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# Boise City-Nampa MSA Employment and Industry Analysis

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**BOISE STATE UNIVERSITY**

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## Collegiate Employment/ Workforce Readiness Report

Part I

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This report is the first component of a four-part study on skills alignment of Boise State University graduates and Boise City-Nampa Metropolitan Statistical Area (MSA) employers. This report frames the local economic and social environment through a demographic and socio-economic comparative analysis of the Boise City-Nampa MSA and 20 peer MSAs across the western United States. An employment analysis of the Boise City-Nampa MSA at the industry sector and industry sub-sector is also provided, identifying how the industry composition has changed following the Great Recession, which industries show area competitiveness through resilience to employment loss, if not growth, as well as which industries are heavily embedded within the Treasure Valley when compared to the nation. The employment analysis ties directly into an industry sector analysis of the Treasure Valley. Interviews and focus groups with local business owners, economic developers and chambers of commerce representatives were conducted in early 2013 to provide insight into the local economy and its industry sectors. The report has potential to provide useful information for state and local representatives and institutions attempting to foster a competitive region through policies and meeting employment and employer needs for successful outcomes. These three analyses comprise the first part of the larger four-part study.



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# Executive Summary

The Collegiate Employment/Workforce Readiness Report's regional economic portion of the study is comprised of three analyses—the demographic and socio-economic comparative analysis, the employment analysis of the Boise City-Nampa Metropolitan Statistical Area (MSA), and the Boise City-Nampa MSA industry sector analysis. These three analyses, combined with the results from the current student, employer, and Alumni surveys, provide a wealth of information pertaining to the strengths and weaknesses in our regional economy.

Employment changed significantly over the last 40 years in the Boise City-Nampa MSA, adding more than 250,000 employees across all sectors of the economy. Nearly 60 percent of this increase resides in services, which added more than 150,000 jobs. The Finance and Construction industries each increased by rates of more than 300 percent over the last 40 years, adding 28,000 and 15,000 jobs respectively.

When compared to 20 western United States MSAs, the Boise City-Nampa MSA experienced high population growth rates between 2000 and 2010, second only to Provo-Orem, UT. For residents aged 65 and older, the Boise City-Nampa MSA grew the fastest of all peer regions between 2000 and 2010, increasing by more than 60 percent.

The high population growth led to a large amount of activity in the housing construction industry

through the decade. When the housing bubble burst near the beginning of the Great Recession, the unemployment rate began to climb quickly. The annual average unemployment rate in 2000 was 3.7 percent, while the rate in 2010 was 9.7 percent, placing the Boise City Nampa MSA near the middle of its peers for overall unemployment rate in 2010 and percentage change in unemployment rate.

Over the ten-year period ending in 2010, the Boise City-Nampa MSA grew by more than 67,000 households, or 42.4 percent. This was second only to the Provo-Orem, UT MSA, which grew at a rate of 43.8 percent. These two MSA's were the only MSA's to attain growth rates in the total number of households greater than 40 percent over the ten-year period.

Over the decade ending in 2010, median home values in the Boise City-Nampa MSA grew by 47 percent from \$117,800 in 2000 to \$173,200 in 2010. The Boise City-Nampa MSA placed in the middle of its peer MSA's.

The Boise City-Nampa MSA maintained the fourth highest housing opportunity in 2010 of the MSAs in this analysis. From 2000 to 2010, housing opportunity declined substantially; however, the area remained a strong contender when compared to its peer MSAs in all three time periods—2000, 2005, 2010.

The Boise City-Nampa MSA maintains one of the lowest overall costs-of-living of the MSA's in this

## Executive Summary cont.

analysis where data is available. Overall, Transportation and HealthCare costs are the biggest contributing factors to the potential increasing cost-of-living in the Boise City-Nampa MSA.

During the second five-year period ending in 2010 the Boise City-Nampa MSA saw the lowest growth rate in median household income at 0.6 percent, growing from \$46,960 to \$47,237. In 2010, the Boise City-Nampa MSA had the 14th highest median household income out of the 21 peer MSA's.

Area exporters of goods and services are most evident in the following industry subsectors: Administration of Environmental Quality Programs, Computer and Electronic Product Manufacturing, Animal Production, Support Activities for Agriculture and Forestry, and Wood Product Manufacturing. These industries maintain employment levels significantly higher than would be expected if the Boise City-Nampa MSA were to emulate national industry patterns of employment.

Shift-share measurement suggested that the following industry subsectors had the highest competitive effect from 2006 to 2010:

Administrative and Support Services, Hospitals, Educational Services, Ambulatory Health Care Services, Personal and Laundry Services.

The industry sector analysis shows that many of the growing industries in the Boise City-Nampa MSA surround agriculture. Unique infrastructure,

such as the miles of irrigation canals that serve the Treasure Valley bolster agriculture production and the corresponding food production which follows.

Of the businesses interviewed for the industry sector analysis, 61 percent, or 11 of the 19 businesses indicated regional assets needed for their growth are air and/or regional passenger transportation.

The most frequent barrier to expansion for local businesses was the ability to find qualified employees needed for the job. There were several frequently listed advantages to the region including, cost of doing business, quality of life and cost of living.

Engineering, trades, and customer service were some of the more frequently noted growing occupations among the interviewees.

Finally, there was nearly unanimous agreement across all categories of industry that the future looked good for their industry in the region. Businesses in the transforming and declining segments were more likely to make their prognosis of bright future in the region contingent on being able to find qualified talent.

# Overview of the State of Idaho

While this report focuses on the Boise City-Nampa MSA and other peer metropolitan statistical areas, the State of Idaho data is provided as background information.

Total population in the state increased by 21 percent from slightly under 1.3 million in 2000 to 1.56 million in 2010. Idaho residents in one age bracket, 20-39, increased slower relative to total population at 15.5 percent. The Idaho resident population between the ages of 40 and 64 increased faster than the state average at 28.7 percent. The final cohort in the age bracket 65 and over increased at the fastest rate of the three age cohorts in this analysis at 33.4 percent compared with 21 percent for the total state population.

The total number of households in the state increased from just under 470,000 to slightly fewer than 580,000 over the decade. The total number of households occupied by families decreased slightly from a decade earlier from 71.5 percent in 2000 to 69.6 percent in 2010. Single family households remained relatively unchanged over the decade at 12.5 percent.

Educational attainment in Idaho increased across the population those with at least a high school diploma by 3.6 percent, at least a bachelor's degree by 2.7 percent, and at least a master's degree by 0.9 percent.

Median household income increased by nearly 16 percent over the decade, from \$37,672 in 2000 to \$43,490 in 2010.

Median housing value increased substantially, growing by 55.3 percent to \$165,100 in 2010 from \$106,300 in 2000.

Housing opportunity of an area is related to the cost of homes in an area and the income of residents. A value of 100 would indicate adequate housing opportunity and the greater the value over 100 the greater the housing opportunity. For the state of Idaho, housing opportunity decreased from a score of 173 in 2000 to 134 in 2010. Housing opportunity remains strong in Idaho, although it has declined from a decade ago.

**Table 1. State of Idaho Characteristics, 2000, 2005, 2010**

Characteristic	2000	2005	2010	2000 - 2005	2005 - 2010	2000 - 2010
				Percent Change	Percent Change	Percent Change
Total Population	1,293,953	1,395,634	1,567,582	7.9%	12.3%	21.1%
Total Population, 20-39 Year Olds	358,340	378,217	414,019	5.5%	9.5%	15.5%
Total Population, 40-64 Year Olds	375,832	447,999	483,614	19.2%	7.9%	28.7%
Total Population, 65 and Over	145,916	156,311	194,668	7.1%	24.5%	33.4%
Total Households	469,645	532,135	579,408	13.3%	8.9%	23.4%
Family Households	71.5%	70.0%	69.6%	-2.2%	-0.5%	-2.7%
Single Family Households	12.5%	12.6%	12.5%	0.6%	-1.0%	-0.3%
Educational Attainment—At Least a High School Diploma	84.7%	86.6%	88.3%	2.2%	2.0%	4.3%
Educational Attainment—At Least a Bachelor's Degree	21.7%	23.3%	24.4%	7.4%	4.7%	12.4%
Educational Attainment—At Least a Masters Degree	6.8%	7.4%	7.7%	8.8%	4.1%	13.2%
Median Household Income	37,572	41,443	43,490	10.3%	4.9%	15.8%
Median Home Value	\$ 106,300	\$ 134,900	\$ 165,100	26.9%	22.4%	55.3%
Housing Opportunity	173	153	134	-11.6%	-12.3%	-22.5%
Unemployment Rate	3.7%	3.4%	9.3%	-8.0%	151.4%	102.2%

Source: See Associated Characteristic Table for Peer Area Comparisons



# Section 1: Boise City-Nampa MSA and Peer Regions

## Demographic and Socio-economic Characteristics

Section 1 of the report contains various demographic and socio-economic characteristics such as population, home values, and educational attainment as can be seen in the list below. Data is provided across three time periods—2000, 2005, and 2010—for the Boise City-Nampa MSA and 20 other peer regions from the following nine western states—California, Colorado, Idaho,

Montana, Oregon, New Mexico, Nevada, Utah, and Washington. All comparison tables contained in this section are sorted by the last column. The following demographic and socio-economic characteristics are provided for comparison between the Boise City-Nampa MSA and its peer regions:

- Total Population
- Total Population, 20-39 Year Olds
- Total Population, 40-64 Year Olds
- Total Population, 65 and Over
- Total Households
- Family and Single Parent Households
- Educational Attainment, At Least a High School Diploma
- Educational Attainment, At Least a Bachelor's Degree
- Educational Attainment, At Least a Master's Degree
- Median Household Income
- Median Home Value
- Housing Opportunity
- Cost of Living
- Unemployment Rate

# Metropolitan Statistical Areas and Corresponding Geographical Changes over Time

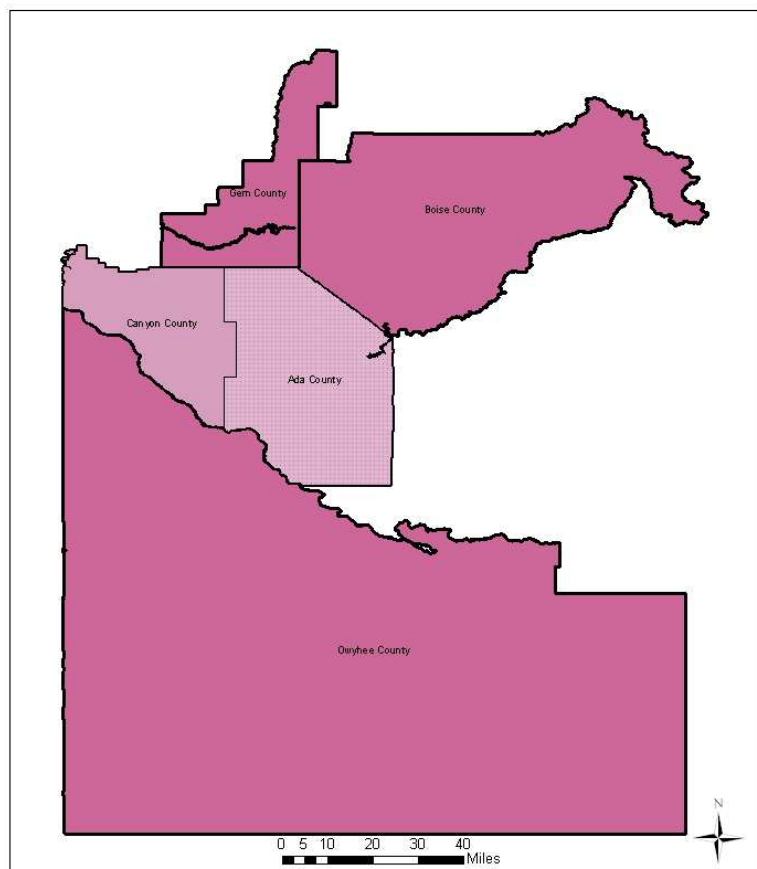
A MSA contains a core urban area with a population of 50,000 or more. Each MSA consists of one or more counties and includes the counties containing the core urban area, as well as any adjacent counties that have a high degree of social and economic integration (as measured by commuting to work) with the urban core.

The geographic boundaries, or definition, of an MSA is reanalyzed by the Office of Management and Budget (OMB) following each decennial census. The resulting changes become effective roughly three years following the respective decennial census. The MSA changes stemming from the 2010 census are expected to be finalized in 2013.

What is now the Boise City-Nampa MSA has gone through several changes in the last three decades since becoming an MSA, as can be seen in Figure 1. Following the 1980 census, the MSA consisted of Ada County. Canyon County was added following the 1990 census. As a result of the 2000 census,




Boise, Gem, and Owyhee Counties were added to what is now the Boise City-Nampa MSA.

Figure 1. Boise City-Nampa MSA Definition, 1983-2003



The map reflects the changing definition of the Boise MSA. In 1980 Ada County was the entire MSA. Ada and Canyon counties comprised the MSA from 1993-2003. Since 2003 the five counties of Ada, Boise, Canyon, Gem and Owyhee are designated as the Boise-Nampa MSA.

## Legend

	1980
	1993
	2003

Source: U.S Census Bureau

# Peer Region MSA Definition Changes

**Table 2. MSA Definitions, 2000 Census Definition, Post-2000 Census Definition**

MSA Name	2000 Census Definition	Post-2000 Census Definition	MSA Definition Change
Albuquerque, NM	Bernalillo, NM Sandoval, NM Valencia, NM	Bernalillo, NM Sandoval, NM Torrance, NM Valencia, NM	Add 1 County
Billings, MT	Yellowstone, MT	Yellowstone, MT Carbon, MT	Add 1 County
Boise City-Nampa, ID	Ada, ID Canyon, ID	Ada, ID Canyon, ID Gem, ID Owyhee, ID Boise, ID	Add 3 Counties
Boulder, CO	Boulder, CO	Boulder, CO	No Change
Coeur d'Alene, ID	Not an MSA, ID	Kootenai, ID	New MSA
Colorado Springs, CO	El Paso, CO	El Paso, CO Teller, CO	Add 1 County
Eugene-Springfield, OR	Lane County, OR	Lane County, OR	No Change
Fresno, CA	Fresno, CA Madera, CA	Fresno, CA	Subtract 1 County
Ft. Collins, CO	Larimer, CO	Larimer, CO	No Change
Idaho Falls, ID	Not an MSA	Bonneville, ID Jefferson, ID	New MSA
Kennewick-Pasco-Richland, WA	Benton, WA Franklin, WA	Benton, WA Franklin, WA	No Change
Portland, OR	Clackamas, OR Columbia, OR Multnomah, OR Washington, OR Yamhill, OR Clark, WA	Clackamas, OR Columbia, OR Multnomah, OR Washington, OR Yamhill, OR Clark, WA Skamania, WA	Add 1 County
Provo-Orem	Utah County, UT	Juab County, UT Utah County, UT	Add 1 County
Reno-Sparks, NV	Washoe, NV	Washoe, NV Storey, NV	Add 1 County
Sacramento, CA	El Dorado, CA Placer, CA Sacramento, CA	El Dorado, CA Placer, CA Sacramento, CA Yolo, CA	Add 1 County
Salem, OR	Marion, OR Polk, OR	Marion, OR Polk, OR	No Change
Salt Lake City, UT	Davis, UT Salt Lake, UT Weber, UT	Salt Lake, UT Summit, UT Tooele, UT	Add 2 Counties; Subtract 2 Counties
San Jose, CA	Santa Clara, CA	Santa Clara, CA San Benito, CA	Add 1 County
Santa Fe, NM	Los Alamos, NM Santa Fe, NM	Santa Fe, NM	Subtract 1 County
Spokane, WA	Spokane, WA	Spokane, WA	No Change
Yakima, WA	Yakima, WA	Yakima, WA	No Change

Source: U.S. Census, <http://www.census.gov/population/metro/>

Definitions are determined by the Office of Management and Budget as of 2003. In summary, 2 MSA's are new: Idaho Falls and Coeur d'Alene; 7 MSA's did not change geographic boundaries: Boulder, CO, Eugene-Springfield, OR, Ft. Collins, CO, Kennewick-Pasco-Richland, WA, Salem, OR, Spokane, WA, and Yakima, WA; 2 MSA's lost counties: Fresno, CA and Santa Fe, NM; 9 MSAs grew in geographic size: Albuquerque, NM, Billings, MT, Boise City-Nampa, ID, Colorado Springs, CO, Portland, OR, Provo-Orem, UT, Reno-Sparks, NV, Sacramento, CA, and San Jose, CA; 1 MSA—Salt Lake City, UT—both added and subtracted counties from its geography.

# Population

Population levels vary significantly between the Boise City-Nampa MSA and its peer MSAs, ranging from 130,374 in Idaho Falls, ID to more than 2.2 million in Portland, OR. Besides total population levels, viewing population levels by age cohort reveal the composition of the area's total population. The three age cohorts provided in the following section of the report are 20-39, 40-64, and 65 and over.

The population of an area between the ages of 20 and 39 is important since it contains those individuals most likely to significantly change occupations through increased educational attainment. The opportunity costs associated with obtaining an education are theoretically less for this age cohort than it would be for those in the 40-64 year old or 65 and over age cohorts, as the cost of the education can be offset by the potential of increased wages over more years. Also, income is likely to be less for those less

established in their careers than for those 40 or over. The total population between 20 and 39 heavily influences the natural population growth, meaning the population growth not stemming from in/outmigration.

The population aged 40 to 64 is theoretically more experienced and established in his/her occupation. This age group is a valuable contributor to the workforce. This age cohort is also important to understanding the impacts to the workforce in future decades, as these individuals begin to retire.

Finally, population levels for those aged 65 and over are provided. This cohort in the Boise City-Nampa MSA increased the fastest compared to all other peer MSAs between the years 2000 and 2010.



Downtown Boise  
Source: Boise State University

# Total Population—2000, 2005, 2010

The Boise City-Nampa MSA added nearly 100,000 people to its population from 2000 to 2005, reaching over half a million people. Of all of the MSA's during the first half of the decade, the Boise City-Nampa MSA was second in rate of growth only to the Sacramento MSA, which grew at 23.1 percent, or 0.4 percent higher than the 22.7 percent growth rate of the Boise City-Nampa MSA from 2000 to 2005.

In the second half of the decade, the Boise City-Nampa MSA again showed strong growth when compared to its peer MSA's in this analysis. The Boise City-Nampa MSA added an additional 86,000 residents in the second half of the decade reaching more than 616,000 people.

Overall, the Boise City-Nampa MSA grew by 43 percent in the last decade, adding nearly 200,000 residents to its population. The Provo-Orem, UT MSA was the only MSA to outpace the growth

experienced in the Boise City-Nampa MSA and this was only by three-tenths of a percentage point. These two MSA's were the only two MSA's that reached or exceeded a 40 percent rate of growth from 2000 to 2010.

Only two other MSA's attained over 30 percent growth - Kennewick-Pasco-Richland, WA and Sacramento-Arden-Arcade-Roseville, CA. The remaining MSA's were well below this level. The average population growth rate from 2000 to 2010 was 18 percent for the MSA's in this analysis.

Only one MSA - Salt Lake City, UT - experienced a population loss over the decade, declining by more than 200,000 people. This is due to the redefining of the Salt Lake City MSA, which lost two counties and added another two counties, remaining three counties in size, albeit with very different population levels.

