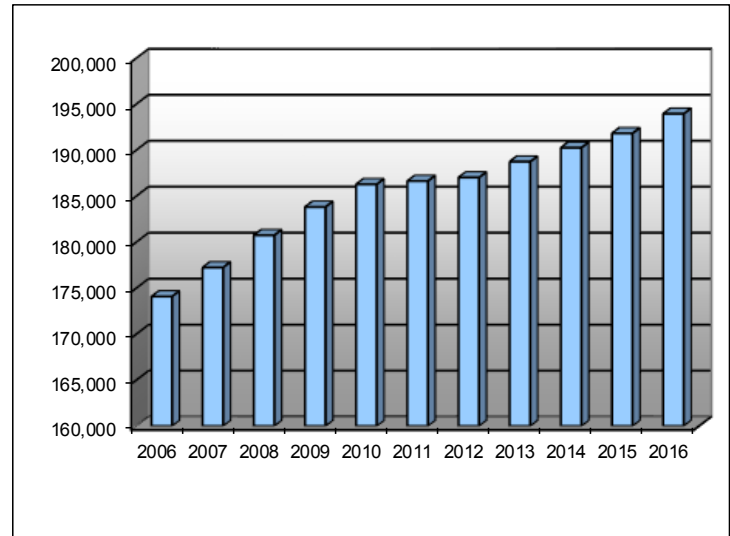
IDAHO
DEPT. OF LABOR

September 2017

Workforce Trends

Population

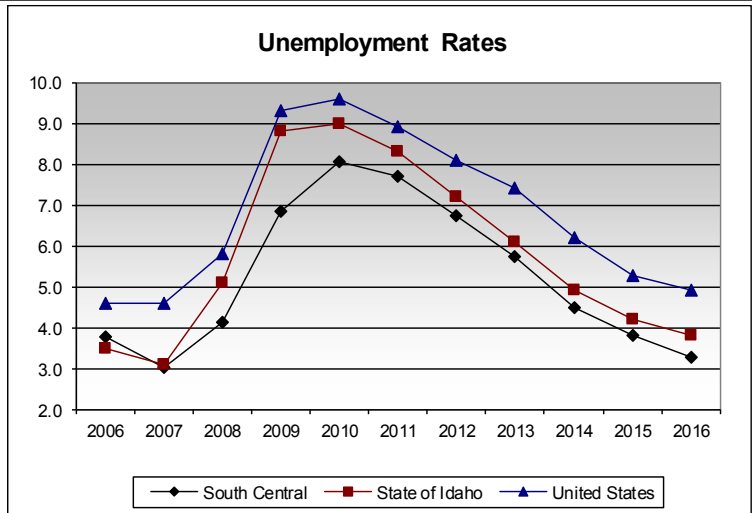
South central Idaho has grown steadily from 174,078 in the eight-county area in 2006 to 193,947 in 2016, an increase of 11.4 percent. The highest growth counties were Twin Falls at 16 percent, Jerome at 14.3 percent, Lincoln at 10.7 percent and Cassia at 10.4 percent. Twin Falls county was ranked sixth in population size in 2016. This growth is attributed to the diverse recreational opportunities provided by the mountains, waterways, deserts and canyons that make up the region, the relatively mild climate that attracts retirees and the low cost of living and doing business which has resulted in job creation. Counties located on I-84 have fared better economically. The area continues to see high growth among the Hispanic population at 11.5 percent in the last five years. The region's share of the statewide Hispanic population is 22.1 percent, many initially attracted by seasonal farm jobs have permanently settled in the region that offers year-round dairy production or service-related jobs and reasonably-priced education so their children have career options. The outlook for annual growth is steady. Twin Falls is the eighth largest city at 48,260 in 2016 growing two percent from 2015.



Labor Force & Employment

Employment opportunities slowed in 2009 when the recession fully hit south central Idaho. Before then, manufacturing was on the rise with the relocation of national recreational vehicle maker Jayco setting up shop in Twin Falls and moving to the URA Industrial Park to expand. Plastic bag maker Hilex Poly chose Jerome, expanding multiple times. High-volume dairy production keeps milk processors and cheese companies in expansionary mode including Brewster Dairy, Glanbia Foods, Gossner Cheese, Commercial Creamery, Idaho Milk Products, Jerome Cheese, High Desert Milk and Chobani Greek Yogurt. Other large manufacturers include Amalgamated Sugar, ConAgra, McCain Foods and corrugated box makers PCA and KapStone Paper. Blaine County was hit the hardest in the recession, battered by the loss of consumer interest in both tourism and real estate. Minidoka and Cassia Counties fared the recession well due to the combination of commodities and valued-added industry. In the fall of 2015, Fabri-Kal started making yogurt containers in Burley.

