

RECREATIONAL TECHNOLOGY INDUSTRY IN IDAHO



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Recreation Technology in Idaho



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Executive Summary

Expansion by trailer manufacturers in south central Idaho and the surge in ammunition manufacturing in the north central part of the state over the last decade have brought increased attention to the recreational technology sector.

While still only a fractional part of the state economy, more than 300 businesses involved in recreational technology in one way or another have made the sector one of the fastest growing parts of Idaho's economy with prospects for substantial growth in the decade to come.

Nationally, Idaho's rec-tech businesses have grown faster than the sector in nearly every other state since 2001 and should continue outpacing state rec-tech sectors throughout much of the country.

The average wage in Idaho's rec-tech sector was over 8 percent higher than the average wage for all jobs, but that gap was far greater in three-quarters of the other states in 2013. Nationally, Idaho's average rec-tech wage ranked near the bottom of the states as did the average wage for all jobs in the state.

Recreation encompasses a wide range of pursuits, bringing a relatively broad range of business activity into the sphere of recreational technology. Beyond the expected components like sporting goods manufacturers, gun makers and boat, trailer and small plane builders, the sector includes jobs involved in brewing, distilling and wine-making as well as those that produce sports clothing.

Businesses like Quest Aircraft in Sandpoint, ammunition manufacturers PNW Arms and ATK in north central Idaho, inflatable boat maker Aire Inc. in Meridian, SCOTT Sport manufacturing in Sun Valley, Herrett Gun Stocks in Twin Falls and Clackacraft Drift Boats in Idaho Falls have set the stage for rec-tech expansion as the economy continues to recover.

As a destination for sportsmen of all kinds who generate over \$2 billion a year in retail sales, Idaho's diverse landscape provides a prime research ground for rec-tech companies to test their products in the environments where they will be used.

Findings

Nationally, jobs in the 66 subsectors that make up the recreation technology sector accounted for just 12 percent of all jobs in 2013. That was a third of a percent greater than the share of Idaho jobs in rec-tech. But rec-tech had grown from just seven-tenths of all Idaho jobs in 2001 to nine-tenths in 2013 while the sector declined nationally from 16 percent of all jobs in 2001.

Where Idaho stands out is in the growth of rec-tech since 2001. At over 40 percent, Idaho ranked second to North Dakota. Only six other states record growth from 2001 to 2013. Nationally the industry shrank 26 percent.

Idaho's overall economy, as measured by jobs, grew just over 10 percent.

The next decade also appears bright for Idaho's rec-tech sector. Based on estimates from Economic Modeling Specialists International, the sector should grow another 16 percent by 2023. Only eight other

states anticipate stronger growth while the sector nationally will continue to decline, nearly another 2 percent with 20 states contributing to that decline.

But even that growth rate in rec-tech would fall short of EMSI's projection for overall job growth in Idaho through 2023 – 165 percent.

Nationally

California, the nation's most populous state with an economy larger than most foreign countries, had the largest share of recreation technology jobs among the states in 2013 at nearly 13 percent. Washington with 100,000 jobs in aircraft production ranked second at 75 percent.

Aircraft jobs put Washington atop the states in the share of rec-tech jobs in its economy at 4 percent. Kansas, which also has significant aircraft production, was second with 33 percent of its jobs in rec-tech.

Idaho ranked 38th among the state's in its percentage of national rec-tech jobs at just under four-tenths of a percent, and it was 31st in the percentage of jobs that were in rec-tech jobs at nine-tenths of a percent.

Idaho's average rec-tech wage in 2013 was \$48,613, less than two-thirds of the national average wage in rec-tech. Only four other states – South Dakota, Montana, Wyoming and Hawaii – had lower average rec-tech wages. Connecticut, another state with significant aircraft production employment, had the highest rec-tech average at nearly \$115,000 while Washington ranked second at over \$112,000.

The average wage is a combination of wage and salary payments, proprietors earnings and supplements to earnings.

Idaho's rec-tech wage was 8 percent higher than the average wage for all jobs in the state, but that gap was small compared to most states. Nationally, the average rec-tech wage was 25 percent higher than average for all jobs. Nevada had the highest spread at 92 percent higher.

Idaho did rank third among the states in the share of its 50,000 businesses in the rec-tech cluster at 352, or just under seven-tenths of a percent, in 2012. Nationally rec-tech businesses accounted for just four-tenths of a percent of all businesses. Maine and Minnesota were first and second at just over seven-tenths of a percent each.

Idaho's high ranking, however, was due to the comparatively small payrolls of its rec-tech businesses. On average Idaho's rec-tech businesses had 15 employees compared to an average of 39 nationally. Only five other states – Alaska, Wyoming, Montana, Hawaii and New Mexico – had lower average rec-tech payrolls.

Idaho's smaller payrolls may be the reason rec-tech growth over the next decade is anticipated to be so strong by Economic Modeling Specialists International. The state's projected growth of nearly 16 percent – the equivalent of nearly 900 new jobs – ranked ninth among the states. North Dakota had the highest projected growth rate at 35 percent.

Regionally

With a huge Boeing aircraft operation in northwestern Washington, that state dominates the region in recreation technology businesses and employment.

Unlike Idaho, however, recreation technology is not growing and is not anticipated to grow as strongly in Washington. Idaho led the region in rec-tech growth since 2001 and will be third in projected growth for the next decade.