**Table 3. Comparison of Total Population, 2000, 2005, 2010**

Ranking	MSA Title	2000 Total Population	2005 Total Population	2010 Total Population	2000-2005 Percent Change	2005-2010 Percent Change	2000-2010 Percent Change
1	Provo-Orem, UT	368,536	443,188	526,810	20.3%	18.9%	42.9%
2	<b>Boise City-Nampa, ID</b>	<b>432,345</b>	<b>530,359</b>	<b>616,561</b>	<b>22.7%</b>	<b>16.3%</b>	<b>42.6%</b>
3	Kennewick-Pasco-Richland, WA MSA	191,822	219,224	253,340	14.3%	15.6%	32.1%
4	Sacramento--Arden-Arcade--Roseville, CA	1,628,197	2,004,476	2,149,127	23.1%	7.2%	32.0%
5	Idaho Falls, ID	101,677	113,677	130,374	11.8%	14.7%	28.2%
6	Coeur d'Alene, ID	108,685	126,079	138,494	16.0%	9.8%	27.4%
7	Reno-Sparks, NV	339,486	387,750	425,417	14.2%	9.7%	25.3%
8	Colorado Springs, CO	516,929	571,244	645,613	10.5%	13.0%	24.9%
9	Albuquerque, NM MSA	712,738	783,920	887,077	10.0%	13.2%	24.5%
10	Billings, MT	129,352	143,977	158,050	11.3%	9.8%	22.2%
11	Ft. Collins, CO	251,494	264,807	299,630	5.3%	13.2%	19.1%
12	Portland-Vancouver-Hillsboro, OR-WA	1,918,009	2,063,277	2,226,009	7.6%	7.9%	16.1%
13	Spokane, WA	417,939	425,684	471,221	1.9%	10.7%	12.7%
14	Salem, OR	347,214	360,857	390,738	3.9%	8.3%	12.5%
15	Yakima, WA	222,581	227,809	243,231	2.3%	6.8%	9.3%
16	San Jose, CA	1,682,585	1,726,057	1,836,911	2.6%	6.4%	9.2%
17	Eugene-Springfield, OR	322,959	327,762	351,715	1.5%	7.3%	8.9%
18	Boulder, CO	291,288	271,934	294,567	-6.6%	8.3%	1.1%
19	Fresno, CA	922,516	858,948	930,450	-6.9%	8.3%	0.9%
20	Santa Fe, NM	147,635	137,758	144,170	-6.7%	4.7%	-2.3%
21	Salt Lake City, UT	1,333,914	1,017,572	1,124,197	-23.7%	10.5%	-15.7%

Source: U.S. Census Bureau, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Population, 20-39 year olds—2000, 2005, 2010

The growth rate for the population aged 20-39 for the Boise City-Nampa MSA from 2000 to 2005 was 14.7 percent, resulting in an additional 20,000 residents. The growth rate is substantially smaller than the growth rate of 22.7 percent for the total population of the Boise City-Nampa MSA.

The Boise City-Nampa MSA continued to show relatively strong growth in the population for those aged 20-39 during the second five-year period, growing by 10.6 percent, or over 16,000 residents. Only four other MSA's attained a growth rate of over 10 percent, compared with five from the prior five-year period.

The Boise City-Nampa MSA and three other MSAs - Idaho Falls, ID, Kennewick-Pasco-Richland, WA, and Provo-Orem, UT - were the only MSAs to attain over 10 percent growth during both five-year periods.

Over the decade ending in 2010, the Boise City-Nampa MSA added over 33,000 residents aged 20-39, growing by 27 percent. The MSA was the sixth fastest growing MSA when compared to its peer MSA's.

Five MSAs showed declines for the population aged 20 to 39 - Fresno, CA, San Jose, CA, Boulder, CO, Santa Fe, NM, and Salt Lake City, UT.

Table 4. Population 20-39 year olds, 2000, 2005, 2010

Rankings	MSA Title	2000 Population 20-39 yr olds	2005 Population 20-39 yr olds	2010 Population 20-39 yr olds	2000-2005 Percent Change	2005-2010 Percent Change	2000-2010 Percent Change
1	Provo-Orem, UT	132,262	163,807	180,154	23.9%	10.0%	36.2%
2	Kennewick-Pasco-Richland, WA MSA	51,348	59,455	68,443	15.8%	15.1%	33.3%
3	Idaho Falls, ID	26,147	30,018	34,432	14.8%	14.7%	31.7%
4	Sacramento--Arden-Arcade--Roseville, CA	459,658	577,712	586,104	25.7%	1.5%	27.5%
5	<b>Boise City-Nampa, ID</b>	<b>133,551</b>	<b>153,211</b>	<b>169,410</b>	<b>14.7%</b>	<b>10.6%</b>	<b>26.9%</b>
6	Coeur d'Alene, ID	28,204	34,596	33,242	22.7%	-3.9%	17.9%
7	Billings, MT	34,585	35,800	40,315	3.5%	12.6%	16.6%
8	Albuquerque, NM MSA	206,718	213,271	240,625	3.2%	12.8%	16.4%
9	Reno-Sparks, NV	100,606	107,172	115,833	6.5%	8.1%	15.1%
10	Ft. Collins, CO	81,193	84,818	90,948	4.5%	7.2%	12.0%
11	Colorado Springs, CO	162,000	167,252	180,979	3.2%	8.2%	11.7%
12	Spokane, WA	117,241	118,203	128,629	0.8%	8.8%	9.7%
13	Portland-Vancouver-Hillsboro, OR-WA	582,748	609,388	639,319	4.6%	4.9%	9.7%
14	Salem, OR	97,363	99,667	103,361	2.4%	3.7%	6.2%
15	Eugene-Springfield, OR	91,969	96,029	97,337	4.4%	1.4%	5.8%
16	Yakima, WA	60,412	61,344	63,395	1.5%	3.3%	4.9%
17	Fresno, CA	267,043	243,885	265,729	-8.7%	9.0%	-0.5%
18	San Jose, CA	568,005	496,392	537,456	-12.6%	8.3%	-5.4%
19	Boulder, CO	99,184	86,885	88,910	-12.4%	2.3%	-10.4%
20	Santa Fe, NM	38,756	35,904	32,992	-7.4%	-8.1%	-14.9%
21	Salt Lake City, UT	423,864	338,616	354,254	-20.1%	4.6%	-16.4%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Population, 40-64 year olds—2000, 2005, 2010

For the age cohort containing those aged 40-64 the Boise City-Nampa MSA showed the highest growth rate from 2000 to 2005 at 38.4 percent. This growth rate resulted in roughly 47,000 residents being added to the population of the Boise City-Nampa MSA. Only two other MSA's experienced growth rates above 30 percent - Billings, MT and Provo-Orem, UT - at 30.1 percent and 33 percent respectively.

The second five-year period from 2005 to 2010 showed substantially lower growth rates for the Boise City-Nampa MSA, which grew at 13.6 percent and added about 23,000 residents. However, the Boise City-Nampa MSA's growth rate remained strong relative to its peers, with only

three other MSA's - Provo-Orem, UT, Colorado Springs, CO, and Ft. Collins, CO - experiencing higher rates of growth.

The Boise City-Nampa MSA topped the list in terms of rate of growth for those aged 40-64 during the decade ending 2010 at 57 percent. The Boise City-Nampa MSA added nearly 70,000 residents in this age cohort.

The Provo-Orem, UT MSA was the only other MSA with a growth rate of over 50 percent, while only two MSA's - Sacramento and Colorado Springs - maintained growth rates over 40 percent. The average growth rate for the Boise City-Nampa MSA and its peer MSA's was 27 percent.

Table 5. Population 40-64 year olds, 2000, 2005, 2010

Rankings	MSA Title	2000 Population 40-64 yr olds	2005 Population 40-64 yr olds	2010 Population 40-64 yr olds	2000-2005 Percent Change	2005-2010 Percent Change	2000-2010 Percent Change
1	Boise City-Nampa, ID	121,507	168,215	191,024	38.4%	13.6%	57.2%
2	Provo-Orem, UT	65,577	87,191	102,903	33.0%	18.0%	56.9%
3	Sacramento--Arden-Arcade--Roseville, CA	493,118	626,514	703,711	27.1%	12.3%	42.7%
4	Colorado Springs, CO	151,994	181,611	212,587	19.5%	17.1%	39.9%
5	Coeur d'Alene, ID	34,572	41,837	47,087	21.0%	12.5%	36.2%
6	Kennewick-Pasco-Richland, WA MSA	56,925	71,193	77,077	25.1%	8.3%	35.4%
7	Albuquerque, NM MSA	217,230	265,413	293,963	22.2%	10.8%	35.3%
8	Reno-Sparks, NV	109,074	131,162	145,150	20.3%	10.7%	33.1%
9	Billings, MT	40,942	53,274	54,160	30.1%	1.7%	32.3%
10	Idaho Falls, ID	28,741	35,086	36,778	22.1%	4.8%	28.0%
11	Ft. Collins, CO	76,253	85,474	97,265	12.1%	13.8%	27.6%
12	Portland-Vancouver-Hillsboro, OR-WA	597,081	690,762	751,980	15.7%	8.9%	25.9%
13	Spokane, WA	127,471	142,278	156,372	11.6%	9.9%	22.7%
14	San Jose, CA	494,441	574,367	604,984	16.2%	5.3%	22.4%
15	Salem, OR	100,468	112,088	121,593	11.6%	8.5%	21.0%
16	Yakima, WA	59,490	65,463	70,026	10.0%	7.0%	17.7%
17	Eugene-Springfield, OR	103,115	109,462	118,776	6.2%	8.5%	15.2%
18	Boulder, CO	91,236	92,813	100,906	1.7%	8.7%	10.6%
19	Fresno, CA	238,495	238,236	260,565	-0.1%	9.4%	9.3%
20	Santa Fe, NM	53,424	52,831	55,964	-1.1%	5.9%	4.8%
21	Salt Lake City, UT	333,318	274,858	310,880	-17.5%	13.1%	-6.7%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Population, 65 and older—2000, 2005, 2010

During the first five-year period the age cohort of the population containing those 65 and older showed significantly lower growth rates overall for the MSA's, with the majority showing declines. However, the Boise City-Nampa MSA was one of only six MSA's in the analysis that showed a positive growth rate for this age cohort, growing at 6.6 percent and adding fewer than 3,000 residents.

In terms of growth rates for the population aged 65 and older, the second half of the decade was substantially different from the first half. None of the MSA's showed a declining growth rate. In fact, none of the MSA's in this analysis showed growth rates below 28 percent (Reno-Sparks, NV).

The Boise City-Nampa MSA showed the highest growth rate of 51.1 percent; the only MSA to attain a growth rate over 50 percent. The Boise City-Nampa MSA added roughly 23,000 residents over the age of 65 in the five years ending 2010.

Over the ten-year period ending 2010, the Boise City-Nampa MSA's growth rate was 61.1 percent - the only MSA in the analysis over 60 percent. The Boise City-Nampa MSA added 25,500 residents over the age of 65 from 2000 to 2010.

The second highest growth rate was achieved by Coeur d'Alene at 50.5 percent. The growth rate for the Idaho Falls MSA was 36.1 percent.

**Table 6. Population 65+ year olds, 2000, 2005, 2010**

Rankings	MSA Title	2000 Population 65+ yr olds	2005 Population 65+ yr olds	2010 Population 65+ yr olds	2000-2005 Percent Change	2005-2010 Percent Change	2000-2010 Percent Change
1	Boise City-Nampa, ID	41,762	44,532	67,281	6.6%	51.1%	61.1%
2	Coeur d'Alene, ID	13,345	14,596	20,078	9.4%	37.6%	50.5%
3	Ft. Collins, CO	24,037	23,882	35,541	-0.6%	48.8%	47.9%
4	Provo-Orem, UT	23,503	25,280	34,500	7.6%	36.5%	46.8%
5	Colorado Springs, CO	44,787	44,048	65,074	-1.7%	47.7%	45.3%
6	Reno-Sparks, NV	35,797	40,220	51,617	12.4%	28.3%	44.2%
7	Kennewick-Pasco-Richland, WA MSA	18,819	18,188	26,282	-3.4%	44.5%	39.7%
8	Sacramento--Arden-Arcade--Roseville, CA	187,769	192,472	258,408	2.5%	34.3%	37.6%
9	Idaho Falls, ID	10,173	10,326	13,847	1.5%	34.1%	36.1%
10	Albuquerque, NM MSA	80,421	76,676	108,962	-4.7%	42.1%	35.5%
11	Santa Fe, NM	16,123	14,610	21,804	-9.4%	49.2%	35.2%
12	Billings, MT	17,243	15,528	22,763	-9.9%	46.6%	32.0%
13	Boulder, CO	22,670	21,244	29,521	-6.3%	39.0%	30.2%
14	Portland-Vancouver-Hillsboro, OR-WA	198,234	176,734	252,218	-10.8%	42.7%	27.2%
15	San Jose, CA	160,527	152,994	202,304	-4.7%	32.2%	26.0%
16	Eugene-Springfield, OR	42,954	38,716	52,781	-9.9%	36.3%	22.9%
17	Spokane, WA	51,949	43,014	60,969	-17.2%	41.7%	17.4%
18	Salem, OR	44,449	36,690	51,701	-17.5%	40.9%	16.3%
19	Yakima, WA	24,921	21,320	28,122	-14.4%	31.9%	12.8%
20	Fresno, CA	92,805	69,520	93,421	-25.1%	34.4%	0.7%
21	Salt Lake City, UT	110,500	70,394	96,514	-36.3%	37.1%	-12.7%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census



# Total Households

Households are defined by the U.S. Census Bureau as an individual or group of individuals that occupy the same housing unit. The total number of households is an important indicator of the amount of residential development occurring within an area. This variable is heavily influenced by population growth trends reviewed in the preceding section.

The following section provides the total number of households in the Boise City-Nampa MSA and

its peer comparison MSAs for 2000, 2005, and 2010. Additionally, the percentage change in the number of households between the two five-year periods—2000 to 2005 and 2005 to 2010—and the ten-year period—2000 to 2010—are provided. The table is sorted by percent change in the total number of households from 2000 to 2010 by highest to lowest percentage change.



Housing Development in Boise  
Source: TheHelpProgram.com

# Total Households—2000, 2005, 2010

The total number of households in the Boise City-Nampa MSA grew by more than 45,000 from 2000 to 2005, increasing at a rate of 28.8 percent over the five-year period. The Boise City-Nampa MSA was the fastest growing MSA when compared to its peer MSA's in terms of the total number of households during this timeframe.

The second five-year period ending in 2010 resulted in substantially decreased growth rates for all MSA's, although none experienced negative growth rates as during the previous five-year period. The Boise City-Nampa MSA added another 20,000 households, increasing by 10.5 percent, to reach over 225,000 households in all.

The Boise City-Nampa MSA was the sixth fastest growing MSA during this time period following

Santa Fe, NM, Provo, UT, Tri-Cities, and the two other Idaho MSA's in this analysis - Coeur d'Alene and Idaho Falls MSA's.

Over the ten-year period ending in 2010, the Boise City-Nampa MSA grew by more than 67,000 households, or 42.4 percent. This was second only to the Provo-Orem, UT MSA, which grew at a rate of 43.8 percent. These two MSA's were the only MSA's to attain growth rates in the total number of households greater than 40 percent over the ten-year period ending 2010.

Only one MSA - Salt Lake City, UT - showed negative growth over the decade ending 2010, losing more than 58,000 households, or negative 13.5 percent.

Table 7. Comparison of Total Housholds, 2000, 2005, 2010

Rankings	MSA Title	2000 Total Households	2005 Total Households	2010 Total households	2000-2005 Percent Growth in Households	2005-2010 Percent Growth in Households	2000-2010 Percent Growth in Households
1	Provo-Orem, UT	99,937	122,997	143,695	23.1%	16.8%	43.8%
2	<b>Boise City-Nampa, ID</b>	<b>158,426</b>	<b>204,078</b>	<b>225,594</b>	<b>28.8%</b>	<b>10.5%</b>	<b>42.4%</b>
3	Coeur d'Alene, ID	41,308	48,082	54,200	16.4%	12.7%	31.2%
4	Kennewick-Pasco-Richland, WA MSA	67,686	76,266	88,549	12.7%	16.1%	30.8%
5	Sacramento--Arden-Arcade--Roseville, CA	605,923	745,740	787,667	23.1%	5.6%	30.0%
6	Idaho Falls, ID	34,654	40,405	44,775	16.6%	10.8%	29.2%
7	Colorado Springs, CO	192,409	224,289	245,764	16.6%	9.6%	27.7%
8	Albuquerque, NM MSA	275,028	319,677	347,366	16.2%	8.7%	26.3%
9	Billings, MT	52,084	59,428	65,243	14.1%	9.8%	25.3%
10	Reno-Sparks, NV	132,084	154,704	165,187	17.1%	6.8%	25.1%
11	Ft. Collins, CO	97,164	109,087	120,295	12.3%	10.3%	23.8%
12	Portland-Vancouver-Hillsboro, OR-WA	741,776	803,442	867,794	8.3%	8.0%	17.0%
13	Spokane, WA	163,611	177,754	187,167	8.6%	5.3%	14.4%
14	Salem, OR	124,699	133,824	141,245	7.3%	5.5%	13.3%
15	Eugene-Springfield, OR	130,453	136,635	145,966	4.7%	6.8%	11.9%
16	San Jose, CA	565,863	597,597	621,009	5.6%	3.9%	9.7%
17	Yakima, WA	73,993	76,288	80,592	3.1%	5.6%	8.9%
18	Boulder, CO	114,680	113,405	119,300	-1.1%	5.2%	4.0%
19	Santa Fe, NM	59,979	52,799	61,963	-12.0%	17.4%	3.3%
20	Fresno, CA	289,095	274,129	289,391	-5.2%	5.6%	0.1%
21	Salt Lake City, UT	432,040	342,724	373,583	-20.7%	9.0%	-13.5%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Family and Single Parent Households

Table 8 below includes the number of family households as a percentage of all households for the Boise City-Nampa MSA and its peer MSAs. Additionally, the table shows the number of single parent households as a percentage of family households.

The Boise City-Nampa MSA is similar to its peer MSA's analyzed in this report in terms of the number of family households, with 69 percent of all households being comprised of a family - or two

parents and at least one child. The Boise City-Nampa MSA is also unremarkable in terms of single parent households at 14 percent, which is the average percentage of all MSA's in this analysis.

Provo-Orem, UT MSA maintains the highest percentage of family households, as well as the lowest single parent family households at 81 percent and 7 percent respectively. The Boulder, CO MSA maintains the lowest percentage of family households at 58 percent.

**Table 8. Family and Single Parent Households, 2000, 2005, 2010**

Rankings	MSA Title	2000 Family Households as Percent of Total Households	2000 Single Parent Households as Percent of Family Households	2005 Family Households as Percent of Total Households	2005 Single Parent Households as Percent of Family Households	2010 Family Households as Percent of Total Households	2010 Single Parent Households as Percent of Family Households
1	Provo-Orem, UT	80.8%	7.2%	79.9%	6.4%	81.3%	7.4%
2	Idaho Falls, ID	76.0%	10.7%	73.1%	8.9%	74.8%	11.6%
3	Salt Lake City, UT	74.7%	11.2%	70.5%	13.5%	71.3%	12.0%
4	Fresno, CA	74.5%	17.1%	73.6%	19.3%	74.1%	18.4%
5	Yakima, WA	73.8%	16.0%	73.0%	17.5%	72.9%	18.3%
6	Kennewick-Pasco-Richland, WA MSA	73.6%	13.9%	72.5%	15.2%	72.1%	15.2%
7	Coeur d'Alene, ID	71.8%	12.4%	67.9%	14.8%	68.8%	13.3%
8	Spokane, WA	70.3%	12.5%	63.0%	13.3%	63.2%	15.0%
9	San Jose, CA	69.9%	10.1%	70.3%	11.2%	70.9%	10.2%
10	Colorado Springs, CO	69.6%	13.2%	66.8%	15.1%	68.1%	14.0%
11	Salem, OR	69.4%	13.7%	71.0%	16.9%	68.4%	14.8%
12	Sacramento--Arden-Arcade--Roseville, CA	67.4%	15.8%	66.8%	15.4%	66.8%	14.8%
13	Albuquerque, NM MSA	66.3%	16.4%	63.9%	16.7%	64.1%	17.3%
14	Billings, MT	65.7%	13.6%	62.1%	12.4%	63.2%	14.3%
15	Ft. Collins, CO	65.0%	11.1%	61.0%	13.5%	62.3%	11.2%
16	Portland, OR	65.0%	13.1%	63.4%	14.0%	63.5%	13.5%
17	<b>Boise City-Nampa, ID</b>	<b>64.8%</b>	<b>15.2%</b>	<b>68.5%</b>	<b>12.7%</b>	<b>69.3%</b>	<b>13.7%</b>
18	Santa Fe, NM	63.6%	15.7%	57.9%	18.6%	58.4%	15.6%
19	Reno-Sparks, NV	63.4%	14.7%	61.8%	14.2%	62.9%	15.1%
20	Eugene-Springfield, OR	63.0%	14.2%	58.1%	14.5%	59.6%	14.3%
21	Boulder, CO	60.0%	11.7%	60.1%	13.3%	57.7%	11.6%

Source: U.S. Census Bureau, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Educational Attainment

Educational attainment is an important characteristic of any area's population. The educational attainment information contained in the peer-MSA comparison is for the population aged 25 and older that maintain: (1) at least a high school diploma (or equivalent); (2) at least a bachelor's degree; (3) at least a master's degree.

Higher educational attainment is associated with higher wages of an area. While it is true that not all four-year degrees will result in higher wages than a lower degreed education, wages and education are highly correlated.

Additionally, it is preferable for businesses to locate in areas where their labor needs are adequately supplied. Those areas with higher

educational attainment levels may be more attractive to migrating businesses than those areas with less educational attainment.

Additionally, business expansion is easier for employers that are able to obtain workers with the necessary skills.