Health care weathered the downturn, continuing to provide high-quality jobs. Residential construction, durable manufacturing and retail were hit hardest with job losses. Twin Falls momentum has not ceased with commercial construction's pipeline reloading after the completion of a \$250 million hospital in Twin Falls, the College of Southern



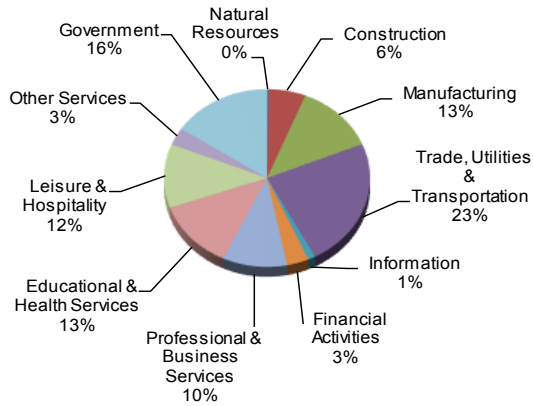
Idaho's new LEED-certified Health Science and a Technology building, a \$450 million Greek yogurt plant, a new bypass and six new hotels adding more than 400 rooms. Twin Falls' downtown is experiencing a renaissance, new hotels are cropping up across the region and a new national retailers and restaurants are opening doors in Burley and Twin Falls. Clif Bar's new plant started production in June 2016. The college offers curricula custom-designed for employers, dual credit to high school students and two-year degrees at a third the cost of credits at a four-year university.

The increased economic activity in the region resulted in a steady increase in employment beginning in 2011. As a result, employment reached a record high 2016.

| Labor Force | Aug 16 | Aug 17 |
|-----------------------------|--------|--------|
| Civilian Labor Force | 97,579 | 98,005 |
| Total Employment | 94,423 | 95,747 |
| Unemployed | 3,156 | 2,257 |
| South Central % Unemployed | 3.2 | 2.3 |
| State of Idaho % Unemployed | 3.8 | 2.9 |
| U.S. % Unemployed | 4.9 | 4.4 |

| Labor Force | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|-----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Civilian Labor Force | 94,339 | 93,511 | 94,529 | 94,623 | 92,937 | 92,810 | 93,824 | 94,169 | 93,723 | 96,238 | 97,580 |
| Unemployment | 3,570 | 2,834 | 3,910 | 6,486 | 7,493 | 7,147 | 6,326 | 5,398 | 4,218 | 3,650 | 3,208 |
| % of Labor Force Unemployed | 3.8 | 3.0 | 4.1 | 6.9 | 8.1 | 7.7 | 6.7 | 5.7 | 4.5 | 3.8 | 3.3 |
| Employment | 90,769 | 90,677 | 90,619 | 88,137 | 85,445 | 85,663 | 87,498 | 88,771 | 89,505 | 92,588 | 94,372 |

Nonfarm Payroll Jobs for 2016



Covered Employment & Wages

Average wages in south central Idaho are third lowest among the six regions statewide. Conversely, per capita income is 15 percent higher than the state as a whole—the numerous service and agricultural jobs are traditionally seasonal and require less skill, adversely affecting the average wage. Growth in covered wages and average employment outpaced the state's growth from 2006. There is little wage competition from neighboring Nevada and no employer or industry is quite large enough to pull in corporate back-office positions providing executive wages. But many believe the region carries less risk than others that rely on the military, large corporations or government, which all must regularly renew funding or contracts. Dow Chemical is building a Styrofoam insulation plant in Burley and existing manufacturers continue to expand or change up lines throughout the region. Per capita income in south central Idaho experienced solid growth in all counties, increasing 34 percent since 2006 —up 2.5 percent since 2014, slower than the state and nation coming off a high growth year. New elementary schools are open in Twin Falls with the new middle school in construction mode and an elementary school in Burley part-way built. Residential construction is rebounding in the city of Twin Falls, yet less than half of pre-recession activity at 249 permits pulled in 2016. The commercial pipeline is stabilizing in Twin Falls, while the Mini-Cassia area continues in expansion mode with goals for new housing options. The outlook continues to be strong growth.