In Idaho, the trend for rec-tech has been toward expansion. The issue for the industry in the state would appear to be wages. While Wyoming and Montana both have average rec-tech wages below Idaho, recreation technology activity is almost negligible in Wyoming. Growth could impact wages in Montana. Its projected growth through 2023 is over 18 percent, six percentage points higher than projected growth for all jobs in that state. Oregon leads the region in projected growth at over 20 percent.

| Regional Metrics for Recreation Technology | | | | | | | | |
|---|--------------|-----------|-------------------------------|-----------------|-----------|---|---------------|-----------|
| Rec-Tech Jobs % of Nation | | | Rec-Tech Jobs % of State | | | % Chg in Rec-Tech Jobs 2001-2013 | | |
| State | % | Rank | State | % | Rank | State | % | Rank |
| U.S. | | | U.S. | | | U.S. | -26.8% | |
| California | 12.8% | 1 | Washington | 4.0% | 1 | North Dakota | 79.1% | 1 |
| Washington | 7.5% | 2 | Utah | 1.1% | 23 | Idaho | 40.7% | 2 |
| Oregon | 1.1% | 29 | Oregon | 1.1% | 25 | Montana | 21.5% | 4 |
| Utah | 0.9% | 32 | Idaho | 0.9% | 31 | Utah | 10.0% | 6 |
| Nevada | 0.5% | 36 | Nevada | 0.7% | 36 | Washington | 9.1% | 7 |
| Idaho | 0.4% | 38 | Montana | 0.6% | 41 | Nevada | 5.8% | 8 |
| Montana | 0.2% | 45 | Wyoming | 0.1% | 49 | Oregon | -1.8% | 10 |
| Wyoming | 0.0% | 49 | | | | Wyoming | -55.4% | 49 |
| Projected % Chg in Rec-Tech Jobs 2013-2023 | | | Rec-Tech Average 2013 Wage | | | Ratio of Rec-Tech Wage to Average Wage | | |
| State | % | Rank | State | Wage | Rank | State | % | Rank |
| U.S. | -1.9% | | U.S. | \$74,848 | | U.S. | 124.7% | |
| North Dakota | 35.1% | 1 | Connecticut | \$114,894 | 1 | Nevada | 192.4% | 1 |
| Oregon | 20.2% | 5 | Washington | \$112,659 | 2 | Washington | 177.0% | 2 |
| Montana | 18.6% | 7 | Nevada | \$101,848 | 3 | Utah | 113.8% | 28 |
| Idaho | 15.8% | 9 | Oregon | \$59,793 | 35 | Oregon | 110.0% | 35 |
| Nevada | 15.3% | 10 | Utah | \$58,050 | 39 | Idaho | 108.4% | 38 |
| Utah | 11.9% | 12 | Idaho | \$48,613 | 46 | Montana | 97.2% | 44 |
| Washington | 9.7% | 15 | Wyoming | \$48,265 | 48 | Wyoming | 88.2% | 48 |
| Wyoming | -16.3% | 47 | Montana | \$45,192 | 49 | | | |

| Rec-Tech Firms as % of All Firms 2012 | | | |
|---------------------------------------|---------------|-------------|------|
| State | Number | % | Rank |
| U.S. | 38,838 | 0.4% | |
| Maine | 345 | 0.7% | 1 |
| Idaho | 352 | 0.7% | 3 |
| Oregon | 878 | 0.7% | 4 |
| Washington | 1,203 | 0.5% | 10 |
| Utah | 434 | 0.5% | 11 |
| Montana | 186 | 0.5% | 18 |
| Nevada | 209 | 0.3% | 41 |
| Wyoming | 56 | 0.2% | 48 |

Within Idaho

Southwestern Idaho, the state’s population, business and government center, claimed nearly 40 percent of Idaho’s rec-tech jobs in 2013, but they accounted for just a fraction of the region’s jobs overall.

North central Idaho, where ammunition manufacturers have been expanding in recent years, had rec-tech as the largest part of its economy at 2.3 percent. In all other regions rec-tech accounted for less than 1 percent of all jobs in 2013.

Solid growth, albeit off relatively small bases in 2001, was posted in four of the six regions with south central Idaho seeing an increase of more than 150 percent. In southwestern Idaho growth was a modest 13 percent while the southeastern part of the state saw the sector contract by 25 percent. Fewer than 100 rec-tech jobs were part of that region’s economy in 2013.

The average rec-tech wage in four of the six regions was substantially higher than the average wage for all jobs and above the 8 percent premium rec-tech jobs received statewide.

But the average wage in southwestern Idaho was slightly below the average for all jobs there while rec-tech in the five northernmost counties paid on average nearly 5 percent less than the average for all jobs.

Growth through 2023 was projected at more than the 15.8 percent rate anticipated statewide. Eastern, south central and northern Idaho had projected growth rates between 30 percent and 40 percent.

Southwestern Idaho’s rate was only slightly above the state rate while north central Idaho, where rec-tech has the most economic influence, was expected to see 14.6 percent growth.

The decline in rec-tech was forecast to continue in southeastern Idaho. The number of rec-tech jobs was likely to be barely two dozen by 2023.

| Idaho Metrics for Recreation Technology | | | | | | |
|---|-------------|--------|------|---|--------|------|
| Rec-Tech Jobs as % of State Rec-Tech Jobs 2013 | | | | Rec-Tech Jobs as % of All Regional Jobs 2013 | | |
| Region | # of Jobs | % | Rank | Region | % | Rank |
| State | 5,610 | | | State | 0.9% | |
| Southwestern | 2,226 | 39.7% | 1 | North Central | 2.3% | 1 |
| North Central | 1,376 | 24.5% | 2 | Northern | 0.9% | 2 |
| Northern | 1,074 | 19.1% | 3 | South Central | 0.6% | 3 |
| South Central | 726 | 12.9% | 4 | Southwestern | 0.5% | 4 |
| Eastern | 289 | 5.2% | 5 | Eastern | 0.2% | 5 |
| Southeastern | 87 | 1.6% | 6 | Southeastern | 0.1% | 6 |
| Projected % Chg in Rec-Tech Jobs 2013-2023 | | | | % Chg in Rec-Tech Jobs 2001-2013 | | |
| Region | Chg in Jobs | % | Rank | Region | % | Rank |
| State | 884 | 15.8% | | State | 40.7% | |
| Eastern | 114 | 39.4% | 1 | South Central | 153.8% | 1 |
| South Central | 231 | 31.8% | 2 | Northern | 93.9% | 2 |
| Northern | 313 | 29.1% | 3 | North Central | 74.0% | 3 |
| Southwestern | 362 | 16.3% | 4 | Eastern | 65.1% | 4 |
| North Central | 201 | 14.6% | 5 | Southwestern | 12.9% | 5 |
| Southeastern | -60 | -69.0% | 6 | Southeastern | -25.6% | 6 |
| Rec-Tech Average 2013 Wage | | | | Ratio of Rec-Tech Wage to Average Wage | | |
| Region | | | Rank | Region | | Rank |
| State | \$48,613 | | | State | 108.6% | |
| Eastern | \$57,221 | | 1 | South Central | 132.8% | 1 |
| South Central | \$52,259 | | 2 | Eastern | 128.6% | 2 |
| North Central | \$51,975 | | 3 | North Central | 124.7% | 3 |
| Southwestern | \$46,986 | | 4 | Southeastern | 112.7% | 4 |
| Southeastern | \$46,911 | | 5 | Southwestern | 98.4% | 5 |
| Northern | \$39,776 | | 6 | Northern | 95.7% | 6 |