The following section of the report provides educational attainment levels for the Boise City-Nampa MSA and its peer MSAs for the years 2000, 2005, and 2010. Additionally, the percentage change in the number of households between the two five-year periods—2000 to 2005 and 2005 to 2010—and the ten-year period—2000 to 2010—are provided.



Boise High School, 2009  
Source: RandyGridley.com

# Percentage of the Population 25 and over with at least a High School Diploma—2000, 2005, 2010

The Boise City-Nampa MSA maintained 86.5 percent of its population age 25 and over in the year 2000 with at least a high school diploma. This figure changed to 88.3 percent five years later and continued to increase to 88.9 percent by 2010. In the first five-year period, the Boise City-Nampa MSA increased the percentage of the population with a high school diploma by 2.1 percent. During the second five-year period the increase slowed to 0.7 percent.

The average percentage of the population age 25 and older with at least a high school diploma for the Boise City-Nampa MSA and its peer MSAs was

85.1 in 2000. This increased to 87 percent in 2005 and further increased to 87.8 percent in 2010.

In 2010, only six MSAs maintain over 90 percent of the population 25 and older with a high school diploma or higher - Boulder, CO, Colorado Springs, CO, Ft. Collins, CO, Provo, UT, Billings, MT, and Spokane, WA. Ft. Collins, CO maintained the highest percentage of its population with at least a high school diploma in 2010 at 94.9 percent. Yakima, WA maintained the lowest percentage of its population 25 and older with at least a high school diploma in 2010 at 70.8 percent.

**Tables 9. Educational Attainment - Percent of Population 25 and older with High School or Higher, 2000, 2005, 2010**

Rankings	MSA Title	2000	2005	2010	2000-2005 Percent Change	2005-2010 Percent Change	2000-2010 Percent Change
1	Fresno, CA	67.2%	71.5%	73.8%	6.4%	3.2%	9.8%
2	Coeur d'Alene, ID	87.3%	90.3%	91.4%	3.4%	1.2%	4.7%
3	Billings, MT	88.5%	91.2%	92.4%	3.1%	1.3%	4.4%
4	Salem, OR	80.4%	83.2%	83.9%	3.5%	0.8%	4.4%
5	Reno-Sparks, NV	83.9%	85.8%	87.3%	2.3%	1.7%	4.1%
6	Spokane, WA	89.1%	91.1%	92.7%	2.2%	1.8%	4.0%
7	Albuquerque, NM MSA	83.9%	86.0%	86.8%	2.5%	0.9%	3.5%
8	San Jose, CA	83.4%	85.4%	86.2%	2.4%	0.9%	3.4%
9	Provo-Orem, UT	90.9%	93.3%	93.8%	2.6%	0.5%	3.2%
10	Portland-Vancouver-Hillsboro, OR-WA	87.2%	89.5%	89.9%	2.6%	0.4%	3.1%
11	Eugene-Springfield, OR	87.5%	90.3%	90.2%	3.2%	-0.1%	3.1%
12	Yakima, WA	68.7%	69.6%	70.8%	1.3%	1.7%	3.1%
13	Ft. Collins, CO	92.3%	94.4%	94.9%	2.3%	0.5%	2.8%
<b>14</b>	<b>Boise City-Nampa, ID</b>	<b>86.5%</b>	<b>88.3%</b>	<b>88.9%</b>	<b>2.1%</b>	<b>0.7%</b>	<b>2.8%</b>
15	Idaho Falls, ID	87.2%	86.2%	89.4%	-1.1%	3.7%	2.5%
16	Sacramento--Arden-Arcade--Roseville, CA	85.0%	86.8%	87.1%	2.1%	0.3%	2.5%
17	Kennewick-Pasco-Richland, WA MSA	80.1%	81.4%	81.9%	1.6%	0.6%	2.2%
18	Colorado Springs, CO	91.3%	92.1%	92.9%	0.9%	0.9%	1.8%
19	Boulder, CO	92.8%	94.1%	94.1%	1.4%	0.0%	1.4%
20	Salt Lake City, UT	87.5%	88.8%	88.4%	1.5%	-0.5%	1.0%
21	Santa Fe, NM	86.0%	87.4%	86.7%	1.6%	-0.8%	0.8%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Percentage of the Population 25 and over with Bachelor's degrees or higher—2000, 2005, 2010

The Boise City-Nampa MSA was slightly below the 28.2 percent average at 26.5 percent in the year 2000.

Compared to the Coeur d'Alene and Idaho Falls MSA's the Boise City-Nampa MSA maintained at least a 2 percent higher concentration of its population with at least bachelor's degrees in 2000. By 2005, the Boise City-Nampa MSA maintained a 3 percent higher concentration of its population with at least a bachelor's degree, as the Idaho Falls MSA decreased in its concentration of bachelor degreed population. The Boise City-Nampa MSA remained steady from 2000 to 2005 at 26.5 percent, showing no change in the five-year period.

In terms of rate of growth in the percentage of its population that maintains at least a bachelor's degree, the Boise City-Nampa MSA performed relatively poorly in the first five-year period showing no change and maintaining a higher rate of growth than only two other MSA's - Kennewick-Pasco-Richland, WA at -0.4 percent and Idaho Falls, ID at -3.8 percent.

During the second five-year period from 2005 to 2010 the number of MSA's that showed declines in the percent of its population aged 25 and older grew substantially, from 2 percent in the preceding five-year period to 7 percent during the second five-year period. All of Idaho MSA's showed positive growth rates for the percentage of

**Tables 10. Educational Attainment - Percent of Population 25 and older with Bachelor's Degrees or Higher, 2000, 2005, 2010**

Ranking	MSA Title	2000	2005	2010	2000-2005	2005-2010	2000-2010
					Percent Change	Percent Change	Percent Change
1	Coeur d'Alene, ID	19.1%	21.3%	22.9%	11.5%	7.5%	19.9%
2	Billings, MT	26.4%	27.1%	31.6%	2.7%	16.6%	19.7%
3	Fresno, CA	16.8%	19.7%	20.1%	17.3%	2.0%	19.6%
4	Ft. Collins, CO	39.5%	43.4%	45.8%	9.9%	5.5%	15.9%
5	Portland-Vancouver-Hillsboro, OR-WA	28.8%	31.9%	33.0%	10.8%	3.4%	14.6%
6	Spokane, WA	25.0%	26.4%	28.5%	5.6%	8.0%	14.0%
7	Sacramento--Arden-Arcade--Roseville, CA	25.9%	29.9%	29.4%	15.4%	-1.7%	13.5%
8	San Jose, CA	40.5%	43.7%	45.3%	7.9%	3.7%	11.9%
9	Provo-Orem, UT	31.5%	34.6%	35.2%	9.8%	1.7%	11.7%
10	Boulder, CO	52.4%	57.6%	57.5%	9.9%	-0.2%	9.7%
11	Reno-Sparks, NV	23.7%	27.0%	26.0%	13.9%	-3.7%	9.7%
12	Salt Lake City, UT	26.5%	28.5%	29.0%	7.5%	1.8%	9.4%
13	Eugene-Springfield, OR	25.5%	28.0%	27.9%	9.8%	-0.4%	9.4%
14	Salem, OR	20.8%	21.9%	22.6%	5.3%	3.2%	8.7%
15	Colorado Springs, CO	31.8%	33.7%	34.1%	6.0%	1.2%	7.2%
<b>16</b>	<b>Boise City-Nampa, ID</b>	<b>26.5%</b>	<b>26.5%</b>	<b>28.3%</b>	<b>0.0%</b>	<b>6.8%</b>	<b>6.8%</b>
17	Kennewick-Pasco-Richland, WA MSA	23.3%	23.2%	24.1%	-0.4%	3.9%	3.4%
18	Albuquerque, NM MSA	28.4%	30.0%	29.3%	5.6%	-2.3%	3.2%
19	Yakima, WA	15.3%	16.2%	15.6%	5.9%	-3.7%	2.0%
20	Idaho Falls, ID	24.2%	23.3%	23.6%	-3.8%	1.3%	-2.6%
21	Santa Fe, NM	39.9%	40.7%	37.9%	2.0%	-6.9%	-5.0%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

## Percentage of the Population 25 and over with Bachelor's degrees or higher—2000, 2005, 2010 cont.

population with bachelor's degrees during the second five-year period.

The Boise City-Nampa MSA maintained one of the highest growth rates of its overall percentage of the population with at least a bachelor's degree, growing from 26.5 percent in 2005 to 28.3 percent from 2005 to 2010.

Over the decade, the Boise City-Nampa MSA's concentration of the population with bachelor's degree's or higher grew by 6.8 percent from 26.5 percent in 2000 to 28.3 percent in 2010. It remained one of the slower growing MSA's in terms of the concentration of its population with

bachelor's degree's when compared to the average growth rate of the MSA's in the analysis of 9.7 percent.

The Coeur d'Alene MSA experienced the highest growth rate in concentration of bachelor degreed population over age 25, growing by 19.9 percent from 19.1 to 22.9 percent from 2000 to 2010.

The Boulder, CO MSA is the only MSA to maintain over 50 percent of its population over age 25 with bachelor degrees or higher, more than twice that of the Boise City-Nampa MSA.



Boise State Winter Commencement, 2009  
Source: StateImpact.npr.org

# Percentage of the Population 25 and over with at least a Master's Degree—2000, 2005, 2010

The range of graduate degree attainment within the MSAs in this analysis varied considerably when compared to high school and bachelor degree level educational attainment

The Boise City-Nampa MSA maintained 7.4 percent of its population age 25 and over with a master's degree or higher in 2000. The percentage declined to 7.8 percent in 2005 and increased to 9.1 percent in 2010.

The average attainment of at least a master's degree was 10.2 percent in 2000, 11.1 percent in

2005, and 11.5 percent in 2010.

In 2010, the highest graduate level educational attainment occurred in Boulder, CO, with nearly a quarter of its population age 25 and older holding at least a master's level of education or higher.

Yakima, WA maintained the lowest educational attainment in this category at 5.4 percent in 2010, or less than half of the MSAs in this analysis.

**Tables 11. Educational Attainment - Percent of Population 25 and older with Master's Degrees or Higher, 2000, 2005, 2010**

Rankings	MSA Title	2000	2005	2010	2000-2005	2005-2010	2000-2010
					Percent Change	Percent Change	Percent Change
1	Coeur d'Alene, ID	6.1%	8.6%	8.4%	41.0%	-2.3%	37.7%
2	Fresno, CA	5.2%	6.3%	6.6%	21.2%	4.8%	26.9%
3	Spokane, WA	8.7%	9.7%	10.8%	11.5%	11.3%	24.1%
4	Salem, OR	7.1%	7.9%	8.8%	11.3%	11.4%	23.9%
5	Ft. Collins, CO	14.5%	16.2%	17.7%	11.7%	9.3%	22.1%
6	Portland-Vancouver-Hillsboro, OR-WA	9.7%	11.2%	11.8%	15.5%	5.4%	21.6%
7	San Jose, CA	16.4%	18.3%	19.8%	11.6%	8.2%	20.7%
8	Sacramento--Arden-Arcade--Roseville, CA	8.3%	10.0%	10.0%	20.5%	0.0%	20.5%
9	Reno-Sparks, NV	7.9%	9.0%	9.4%	13.9%	4.4%	19.0%
10	Salt Lake City, UT	8.5%	9.1%	9.8%	7.1%	7.7%	15.3%
11	Boulder, CO	21.3%	23.7%	24.5%	11.3%	3.4%	15.0%
12	Billings, MT	7.4%	7.2%	8.5%	-2.7%	18.1%	14.9%
13	Eugene-Springfield, OR	9.9%	11.1%	11.2%	12.1%	0.9%	13.1%
<b>14</b>	<b>Boise City-Nampa, ID</b>	<b>8.1%</b>	<b>7.8%</b>	<b>9.1%</b>	<b>-3.7%</b>	<b>16.7%</b>	<b>12.3%</b>
15	Colorado Springs, CO	11.6%	12.6%	13.0%	8.6%	3.2%	12.1%
16	Albuquerque, NM MSA	12.0%	13.1%	12.6%	9.2%	-3.8%	5.0%
17	Provo-Orem, UT	9.9%	9.4%	10.1%	-5.1%	7.4%	2.0%
18	Santa Fe, NM	19.1%	19.6%	19.2%	2.6%	-2.0%	0.5%
19	Yakima, WA	5.5%	5.6%	5.4%	1.8%	-3.6%	-1.8%
20	Idaho Falls, ID	7.9%	8.2%	7.3%	3.2%	-11.0%	-8.1%
21	Kennewick-Pasco-Richland, WA MSA	8.5%	9.3%	7.6%	9.4%	-18.3%	-10.6%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census



# Median Household Income

Household income is the income received by all persons within a household aged 15 and over. A household is defined as a housing unit and can be a house, apartment, mobile home, single room, or collection of rooms.

The following section of the report provides the median household income for the Boise City-Nampa MSA and each of the peer MSAs for the year 2000, 2005, and 2010. Since the Idaho Falls, ID MSA was not a MSA in 2000 and consists of

two counties, the median household income was calculated through interpolation. While Coeur d'Alene was also not an MSA in 2000, given that it is defined as one county—Kootenai County, ID—allows for the county level data to be acquired from the 2000 decennial census.

Additionally, the percentage change in median household income has been calculated for the two five-year periods—2000 to 2005 and 2005 to 2010—and ten-year period—2000 to 2010.



Boise State University Broncos Money Clip  
Source: Sportsmemorabilia.com

Source: U.S. Census Bureau

# Median Household Income—2000, 2005, 2010

The Boise City-Nampa MSA saw one of the highest rates of growth in terms of household income during the five-year period ending 2005, growing from \$42,570 to \$46,960, or 10.3 percent. Only four other MSA's grew at higher rates - Fresno, CA, Sacramento, CA, Spokane, WA, and Billings, MT with growth rates of 19.8 percent, 15.6 percent, 11.7 percent, and 11.1 percent respectively.

During the second five-year period ending in 2010 the Boise City-Nampa MSA saw the lowest growth rate in median household income at 0.6 percent, growing from \$46,960 to \$47,237.

Over the decade, the Boise City-Nampa MSA saw an increase in median household income of 11 percent over the decade ending 2010. The median household income in the Boise City-Nampa MSA

grew by nearly \$5,000 from \$42,570 in 2000 to \$47,237 in 2010. The Boise City-Nampa MSA had the 16th highest growth in median household income out of the 21 peer MSA's.

The average median household income growth rate over the 10-year period was 16.3 percent for the 21 MSA's in the analysis. The Billings, MT MSA's median household income grew by 30.6 percent and was the only MSA to grow by more than 30 percent. The Fresno, CA and Spokane, WA MSA's median household income grew at the second and third highest rates, growing at 29.4 percent and 26.1 percent respectively. Only two MSA's showed growth rates in the single digits - Eugene-Springfield, OR and Santa Fe, NM - growing at 9 percent and 2.7 percent respectively.

Table 12. Median Household Income, 2000, 2005, 2010

Rankings	MSA Title	2000 Median Household Income	2005 Median Household Income	2010 Median Household Income	2000-2005 Percent Growth in Median Household Income	2005-2010 Percent Growth in Median Household Income	2000-2010 Percent Growth in Median Household Income
1	Billings, MT	36,727	40,807	47,968	11.1%	17.5%	30.6%
2	Fresno, CA	34,960	41,899	45,221	19.8%	7.9%	29.4%
3	Spokane, WA	37,308	41,667	47,039	11.7%	12.9%	26.1%
4	Kennewick-Pasco-Richland, WA MSA	44,886	48,726	56,407	8.6%	15.8%	25.7%
5	Albuquerque, NM MSA	39,088	43,070	47,383	10.2%	10.0%	21.2%
7	Idaho Falls, ID	41,469	43,918	50,113	5.9%	14.1%	20.8%
6	Sacramento--Arden-Arcade--Roseville, CA	46,602	53,890	56,233	15.6%	4.3%	20.7%
8	Provo-Orem, UT	45,833	47,229	54,201	3.0%	14.8%	18.3%
9	Salt Lake City, UT	48,594	48,993	57,419	0.8%	17.2%	18.2%
10	Yakima, WA	34,828	34,412	40,648	-1.2%	18.1%	16.7%
11	San Jose, CA	74,335	76,478	83,944	2.9%	9.8%	12.9%
12	Portland-Vancouver-Hillsboro, OR-WA	47,077	49,833	53,078	5.9%	6.5%	12.7%
13	Salem, OR	40,665	43,295	45,584	6.5%	5.3%	12.1%
14	Coeur d'Alene, ID	37,754	36,675	42,316	-2.9%	15.4%	12.1%
15	Ft. Collins, CO	48,655	48,686	54,154	0.1%	11.2%	11.3%
16	<b>Boise City-Nampa, ID</b>	<b>42,570</b>	<b>46,960</b>	<b>47,237</b>	<b>10.3%</b>	<b>0.6%</b>	<b>11.0%</b>
17	Boulder, CO	55,861	57,502	61,859	2.9%	7.6%	10.7%
18	Reno-Sparks, NV	45,815	48,974	50,699	6.9%	3.5%	10.7%
19	Colorado Springs, CO	46,844	51,146	51,683	9.2%	1.0%	10.3%
20	Eugene-Springfield, OR	36,942	37,290	40,276	0.9%	8.0%	9.0%
21	Santa Fe, NM	45,822	45,304	47,080	-1.1%	3.9%	2.7%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Median Home Value

The following section provides the median home value of the Boise City-Nampa MSA and its peer MSAs. Once again, the Idaho Falls, ID MSA data was calculated through interpolation in the same manner as median household income.

The median home value of an area can play an integral role in the decision to migrate to an area. If the housing price of the potential relocation area is high relative to an individual's home area, the prospect of moving to the relocation area is negatively affected.

The median value for homes is calculated from all of the owner occupied housing units and does

not take into consideration housing units occupied by renters.

The following section of the report provides the median home value for the Boise City-Nampa MSA and each of the peer MSAs for the year 2000, 2005, and 2010. Additionally, the percentage change in median home value has been calculated for the two five-year periods—2000 to 2005 and 2005 to 2010—and ten-year period—2000 to 2010 as is done in previous sections.



Boise Home.  
Source: [money.cnn.com](http://money.cnn.com)

# Median Home Value—2000, 2005, 2010

Median home values in the Boise City-Nampa MSA increased at a moderate rate of 26.8 percent compared with its peer MSA's between 2000 and 2005. The median home value increased from \$117,800 in 2000 to \$149,400 in 2005.

Despite the recession's impact on housing values across the country, the overall 2005 to 2010 performance remained largely positive on median home values, with only four MSA's experiencing negative growth rates - San Jose, CA, Fresno, CA, Sacramento, CA, and Reno, NV. The median home value for the Boise City-Nampa MSA continued to increase during the second half of the decade which maintained a growth rate of 15.9 percent, increasing from \$149,400 in 2005 to \$173,200 in 2010. The second five-year growth rate for the Boise City-Nampa MSA placed it about in the middle when compared to its peer MSA's and the state of Idaho.

Growth in the median home value from 2000 to 2010 for Idaho Falls was fourth overall at just under 70 percent, placing it behind Fresno, CA at 99 percent, Billings, MT at 76.4 percent, and Sacramento, CA at 75.5 percent. The Coeur d'Alene MSA maintained a 10-year growth rate at 62.9 percent, placing the Boise City-Nampa MSA with the lowest growth rate for the Idaho MSAs included in this report.

Over the decade ending 2010, median home values in the Boise City-Nampa MSA grew by 47 percent from \$117,800 in 2000 to \$173,200 in 2010. The Boise City-Nampa MSA placed in the middle of its peer MSA's. Half of the MSA's in this analysis grew in the 40 percent to 50 percent range in terms of home value.