Major Employers

| | |
|--------------------------------|------------------------------------|
| Amalgamated Sugar | Hilex Poly aka Novolex |
| Bettencourt Dairies | Jerome Cheese aka Agropur |
| Cassia Regional Medical Center | McCain Foods |
| C3 CustomerContactChannels | Minidoka Regional Medical Center |
| Chobani Greek Yogurt | Personnel Plus |
| Clear Springs Foods | Power Engineers |
| College of Southern Idaho | Spears Manufacturing, Inc. |
| ConAgra Foods | St. Luke's Regional Medical Center |
| Glanbia Foods NA | Sun Valley Company |
| Independent Meat | Wal-Mart |

| South Central Occupational Wages* | Entry Wage | Median Wage |
|-----------------------------------|------------|-------------|
| Bookkeeper | \$11.78 | \$17.87 |
| Cashiers | \$8.34 | \$9.27 |
| Childcare Workers | \$8.22 | \$9.58 |
| Customer Service Rep | \$10.06 | \$13.70 |
| Dental Assistant | \$13.22 | \$14.98 |
| Janitor & Cleaner | \$8.95 | \$12.59 |
| Laborer & Material Handler | \$10.24 | \$13.85 |
| Office Clerk/Secretary | \$9.25 | \$13.78 |
| Team Assemblers | \$9.93 | \$11.45 |
| Registered Nurse | \$22.07 | \$28.72 |
| Salesperson, Retail | \$8.48 | \$11.87 |
| Teacher, Elementary | \$30,730 | \$45,120 |
| Teacher, Secondary | \$35,700 | \$45,470 |
| Truck Drivers, Heavy | \$15.00 | \$22.31 |

* Additional occupational wage data can be found on the Idaho Department of Labor website at lmi.idaho.gov.

| Covered Employment & Average Annual Wages Per Job for 2006, 2015 & 2016 | 2006 | | 2015 | | 2016 | |
|---|----------------|-----------|----------------|-----------|----------------|-----------|
| | Avg Employment | Avg Wages | Avg Employment | Avg Wages | Avg Employment | Avg Wages |
| Total Covered Wages | 80,160 | \$27,840 | 84,826 | \$34,261 | 86,479 | \$35,010 |
| Agriculture | 8,597 | \$23,704 | 10,173 | \$32,999 | 10,444 | \$34,456 |
| Mining | 249 | \$31,280 | 176 | \$36,213 | 185 | \$35,013 |
| Construction | 6,027 | \$31,285 | 4,173 | \$38,681 | 4,241 | \$39,180 |
| Manufacturing | 8,016 | \$35,943 | 9,564 | \$45,160 | 9,788 | \$46,069 |
| Trade, Utilities & Transportation | 16,793 | \$27,939 | 17,697 | \$34,807 | 17,888 | \$35,502 |
| Information | 1,173 | \$31,756 | 866 | \$41,142 | 892 | \$42,315 |
| Financial Activities | 3,021 | \$38,103 | 2,489 | \$43,031 | 2,572 | \$44,051 |
| Professional and Business Services | 7,529 | \$29,149 | 7,934 | \$34,638 | 7,636 | \$35,896 |
| Educational and Health Services | 6,993 | \$27,664 | 9,362 | \$37,129 | 9,692 | \$37,251 |
| Leisure and Hospitality | 7,534 | \$13,536 | 8,460 | \$16,324 | 8,905 | \$16,933 |
| Other Services | 2,084 | \$22,338 | 2,241 | \$29,957 | 2,350 | \$31,043 |
| Government | 12,143 | \$29,681 | 11,693 | \$32,883 | 11,887 | \$33,589 |

| Per Capita Income | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|-----------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| South Central Region | \$29,928 | \$31,135 | \$31,175 | \$30,498 | \$30,857 | \$32,522 | \$33,786 | \$34,491 | \$35,408 | \$37,051 |
| State of Idaho | \$31,357 | \$32,580 | \$33,031 | \$31,436 | \$31,727 | \$33,296 | \$34,691 | \$35,703 | \$37,153 | \$38,392 |
| United States | \$38,144 | \$39,821 | \$41,082 | \$39,376 | \$40,277 | \$42,453 | \$44,267 | \$44,462 | \$46,414 | \$48,112 |

Information provided by Bureau of Economic Analysis