Source: Economic Modeling Specialists International

Industrial Subsectors Comprising Recreation Technology

| | |
|--------|---|
| 312120 | Breweries |
| 312130 | Wineries |
| 312140 | Distilleries |
| 314911 | Textile Bag Mills |
| 314912 | Canvas and Related Product Mills |
| 314991 | Rope, Cordage, and Twine Mills |
| 315111 | Sheer Hosiery Mills |
| 315119 | Other Hosiery and Sock Mills |
| 315191 | Outerwear Knitting Mills |
| 315192 | Underwear and Nightwear Knitting Mills |
| 315211 | Men's and Boys' Cut and Sew Apparel Contractors |
| 315212 | Women's, Girls' and Infants' Cut and Sew Apparel Contractors |
| 315221 | Men's and Boys' Cut and Sew Underwear and Nightwear Manufacturing |
| 315222 | Men's and Boys' Cut and Sew Suit, Coat, and Overcoat Manufacturing |
| 315223 | Men's and Boys' Cut and Sew Shirt (except Work Shirt) Manufacturing |
| 315224 | Men's and Boys' Cut and Sew Trouser, Slack, and Jean Manufacturing |
| 315225 | Men's and Boys' Cut and Sew Work Clothing Manufacturing |
| 315228 | Men's and Boys' Cut and Sew Other Outerwear Manufacturing |
| 315231 | Women's and Girls' Cut and Sew Lingerie, Loungewear and Nightwear Manufacturing |
| 315232 | Women's and Girls' Cut and Sew Blouse and Shirt Manufacturing |
| 315233 | Women's and Girls' Cut and Sew Dress Manufacturing |
| 315234 | Women's and Girls' Cut and Sew Suit, Coat, Tailored Jacket and Skirt Manufacturing |
| 315239 | Women's and Girls' Cut and Sew Other Outerwear Manufacturing |
| 315291 | Infants' Cut and Sew Apparel Manufacturing |
| 315292 | Fur and Leather Apparel Manufacturing |
| 315299 | All Other Cut and Sew Apparel Manufacturing |
| 315991 | Hat, Cap, and Millinery Manufacturing |
| 315992 | Glove and Mitten Manufacturing |
| 315993 | Men's and Boys' Neckwear Manufacturing |
| 315999 | Other Apparel Accessories and Other Apparel Manufacturing |
| 316110 | Leather and Hide Tanning and Finishing |
| 316211 | Rubber and Plastics Footwear Manufacturing |
| 316212 | House Slipper Manufacturing |
| 316213 | Men's Footwear (except Athletic) Manufacturing |
| 316214 | Women's Footwear (except Athletic) Manufacturing |
| 316219 | Other Footwear Manufacturing |
| 316991 | Luggage Manufacturing |
| 316992 | Women's Handbag and Purse Manufacturing |
| 316993 | Personal Leather Good (except Women's Handbag and Purse) Manufacturing |
| 316999 | All Other Leather Good and Allied Product Manufacturing |
| 321999 | All Other Miscellaneous Wood Product Manufacturing |
| 326199 | All Other Plastics Product Manufacturing |
| 326299 | All Other Rubber Product Manufacturing |
| 332211 | Cutlery and Flatware (except Precious) Manufacturing |
| 332992 | Small Arms Ammunition Manufacturing |
| 332993 | Ammunition (except Small Arms) Manufacturing |
| 332994 | Small Arms Manufacturing |
| 332995 | Other Ordnance and Accessories Manufacturing |
| 333112 | Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing |
| 333415 | Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing |
| 333518 | Other Metalworking Machinery Manufacturing |
| 333611 | Turbine and Turbine Generator Set Units Manufacturing |
| 336212 | Truck Trailer Manufacturing |
| 336213 | Motor Home Manufacturing |
| 336214 | Travel Trailer and Camper Manufacturing |
| 336321 | Vehicular Lighting Equipment Manufacturing |
| 336411 | Aircraft Manufacturing |
| 336412 | Aircraft Engine and Engine Parts Manufacturing |
| 336413 | Other Aircraft Parts and Auxiliary Equipment Manufacturing |
| 336612 | Boat Building |
| 336991 | Motorcycle, Bicycle, and Parts Manufacturing |
| 336999 | All Other Transportation Equipment Manufacturing |
| 339115 | Ophthalmic Goods Manufacturing |
| 339920 | Sporting and Athletic Goods Manufacturing |
| 339992 | Musical Instrument Manufacturing |
| 339999 | All Other Miscellaneous Manufacturing |