**Table 13. Median Home Value, 2000, 2005, 2010**

Rankings	MSA Title	2000 Median Home Value	2005 Median Home Value	2010 Median Home Value	2000-2005 Percent Growth in Median Home Value	2005-2010 Percent Growth in Median Home Value	2000-2010 Percent Growth in Median Home Value
1	Fresno, CA	106,800	251,000	212,500	135.0%	-15.3%	99.0%
2	Billings, MT	101,900	134,400	179,800	31.9%	33.8%	76.4%
3	Sacramento--Arden-Arcade--Roseville, CA	159,000	396,900	279,100	149.6%	-29.7%	75.5%
4	Idaho Falls, ID	92,819	117,600	157,700	26.7%	34.1%	69.9%
5	Spokane, WA	113,200	147,000	187,000	29.9%	27.2%	65.2%
6	Coeur d'Alene, ID	120,100	173,600	195,600	44.5%	12.7%	62.9%
7	Eugene-Springfield, OR	141,000	173,600	229,400	23.1%	32.1%	62.7%
8	Portland-Vancouver-Hillsboro, OR-WA	170,000	228,400	271,700	34.4%	19.0%	59.8%
9	Salt Lake City, UT	151,400	177,900	236,800	17.5%	33.1%	56.4%
10	Salem, OR	134,500	165,000	204,900	22.7%	24.2%	52.3%
<b>11</b>	<b>Boise City-Nampa, ID</b>	<b>117,800</b>	<b>149,400</b>	<b>173,200</b>	<b>26.8%</b>	<b>15.9%</b>	<b>47.0%</b>
12	Albuquerque, NM MSA	124,700	146,900	183,300	17.8%	24.8%	47.0%
13	Boulder, CO	241,900	344,300	352,800	42.3%	2.5%	45.8%
14	Colorado Springs, CO	147,100	191,400	214,300	30.1%	12.0%	45.7%
15	Kennewick-Pasco-Richland, WA MSA	116,200	141,300	168,900	21.6%	19.5%	45.4%
16	Santa Fe, NM	196,300	260,900	284,800	32.9%	9.2%	45.1%
17	Ft. Collins, CO	172,000	230,900	247,600	34.2%	7.2%	44.0%
18	Provo-Orem, UT	156,400	176,100	223,000	12.6%	26.6%	42.6%
19	San Jose, CA	446,400	679,800	631,400	52.3%	-7.1%	41.4%
20	Yakima, WA	113,800	122,100	160,300	7.3%	31.3%	40.9%
21	Reno-Sparks, NV	161,600	333,700	215,900	106.5%	-35.3%	33.6%

Source: U.S. Census, 2000 Decennial Census, 2005 American Community Survey, 2010 Census

# Housing Opportunity

The housing opportunity of an area is directly related to the cost of homes in the area, as well as the income of the residents. Building from the preceding analysis, mortgage payments stemming from the median home values of each area were amortized over 30 years with the assumption of no down payment and a fixed interest rate of 5.25 percent, creating a conservative estimate. This produced the monthly payment, or mortgage cost, associated with purchasing a home.

Monthly income was obtained by taking the median annual family income and dividing it by 12.

The National Association of Home Buyers (NAHB)

recommends a debt-to-income ratio of no higher than 28 percent as acceptable for personal fiscal health. The debt-to-income ratio for an area was calculated by dividing the monthly home costs by the monthly median family income.

The Housing Opportunity Index was calculated by dividing the acceptable debt-to-income ratio as determined by the NAHB (0.28) by the area's calculated debt-to-income ratio and multiplying it by 100; where anything greater than 100 would be assumed to have adequate housing opportunity.

While a proxy, the index provides insight into the interplay between income and housing costs in an area.



House for Sale  
Source: Microsoft Clip Art

# Housing Opportunity—2000, 2005, 2010

Housing Opportunity in the Boise City-Nampa MSA declined consistently over the decade. The Boise City-Nampa MSA had the fourth highest housing opportunity in 2000. From 2000 to 2005 the Housing Opportunity Index for the Boise City-Nampa MSA dropped by 19.6 points from 176.7 to 157.1. In 2005, the Boise City-Nampa MSA had the fifth highest housing opportunity, dropping one rank from five years earlier. From 2005 to 2010 the housing opportunity continued to decline in the Boise City-Nampa MSA, dropping by 19.4 points, or slightly less than it had in the preceding five-year period. The Boise City-Nampa MSA maintained the fourth highest housing opportunity in 2010 of the MSAs in this analysis. From 2000 to 2010, housing opportunity declined substantially; however, the area remained a strong contender when compared to its peer MSAs in all three time periods.

Salem, OR and Fresno, CA are the only two MSAs to realize a decline in housing opportunity of more than 50 points over the decade. Three other regions maintained losses in housing opportunity between 40 and 49.9 points - Billings, MT, Coeur d'Alene, ID, and Sacramento, CA.

In 2000, only one MSA maintained a housing opportunity below 100 - San Jose, CA - at 77.4. Over the decade, two other MSAs were added to the below-100 list - Eugene-Springfield, OR at 96.7 and Santa Fe, NM at 86.6.

In 2010, the three area's with the highest housing opportunity were Kennewick-Pasco-Richland (Tri-Cities), WA, Idaho Falls, ID, and Billings, MT with 159.6, 147.4 and 140.9 respectively.

**Table 14. Housing Opportunity Index, 2000, 2005, 2010**

Rankings	MSA Title	2000	2005	2010	2000 - 2005 Percent Change	2005 - 2010 Percent Change	2000 - 2010 Percent Change
1	Albuquerque, NM MSA	156.0	153.1	136.4	-1.9%	-10.9%	-12.6%
2	Kennewick-Pasco-Richland, WA MSA	186.4	170.3	159.6	-8.7%	-6.3%	-14.4%
3	Reno-Sparks, NV	141.9	76.5	120.0	-46.1%	56.9%	-15.5%
4	Ft. Collins, CO	144.6	117.3	121.8	-18.9%	3.8%	-15.8%
5	Boulder, CO	123.3	95.4	103.2	-22.6%	8.1%	-16.3%
6	Yakima, WA	147.6	151.9	123.1	2.9%	-18.9%	-16.6%
7	Colorado Springs, CO	155.1	137.6	128.2	-11.3%	-6.8%	-17.3%
8	San Jose, CA	77.4	55.2	63.8	-28.7%	15.6%	-17.6%
9	Provo-Orem, UT	135.6	124.7	110.4	-8.1%	-11.5%	-18.6%
<b>10</b>	<b>Boise City-Nampa, ID</b>	<b>176.7</b>	<b>157.1</b>	<b>137.7</b>	<b>-11.1%</b>	<b>-12.3%</b>	<b>-22.1%</b>
11	Salt Lake City, UT	152.0	134.5	118.0	-11.5%	-12.2%	-22.4%
12	Spokane, WA	173.4	158.4	133.6	-8.7%	-15.6%	-22.9%
13	Billings, MT	187.8	161.9	140.9	-13.8%	-13.0%	-25.0%
14	Santa Fe, NM	117.5	80.8	86.6	-31.2%	7.2%	-26.3%
15	Portland-Vancouver-Hillsboro, OR-WA	138.4	111.6	100.0	-19.3%	-10.4%	-27.7%
16	Eugene-Springfield, OR	135.2	120.6	96.7	-10.8%	-19.8%	-28.5%
17	Coeur d'Alene, ID	151.0	113.1	107.5	-25.1%	-4.9%	-28.8%
18	Sacramento--Arden-Arcade--Roseville, CA	143.5	67.9	101.0	-52.7%	48.8%	-29.6%
19	Idaho Falls, ID	213.0	187.6	147.4	-11.9%	-21.4%	-30.8%
20	Fresno, CA	152.6	78.7	102.1	-48.4%	29.7%	-33.1%
21	Salem, OR	174.9	131.5	106.8	-24.8%	-18.8%	-38.9%

Source: National Association of Home Builders; U.S. Census - 2000 Decennial Census, 2005 American Community Survey, 2010 Decennial Census

# Cost-of-Living

Another factor of consideration of housing opportunity and general regional health is cost-of-living.

The Boise City-Nampa MSA maintains one of the lowest overall costs-of-living of the MSA's in this analysis where data is available.<sup>1</sup> The composite index for the Boise City-Nampa MSA is 95.2, indicating the cost-of-living in the area is less than the average index of 100.

The Boise City-Nampa MSA maintains a housing cost of 83.8, or the third lowest of the peer MSA's contained in Table 15.

Grocery costs in the Boise City-Nampa MSA ranked the third lowest as well at 94.5, behind Spokane, WA and Eugene-Springfield, OR.

HealthCare and Miscellaneous Goods and Services for the Boise City-Nampa MSA ranked fourth lowest at 103.5 and 99.8 respectively.

Utilities were among the highest in the Boise City-Nampa MSA at 100.8, second only to San Jose, CA among the peer regions. It should be noted that even placing second highest the Boise City-Nampa MSA's utility costs are only 0.8 percent above the average MSA. San Jose, which maintains the highest overall utility costs of the peer MSA's was 128.1, or 28.1 percent above the MSA average.

Overall, Transportation and HealthCare costs are the biggest contributing factors to the potential increasing cost-of-living in the Boise City-Nampa MSA.

**Table 15. 2009 Cost of Living Indices**

Rankings	MSA Title	Groceries	Housing	Utilities	Transportation	HealthCare	Misc. Goods /Services	Composite
1	Colorado Springs, CO	96.2	92.4	84.3	95.0	105.0	91.2	92.5
2	Ft. Collins, CO	100.2	80.3	93.8	96.5	101.4	98.5	92.9
3	Spokane, WA	93.8	83.5	84.7	106.6	107.0	97.9	93.3
<b>4</b>	<b>Boise City-Nampa, ID</b>	<b>94.5</b>	<b>83.8</b>	<b>100.8</b>	<b>103.5</b>	<b>103.5</b>	<b>99.8</b>	<b>95.2</b>
5	Albuquerque, NM MSA	98.3	89.5	89.1	96.8	103.5	103.3	96.4
6	Salt Lake City, UT	104.8	106.9	71.1	99.9	96.1	102.0	100.2
7	Reno-Sparks, NV	107.4	112.8	97.2	108.9	105.8	101.5	106.2
8	Eugene-Springfield, OR	91.7	136.5	88.8	110.2	117.0	103.3	111.3
9	Sacramento--Arden-Arcade--Roseville, CA	116.1	139.0	99.8	115.5	109.5	101.9	116.2
10	Portland-Vancouver-Hillsboro, OR-WA	115.6	129.3	93.4	112.7	108.8	115.7	116.8
11	Boulder, CO	103.7	184.1	93.1	97.6	108.3	104.3	125.6
12	San Jose, CA	132.7	243.0	128.1	119.5	114.0	112.6	155.4

Source: America's Top-Rated Cities 2010, 17th edition, A Statistical Handbook, Grey House Publishing

<sup>1</sup>Data was unavailable for the following MSAs: Billings, MT, Coeur d'Alene, ID, Fresno, CA, Idaho Falls, ID, Kennewick-Pasco-Richland, WA, Provo-Orem, UT, Salem, OR, Santa Fe, NM, and Yakima, WA.

# Unemployment Rate

The unemployment rate is a commonly tracked indicator of the relative health of an area's economy. Higher unemployment rates are associated with weaker economies. The U.S. Bureau of the Census conducts a monthly survey of households called the Current Population Survey for the Bureau of Labor Statistics.

The unemployment rate is a function of the total labor force of an area. The labor force is comprised of the employed and unemployed. Dividing the number of unemployed by the total labor force and multiplying by 100 provides the unemployment rate.

The unemployment rate is a lagging indicator, meaning that its value is dependent on the events occurring within the economy from three to six months prior, even longer in some instances. Therefore, the value of the indicator is

best realized when comparing it longitudinally or as a point in time comparison amongst several geographies, as is done within this report.

Annual average unemployment rates are used to remove seasonality which occurs with the ebb and flow of demand for certain products or the weather conditions that constrain productivity. For example, most skiing facilities are unable to operate year-round and therefore hire and layoff a substantial number of workers at any given time. Without using monthly or quarterly seasonally adjustment data or taking the annual average seasonally unadjusted data, areas that have skiing facilities may show substantially higher or lower unemployment rates at certain times of the year when compared to those areas that do not have skiing facilities.



Help Wanted Sign  
Source: Microsoft Clip Art



# Unemployment Rate—2000, 2005, 2010

Between 2000 and 2005 the Boise City-Nampa MSA experienced a slight decline in the unemployment rate. In 2000, the annual average unemployment rate was 3.7 percent and in 2005 it was 3.4 percent. The Boise City-Nampa MSA was one of only six MSAs in this analysis that showed a decrease in unemployment rate from 2000 to 2005. The average change in unemployment that the MSA's in this analysis experienced in 2005 was a 20.5 percent increase from 2000.

The Boise City-Nampa MSA showed a significant increase in its unemployment rate in 2010 from 2005, nearly tripling from 3.4 percent to 9.6 percent. Only one other MSA experienced a larger relative increase in its unemployment rate - the Reno-Sparks, NV MSA, increasing by over 225 percent from 4.3 percent in 2005 to 14.1 percent in 2010.

The performance of the MSA's during the 2005 to 2010 time period appears largely in contrast with

their respective performance during the preceding five-year time period.

Looking at the 10-year change in the unemployment rate from 2000 to 2010, the Boise City-Nampa MSA appears slightly more stable when compared to the bulk of its peer MSA's than the area did during the 2005 to 2010 time period. The Boise City-Nampa MSA experienced a 161 percent increase in the unemployment rate from 2000 to 2010, growing by nearly 6 percent to attain a 2010 annual average unemployment rate of 9.6 percent.

Some of the lowest, although still large, percentage changes in unemployment rate between 2000 and 2010 occurred in Kennewick-Pasco-Richland, WA at 38 percent, Billings, MT at 35.4 percent, and Yakima, WA at 27.2 percent.

Table 16. Comparison of Unemployment Rates, 2000, 2005, 2010

Rankings	MSA Title	2000 Unemp. Rate	2005 Unemp. Rate	2010 Unemp. Rate	2000-2005 % Change in Unemployment Rate	2005-2010 % Change in Unemployment Rate	2000-2010 % Change in Unemployment Rate
1	Reno-Sparks, NV	3.7%	4.3%	14.1%	16.5%	227.9%	281.8%
2	San Jose, CA	3.2%	5.4%	11.3%	70.7%	108.6%	256.0%
3	Colorado Springs, CO	2.9%	5.4%	9.6%	83.7%	80.0%	230.7%
4	Ft. Collins, CO	2.5%	4.5%	7.4%	79.4%	66.6%	199.0%
5	Boulder, CO	2.4%	4.5%	7.1%	86.8%	58.1%	195.3%
6	Sacramento--Arden-Arcade--Roseville, CA	4.3%	4.9%	12.6%	14.9%	155.8%	193.9%
7	Provo-Orem, UT	3.0%	4.0%	7.8%	35.4%	94.5%	163.2%
<b>8</b>	<b>Boise City-Nampa, ID</b>	<b>3.7%</b>	<b>3.4%</b>	<b>9.6%</b>	<b>-8.0%</b>	<b>184.5%</b>	<b>161.8%</b>
9	Portland-Vancouver-Hillsboro, OR-WA	4.4%	5.9%	10.6%	32.1%	81.1%	139.2%
10	Salt Lake City, UT	3.2%	4.1%	7.5%	28.3%	82.0%	133.4%
11	Albuquerque, NM MSA	4.1%	4.9%	8.8%	18.2%	79.8%	112.4%
12	Idaho Falls, ID	3.4%	2.8%	7.1%	-17.4%	151.7%	107.9%
13	Eugene-Springfield, OR	5.4%	6.2%	11.1%	14.3%	80.6%	106.3%
14	Salem, OR	5.4%	6.3%	10.8%	17.7%	70.0%	100.1%
15	Santa Fe, NM	3.6%	4.1%	7.1%	14.1%	70.4%	94.4%
16	Spokane, WA	5.2%	5.6%	9.6%	9.2%	70.0%	85.7%
17	Coeur d'Alene, ID	6.2%	4.2%	11.0%	-33.0%	164.2%	77.1%
18	Fresno, CA	10.4%	9.0%	16.8%	-13.0%	85.6%	61.4%
19	Kennewick-Pasco-Richland, WA MSA	5.4%	6.1%	7.5%	11.0%	24.2%	38.0%
20	Billings, MT	4.1%	3.0%	5.6%	-27.7%	87.4%	35.4%
21	Yakima, WA	7.6%	7.4%	9.7%	-3.0%	31.1%	27.2%

Source: Bureau of Labor Statistics

## Section 2: Boise City-Nampa MSA Employment

Section 2 of the report contains detailed information on employment in the Boise City-Nampa MSA. Industries are determined by the North American Industry Classification System (NAICS) and grouped according to production process. Five levels of classifications are available using NAICS, with the broadest classification being the 2-digit industry sector. The most detailed NAICS classification is the 6-digit U.S. industry. In this report, the industry sector data (2 digit) and industry sub-sector (3-digit) data are analyzed.

Historical employment levels are provided for the Boise City-Nampa MSA industry sector for the years 1970 – 2010.

Additionally, location quotients were generated at the industry sector and industry subsector level for the years 2006 and 2010 to assess regional employment relative to the nation as a whole.

Finally, Shift-share analysis was performed at the industry sector and industry subsector levels between the years of 2006 and 2010 to isolate the competitive effect of the region.



Commercial Building  
Source: Microsoft Clip Art

# Boise City-Nampa MSA Employment—2 Digit Industry Sector

Employment in the Boise City-Nampa MSA has changed significantly over the last 40 years, growing from around 90,000 to over 350,000 jobs.

Retail Trade and Services is the fastest growing sector, increasing nearly five-fold from 40 years ago compared with a three-fold increase in total employment. Nearly 185,000 people held jobs in this industry in 2010.

Government and government enterprises account for the second largest employing industry, although its growth has been less than overall employment in 2010—meaning fewer workers are employed by the government relative to total employment in 2010 than 40 years ago.

Finance, Insurance, and Real Estate increased substantially over the last 40 years, especially over the last decade which realized an increase of over 12,000 more employees in this sector. This sector experienced the second highest percentage increase over the last four decades at 395 percent.

Wholesale Trade showed relatively slower growth when compared to total employment growth, adding 7,800 jobs and increasing by 175 percent since 1970.

Transportation and Public Utilities grew, although not as fast as total employment. This sector added nearly 11,000 jobs, increasing by 223 percent.

Manufacturing increased relatively slowly in the Boise City-Nampa MSA when compared to total employment and all other industry sectors,

adding just under 12,000 employees, or growing by 99.7 percent.

Construction experienced the third highest rate of growth, increasing by 311 percent and adding 15,600 jobs. This industry experienced a decline from 2000 to 2010, with peak employment occurring prior to the 2007 recession.

Agricultural Services, Forestry, Fishing, and Mining showed healthy growth, increasing by over 243 percent over the last 40 years, adding 3,200 jobs. While maintaining a relatively small level of overall employment, this industry is discussed further in terms of its value to the local economy in the succeeding sections of the report.

Farm employment was the only employing sector to experience a loss, declining by 18 percent, or losing 1,500 of its workers.

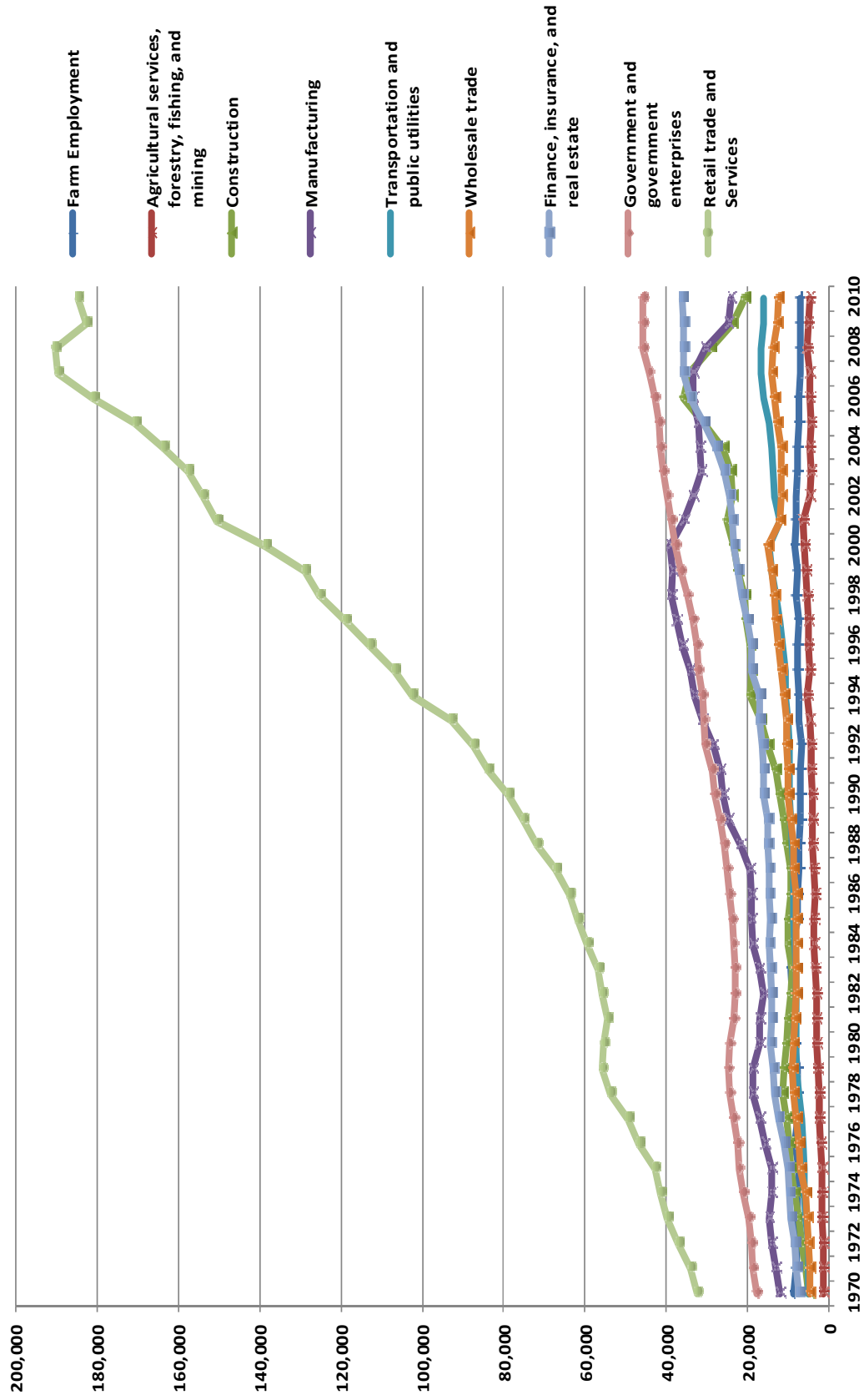
Figure 2 illustrates one industry employment trend between 1970 and 2010.



Job Seekers at Job Fair in Boise  
Source: stateimpact.npr.org

# Boise City-Nampa MSA Employment—2 Digit Industry Sector cont.

Figure 2. Employment by Industry, Idaho, 1970-2010



Source: Bureau of Economic Analysis, Total full and part-time employment by industry

# Location Quotient

The location quotient (LQ) is a measure that compares the relative concentration of an area's employment within a given industry to a larger geographic area, generally the nation's, as is the case in this analysis. Industries with a larger concentration of local employment than the nation's are considered to produce more than the local area consumes thereby exporting the remaining product outside the region.

An LQ below 1 indicates that the analysis area maintains a lower percentage of employment than you would see at the national level. An LQ equal to 1 indicates that employment is comparable to the national level, while an LQ greater than 1 indicates employment to be more highly concentrated in the analysis area relative to the nation as a whole.

LQs are often used to identify importing and exporting industries. Those industries with LQs between 0.75 and 1.25 are deemed to be self-sufficient, or produce as much as the area consumes. LQs below 0.75 are an indication of an importing industry, as the production by the industry in the area is likely insufficient to serve local consumption. In contrast, LQs over 1.25 are deemed to be area exporters, as the production by the industry likely exceeds local area consumption.

The benefits of LQ analysis increases with the more detailed industry information used. In this report, the industry sector data (2 digit) and industry sub-sector (3-digit) data are analyzed.



Agricultural Land for Sale in Nampa  
Source: realestatebook.com

# Location Quotient—2 Digit Industry Sector

The Boise MSA employment picture has undergone significant changes in the past several years.

Even at the most aggregated industry level - the industry sector - Agriculture, Forestry, Fishing and Hunting shows a significant concentration of employment in 2010. With a LQ of over 2 as seen in Table 17, this industry has twice the concentration of employment than the nation. This suggests this industry produces more than the area consumes, where the remainder is exported outside the region.

The next highest LQ is Administration and Support and Waste Management and Remediation Services industry at 1.39 in 2010. This industry comprises many of the establishment that provide temporary workers to employers on a contract or as-needed basis.

The only other industry with an LQ higher than the 1.25 threshold is Government at 1.26. The Boise City-Nampa MSA is home to the state capital, Boise, and thus employs many of the state

government workers relative to its size. In addition there is also an abundance of federal agencies located in the area which add to the government employment figure. While government services do not export a good outside the region, it does employ those that provide services which serve the entire state.

The lowest LQ occurs in Mining, Quarrying, and Oil and Gas Extraction at 0.13. The Boise City-Nampa MSA is reliant on the import of many raw materials produced within this industry. While this industry used to be predominant, especially throughout Boise County, employment in this sector has declined substantially over the decades.

The industry with the second lowest LQ at the industry sector level is Management of Companies and Enterprises at 0.60. Establishments in this industry are many times headquarters, which provide executive decision making for the larger firm or several firms. Employment in this industry has declined by 1,400, or 24 percent, from 2006 to 2010.

**Table 17. Boise City-Nampa MSA - Location Quotient - 2 Digit**

2-Digit Industry	2006	2010	2006-2010	2006 Location	2010 Location
	Employment	Employment	Net Change	Quotient	Quotient
11 - Agriculture, Forestry, Fishing and Hunting	5,238	5,474	236	1.87	2.01
56 - Administrative and Support and Waste Management and Remediation Services	24,913	24,557	-356	1.21	1.39
92 - Government	17,537	18,662	1,125	1.22	1.26
23 - Construction	30,321	18,030	-12,291	1.49	1.11
53 - Real Estate and Rental and Leasing	10,888	9,464	-1,425	1.20	1.10
44-45 - Retail Trade	36,790	34,576	-2,214	1.07	1.07
62 - Health Care and Social Assistance	34,211	39,983	5,772	0.93	1.03
42 - Wholesale Trade	12,581	11,643	-938	1.01	1.01
31-33 - Manufacturing	32,285	22,955	-9,330	1.12	0.99
52 - Finance and Insurance	11,982	11,321	-661	0.89	0.92
22 - Utilities	1,042	1,468	426	0.64	0.90
81 - Other Services (except Public Administration)	12,263	13,036	774	0.79	0.90
72 - Accommodation and Food Services	21,023	20,106	-917	0.92	0.89
54 - Professional, Scientific, and Technical Services	17,551	18,175	623	0.83	0.88
61 - Educational Services	19,611	21,587	1,976	0.80	0.87
71 - Arts, Entertainment, and Recreation	4,885	5,578	693	0.71	0.86
51 - Information	5,393	5,165	-229	0.77	0.83
48-49 - Transportation and Warehousing	9,569	9,635	66	0.76	0.82
55 - Management of Companies and Enterprises	5,760	4,361	-1,400	0.81	0.60
21 - Mining, Quarrying, and Oil and Gas Extraction	269	199	-70	0.19	0.13
99 - Unknown	15	16	1	0.03	0.05

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

## Location Quotient—3-Digit Industry Sub-sector

Looking at each industry in greater detail, or in this case the industry subsector, industries can be identified which may have been obscured within the broader 2-digit level of categorization.

Table 18 below provides the industry subsectors which maintain the LQs above 1.25 in 2010, or sure exporters of their respective products outside the region.

Many of the industry subsectors with LQs above 1.25 are not surprisingly those subsectors contained within their parent sector, such as 111-Crop Production, 112-Animal Production, and 115-Support Activities for Agriculture and Forestry, which are each a component of the 2-digit level sector 11 - Agriculture, Forestry, Fishing and Hunting.

The highest LQ for the industry subsector for 2010 was 924-Administration of Environmental Quality

Programs at 4.37 in 2010. The industry employs nearly 3,000 government workers in federal, state, and local government capacities. Employment has remained relatively stable since 2006, increasing only slightly by 16.

Other government industry subsectors with LQs above 1.25 and export services across the state include 926-Administration of Economic Programs and 923-Administration of Human Resource Programs at 1.71 and 1.65 respectively. These two government industry subsectors employ similar levels as 924-Administration of Environmental Quality Programs (924) at 2,000-3,000. In contrast to 924, these two industry subsectors each added over 200 employees from 2006 to 2010.

The industry subsector 334-Computer and Electronic Product Manufacturing maintains the second highest LQ at 4.09, which is just over four time the relative employment concentration of the

**Table 18. Boise City-Nampa MSA - Location Quotient (3 Digit)**

2010 Highest LQ	2006 Employment	2010 Employment	2006-2010 Net Change	2006 LQ	2010 LQ
924-Administration of Environmental Quality Programs	2,861	2,879	19	4.34	4.37
334-Computer and Electronic Product Manufacturing	14,876	9,024	-5,851	5.62	4.09
112-Animal Production	1,447	1,677	230	3.32	3.73
115-Support Activities for Agriculture and Forestry	1,645	1,644	-1	1.87	1.94
321-Wood Product Manufacturing	2,692	1,326	-1,366	2.30	1.82
111-Crop Production	1,862	1,898	36	1.71	1.80
451-Sporting Goods, Hobby, Book, and Music Stores	2,208	2,478	270	1.49	1.79
926-Administration of Economic Programs	2,355	2,559	204	1.93	1.71
923-Administration of Human Resource Programs	2,299	2,555	255	1.54	1.65
311-Food Manufacturing	4,326	4,760	434	1.43	1.63
454-Nonstore Retailers	3,027	3,836	808	1.25	1.51
561-Administrative and Support Services	24,388	23,953	-435	1.22	1.41
316-Leather and Allied Product Manufacturing	74	90	16	0.89	1.38
237-Heavy and Civil Engineering Construction	3,573	2,823	-750	1.47	1.35
442-Furniture and Home Furnishings Stores	1,735	1,218	-517	1.38	1.29

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

## Location Quotient—3-Digit Industry Sub-sector cont.

nation in this sector, and is known to export its products throughout the world. Employment has declined substantially from 2006 when nearly 15,000 people were employed in this industry, losing over 5,800 jobs, or 39 percent of its employment. By 2010, employment in this sector declined by over 9,000.

The industry subsector 112-Animal Production maintained the third highest LQ in 2010 at 3.73. This exporting industry added 230 jobs, or an increase of nearly 16 percent, from 2006 to 2010.

Other agricultural industry subsectors with LQs above 1.25 include 115-Support Activities for Agriculture and Forestry and 111-Crop Production at 1.94 and 1.80 respectively. Employment in both of these industries changed only slightly from 2006 to 2010, with 115-Support Activities for Agriculture and Forestry declining by 1 and 111-Crop Production increasing by 36. Despite the marginal shift in employment, the LQs in both of these industry subsectors increased, as the entire local economy lost employment more heavily in other sectors.

Manufacturing accounted for four of the 15 industry subsectors with LQs above 1.25. The industry subsectors include: 334-Computer and Electronic Product Manufacturing (mentioned

previously) with an LQ of 4.09, 321-Wood Product Manufacturing with an LQ of 1.82, 311-Food Manufacturing with an LQ of 1.63, and 316-Leather and Allied Product Manufacturing with an LQ of 1.38. While each of these industries is involved in manufacturing, their focus is substantially different. The processes required to manufacture computers are understandably different from that of wood products.

The other industry subsectors with LQs above 1.25 include: 451-Sporting Goods, Hobby, Book, and Music Stores with an LQ of 1.79, 454-Non-store Retailers with an LQ of 1.51, 561-Administrative and Support Services with an LQ of 1.41, 237-Heavy and Civil Engineering Construction with an LQ of 1.35, and 442-Furniture and Home Furnishings Stores with an LQ of 1.29.

See Appendix A for a listing of all industry subsector LQs.



Glenn Oakley (Photographer). Ann Morrison Park, Boise.  
Source: grovehotelboise.com



# Shift-Share

Shift-share analysis provides insight into an area's industries that may have a competitive advantage locally. This type of analysis provides useful information to decision makers and allows for a better understanding of an area's local competitiveness.

It is often too difficult to ascertain why employment for a particular industry shifted in a specific direction by looking at changes in employment from one year to another. Shift-share analysis attributes changes in employment to three factors: national economic growth, industry specific growth, and the growth occurring due to the competitive advantage of the region being analyzed. It is this third component, or the competitive advantage, that is the focus of this section.

As the nation's economy grows, it is reasonable to expect that employment within any industry would be positively influenced by this growth. As such, the percent of employment growth is applied to all industries to obtain the *national effect*.

Additionally, each industry will be influenced by its respective market for the goods that it produces. National growth trends may in fact be moving in the opposite direction of some industries. For example, employment in education and healthcare continued to increase during the last recession even though national employment declined as a whole substantially. This is called the *industry effect*.

Finally, each area will have employment trends which occur outside the effects of national and industry-specific changes. This remaining component of the data is considered the *competitive effect* or *local share*. For example,

despite national employment losses which occurred between 2006 and 2010 during the recession and industry specific losses which occurred in Administrative and Support and Waste Management and Remediation Services, which was adversely affected during the recession, the Boise City-Nampa MSA area only declined by 356 jobs. While still a loss, had employers operating in the Boise area experienced employment losses comparable to national and industry specific trends, the area would have declined by more than 2,900 jobs. Therefore, the employment within this industry in the Boise area was sheltered in part from the full effect of the recession, demonstrating the Boise City-Nampa MSA maintains a competitive advantage in the industry. See Table in Appendix A for more detailed information.

Shift-share analysis focuses on two points in time and therefore does have some limitations. Business cycles frequently occur at different times across the nation; the nation's business cycle is the average of all of the locales contained within one nation. Some geographic areas lag or lead a business cycle and Idaho has traditionally been a lagging geography when it comes to national business cycles. When the nation is in decline, it is possible for some areas to still be experiencing economic growth, as they have not yet realized the peak of their growth, let alone the likely decline that is to follow.

As a general rule of thumb, the most recent year is compared to 5 years prior, which has been done in this section. Although outcomes can be sensitive to the year chosen, the national, industry, and competitive effects are still useful in performing a comparative analysis within a specific geography, such as an MSA.

# Shift-Share—2 Digit Sector

Twelve of the 20 industry sectors maintained a positive competitive effect, ranging from 183 jobs in the Finance and Insurance industry sector to nearly 3,200 jobs in the Health Care and Social Assistance industry sector.

The healthcare sector performed strongly during the economic downturn and would have realized an employment increase even excluding the competitive advantage of the Boise City-Nampa MSA surrounding this industry. As noted above, the competitive advantage of this industry accounted for 3,200 new jobs created in the local economy. In total, employment in this industry increased by 5,772.

The Administrative and Support and Waste Management and Remediation Services industry sector also added nearly 3,000 jobs to payrolls between 2006 and 2010 due to the competitive advantage of the area. While it was not enough to offset the decline from the national and industry specific declines it did prevent the area from realizing an employment loss of nearly 3,300.

The industry Other Services, which includes establishments that provide laundry and dry cleaning services, automotive repair, and religious organizations to name a few, showed a competitive growth in employment of nearly 1,500. Similar to the Administrative and Support and Waste Management and Remediation Services

**Table 19. Boise City-Nampa MSA Shift-Share Analysis by 2-Digit Industry**

2-Digit Industry	2006 Employment	2010 Employment	2006-2010 Net Change	National Effect	Industry Mix	Competitive Effect
62 - Health Care and Social Assistance	34,211	39,983	5,772	-1,581	4,164	3,190
56 - Administrative and Support and Waste Management and Remediation Services	24,913	24,557	-356	-1,152	-2,106	2,902
81 - Other Services (except Public Administration)	12,263	13,036	774	-567	-129	1,469
61 - Educational Services	19,611	21,587	1,976	-907	1,424	1,458
71 - Arts, Entertainment, and Recreation	4,885	5,578	693	-226	29	889
54 - Professional, Scientific, and Technical Services	17,551	18,175	623	-811	559	875
48-49 - Transportation and Warehousing	9,569	9,635	66	-442	-142	651
22 - Utilities	1,042	1,468	426	-48	54	420
92 - Government	17,537	18,662	1,125	-811	1,579	357
11 - Agriculture, Forestry, Fishing and Hunting	5,238	5,474	236	-242	164	314
51 - Information	5,393	5,165	-229	-249	-261	281
52 - Finance and Insurance	11,982	11,321	-661	-554	-290	183
99 - Unknown	15	16	1	-1	-5	7
21 - Mining, Quarrying, and Oil and Gas Extraction	269	199	-70	-12	24	-81
42 - Wholesale Trade	12,581	11,643	-938	-582	-270	-86
44-45 - Retail Trade	36,790	34,576	-2,214	-1,701	-111	-402
72 - Accommodation and Food Services	21,023	20,106	-917	-972	885	-831
53 - Real Estate and Rental and Leasing	10,888	9,464	-1,425	-503	110	-1,032
55 - Management of Companies and Enterprises	5,760	4,361	-1,400	-266	491	-1,624
31-33 - Manufacturing	32,285	22,955	-9,330	-1,492	-4,371	-3,467
23 - Construction	30,321	18,030	-12,291	-1,402	-4,520	-6,369

Source: U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages; U.S. Census Bureau. Non-employer Statistics

## Shift-Share—2 Digit Sector cont.

industry, this industry would have realized a loss were it not for the competitive advantage of the Boise City-Nampa MSA surrounding this industry.

The Educational Services industry, which is comprised of schools, colleges, universities, and training centers was the only other industry sector to show a competitive effect on employment of more than 1,000. The industry across the nation between 2006 and 2010 accounted for an additional 1,424 jobs being created in the Boise City-Nampa MSA. In total, this industry added nearly 2,000 people to payrolls between 2006 and 2010, 1,458 due to the competitive advantage of the Boise City-Nampa MSA.

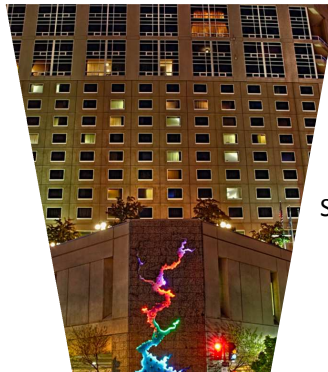
The industries which maintained the lowest competitive effect in the Boise City-Nampa MSA include Construction, Manufacturing, Management of Companies and Enterprises, and Real Estate and Rental and Leasing.

The competitive environment of the Boise City-Nampa MSA led to nearly 6,400 jobs being lost in addition to the 5,922 jobs lost due to changes at the national and industry levels. The competitive disadvantage in the Boise City-Nampa MSA during this time period effectively doubled the employment losses experienced and totaled 12,291.

The manufacturing industry was also affected by the competitive environment of the Boise City-Nampa MSA, which accounted for an additional 3,467 jobs lost in the Valley. Including the national and industry specific declines of 5,863, the area lost 9,330 jobs between 2006 and 2010.

The Management of Companies and Enterprises industry lost over 1,600 jobs between 2006 and 2010 due to the competitive disadvantage of the Boise City-Nampa MSA. Employment changes in the area would have been positive had the Boise City-Nampa MSA emulated the national and industry specific shifts that occurred during this time period. However, this was not the case and job losses totaled 1,400.

The Real Estate and Rental and Leasing industry sector was the only other industry sector to realize losses of more than 1,000 jobs due to the competitive disadvantage of the Boise City-Nampa MSA. Without the employment losses stemming from the competitive disadvantage of the area, employment would have declined by 393. Including all factors, however, employment declined by 1,425.



The Grove Hotel, Boise  
Source: [grovehotelboise.com](http://grovehotelboise.com)

# Shift Share—3-Digit Industry Sub-sector

The following subsection provides the five industry sub-sectors with the highest and lowest employment shifts occurring due to the competitive advantage of the Boise City-Nampa MSA.

The industry subsector with the largest net competitive effect was Administrative and Support Services (561). While the subsector ultimately lost more than 435 jobs in total between 2006 and 2010, the competitive effect of the Boise MSA resulted in nearly 3,000 jobs being saved. Without the competitive effect the Boise MSA would have lost a total of 3,337 jobs in this industry. The area's competitive advantage in this industry subsector likely stems from larger firms in the area, such as Micron and Hewlett Packard, which rely on temporary employment agencies to provide a portion of their labor, as well as the area's high concentration of call centers which enjoy low labor costs.

Hospitals (622) also performed strongly due to the competitive advantage of the Boise City-Nampa MSA. The competitive effect amounted to nearly 1,600 jobs added to employer payrolls over national and industry levels. Overall, this subsector grew by nearly 2,200 jobs. Without the competitive advantage of the Boise City-Nampa MSA, employment in this industry subsector would have increased by only 602 jobs between 2006 and 2010. Overall demand for hospital services is generally tied to the local population base. This is especially true for the part of the population aged 65 and older. Therefore, the competitive advantage in this industry subsector likely stemmed from the large increase in population which occurred between 2000 and 2010 of more than 40 percent, second only to Provo-Orem, UT of the peer regions. The area also experienced the highest population growth rate—more than 60 percent—between 2000 and 2010 for residents aged 65 and older.