Source: Economic Modeling Specialists International

Occupations in Idaho's Recreation Technology Sector

| SOC | Occupation | 2013 Jobs | Median Hourly Wage | Required Education | Required Experience | Required Training |
|---------|--|-----------|--------------------|--------------------------------|---------------------|-----------------------------------|
| 51-2092 | Team Assemblers | 831 | \$1,249 | High school diploma | None | Moderate-term on-the-job training |
| 51-4121 | Welders, Cutters, Solderers, and Brazers | 328 | \$1,574 | High school diploma | None | Moderate-term on-the-job training |
| 51-1011 | First-Line Supervisors of Production and Operating Workers | 227 | \$2,246 | Postsecondary non-degree award | Less than 5 years | None |
| 51-6031 | Sewing Machine Operators | 209 | \$1,054 | Less than high school | None | Short-term on-the-job training |
| 11-1021 | General and Operations Managers | 156 | \$3,436 | Bachelor's degree | Less than 5 years | None |
| 41-4012 | Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products | 137 | \$2,190 | High school diploma | None | Moderate-term on-the-job training |
| 51-4041 | Machinists | 113 | \$1,771 | High school diploma | None | Long-term on-the-job training |
| 51-4072 | Molding, Coremaking, and Casting Machine Setters, Operator and Tenders, Metal and Plastic | 118 | \$1,096 | High school diploma | None | Moderate-term on-the-job training |
| 43-9061 | Office Clerks, General | 109 | \$1,259 | High school diploma | None | Short-term on-the-job training |
| 53-7062 | Laborers and Freight, Stock and Material Movers, Hand | 104 | \$1,163 | Less than high school | None | Short-term on-the-job training |
| 43-5071 | Shipping, Receiving and Traffic Clerks | 104 | \$1,287 | High school diploma | None | Short-term on-the-job training |
| 51-4011 | Computer-Controlled Machine Tool Operators, Metal and Plastic | 94 | \$1,582 | High school diploma | None | Moderate-term on-the-job training |
| 51-2041 | Structural Metal Fabricators and Fitters | 99 | \$1,764 | High school diploma | None | Moderate-term on-the-job training |
| 51-9061 | Inspectors, Testers, Sorters, Samplers and Weighers | 96 | \$1,662 | High school diploma | None | Moderate-term on-the-job training |
| 43-4051 | Customer Service Representatives | 89 | \$1,228 | High school diploma | None | Short-term on-the-job training |
| 49-9071 | Maintenance and Repair Workers, General | 86 | \$1,575 | High school diploma | None | Long-term on-the-job training |
| 51-4031 | Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic | 79 | \$1,315 | High school diploma | None | Moderate-term on-the-job training |
| 17-2141 | Mechanical Engineers | 77 | \$3,820 | Bachelor's degree | None | None |
| 43-3031 | Bookkeeping, Accounting and Auditing Clerks | 77 | \$1,493 | High school diploma | None | Moderate-term on-the-job training |
| 51-4081 | Multiple Machine Tool Setters, Operators and Tenders, Metal and Plastic | 74 | \$1,543 | High school diploma | None | Moderate-term on-the-job training |
| 51-9198 | Helpers--Production Workers | 68 | \$1,082 | Less than high school | None | Short-term on-the-job training |
| 43-5061 | Production, Planning, and Expediting Clerks | 67 | \$1,761 | High school diploma | None | Moderate-term on-the-job training |
| 53-7051 | Industrial Truck and Tractor Operators | 65 | \$1,428 | Less than high school | None | Short-term on-the-job training |
| 49-9041 | Industrial Machinery Mechanics | 62 | \$2,159 | High school diploma | None | Long-term on-the-job training |
| 420700 | Industrial Production Managers | 62 | \$3,490 | Bachelor's degree | 5 years or more | None |
| 51-9111 | Packaging and Filling Machine Operators and Tenders | 59 | \$1,383 | High school diploma | None | Moderate-term on-the-job training |
| 17-2112 | Industrial Engineers | 47 | \$4,012 | Bachelor's degree | None | None |

Occupations in Idaho's Recreation Technology Sector (cont.)

| SOC | Occupation | 2013 Jobs | Median Hourly Wage | Required Education | Required Experience | Required Training |
|---------|--|--------------|-----------------------|--------------------------------|------------------------|-----------------------------------|
| 51-9122 | Painters, Transportation Equipment | 51 | \$1,668 | High school diploma | None | Moderate-term on-the-job training |
| 43-6014 | Secretaries and Administrative Assistants, Except Legal, Medical and Executive | 49 | \$1,350 | High school diploma | None | Short-term on-the-job training |
| 47-2211 | Sheet Metal Workers | 50 | \$1,638 | High school diploma | None | Apprenticeship |
| 53-7064 | Packers and Packagers, Hand | 47 | \$887 | Less than high school | None | Short-term on-the-job training |
| 53-3032 | Heavy and Tractor-Trailer Truck Drivers | 46 | \$1,720 | Postsecondary non-degree award | None | Short-term on-the-job training |
| 51-2091 | Fiberglass Laminators and Fabricators | 47 | \$1,174 | High school diploma | None | Moderate-term on-the-job training |
| 51-9121 | Coating, Painting, and Spraying Machine Setters, Operators and Tenders | 46 | \$1,356 | High school diploma | None | Moderate-term on-the-job training |
| 13-1023 | Purchasing Agents, Except Wholesale, Retail and Farm Products | 46 | \$2,433 | High school diploma | None | Long-term on-the-job training |
| 43-5081 | Stock Clerks and Order Fillers | 42 | \$1,033 | Less than high school | None | Short-term on-the-job training |
| 51-2099 | Assemblers and Fabricators, All Other | 39 | \$1,042 | High school diploma | None | Moderate-term on-the-job training |
| 51-4033 | Grinding, Lapping, Polishing and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic | 37 | \$1,209 | High school diploma | None | Moderate-term on-the-job training |
| 51-9199 | Production Workers, All Other | 40 | \$2,021 | High school diploma | None | Moderate-term on-the-job training |
| 51-7042 | Woodworking Machine Setters, Operators and Tenders, Except Sawing | 35 | \$1,384 | High school diploma | None | Short-term on-the-job training |
| 17-3013 | Mechanical Drafters | 38 | \$1,934 | Associate's degree | None | None |
| 51-4122 | Welding, Soldering, and Brazing Machine Setters, Operators and Tenders | 35 | \$1,638 | High school diploma | None | Moderate-term on-the-job training |
| 47-2111 | Electricians | 36 | \$2,206 | High school diploma | None | Apprenticeship |
| 47-2031 | Carpenters | 35 | \$1,581 | High school diploma | None | Apprenticeship |
| 13-2011 | Accountants and Auditors | 35 | \$2,688 | Bachelor's degree | None | None |
| 27-1024 | Graphic Designers | 35 | \$1,739 | Bachelor's degree | None | None |
| 43-1011 | First-Line Supervisors of Office and Administrative Support Workers | 33 | \$1,931 | High school diploma | Less than 5 years | None |
| 51-7011 | Cabinetmakers and Bench Carpenters | 32 | \$1,306 | High school diploma | None | Moderate-term on-the-job training |
| 37-2011 | Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 32 | \$996 | Less than high school | None | Short-term on-the-job training |
| 44866 | Sales Managers | 30 | \$3,624 | Bachelor's degree | Less than 5 years | None |
| 51-9012 | Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators and Tenders | 28 | \$1,673 | High school diploma | None | Moderate-term on-the-job training |
| 51-9032 | Cutting and Slicing Machine Setters, Operators and Tenders | 30 | \$1,339 | High school diploma | None | Short-term on-the-job training |
| 2608503 | Architectural and Engineering Managers | 27 | \$5,918 | Bachelor's degree | 5 years or more | None |
| 51-2011 | Aircraft Structure, Surfaces, Rigging and Systems Assemblers | 29 | \$1,350 | High school diploma | None | Moderate-term on-the-job training |
| 41-2031 | Retail Salespersons | 28 | \$999 | Less than high school | None | Short-term on-the-job training |