**Table 20. Boise City-Nampa MSA Shift-Share (3 Digit), Highest and Lowest Competitive Effect**

3-Digit Industry	2006 Employment	2010 Employment	Employment Change 2006 - 2010	National Effect	Industry Mix	Competitive Effect
561-Administrative and Support Services	24,388	23,953	-435	-1,152	-2,185	2,902
622-Hospitals	10,408	12,599	2,191	-492	1,094	1,588
611-Educational Services	19,611	21,587	1,976	-926	1,444	1,458
621-Ambulatory Health Care Services	12,242	14,699	2,456	-578	1,723	1,311
812-Personal and Laundry Services	5,654	6,112	458	-267	-312	1,037

3-Digit Industry	2006 Employment	2010 Employment	Employment Change 2006 - 2010	National Effect	Industry Mix	Competitive Effect
238-Specialty Trade Contractors	20,590	11,554	-9,036	-972	-3,046	-5,017
334-Computer and Electronic Product Manufacturing	14,876	9,024	-5,851	-702	-1,629	-3,520
551-Management of Companies and Enterprises	5,760	4,361	-1,400	-272	496	-1,624
236-Construction of Buildings	6,159	3,654	-2,505	-291	-1,103	-1,111
531-Real Estate	9,454	8,411	-1,044	-446	366	-963

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

Source: U.S. Census Bureau; College of Western Idaho

## Shift Share—3-Digit Industry Sub-sector cont.

The industry subsector Educational Services (611) added more than 1,400 jobs to its payrolls due to the competitive advantage of the Boise City-Nampa MSA. While employment would still have been positive during the 2006 to 2010 time period, employment increases would have been much smaller at 518. A portion of the competitive advantage in this industry subsector may stem from the addition of the College of Western Idaho, which first opened its doors to students in January of 2008.

The competitive advantage of the Ambulatory Health Care Services (621) industry subsector induced more than twice the amount of employment required to offset the employment losses stemming from the declining national economy. Overall, the industry was a strong performer across the nation. However, were it not for the competitive advantage of the Boise City-Nampa MSA, employment growth would have been closer to 1,100; not the 2,456 realized in the Valley. The competitive advantage of this industry subsector is likely similar to that of the industry subsector Hospitals (622) noted earlier and tied to the rapid increase in population which occurred between 2005 and 2010.

Personal and Laundry Services (812) was the industry subsector that maintained the fifth largest employment growth due to the competitive advantage of the Boise City-Nampa MSA. More than 1,000 jobs were added and were partially offset by the declining national economy and industry subsector in general. The result was an industry subsector employment growth of nearly 500 jobs. The competitive advantage in Personal and Laundry Services may in part stem from demand from area hospitals and similar facilities which outsource this aspect of operations.

The five industry subsectors in the area with the largest loss in employment stemming from the area's competitive disadvantage of the Boise City-Nampa MSA are Specialty Trade Contractors, Computer and Electronic Product Manufacturing, Management of Companies and Enterprises, Construction of Buildings, and Real Estate.

The Specialty Trade Contractors (238) industry subsector lost more than 5,000 jobs due to the area's competitive disadvantage between 2006 and 2010. Had the Boise City-Nampa MSA experienced solely the losses stemming from the national and industry effects, job losses would have been less than half of what was experienced in the area, or 4,019. The unstable housing market, which was especially active in the Boise City-Nampa MSA leading up to the recession, left a significant loss in demand for these jobs.

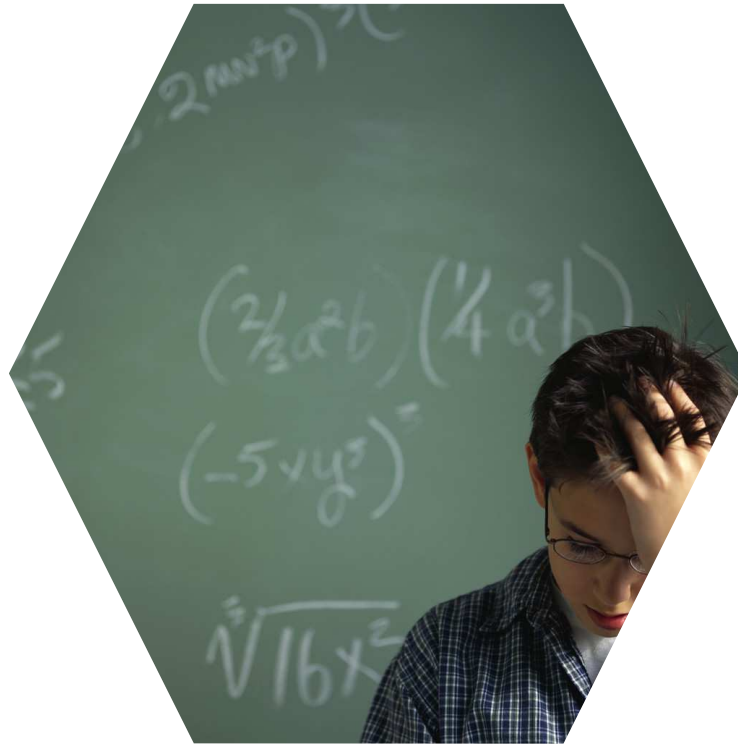
The only other industry subsector with more than 3,000 jobs lost due to the competitive disadvantage of the Boise City-Nampa MSA was Computer and Electronic Product Manufacturing (334). This industry includes the employment of Micron Technology, which experienced a series of layoffs during this time period. In total, employment losses suffered in this industry subsector amounted to 5,851.

Management of Companies and Enterprises (551) also showed large losses due to the competitive disadvantage of the Boise City-Nampa MSA, losing more than 1,500 jobs. The national effect for this industry subsector resulted in a loss of 272 jobs, while the industry-specific performance across the nation provided a boost to employment of nearly 500. Overall, however, the industry in the Boise City-Nampa MSA lost 1,400 jobs between 2006 and 2010.

## Shift Share—3-Digit Industry Sub-sector cont.

The Construction of Buildings (236) industry subsector was the only other industry subsector to lose more than 1,000 jobs due to the competitive disadvantage of the Boise City-Nampa MSA. The losses stemming from the competitive disadvantage almost doubled what would have occurred in the Valley had it emulated national and industry specific shifts. In total, the industry subsector lost just over 2,500 jobs between 2006 and 2010. The competitive disadvantage in this industry subsector stems from the economic downturn, where the Boise City-Nampa MSA experienced rapid investment and corresponding employment increases and thus rapid decline in both investment and employment.

The Real Estate (531) industry subsector lost 963 jobs due to the local effects of the Boise City-Nampa MSA. Losses excluding the competitive disadvantage would have been marginal at 81. Including the local effect, however, equates to losses of 1,044. The competitive disadvantage, as with Specialty Trade Contractors (238) and Construction of Buildings (236), is related to the heavy investment in residential and commercial real estate in the area, where the bursting of the housing bubble disproportionately affected this industry, even more so in the Boise City Nampa MSA.



Boy Studying Math  
Source: Microsoft Clip Art

## Section 3: Industry Sector Analysis

Section 3 of the report utilizes the employment data from section 2, specifically the LQ and shift-share components. This information is coupled with data from focus groups and interviews of local economic developers, chambers of commerce, and businesses to better understand our industry strengths and weaknesses in the region.

The industry sector analysis conducted for this report specifically focuses on categorizing each industry sector and sub-sector using past and current employment to determine which areas maintain high concentrations of employment and have operated competitively between 2006 and 2010.

Industries at the 2 and 3-digit NAICS levels have been placed into one of four categories—Transforming, Growing, Emerging, or Declining—and determined from the quadrant method discussed in more detail within this section.

While the categorization was initially based on the quadrant method, a series of focus groups and interviews were conducted with economic developers, local chambers of commerce, and businesses to vet the quantitative findings with details and experiences from professionals working in the various industries.

Following the focus groups and prior to the conduction of interviews, brief industry histories

were generated and vetted with the interviewees from the respective industry to determine accuracy of the history. The industry histories are created to provide context and are not exhaustive. These industry histories can be found in Appendix B.



Business People Going Over Notes  
Source: Microsoft Clip Art

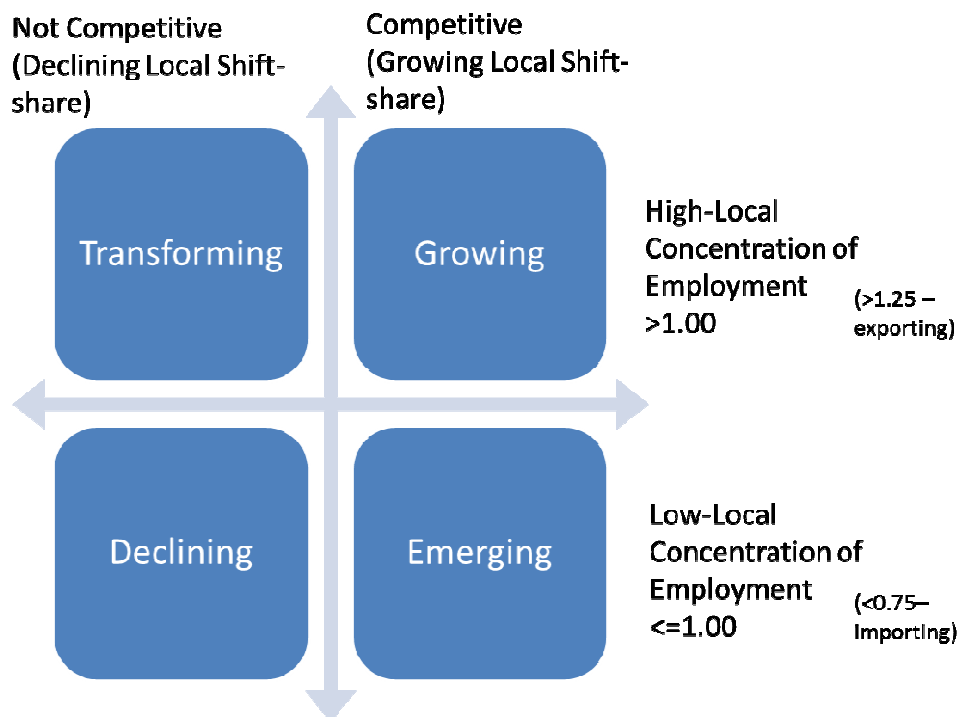
# Quadrant Method

The quadrant method is a relatively simple concept which categorizes industries by using 2 metrics—LQ and shift share analysis. The quadrant separates the industries vertically by whether the respective industry maintained a positive or negative employment number in the shift-share component. The quadrant separates the industries horizontally by LQ, with those industries maintaining a LQ less than or equal to 1 on the bottom half and those maintaining a LQ greater than 1 on the top half (See Figure 3 Below).

This allows each industry sector to be categorized into one of four areas: Transforming, Growing, Emerging, and Declining. Transforming industry sectors have a high concentration of employment

when compared to the nation, but are experiencing a declining competitive position within the national context. Growing industry sectors are those that have both a high concentration of employment and a higher growth than when compared to the nation. Emerging sectors maintain a low concentration of employment compared to the nation but have experienced gains in employment higher than would be expected when the national economy and national industry sector performance are taken into account. Finally, declining industry sectors have an overall lower concentration of employment when compared to the nation and a declining competitive position within the local economy.

Figure 3. Quadrant Method





# Quadrant Method—2-Digit NAICS

Table 21 below applies the quadrant method to the 2-digit industry sectors. Starting from the upper-left and moving clockwise, the transforming industries, which are those that maintain high concentrations of employment relative to the nation but have experienced losses in employment due to a competitive disadvantage, include Construction, Real Estate and Rental and Leasing, Retail Trade, and Wholesale Trade. Growing industries, which are those that maintain both higher concentrations and positive growth stemming from the competitive nature of the Boise City-Nampa MSA, include Agriculture, Forestry, Fishing and Hunting, Administrative and Support and Waste Management and Remediation Services, Public Administration, and Health Care and Social Assistance. The Emerging industries, which are industries with a low concentration of employment compared to the nation but have experienced gains in employment higher than would be expected when accounting for the national economy and industry-specific occurrences, include Other Services (except Public Administration), Educational Services, Arts, Entertainment, and Recreation, Professional,

Scientific, and Technical Services, Transportation and Warehousing, Utilities, Information, and Finance and Insurance. The Declining industries are those that maintain both low concentrations of employment compared to the nation and are competitively disadvantaged and include Manufacturing, Management of Companies and Enterprises, Accommodation and Food Services, and Mining, Quarrying, and Oil and Gas Extraction.

Only three industries are identified as exporters at the 2-Digit level—Agriculture, Forestry, Fishing and Hunting, Administrative and Support and Waste Management and Remediation Services, and Public Administration.

Only two industries are identified as importers at the 2-Digit level—Management of Companies and Enterprises and Mining, Quarrying, and Oil and Gas Extraction.

As with the shift-share and LQ analyses, disaggregated industry information assists with identifying those industry subsectors obscured by their parent industry.

Table 21. QUADRANT - 2 DIGIT NAICS, Boise City-Nampa MSA, 2006-2010

Transforming Industries				Growing Industries			
2-Digit Industry Title	Competitive Effect	2010 LQ		2-Digit Industry Title	Competitive Effect	2010 LQ	
23 - Construction	-6,369	1.11		11 - Agriculture, Forestry, Fishing and Hunting	314	2.01	
53 - Real Estate and Rental and Leasing	-1,032	1.10		56 - Administrative and Support and Waste Management and Remediation Services	2,902	1.39	
44-45 - Retail Trade	-402	1.07		92 - Public Administration	357	1.26	
42 - Wholesale Trade	-86	1.01		62 - Health Care and Social Assistance	3,190	1.03	
Declining Industries				Emerging Industries			
3-Digit Industry Title	Competitive Effect	2010 LQ		3-Digit Industry Title	Competitive Effect	2010 LQ	
31-33 - Manufacturing	-3,467	0.99		81 - Other Services (except Public Administration)	1,469	0.90	
55 - Management of Companies and Enterprises	-1,624	0.60		61 - Educational Services	1,458	0.87	
72 - Accommodation and Food Services	-831	0.89		71 - Arts, Entertainment, and Recreation	889	0.86	
21 - Mining, Quarrying, and Oil and Gas Extraction	-81	0.13		54 - Professional, Scientific, and Technical Services	875	0.88	
				48-49 - Transportation and Warehousing	651	0.82	
				22 - Utilities	420	0.90	
				51 - Information	281	0.83	
				52 - Finance and Insurance	183	0.92	

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

# Quadrant Method—3-Digit NAICS—Transforming

Due to the number of industries and corresponding size of the table with all four quadrants, the following subsection of the report provides each quadrant separately. The full 3-digit quadrant table can be found in the Appendix of this report.

Table 22 below provides the industry subsectors that are deemed to be transforming upon application of the quadrant method. As noted earlier, the industries contained within this quadrant maintain relatively large concentrations of employment, but experienced losses in employment due to the competitive disadvantage of the Boise City-Nampa MSA.

Nonetheless, six industries in this quadrant maintain a LQ in 2010 high enough to be considered exporting industries—Administration of Environmental Quality Programs, Computer and Electronic Product Manufacturing, Wood Product

Manufacturing, Administration of Economic Programs, Heavy and Civil Engineering Construction, and Furniture and Home Furnishings Stores.

Administration of Environmental Quality Programs and Computer and Electronic Product Manufacturing maintain the highest concentration of those industries deemed to be exporting, each with over four times the amount of employment you would expect to find if we emulated national employment patterns.

The industries most impacted in net employment changes stemming from the Boise City-Nampa MSAs competitive disadvantage include Specialty Trade Contractors with a loss of 5,017 jobs, Computer and Electronic Product Manufacturing reduced by 3,520 jobs, and Management of Companies and Enterprises with a decline of 1,624 jobs between 2006 and 2010.

**Table 22. Quadrant - 3 Digit NAICS, Boise City-Nampa MSA, 2006-2010 - Transforming**

Transforming Industries	Three Digit Title	Competitive Effect	2010 LQ
	924-Administration of Environmental Quality Programs	-15	4.37
	334-Computer and Electronic Product Manufacturing	-3,520	4.09
	321-Wood Product Manufacturing	-374	1.82
	926-Administration of Economic Programs	-356	1.71
	237-Heavy and Civil Engineering Construction	-273	1.35
	442-Furniture and Home Furnishings Stores	-104	1.29
	453-Miscellaneous Store Retailers	-15	1.23
	443-Electronics and Appliance Stores	-292	1.19
	551-Management of Companies and Enterprises	-1,624	1.18
	441-Motor Vehicle and Parts Dealers	-53	1.15
	444-Building Material and Garden Equipment and Supplies Dealers	-734	1.14
	531-Real Estate	-963	1.12
	238-Specialty Trade Contractors	-5,017	1.10
	515-Broadcasting (except Internet)	-49	1.06
	423-Wholesale Trade, Durable Goods	-302	1.05
	452-General Merchandise Stores - (stores which sell a variety of merchandise)	-320	1.04
	524-Insurance Carriers and Related Activities	-10	1.02

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

# Quadrant Method—3-Digit NAICS—Growing

Table 23 provides the industry subsectors that are deemed to be Growing Base industries upon application of the quadrant method. As noted earlier, the industries contained within this quadrant maintain relatively large concentrations of employment and have experienced gains in employment due to the competitive advantage of the Boise City-Nampa MSA.

Nine industries maintain a LQ in 2010 high enough to be considered exporting industries—Animal Production, Support Activities for Agriculture and Forestry, Crop Production, Sporting Goods, Hobby, Book, and Music Stores, Administration of Human Resource Programs, Food Manufacturing, Non-store Retailers, Administrative and Support Services, and Leather and Allied Product

Manufacturing.

Animal Production maintains the highest concentration of those industries deemed to be exporting, with nearly four times the amount of employment you would expect to find if we emulated national employment patterns. All other exporting industries in this quadrant have a LQ less than 2.0.

The industries most impacted in net employment changes stemming from the Boise City-Nampa MSAs competitive advantage include Administrative and Support Services with 2,902 more jobs, Hospitals with 1,588 jobs added, and Ambulatory Health Care Services with job increases of 1,311 between 2006 and 2010.

**Table 23. Quadrant - 3 Digit NAICS, Boise City-Nampa MSA, 2006-2010 - Growing Base**

<b>Growing Industries</b>			
	<b>Three Digit Title</b>	<b>Competitive Effect</b>	<b>2010 LQ</b>
112-Animal Production		166	3.73
115-Support Activities for Agriculture and Forestry		42	1.94
111-Crop Production		76	1.80
451-Sporting Goods, Hobby, Book, and Music Stores		388	1.79
923-Administration of Human Resource Programs		148	1.65
311-Food Manufacturing		541	1.63
454-Nonstore Retailers - (newspapers, online retailers, door-to-door, etc.)		621	1.51
561-Administrative and Support Services		2,902	1.41
316-Leather and Allied Product Manufacturing		32	1.38
921-Executive, Legislative, and Other General Government Support		447	1.19
519-Other Information Services - (news syndicates, libraries, web search portals, etc)		284	1.13
925-Administration of Housing Programs, Urban Planning, and Community Development		42	1.12
624-Social Assistance		335	1.11
622-Hospitals		1,588	1.07
621-Ambulatory Health Care Services		1,311	1.06
484-Truck Transportation		56	1.04
447-Gasoline Stations		413	1.03
811-Repair and Maintenance		50	1.01
424-Wholesale Trade, Nondurable Goods		347	1.00

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

# Quadrant Method—3-Digit NAICS—Emerging

Table 24 provides the industry subsectors that are deemed to be Emerging upon application of the quadrant method. As noted earlier, the industries contained within this quadrant maintain relatively low concentrations of employment, but have experienced gains in employment due to the competitive advantage of the Boise City-Nampa MSA.

By definition, none of the industries in this quadrant are exporters, although if they continue to make gains due to the competitive advantage of the Boise City-Nampa MSA they could be in the future.

Educational Services and Personal and Laundry Services top the list of those with the highest net change in employment stemming from the

competitive advantage of the Boise City-Nampa MSA with a gain of 1,458 and 1,037 jobs respectively. Others, such as Professional, Scientific, and Technical Services and Performing Arts, Spectator Sports, and Related Industries show high changes as well at 875 and 732 respectively. Each of these four industries maintains a LQ between 0.75 and 1.25 and therefore is assumed to sufficiently provide for local consumption, but is not yet in the realm of exporting their goods or services.

Some importing industries in this quadrant include Apparel Manufacturing, Chemical Manufacturing, Electrical Equipment, Appliance, and Component Manufacturing, and Textile Mills.

**Table 24. Quadrant - 3 Digit NAICS, Boise City-Nampa MSA, 2006-2010 - Emerging**

Emerging Industries	Three Digit Title	Competitive Effect	2010 LQ
611-Educational Services		1,458	0.86
812-Personal and Laundry Services		1,037	0.92
541-Professional, Scientific, and Technical Services		875	0.87
711-Performing Arts, Spectator Sports, and Related Industries		732	0.90
221-Utilities		420	0.89
813-Religious, Grantmaking, Civic, Professional, and Similar Organizations		350	0.91
448-Clothing and Clothing Accessories Stores		271	0.88
493-Warehousing and Storage		256	0.68
485-Transit and Ground Passenger Transportation		246	0.85
488-Support Activities for Transportation		224	0.56
523-Securities, Commodity Contracts, and Other Financial Investments and Related Activities		208	0.69
814-Private Households - (households which employ cooks, gardeners, maintenance workers, etc.)		194	0.34
312-Beverage and Tobacco Product Manufacturing - (includes both alcoholic and non-alcoholic beverages)		125	0.76
713-Amusement, Gambling, and Recreation Industries		120	0.86
446-Health and Personal Care Stores		118	0.69
491-Postal Service - (National Post Office and its subcontractors)		110	0.83
517-Telecommunications		97	0.78
518-ISP's, Search Portals, and Data Processing		97	0.75
332-Fabricated Metal Product Manufacturing		94	0.56
315-Apparel Manufacturing		72	0.53
562-Waste Management and Remediation Services		69	0.74
325-Chemical Manufacturing		64	0.14
335-Electrical Equipment, Appliance, and Component Manufacturing		59	0.17
322-Paper Manufacturing		54	0.26
313-Textile Mills		27	0.22
928-National Security and International Affairs		24	0.87
323-Printing and Related Support Activities		23	0.62
487-Scenic and Sightseeing Transportation		9	0.41
522-Credit Intermediation and Related Activities		5	0.91
483-Water Transportation		4	0.05
712-Museums, Historical Sites, and Similar Institutions		3	0.45

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

## Quadrant Method—3-Digit NAICS—Declining

Table 25 below provides the industry subsectors that are deemed to be Declining upon application of the quadrant method. As noted earlier, the industries contained within this quadrant maintain relatively small concentrations of employment and have experienced losses in employment due to the competitive advantage of the Boise City-Nampa MSA.

By definition, none of the industries in this quadrant are exporters. Several are importers, such as Support Activities for Mining, Air

Transportation, Forestry and Logging, and Machinery Manufacturing to name a few.

The industries most impacted in net employment changes stemming from the Boise City-Nampa MSAs competitive disadvantage include Construction of Buildings with 1,111 fewer jobs, Food Services and Drinking Places with 563 less jobs, and Food and Beverage Stores with a 446 reduction in jobs between 2006 and 2010.

**Table 25. Quadrant - 3 Digit NAICS, Boise City-Nampa MSA, 2006-2010 - Declining**

Declining Industries		
Three Digit Title	Competitive Effect	2010 LQ
236-Construction of Buildings	-1,111	0.97
722-Food Services and Drinking Places	-563	0.96
445-Food and Beverage Stores	-446	0.73
721-Accommodation	-317	0.49
336-Transportation Equipment Manufacturing	-274	0.54
337-Furniture and Related Product Manufacturing	-264	0.53
333-Machinery Manufacturing	-259	0.42
425-Electronic Markets and Agents and Brokers	-132	0.78
481-Air Transportation	-120	0.55
492-Couriers and Messengers	-114	0.84
532-Rental and Leasing Services	-96	0.88
511-Publishing Industries	-77	0.85
212-Mining (except Oil and Gas)	-75	0.31
339-Miscellaneous Manufacturing	-72	0.69
512-Motion Picture and Sound Recording Industries	-50	0.54
623-Nursing and Residential Care Facilities	-48	0.72
326-Plastics and Rubber Products Manufacturing	-48	0.24
533-Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	-39	0.11
113-Forestry and Logging	-37	0.64
486-Pipeline Transportation	-37	0.00
327-Nonmetallic Mineral Product Manufacturing	-24	0.66
922-Justice, Public Order, and Safety Activities	-20	0.58
525-Funds, Trusts, and Other Financial Vehicles	-20	0.27
331-Primary Metal Manufacturing	-13	0.06
314-Textile Product Mills	-8	0.21
213-Support Activities for Mining	-1	0.07
211-Oil and Gas Extraction	0	0.00
521-Monetary Authorities - Central Bank	0	0.00
927-Space Research and Technology	0	0.00

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

# Focus Groups

Focus groups were conducted in Boise, Idaho. Participants included economic development professionals, representatives from local chambers of commerce, and members of several industries in the region from the transforming and growing industry quadrants including Agriculture, Administrative and Support Services, and Computer and Electronic Product Manufacturing. Two focus groups were conducted with economic development and chamber professionals together and the remaining focus groups were conducted by industry sector netting a total five focus groups. The goal was to examine the commonalities and differences in the focus group responses to begin to understand the strengths and weaknesses in the regional economy overall and which may apply to specific industries. When members of specific industries were present they were asked to tailor responses to their respective industries. The focus group participation was not exhaustive in terms of number and kind of industries represented in the region, but a sufficient sample was undertaken to provide a greater understanding of some of the factors affecting the regional economy.

## *Focus Group Questions*

- In reviewing the quadrants do you agree with the classifications for Transforming, Declining, Growing, and Emerging Industries? Are there any missing industries in any of the quadrants that you feel are of particular importance for the region?
- What makes the Boise area competitive for the growing and emerging industries listed in the quadrants?
- What makes the Boise area attractive to expand or locate business operations?
- Are their industries not representative in the region that could be?
- How does knowledge transfer occur in the workplace? Across businesses? Across industries?
- Is there anything we have not asked you about the regional economy that you think would be important for us to know as we work to align workforce needs and education in the region?

## *Focus Group Findings*

The fact that the most current employment data available for analysis is from 2010 was highlighted for the participants and one of the reasons we indicated we needed their help to be sure the data reflected the current reality of our region. In this section we provide general findings from the focus group and in Table 26 a comparison of thematic responses by economic development and chamber professionals are placed beside those of industry-specific professionals.

All of the focus groups indicated the industries appeared to be in the correct quadrant at the 2-digit NAICS code level given their experience. At the 3-digit NAICS code level, discrepancies and highlights surfaced and are noted in Table 26. When asked about the factors that make Boise a

## Focus Groups cont.

competitive region several themes emerged including the higher education institutions that reside within Boise, a lack of bureaucratic hurdles, low cost of doing business, utilities, and access to peers and leadership in town, quality of life, cost of living, ease of mobility around town, and that the area is friendly and safe. Some threats to the competitive advantage of the region were also noted such as population growth, encroachment on agricultural land, air transportation, public transportation options needing improvement, and lack of medium size companies represented in the region. In the agricultural sector specifically, a labor shortage and declining work ethic were noted. For manufacturing, a lack of buildings for

lease as the industry recovers was a concern. As expected, as seen in Table 26 on the following page, we found the economic development and chamber professional responses were bigger picture in nature than those of any one specific industry. That said, there were similarities in terms of the importance of higher education institutions, university and business partnerships in order to assure a prepared workforce, quality of life, low cost of living, low cost of doing business, and the need to recruit specific types of business. Concerns that both economic development specialist and industry professional participants shared included a lack of air and public transportation connectivity.



Business People Meeting at Work Engaging in a Business Discussion  
Source: Microsoft Clip Art

# Focus Groups cont.

**Table 26: Comparison of Thematic Responses by Economic Development and Chamber Professionals and Industry Specific Professionals**

Question	Economic Development and Chamber Professionals	Industry Specific Professionals
<p><i>Reflections on discrepancies and highlights of the Growing and Emerging industries</i></p>	<p><b>Transforming</b> – Engineering, Specialty trade contractors</p> <p><b>Growing</b> – Healthcare, Education, Wineries, Recreational Technologies, Agricultural related industries</p> <p><b>Emerging</b> – Health food stores and thrift stores</p> <p><b>Declining</b> – Nursing homes are not declining and restaurants are on the rise</p>	<p><b>Transforming</b> - Wood manufacturing affected by regulation and lack of supply of raw materials, industries in this quadrant are not fading</p> <p><b>Growing</b> – Trucking is fundamental to agriculture, seed production, leather and manufacturing may be overstated, online retailing, recreational technology firms, computer repair and management, and technical network services</p> <p><b>Emerging</b> – warehousing, food processing, fertilizer, tractors and implements driven by agriculture, shared-services, assembly for the made in the USA sticker</p>
<p><i>Factors that make Boise a competitive region</i></p>	<p>Geography, infrastructure, and history for agriculture, entrepreneurial workforce derived from larger employers, quality of life, Boise State University, and College of Western Idaho, Government accessibility, clusters of similar industries, low cost of doing business</p>	<p>Recreational activities, cost of living, partnerships with universities, Boise State University, friendly community, little traffic, safe (real and perceived), people don't want to leave once they get here</p>
<p><i>Industries that could be represented in our region but are not</i></p>	<p>Finance, recreational technologies, web and software development, green technology, high-tech manufacturing (e.g., medical equipment)</p>	<p>Meat slaughtering and processing, value added crops, tech companies and start-ups, creative services in marketing and design, medium sized companies</p>
<p><i>Means of knowledge transfer</i></p>	<p>Chambers of commerce, industry sector partnerships, professional associations, informal meetings, social media, industry associations, incubators, on-line information gathering</p>	<p>Personal experience, professional associations, vendors and suppliers, professional forums, video conferencing with peers, research organizations</p>
<p><i>Other matters important for education and workforce or the regional economy</i></p>	<p>Connect high school students to the workforce, focus on STEM, recruit companies to help diversify the economy, declining air transportation availability, capacity and responsiveness of education to private sector needs, transportation in terms of mobility and connectivity</p>	<p>Climate is stable, interstate air transportation is problematic, public transportation across metro is not normalized, better secondary education we are low on the totem pole, convention center important for entertainment and transportation and downtown, university should be aggressive in building partnerships with business, policies that target bringing in specific industries as opposed to we are open for business to come in general</p>



# Interviews

Following the focus groups, interviews were conducted with businesses from some of the industries noted in each of the four quadrants. The interviews provide an opportunity to learn firsthand information about the advantages for certain businesses located in the Boise region, what barriers they face, what are their workforce needs, networking and collaborations, and what are their opportunities for growth in the region. Prior to commencing the interviews we asked most of the interviewees to give their assessment of our brief industry history as well as to check the appropriateness of the placement of their industry in the particular segments of the quadrant. We adjusted our histories accordingly as needed and noted any discrepancies with their industry's placement (see Appendix B for a full list of industry sector histories). One value-added item we learned in the process was the sectors in the "emerging" segment of the quadrant did not consider their business to be "emerging" in the classical sense of the word in terms of being entrepreneurial or budding. Rather, interviewees in this segment of the quadrant saw their businesses as responsive to the population base and growth of that population base. As such, perhaps a better description of these industries would be *responsive* industries, as they tend to be industries that provide services such as utilities, transit and ground passenger transportation, education, and performing arts and spectator sports, to name a few. One exception is the

businesses in the Professional, Scientific and Technical services industries which range from software manufacturing to civil engineering and architectural firms.

Given the time constraint, it was not possible to conduct interviews with representatives from all industries listed in each segment of the quadrant at the 3-digit NAICS level; however, key industries and businesses within those industries were sampled. We looked for diversity in employment size and location within the region when selecting businesses for interviews. Only about half the industries contacted permitted us an interview. In the end, we achieved a cross-sample of industries within each group and made every attempt to get more than one business from each industry. Although the sample is not scientifically representative of all of the businesses in the region, it does provide a snapshot of the several industries and few businesses within those industries. The data is sufficient to glean insight into some of the strengths and weaknesses in the regional economy as well as get a sense of some of the occupation and skill needs within the specific industries interviewed. It should be noted that our introduction cannot be construed as a comprehensive understanding of the occupation and skill needs for the region. The occupations and skills mentioned here are clearly a reflection of the specific business and industries that participated in the interview portion of the study. As such, the information is provided as context for

# Interviews cont.

understanding some of the economic strengths and weaknesses in our region. Additional survey research reported in another component of the four-part report provides much greater detail on occupation and skill needs in the Boise-Nampa region.

## Interview Questions:

- Company Background: What are the company’s product lines? What is the company’s specialty in the Boise-Nampa MSA? Where are the non Boise-Nampa MSA facilities located?
- Location decision: How long has the company been located in the Boise-Nampa MSA? Why is it located in here? Is the company planning to expand locally? Are there any barriers to expansion? What competitive advantages does the Boise-Nampa region offer?
- Industry sector relationships: Who are the customer industries, and where are they located? Has the customer base changed over time? Is being near customers important? Who are the supplier industries, and where are they located? Has the supplier base changed over time? Is being near suppliers important?
- Industry sector networking and possibilities for collaborative action: Does the company interact with other firms in the industry? Does the company belong to trade associations or other organizations? Does the company have relationships with local universities? Is the company interested in collaboration? What can be done to encourage more collaboration? On what can companies in the industry collaborate?
- Requirement’s for industry sector growth: Several questions were asked on workforce issues. What are the major occupations categories in the company? Which ones are growing? What skills are important? Are important skills missing in the Boise – Nampa region? What other regional assets could be required for growth such as research based, transportation infrastructure, telecommunications, access to capital, regulatory climate and amenities?
- Opportunities for growth: What is the future for the industry in the Boise-Nampa region? What are the effects of global changes? What is the impact of technology?

**Table 27. Industry Sectors Drawn from for Interviews by Quadrant**

Transforming	Growing
<ul style="list-style-type: none"> <li>● Computer and Electronic Manufacturing</li> <li>● Heavy and Civil Engineering Construction</li> <li>● Wood Product Manufacturing</li> <li>● Furniture and Home Furnishings</li> </ul>	<ul style="list-style-type: none"> <li>● Administrative and Support Services</li> <li>● Agriculture and Food Processing</li> <li>● Sporting Goods, Hobby, Book, and Music Stores</li> </ul>
Declining	Emerging
<ul style="list-style-type: none"> <li>● Transportation Equipment Manufacturing</li> <li>● Furniture and Related Product Manufacturing</li> <li>● Machinery Manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>● Personal and Laundry Services</li> <li>● Utilities</li> <li>● Performing Arts, Spectator Sports, and Related Industries</li> <li>● Professional, Scientific and Technical Services</li> </ul>

# Interview Findings

The following is a summary of the findings across all industry sectors from where interviews were conducted.

## *Location Decision*

Most of the businesses indicated the original founder lived in the area, wanted to live in the area or the company was a spin-off of an existing business in the area. Customer base was important for some businesses, but the founders' personal preference for the area seemed to be a larger driver in their decision to locate here. Lack of local talent was a drawback among growing, transforming and declining industries. The emerging industries reported a greater number of barriers or uncertainties in doing business in the region, but as noted previously, emerging industries, unlike their categorical name are actually not leading industries but rather following industries driven primarily by the demand created by a larger population base for their products or services. Emerging industries were less directly affected by the economy than transforming industries. Across all industry categorizations quality of life and cost of living were considered regional assets and followed closely by the importance of competitive wages. Some sectors note the location to regional amenities as important for both their business and employment stability.

## *Barriers to Expansion and Competitive Advantage of Region*

The most frequent barrier to expansion was the ability to find the local qualified employees needed for the job. There were several frequently listed advantages to the region including, cost of doing business, quality of life and cost of living.

## *Networking and collaboration*

In general most businesses belong to either a chamber or an association in their industry. Competition between suppliers or other like-businesses thwarted collaboration many times. In some cases the interviews indicated they would collaborate or would network if they knew of opportunities to do so. Education or more communication about collaboration and networking opportunities by industry sector is deemed valuable. Larger companies seemed to have more access and involvement in networking, in general. At least one business in each of the quadrants reported lobbying groups as an association they collaborated within their industry.

## *Collaboration with area Colleges and Universities*

Most but not all businesses reported collaborating with area universities sometimes formally with internships or extensions programs but more often in ad hoc ways or informally.

## Interview Findings cont.

### *What is Needed to Encourage Collaboration with Colleges and Universities?*

When interviewees were asked what could be done to encourage collaboration with area colleges and universities for several it was not clear how that might work or what it would look like. Other interviewees expressed better communication about opportunities from both business and colleges and universities. Interviewees seemed open to the idea of collaboration with area colleges and universities and the way it could be mutually beneficial, even if they were not sure how it might take form with their own business.

### *Occupations and Skills*

Engineering, trades, and customer service were some of the more frequently noted growing occupations among the interviewees. Frequently mentioned important skills included work ethic, communication, ability to work with technology, math, writing, people skills, and mechanical ability. Important skills that were identified as missing more frequently than others were manufacturing professionals (e.g., line flow, machine efficiency, industrial engineering), communication, ability to use technology, wood working, trades, and other trade skills. Work ethic was a missing skill mentioned by businesses using or needing

tradesman or craftsman. It should also be noted that in several interviews the good work ethic of Boise residents was noted as a regional strength.

### *Regional Assets Needed*

Sixty-one percent or 11 of the 19 businesses asked about the regional assets needed for their growth indicated air and/or regional passenger transportation as necessary. All but one business in the growth industries indicated this and nearly half of the emerging category of business and more than half of the businesses in the declining quadrant while only one of the two businesses were asked this question in the transforming segment. The second more frequently indicated asset needed was qualified workers.

### *Future for the Industry in Boise*

Almost unanimously, industries across all categorization thought the future looked good for their industry. Businesses in the transforming and declining segments were more likely to make a bright future in the region contingent on the region having a workforce with the skills they need.

# Interview Findings cont.

**Table 28. Interview Findings by Quadrant**

Question	Growing (n = 5)	Emerging (n = 9)	Transforming (n = 4)	Declining (n = 3)
<b>Accuracy of Business Classification</b>	Businesses reported their classification correct with some indicating they were re-emerging, doing great; or that the industry is growing over all but harder for local business as national competition comes in town; or industry is growing in terms of getting higher yields but not employment	Most of these business indicated they are not a leading indicator but rather responsive to the needs of the population, economy, or home building	All agree they are appropriately placed in the transforming group	Businesses indicated the classification was correct for 2010 but all of these businesses also reported being in an upswing
<b>Location Decision</b>	Competitor moved to Idaho in another part of the state; owner liked Boise; close to customers; good fit with the community; location of Boise	Initial business served a niche, location within the region; founder(s) lived here; population base or size of city; quality of life	Local family company; working on a particular project in Boise and then company expanded to Boise	Local family company and wanted to live here; spin off from other local family company
<b>Barriers to Expansion</b>	Hard to find local employees with technical expertise; national competition; competition for same employees	Availability of technical talent; financial resources; competitors; regulations; citizens; competition uncertainty about the economy; healthcare and taxes; slim return on investment; infrastructure to conduct business	Finding talent; capital costs; lack of activity in housing market	Finding employees; location is distant from customers; none
<b>Competitive Advantages to being in Boise</b>	Entrepreneurial region and other startups here, easy access to outdoors; recreational infrastructure; quality of life; cost of living; competitive wages for high quality friendly individuals	Location in the west; quality of life and good quality to attract business; current growing economic environment; regulation not onerous; cost of living, great work ethic; location to natural resources; lack of competition; customer base	Quality of life and cost of living; largest MSA in the state	Low cost of doing business; wages are competitive; quality of life that provides stability in the workforce; energy rates; insurance rates except for medical; good work ethic
<b>Networking and Collaboration</b>	Not much but an awareness about what there is to collaborate on might be helpful; Yes but limited by competition; if there was an association in my field I would; partner with larger firms for big projects; lobbying groups	Competition is fierce so collaboration is difficult; collaborate when jobs require it; with agencies we work with; collaborate with some but not other competitors; collaborate with all of our peers; lobbying groups	Share trench information, buying cooperatives; industry associations; with competitors that are suppliers but not all competitors; CEO roundtable. lobbying groups	More so in the past; with competitors that are suppliers but not all competitors; lobbying groups; several expressed concern with working with competition