Occupations in Idaho's Recreation Technology Sector (cont.)

| SOC | Occupation | 2013 Jobs | Median Hourly Wage | Required Education | Required Experience | Required Training |
|---------|--|-----------|--------------------|-----------------------|---------------------|-----------------------------------|
| 43-4151 | Order Clerks | 27 | \$1,214 | High school diploma | None | Short-term on-the-job training |
| 49-1011 | First-Line Supervisors of Mechanics, Installers and Repairers | 25 | \$2,584 | High school diploma | Less than 5 years | None |
| 51-5112 | Printing Press Operators | 28 | \$1,532 | High school diploma | None | Moderate-term on-the-job training |
| 51-7041 | Sawing Machine Setters, Operators and Tenders, Wood | 24 | \$1,266 | High school diploma | None | Short-term on-the-job training |
| 49-9043 | Maintenance Workers, Machinery | 23 | \$1,951 | High school diploma | None | Moderate-term on-the-job training |
| 51-6062 | Textile Cutting Machine Setters, Operators and Tenders | 26 | \$1,175 | High school diploma | None | Moderate-term on-the-job training |
| 53-3031 | Driver/Sales Workers | 22 | \$1,172 | High school diploma | None | Short-term on-the-job training |
| 51-9195 | Molders, Shapers and Casters, Except Metal and Plastic | 23 | \$1,030 | High school diploma | None | Long-term on-the-job training |
| 53-3033 | Light Truck or Delivery Services Drivers | 21 | \$1,204 | High school diploma | None | Short-term on-the-job training |
| 51-4021 | Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic | 21 | \$1,606 | High school diploma | None | Moderate-term on-the-job training |
| 51-9081 | Dental Laboratory Technicians | 22 | \$1,413 | High school diploma | None | Moderate-term on-the-job training |
| 51-2031 | Engine and Other Machine Assemblers | 21 | \$1,117 | High school diploma | None | Short-term on-the-job training |
| 51-4194 | Tool Grinders, Filers and Sharpeners | 19 | \$1,514 | High school diploma | None | Moderate-term on-the-job training |
| 413395 | Financial Managers | 20 | \$3,874 | Bachelor's degree | 5 years or more | None |
| 51-4191 | Heat Treating Equipment Setters, Operators and Tenders, Metal and Plastic | 19 | \$1,497 | High school diploma | None | Moderate-term on-the-job training |
| 51-9041 | Extruding, Forming, Pressing and Compacting Machine Setters, Operators and Tenders | 18 | \$1,658 | High school diploma | None | Moderate-term on-the-job training |
| 51-4111 | Tool and Die Makers | 16 | \$2,381 | High school diploma | None | Long-term on-the-job training |
| 53-7063 | Machine Feeders and Offbearers | 17 | \$1,318 | Less than high school | None | Short-term on-the-job training |
| 51-6099 | Textile, Apparel, and Furnishings Workers, All Other | 19 | \$1,149 | High school diploma | None | Short-term on-the-job training |
| 43-4171 | Receptionists and Information Clerks | 17 | \$1,188 | High school diploma | None | Short-term on-the-job training |
| 41-9011 | Demonstrators and Product Promoters | 16 | \$1,074 | High school diploma | None | Short-term on-the-job training |
| 13-1161 | Market Research Analysts and Marketing Specialists | 17 | \$2,207 | Bachelor's degree | None | None |
| 51-4012 | Computer Numerically Controlled Machine Tool Programmers, Metal and Plastic | 14 | \$1,960 | High school diploma | None | Long-term on-the-job training |
| 43-3051 | Payroll and Timekeeping Clerks | 15 | \$1,612 | High school diploma | None | Moderate-term on-the-job training |
| 17-2199 | Engineers, All Other | 15 | \$3,564 | Bachelor's degree | None | None |
| 51-4023 | Rolling Machine Setters, Operators, and Tenders, Metal and Plastic | 15 | \$1,101 | High school diploma | None | Moderate-term on-the-job training |
| 45-2092 | Farmworkers and Laborers, Crop, Nursery and Greenhouse | 15 | \$1,005 | Less than high school | None | Short-term on-the-job training |
| 13-1051 | Cost Estimators | 14 | \$2,387 | Bachelor's degree | None | None |
| 13-1199 | Business Operations Specialists, All Other | 14 | \$2,914 | High school diploma | None | None |

Occupations in Idaho's Recreation Technology Sector (cont.)

| SOC | Occupation | 2013 Jobs | Median Hourly Wage | Required Education | Required Experience | Required Training |
|---------|--|-----------|--------------------|--------------------------------|---------------------|-----------------------------------|
| 424353 | Purchasing Managers | 14 | \$3,801 | Bachelor's degree | 5 years or more | None |
| 51-9022 | Grinding and Polishing Workers, Hand | 14 | \$1,153 | Less than high school | None | Moderate-term on-the-job training |
| 51-2023 | Electromechanical Equipment Assemblers | 14 | \$1,770 | High school diploma | None | Short-term on-the-job training |
| 51-4035 | Milling and Planing Machine Setters, Operators and Tenders, Metal and Plastic | 13 | \$1,137 | High school diploma | None | Moderate-term on-the-job training |
| 51-4199 | Metal Workers and Plastic Workers, All Other | 13 | \$1,371 | High school diploma | None | Moderate-term on-the-job training |
| 51-2022 | Electrical and Electronic Equipment Assemblers | 13 | \$1,195 | High school diploma | None | Short-term on-the-job training |
| 47-2152 | Plumbers, Pipefitters, and Steamfitters | 13 | \$1,990 | High school diploma | None | Apprenticeship |
| 51-4034 | Lathe and Turning Machine Tool Setters, Operators and Tenders, Metal and Plastic | 12 | \$1,490 | High school diploma | None | Moderate-term on-the-job training |
| 43-6011 | Executive Secretaries and Executive Administrative Assistants | 13 | \$1,843 | High school diploma | Less than 5 years | None |
| 33-9032 | Security Guards | 12 | \$1,213 | High school diploma | None | Short-term on-the-job training |
| 13-1081 | Logisticians | 12 | \$2,966 | Bachelor's degree | None | None |
| 49-9012 | Control and Valve Installers and Repairers, Except Mechanical Door | 12 | \$1,853 | High school diploma | None | Moderate-term on-the-job training |
| 49-3011 | Aircraft Mechanics and Service Technicians | 13 | \$2,286 | Postsecondary non-degree award | None | None |
| 51-4192 | Layout Workers, Metal and Plastic | 12 | \$1,723 | High school diploma | None | Moderate-term on-the-job training |
| 17-3026 | Industrial Engineering Technicians | 12 | \$1,835 | Associate's degree | None | None |
| 51-9023 | Mixing and Blending Machine Setters, Operators and Tenders | 12 | \$1,393 | High school diploma | None | Moderate-term on-the-job training |
| 51-9194 | Etchers and Engravers | 11 | \$1,170 | High school diploma | None | Moderate-term on-the-job training |
| 51-4193 | Plating and Coating Machine Setters, Operators and Tenders, Metal and Plastic | 11 | \$1,531 | High school diploma | None | Moderate-term on-the-job training |
| 43-3021 | Billing and Posting Clerks | 11 | \$1,450 | High school diploma | None | Short-term on-the-job training |
| 49-3031 | Bus and Truck Mechanics and Diesel Engine Specialists | 11 | \$1,891 | High school diploma | None | Long-term on-the-job training |
| 13-1071 | Human Resources Specialists | 11 | \$2,310 | Bachelor's degree | None | None |
| 17-2071 | Electrical Engineers | 11 | \$4,524 | Bachelor's degree | None | None |

Source: Economic Modeling Specialists International

| Rec-Tech Jobs as % of All Jobs 2013 | | | |
|-------------------------------------|--------------------|------------|-----------|
| State | All Jobs | Rec-Tech % | Rank |
| US | 133,252,253 | 16% | |
| Washington | 2,930,100 | 40% | 1 |
| Kansas | 1,318,379 | 33% | 2 |
| Indiana | 2,786,849 | 29% | 3 |
| Connecticut | 1,581,650 | 25% | 4 |
| Missouri | 2,550,324 | 21% | 5 |
| Wisconsin | 2,665,603 | 20% | 6 |
| Arkansas | 1,129,080 | 19% | 7 |
| Maine | 574,258 | 16% | 8 |
| Vermont | 293,273 | 16% | 9 |
| South Carolina | 1,774,729 | 16% | 10 |
| Tennessee | 2,638,628 | 15% | 11 |
| Alabama | 1,790,024 | 15% | 12 |
| Ohio | 4,974,155 | 14% | 13 |
| California | 14,823,001 | 14% | 14 |
| Georgia | 3,807,768 | 13% | 15 |
| Iowa | 1,490,840 | 13% | 16 |
| Kentucky | 1,764,687 | 12% | 17 |
| Oklahoma | 1,514,730 | 12% | 18 |
| Minnesota | 2,638,221 | 12% | 19 |
| New Hampshire | 600,614 | 11% | 20 |
| Mississippi | 1,062,060 | 11% | 21 |
| Michigan | 3,878,382 | 11% | 22 |
| Utah | 1,248,861 | 11% | 23 |
| South Dakota | 401,909 | 11% | 24 |
| Oregon | 1,633,216 | 11% | 25 |
| North Carolina | 3,897,135 | 11% | 26 |
| Pennsylvania | 5,467,037 | 10% | 27 |
| Illinois | 5,553,372 | 10% | 28 |
| Texas | 10,801,290 | 9% | 29 |
| Nebraska | 908,862 | 9% | 30 |
| Idaho | 622,225 | 9% | 31 |
| Arizona | 2,447,641 | 9% | 32 |
| Massachusetts | 3,227,324 | 8% | 33 |
| Rhode Island | 444,108 | 8% | 34 |
| New York | 8,481,077 | 8% | 35 |
| Nevada | 1,146,612 | 7% | 36 |
| Colorado | 2,295,881 | 7% | 37 |
| North Dakota | 428,465 | 7% | 38 |
| Florida | 7,235,421 | 6% | 39 |
| Maryland | 2,474,967 | 6% | 40 |
| Montana | 431,343 | 6% | 41 |
| West Virginia | 689,653 | 6% | 42 |
| New Jersey | 3,722,919 | 5% | 43 |
| Virginia | 3,561,741 | 5% | 44 |
| Delaware | 399,994 | 3% | 45 |
| New Mexico | 719,960 | 3% | 46 |
| Louisiana | 1,877,697 | 3% | 47 |
| Hawaii | 609,040 | 2% | 48 |
| Wyoming | 272,735 | 1% | 49 |
| Alaska | 321,281 | 1% | 50 |

Source: Economic Modeling Specialists International

| % Change in Rec-Tech Jobs 2001-2013 | | |
|--|---------------|----------|
| State | % | Rank |
| US | -26.8% | |
| North Dakota | 79.1% | 1 |
| Idaho | 40.7% | 2 |
| South Dakota | 24.3% | 3 |
| Montana | 21.5% | 4 |
| Nebraska | 10.1% | 5 |
| Utah | 10.0% | 6 |
| Washington | 9.1% | 7 |
| Nevada | 5.8% | 8 |
| Colorado | -1.4% | 9 |
| Oregon | -1.8% | 10 |
| South Carolina | -4.8% | 11 |
| Indiana | -7.1% | 12 |
| Missouri | -9.9% | 13 |
| Georgia | -11.5% | 14 |
| New Hampshire | -11.9% | 15 |
| Maryland | -13.1% | 16 |
| Oklahoma | -14.8% | 17 |
| Connecticut | -17.5% | 18 |
| Vermont | -19.2% | 19 |
| Iowa | -19.9% | 20 |
| Minnesota | -24.1% | 21 |
| Ohio | -25.2% | 22 |
| Michigan | -25.2% | 23 |
| Texas | -26.4% | 24 |
| Wisconsin | -27.1% | 25 |
| Illinois | -28.0% | 26 |
| Kansas | -28.7% | 27 |
| Rhode Island | -30.7% | 28 |
| Florida | -31.4% | 29 |
| New Mexico | -32.2% | 30 |
| Arizona | -32.8% | 31 |
| California | -33.1% | 32 |
| West Virginia | -35.7% | 33 |
| Massachusetts | -36.8% | 34 |
| Arkansas | -37.6% | 35 |
| Pennsylvania | -38.6% | 36 |
| Maine | -40.3% | 37 |
| Kentucky | -40.4% | 38 |
| Tennessee | -40.9% | 39 |
| Alabama | -41.8% | 40 |
| Virginia | -42.2% | 41 |
| Alaska | -43.8% | 42 |
| New York | -44.3% | 43 |
| North Carolina | -44.7% | 44 |
| New Jersey | -46.5% | 45 |
| Delaware | -47.3% | 46 |
| Mississippi | -48.9% | 47 |
| Hawaii | -54.4% | 48 |
| Wyoming | -55.4% | 49 |
| Louisiana | -58.9% | 50 |

Source: Economic Modeling Specialists International

| Projected % Change in Rec-Tech Jobs 2013-2023 | | | |
|---|----------------|--------------|----------|
| State | Chg In Jobs | % Chg | Rank |
| US | -29,365 | -1.9% | |
| North Dakota | 994 | 35.1% | 1 |
| Alaska | 58 | 32.6% | 2 |
| Delaware | 380 | 30.2% | 3 |
| South Carolina | 6,757 | 24.3% | 4 |
| Oregon | 3,600 | 20.2% | 5 |
| New Mexico | 400 | 18.8% | 6 |
| Montana | 464 | 18.6% | 7 |
| Nebraska | 1,554 | 18.4% | 8 |
| Idaho | 884 | 15.8% | 9 |
| Nevada | 1,266 | 15.3% | 10 |
| Missouri | 6,553 | 12.0% | 11 |
| Utah | 1,635 | 11.9% | 12 |
| South Dakota | 497 | 11.3% | 13 |
| Florida | 4,372 | 9.9% | 14 |
| Washington | 11,454 | 9.7% | 15 |
| Oklahoma | 1,489 | 8.2% | 16 |
| Massachusetts | 1,881 | 7.2% | 17 |
| New Hampshire | 445 | 6.5% | 18 |
| Indiana | 5,070 | 6.2% | 19 |
| Minnesota | 1,821 | 5.9% | 20 |
| Colorado | 978 | 5.9% | 21 |
| Vermont | 214 | 4.6% | 22 |
| Texas | 3,801 | 3.8% | 23 |
| Rhode Island | 124 | 3.5% | 24 |
| Alabama | 851 | 3.3% | 25 |
| Maryland | 427 | 3.0% | 26 |
| Louisiana | 161 | 2.9% | 27 |
| Iowa | 465 | 2.4% | 28 |
| Michigan | 676 | 1.6% | 29 |
| Arkansas | 134 | 0.6% | 30 |
| Kansas | -399 | -0.9% | 31 |
| Connecticut | -1,473 | -3.7% | 32 |
| Georgia | -1,958 | -3.8% | 33 |
| North Carolina | -1,952 | -4.7% | 34 |
| Ohio | -3,568 | -5.0% | 35 |
| Illinois | -3,753 | -6.6% | 36 |
| Mississippi | -861 | -7.1% | 37 |
| Pennsylvania | -4,232 | -7.6% | 38 |
| Wisconsin | -4,647 | -8.7% | 39 |
| Virginia | -1,941 | -10.7% | 40 |
| Kentucky | -2,526 | -11.8% | 41 |
| Arizona | -2,737 | -12.5% | 42 |
| West Virginia | -521 | -13.1% | 43 |
| Hawaii | -134 | -13.3% | 44 |
| California | -26,854 | -13.4% | 45 |
| Maine | -1,271 | -13.9% | 46 |
| Wyoming | -65 | -16.3% | 47 |
| New York | -12,679 | -19.5% | 48 |
| Tennessee | -9,421 | -24.1% | 49 |
| New Jersey | -7,434 | -36.9% | 50 |

Source: Economic Modeling Specialists International

| Rec-Tech Average 2013 Wage | | |
|----------------------------|-----------------|-----------|
| State | Wage | Rank |
| US | \$74,848 | |
| Connecticut | \$114,894 | 1 |
| Washington | \$112,659 | 2 |
| Nevada | \$101,848 | 3 |
| Arizona | \$89,881 | 4 |
| Kansas | \$83,677 | 5 |
| Texas | \$83,657 | 6 |
| Massachusetts | \$81,595 | 7 |
| Missouri | \$79,935 | 8 |
| Georgia | \$76,827 | 9 |
| Maryland | \$75,383 | 10 |
| Colorado | \$74,123 | 11 |
| California | \$73,262 | 12 |
| South Carolina | \$72,872 | 13 |
| New Hampshire | \$72,742 | 14 |
| Vermont | \$71,827 | 15 |
| Indiana | \$70,240 | 16 |
| Ohio | \$70,093 | 17 |
| Illinois | \$69,679 | 18 |
| New Mexico | \$69,312 | 19 |
| New York | \$69,035 | 20 |
| Kentucky | \$68,750 | 21 |
| Pennsylvania | \$68,590 | 22 |
| Wisconsin | \$67,054 | 23 |
| Florida | \$66,133 | 24 |
| Minnesota | \$65,248 | 25 |
| New Jersey | \$64,849 | 26 |
| Michigan | \$64,480 | 27 |
| Delaware | \$64,460 | 28 |
| Rhode Island | \$62,928 | 29 |
| Oklahoma | \$62,770 | 30 |
| Tennessee | \$62,082 | 31 |
| North Dakota | \$61,704 | 32 |
| Iowa | \$61,667 | 33 |
| North Carolina | \$61,503 | 34 |
| Oregon | \$59,793 | 35 |
| Alabama | \$59,671 | 36 |
| Louisiana | \$59,415 | 37 |
| Virginia | \$59,083 | 38 |
| Utah | \$58,050 | 39 |
| Maine | \$55,541 | 40 |
| Nebraska | \$53,252 | 41 |
| West Virginia | \$52,667 | 42 |
| Alaska | \$51,357 | 43 |
| Mississippi | \$50,868 | 44 |
| Arkansas | \$50,079 | 45 |
| Idaho | \$48,613 | 46 |
| South Dakota | \$48,385 | 47 |
| Wyoming | \$48,265 | 48 |
| Montana | \$45,192 | 49 |
| Hawaii | \$42,014 | 50 |

Source: Economic Modeling Specialists International

| Ratio of Rec-Tech Wage To Average Wage | | |
|--|---------------|-----------|
| State | % Ratio | Rank |
| US | 124.7% | |
| Nevada | 192.4% | 1 |
| Washington | 177.0% | 2 |
| Kansas | 165.5% | 3 |
| Arizona | 162.4% | 4 |
| Missouri | 155.1% | 5 |
| Connecticut | 154.2% | 6 |
| South Carolina | 152.4% | 7 |
| Vermont | 139.5% | 8 |
| Indiana | 138.8% | 9 |
| Texas | 138.8% | 10 |
| Georgia | 138.2% | 11 |
| Kentucky | 136.7% | 12 |
| New Mexico | 136.7% | 13 |
| Ohio | 130.5% | 14 |
| Wisconsin | 130.3% | 15 |
| Florida | 129.0% | 16 |
| New Hampshire | 127.0% | 17 |
| Iowa | 123.2% | 18 |
| Colorado | 122.8% | 19 |
| Oklahoma | 122.0% | 20 |
| North Carolina | 118.5% | 21 |
| Pennsylvania | 117.2% | 22 |
| Maine | 116.9% | 23 |
| Tennessee | 116.7% | 24 |
| Alabama | 114.6% | 25 |
| Maryland | 114.3% | 26 |
| Mississippi | 114.1% | 27 |
| Utah | 113.8% | 28 |
| Michigan | 112.8% | 29 |
| Massachusetts | 112.7% | 30 |
| Louisiana | 112.3% | 31 |
| Nebraska | 111.5% | 32 |
| North Dakota | 111.0% | 33 |
| Illinois | 110.3% | 34 |
| Oregon | 110.0% | 35 |
| Minnesota | 110.0% | 36 |
| Rhode Island | 109.7% | 37 |
| Idaho | 108.4% | 38 |
| California | 108.1% | 39 |
| South Dakota | 107.3% | 40 |
| Arkansas | 106.3% | 41 |
| West Virginia | 106.2% | 42 |
| Delaware | 103.6% | 43 |
| Montana | 97.2% | 44 |
| Virginia | 94.5% | 45 |
| New Jersey | 92.5% | 46 |
| New York | 92.4% | 47 |
| Wyoming | 88.2% | 48 |
| Alaska | 80.1% | 49 |
| Hawaii | 77.3% | 50 |

Source: Economic Modeling Specialists International

| Rec-Tech Firms as % of All Firms 2012 | | | |
|---------------------------------------|---------------|-------------|----------|
| State | Number | % | Rank |
| US | 38,838 | 0.4% | |
| Maine | 345 | 0.7% | 1 |
| Minnesota | 1,096 | 0.7% | 2 |
| Idaho | 352 | 0.7% | 3 |
| Oregon | 878 | 0.7% | 4 |
| Wisconsin | 977 | 0.7% | 5 |
| Indiana | 945 | 0.6% | 6 |
| Vermont | 149 | 0.6% | 7 |
| California | 7241 | 0.5% | 8 |
| Rhode Island | 164 | 0.5% | 9 |
| Washington | 1203 | 0.5% | 10 |
| Utah | 434 | 0.5% | 11 |
| Tennessee | 653 | 0.5% | 12 |
| Connecticut | 518 | 0.5% | 13 |
| Ohio | 1329 | 0.5% | 14 |
| New York | 2,744 | 0.5% | 15 |
| Michigan | 998 | 0.5% | 16 |
| South Dakota | 141 | 0.5% | 17 |
| Montana | 186 | 0.5% | 18 |
| Pennsylvania | 1,482 | 0.4% | 19 |
| Kansas | 374 | 0.4% | 20 |
| Missouri | 699 | 0.4% | 21 |
| Illinois | 1457 | 0.4% | 22 |
| North Carolina | 1,006 | 0.4% | 23 |
| New Hampshire | 173 | 0.4% | 24 |
| South Carolina | 401 | 0.4% | 25 |
| Oklahoma | 389 | 0.4% | 26 |
| Alabama | 425 | 0.4% | 27 |
| Arkansas | 307 | 0.4% | 28 |
| Florida | 2,157 | 0.4% | 29 |
| Kentucky | 394 | 0.4% | 30 |
| Iowa | 352 | 0.4% | 31 |
| Hawaii | 138 | 0.4% | 32 |
| Texas | 2,078 | 0.4% | 33 |
| Arizona | 481 | 0.3% | 34 |
| Colorado | 559 | 0.3% | 35 |
| Georgia | 789 | 0.3% | 36 |
| Mississippi | 199 | 0.3% | 37 |
| Massachusetts | 659 | 0.3% | 38 |
| Alaska | 61 | 0.3% | 39 |
| New Mexico | 151 | 0.3% | 40 |
| Nevada | 209 | 0.3% | 41 |
| New Jersey | 706 | 0.3% | 42 |
| Virginia | 632 | 0.3% | 43 |
| Nebraska | 170 | 0.3% | 44 |
| Louisiana | 346 | 0.3% | 45 |
| Delaware | 63 | 0.2% | 46 |
| North Dakota | 67 | 0.2% | 47 |
| Wyoming | 56 | 0.2% | 48 |
| West Virginia | 93 | 0.2% | 49 |
| Maryland | 310 | 0.2% | 50 |

Source: Economic Modeling Specialists International