# Interview Findings cont.

Question	Growing (n = 5)	Emerging (n = 9)	Transforming (n = 4)	Declining (n = 3)
<b>Collaboration with Area Colleges and Universities</b>	Regularly interact with U of I Architecture and BSU engineering; U of I; BSU and ISU through TechHelp Program; College of Idaho; have interactions but nothing formal; BSU and U of I agricultural extension office; no; volunteer or give our time to the university	career fairs and internships; NNU; Yes, very strong; no	summer internships; formal relationships; some relations overtime but nothing ongoing; BSU, U o I , CWI, high schools and grade schools too; no	Not a tremendous about a few things like this; had an apprenticeship program with BSU was discontinued 3 years ago, discussing starting it up with CWI again; BSU continuing education program through the Center for Professional Development; internships; advisory board for a college
<b>What is need to Encourage Collaboration with area Universities and Colleges?</b>	Better communication to find mutual interest; educate people on what it takes to get our product to market; awareness on what is out there for collaboration to take place	Would not oppose it but don't know how it would apply to us; would like to see internships but it is pretty expensive, we should reach out; communication to universities as much as they reach out to use; need to the possibilities and what the universities are capable of offering; not sure what it might look like	Regular communication, we do not sit far from BSU but we don't know what is going on there; It is a two way street, its educating us on what under the hood of the degrees that are being offered so that we can help share industry experience into the formal education process; not sure how that would come about or what that would look like. Maybe a source of expertise and way to get better	The ball is in our court we have to weigh what we can do versus the financial aspects. Sometimes with timelines and dues date we don't think about it and it is hard to nail it out and give to the kids to do when you have to focus on getting it done. We are trying and will probably result in more projects to give to the seniors
<b>Growing Occupations</b>	Customer service agents and their supervisors and managers; food safety; mechanical engineering with a focus on energy	Four out of the eight business indicated they were staffed as needed; customer service; mechanical, management; clerical; computer science	Carpenters and skilled mechanics for shop; software engineers; design engineers; electrical engineers; soil scientists; geologists; civil, structure and mechanical engineers; GIS, multi-media; 3D rendering; marketing; construction inspectors; landscape architecture; and real estate service professionals	Design and tradesman and tradesman are the toughest ones to find of the two; tool cutter grinders
<b>Important Skills</b>	Positive attitude; work ethic; out of box thinking; willingness to learn and improve and accept feedback; relate to others; sales; customer service skills; mechanics; communication	Communication skills to communication with people individually and in a group in writing and orally; customer service, IT skills (computers and electronics, GPS); reading and writing; general people skills; business acumen and being open-minded willing to wear a lot of hats-versatility; customer service; ability to work with a variety of technologies; mechanical, management, and clerical skill; basic education skills in the job category; technical skills for development and testing	Math and communications; software engineers; for engineers to know how to write	Good work ethic; welder; mechanics that understand safety and quality improvements; business acumen; mathematics; computer technology; machinery

# Interview Findings cont.

Question	Growing (n = 5)	Emerging (n = 9)	Transforming (n = 4)	Declining (n =3)
<b>Important Skills Missing in Area</b>	Younger generation lacks social skills; work ethic and positive attitude; have sense of entitlement; manufacturing professionals (e.g., line flow; machine efficiency; industrial engineering, engineering specialist in energy related new technology	Customer service; computer science; business and marketing focused on sports and professional entertainment talent	Software engineers; high quality structure and civil engineering	Wood working; craft skills; manufacturing engineering; machinery; math skills need improvement; meeting management skills; decision making; engineers with business budget and financial view of things
<b>Regional Assets needed for growth</b>	Airport transportation; passenger or transit transportation between Nampa and Boise, including better transportation infrastructure so people can work a system from Nampa, Caldwell Meridian to Boise; Good stream of qualified employees	Dramatically improve the overall transportation infrastructure in the Treasure Valley; favorable regulatory climate; capital; strong airport and hospitality sector; technical support need to act quickly when resources are available	Air transportation; incentive to work on taxes; state and federal funding to contract projects	Air transportation in and out of Boise; transportation such as transit in the region; manpower such as welders
<b>Future of your industry in the region</b>	One the region can count on; good but we do not know what the future holds; there will be growth in the west of the region because we cannot go east	Optimistic; positive; continue growing; will be necessary to adapt to new products and markets.	Good because difficult to outsource or replace by technology; Boise unique in our industry because people want to live here so large firms will stay or firms will consolidate to regional firms; not so bright because of state and federal funding drives our business; bright because cost of living, cost of doing business and taxes provided we make sure we are training our workforce in the right areas (e.g., engineering, math and science)	Good if we can continue to get manpower; anticipate growth in next 15-20 years provided we have some big players terms of in employment in the region.

# Summary of Focus Groups and Interview Findings

In summary, both the focus groups and interviews highlight low cost of doing business, access to peers and leadership in town, quality of life and cost of living, as strengths for the region. Air transportation and passenger transportation options in the region were identified as needing improvement for the growth of businesses by more than half of the interviewees. In the agricultural sector, in particular, labor shortages were noted. There also was reported demand for carpenters and other craftsmen and tradesmen along with engineers of all types and persons adept with machinery. Good customer service, math, and communication skills were also commonly noted as important skills needed among the businesses. In most sectors, other than agriculture and the trades, the regions work ethic was considered a strength. Items of importance from both the focus groups and interviews included university and business partnerships in order to assure a prepared workforce, quality of life, low cost of living, and low cost of doing business. The importance of a quality education at the high school level and earlier was also noted in both the focus groups and interviews.

The interviews highlighted that the business founders' personal preference for the area seemed to be a biggest driver for locating in the region. Additionally proximity to regional amenities such as outdoor recreation was seen as important for

both their business and employment stability.

The most frequent barriers to business growth or expansion was the ability to find the local qualified employees needed for the job and the most often cited needed regional assets for growth were air and passenger ground transportation.

Education or more communication about the way business and education can collaborate and more information on opportunities for industries by thier sector to network were identified as valuable. Interviewees were not always clear about the way business and college or university partnerships might work but overall they did express a desire to collaborate. They also indicated better communication about opportunities from both the business as well as colleges and universities would be advantageous.

Engineering, trades, and customer service were some of the more frequently noted growing occupations among the interviewees.

Finally, there was nearly unanimous agreement across all categories of industry that the future looked good for their industry in the region. Businesses in the transforming and declining segments of the quadrant were more likely to make their prognosis of a bright future in the region contingent on being able to find qualified talent.



# Conclusion and Recommendations

The demographic and socio-economic comparative analysis shows that the Boise City-Nampa MSA remained one of the most vital regions among the 21 western United States MSAs. Rapid population growth in this region has spurred sustainable economic vitality for the past 40 years. The Great Recession brought some disruption to the economic growth, with an unemployment rate of 9.7 percent in 2010. However, over the past decade, this region experienced net growth--the number of households increased 42.4 percent; the median home value increased 47 percent. In summary, relative to peer regions the Boise-Nampa MSA is higher than most of the peer regions in terms of the percentage change in population growth and percentage of people in the working and retiring age groups. The Boise-Nampa MSA is in the last quarter of the peer regions on educational attainment in general and the last third on secondary educational attainment and median income. The fact that the Boise-Nampa MSA maintains a relatively low cost of living and has the median value for housing opportunity of the regions helps to alleviate the burden of being in the last quarter for household income among the peer regions.

The Boise City-Nampa MSA employment analysis included Location Quotient and Shift-share measurements. The Location Quotient measurement suggested that the following 3-digit industry subsectors (see Table 29) have maintained employment levels significantly higher than the national average in 2010 from 1.35 to 4.37 times more employment. These subsectors include:

Administration of Environmental Quality Programs; Computer and Electronic Manufacturing; Animal Production; Support Activities for Agricultural and Forestry; Crop Production; Wood Product Manufacturing; Administration of Economic Programs; Heavy and Civil Engineering Construction; Sporting Goods, Hobby, Book and Music Stores; Administration of Human Resources; Food Manufacturing; Non-store Retailers (e.g., On-line Retailers); and Administrative and Support Services.

The region has a significant competitive advantage in several sub-sectors (see Table 30) in terms of number employed above and beyond the national and industry standards by at least 420 employees. Significant sub-sectors include: Administrative and Support Services; Hospitals; Ambulatory Health Care Services; Educational Services; Personal and Laundry Services; Professional Scientific and Technical Services; Performing Arts, Spectator Sports and Related Industries; Non-Store Retailers; Food Manufacturing; Executive, Legislative, and Other General Government Support; and Utilities. One reason these sectors are important is that they have a higher concentration of employees with educational attainment beyond high school.

A further analysis of the Boise City-Nampa MSA industry sectors grouped industries (at the 2 and 3-digit NAICS levels) into four quadrants—Transforming, Growing, Emerging, or Declining. Using focus groups drawn from organizations in each of these quadrants it was possible to verify that their industries appear to be classified

## Conclusion and Recommendations cont.

correctly. From focus group comments the industries appeared to be in the correct quadrant at the 2-digit NAICS code level. There were a few previously noted comments on some sub-sectors at the 3-digit level classification.

From the focus groups and interviews, several factors were identified that make Boise a competitive region, such as the higher education institutions that reside in Boise, a lack of bureaucratic hurdles in terms of regulations specific to particular industries, low cost of doing business, access to peers and leadership in town, quality of life, cost of living, easy to get around town, and that the area is friendly and safe. Some threats to the competitive advantage of the regions were noted such as insufficient air transportation and regional public transportation. As noted in both the focus groups and interviews, the most frequently mentioned barrier to business growth or expansion was the ability to find the local qualified employees needed for the job.

In terms of occupations, engineering, trades, and customer service were some of the more frequently noted growing occupations among the interviewees. The most frequently mentioned skills of importance included: communication; ability to work with technology; math; writing; people skills; and mechanical ability. Work ethic was an important attitude or behavior mentioned. Important skills that were identified as missing more frequently than others were manufacturing

professionals (e.g., line flow, machine efficiency, industrial engineering), communication, computer science, wood working, trades, and math. Employers in focus groups and interviews mentioned these skills and behaviors but more detail about needed skills and behaviors can be found in Part II and Part III of this study.

Most but not all businesses reported some collaboration with local universities. When interviewees were asked what could be done to encourage collaboration with area colleges and universities, some expressed better communication about opportunities from both the businesses and colleges/universities. Interviewees seemed to be open to the idea of collaboration with area colleges and universities and believed it could be mutually beneficial.

### *Recommendations*

There are several industry sectors that have employment which is significantly larger than what one would expect compared to the nation. These industries along with the ones that demonstrate a competitive regional advantage will likely influence the type and number of employees needed in the region more than other subsectors. Employment in these industry sub-sectors should be monitored for emerging needs as they are likely to be the sectors where more jobs and growth will occur in the future. Table 29 outlines these industry

## Conclusion and Recommendations cont.

subsectors and provides example occupations and degrees that may be needed to meet continued workforce needs in these industries.

As described in the Table 29 and 30 there is a wide range of qualified workforce expertise needed that spans mixed education ( i.e., high school with specialized skills/training/certificates) to associate, bachelor and more advanced degrees. There are two important factors that should be kept in mind. First, although the shortages of software engineers should receive our attention, employers with this need will also likely have other employment requirements such as accountants, personnel management, and front desk personnel. A focus on meeting all their needs, not just those areas with shortages, is critical. Second, the work of any one industry is inter-related with other industries and therefore a multitude of occupations. The food processing cluster maps displayed in Figure A1 and Figure A2 in Appendix A illustrates the inter-relatedness of industries within a cluster with examples of two food processing analyses: frozen potato processing and dairy processing. Looking at the “Specialized Community Infrastructure” in both of these food processing scenarios it is easy to see the vast array of industry sectors and occupations needed to support the food processing sector. Industry sub-sectors such as utilities for irrigation networks and power, education services for training, the heavy and civil engineering involved in road networks, water and waste handling that draws from the administration of human services

where specialized knowledge provided by food, soil and environmental scientists are some examples.

The tables highlight a variety of employment opportunities that industries may need. Yet, without coupling specific data on current employment by occupation and employer projected needs it is difficult to predict the demand for specific fields or occupations. Nonetheless, based on the secondary data provided in this report it would be prudent to monitor the kind of companies that come to the Boise-Nampa MSA and how they fit with the current workforce demands to project future workforce needs. This is one area that will be within the Department of Labor, Department of Commerce, city chambers of commerce, and economic development professionals’ sphere of influence. Knowledge of these companies workforce needs can help higher education institutions focus attention and resources on providing the education and skills to meet current and future workforce needs. Conversations about specific workforce needs across these industries would go a long way to helping educational institutions to identify new degree programs or specializations, or to improve the way existing programs should grow to ensure there is the local qualified pool of talent necessary to meet regional employment needs now and into the future.

The findings also suggest local universities are well

## Conclusion and Recommendations cont.

poised to help nurture and grow the local talent needed across the region by assuring students obtain and realize they are learning skills such as decision making and critical thinking that are needed for problem solving in their jobs, and beyond the technical knowledge of any particular field. At the same time, businesses may find advertising positions by the skills needed rather than a particular degree or the typical occupation title could render larger pools of qualified applicants for their workforce needs. In turn, as institutions of higher education teach skills such as critical thinking in a way that students realize their value across situations and businesses focus more on skills when recruiting employment applicants it may be possible for both educational institutions and employers to net a larger pool of qualified people to meet regional workforce needs.

Certain occupations such as those in the crafts and trades could be emphasized at the local education

level but it may also be wise to consider that wages in some of these occupations in our region may be significantly lower than other regions. This may result in the local talent having moved away, but that could also mean talent would be attracted back if it was more profitable for the workforce to do so.

Finally, conversations and actions that lead to new and continued collaboration between businesses and local education institutions may go a long way to further the goals and workforce needs for the entire region. These connections might be realized with internships at businesses, but also through local industry representatives serving on higher education institutions' advisory boards, industry professionals helping to provide feedback on current and future curriculum developments, and even having government, business, and technical professionals in the classroom.



"Your Career" Sign  
Source: Microsoft Clip Art

# Conclusion and Recommendations cont.

**Table 29. Boise – Nampa MSA Industry Sub-sectors with Significant Employment above National Employment Average**

Industry Sub-sector	Examples of the Types of Educational/Occupational Skills	Examples of Level of Education Required	2010 Employment Numbers Beyond National Expectations	2010 Location Quotient
<b>Administration of Environmental Quality Programs</b>	Soil, Air and Water Scientist; Public Administrators; Planners; Game Wardens; Meteorologist; Administrative Support Staff	BA, MA, PhD	2,221	4.37
<b>Computer and Electronic Manufacturing</b>	Engineers; Manufacturing Professionals; Administrative Support Staff	BA, MA	6,819	4.09
<b>Animal Production</b>	Ranchers; Biologists; Financial Professionals; Veterinarians; Truck Transportation	Mixed Education, BA, MA, Doctor of Veterinary medicine	1,228	3.73
<b>Support Activities for Agricultural and Forestry</b>	Forest Managers; Farm Management Services; Dust Croppers; Vineyard Cultivation Services	Mixed Education, Pilot Licenses, BA, MA	796	1.94
<b>Wood Product Manufacturing</b>	Manufacturing Professionals; Tradesmen; Truck Transportation; Mechanical ability	Mixed Education BA, MA	597	1.82
<b>Crop Production</b>	Farmers; Farm Labor; Truck Transportation; Soil Scientists	Mixed Education, BA, MA	844	1.80
<b>Sporting Goods, Hobby, Book and Music Stores</b>	Marketing Professionals; Retail Management; Customer Service/Sales	Mixed Education, BA, MA	1,095	1.79

## Conclusion and Recommendations cont.

Industry Sub-sector	Examples of the Types of Educational/Occupational Skills	Examples of Level of Education Required	2010 Employment Numbers Beyond National Expectations	2010 Location Quotient
<b>Administration of Economic Programs</b>	Economists; Public Administrators; Statisticians; Trade Commissioners; Tourism Professionals; Planners; Business Professionals; Arts and Culture Program Administrators; Communications, Utility, Banking, Health, Insurance Regulatory and Licensing	Mixed Education, BA, MA, PhD	2,559	1.71
<b>Administration of Human Resources</b>	Social Service Professional, Statisticians, Education certification professionals; Environmental and Public Health Professionals, Public Administrators	Mixed Education, BA, MA, PhD	2,555	1.65
<b>Food Manufacturing</b>	Manufacturing Professionals; Food Safety Inspectors; Food Scientists; Mechanical ability; Machinists; Data Analysts; Business Systems	Mixed Education, BA, MA	4,760	1.63
<b>Non-store Retailers (e.g., On-line Retailers)</b>	Webpage Developers; Graphic designers; Sales/Customer Service; Marketing Professionals; Vending Machine Operators; Delivery Drivers	Mixed Education, BA, MA	3,836	1.51
<b>Administrative and Support Services</b>	Medical; Hotel, Office management services; Government Base and Correctional Facilities Operations; Call Centers; Security Services; Janitorial; Landscaping; Packaging and Labeling	Mixed Education, BA, MA,	23,953	1.41
<b>Heavy and Civil Engineering</b>	Mechanics; Engineering; Planners; Administrative Support Staff	BA, MA	2,823	1.35

# Conclusion and Recommendations cont.

Table 30. Boise - Nampa MSA Industry Sub-sectors with Regional Competitive Advantage of 420 Employees or More

Industry Sub-sector	Examples of the Types of Educational/Occupational Skills*	Examples of Level of Education Required	2010 Employment	2006 - 2010 Competitive Effect in terms of Change in Employment Beyond National and/or Industry Expectations
<b>Administrative and Support Services</b>	Medical; Hotel, Office management services; Government Base and Correctional Facilities Operations; Call Centers; Security Services; Janitorial; Landscaping; Packaging and Labeling	Mixed Education, BA, MA,	23,953	2,902
<b>Hospitals</b>	Medical Professionals; Pharmacist; Administrative Support Staff; Accounting; Customer Service	Mixed Education, BA, MA, Doctor of Medicine / Pharmacy	12,599	1,588
<b>Educational Services</b>	Teachers; Professors; Human Resources; Financial Aid Personnel; Coaches; Counselors; Food Services; Passenger Transportation	Mixed Education, BA, MA, PhD, Doctor of Medicine	21,587	1,488
<b>Ambulatory Health Care Services</b>	Ambulance Drivers; Medical Professionals; Dispatchers; Health Clinics and Center Staff	Mixed Education, BA, MA	14,699	1,311
<b>Personal and Laundry Services</b>	Drying Cleaning Professionals; Cosmetologists; Masseuses; Funeral Services;	Mixed Education, BA, MA	6,112	1,037
<b>Professional, Scientific, and Technical Services</b>	Software Engineers; Lawyers; Legal Services Professional; Drafting; Building Inspectors; Environmental Consulting; Advertising and Public Relations; Veterinary Services	BA, MA, PhD, Doctor of Veterinarian Medicine	18,175	875
<b>Performing Arts, Spectator Sports and Related Industries</b>	Artists; Musicians; Athletes; Marketing Professionals; Agents and Managers; Promoters	Mixed Education, BA, MA	2,270	732
<b>Nonstore Retailers</b>	Webpage Developers; Graphic designers; Sales/Customer Service; Marketing Professionals; Vending Machine Sales	Mixed Education, BA, MA	3,836	621
<b>Food Manufacturing</b>	Manufacturing Professionals; Food Safety Inspectors; Mechanical Ability; Machinists	Mixed Education, BA, MA	4,760	541
<b>Executive, Legislative, and Other General Government Support</b>	Public Administrators; Lawyers; Researchers; Administrative Support Staff; Purchasing and Supply Professionals; Auditors	BA, MA, PhD	7,248	447
<b>Utilities</b>	Engineers; Real Estate Professionals; Customer Service; Meter Readers; Marketing Professionals;	Mixed Education, BA, MA	1,468	420

# **Appendix A: Shift-share example, 3-digit Location Quotient, Shift-share, and Quadrant Tables, and Food Processing Cluster Maps**



# Appendix A: Shift-share Example

**Table A1. Example of Shift-Share Provided in Report**

3-Digit Industry	2006 Employment	2010 Employment	Employment Change 2006 - 2010	National Effect	Industry Mix	Competitive Effect
56 - Administrative and Support and Waste Management	24,913	24,557	-356	-1,152	-2,106	2,902

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

Shift share analysis disaggregates employment changes and apportions the change to three factors—the national, industry, and competitive effects. Industry employment in As noted in the subsection of this report on shift-share analysis, the industry above shows the Administrative and Support and Waste Management industry experienced a decline in employment between 2006 and 2010 of slightly more than 300 jobs. During that timeframe, the nation was experiencing the worst recession since the Great Depression. The national recession affected employment negatively by 1,152 jobs. The Administrative and Support and Waste Management industry specifically experienced losses across the nation beyond what occurred

across all industries together. This affected employment at the local level negatively by 2,106 jobs. The competitive effect is the difference between the national and industry effects and locally experienced job losses. If the Boise city-Nampa MSA experienced job losses in the Administrative and Support and Waste Management industry simply emulating national and industry specific declines, local area job losses would have been 3,258. However, losses were only a fraction of this amount at 356 jobs lost. Therefore, the local area showed some competitive advantage relative the rest of the nation in this industry which amounted to more than 2,902 jobs being saved.

# Appendix A:

## Location Quotient - 3-Digit Industry Sub-sector Table

**Table A2. Boise City-Nampa MSA Location Quotients by 3-Digit Industry**

3-Digit Industry	2006 Employment	2010 Employment	2006-2010 Net Change	2006 LQ	2010 LQ
924-Administration of Environmental Quality Programs	2,861	2,879	19	4.34	4.37
334-Computer and Electronic Product Manufacturing	14,876	9,024	-5,851	5.62	4.09
112-Animal Production	1,447	1,677	230	3.32	3.73
115-Support Activities for Agriculture and Forestry	1,645	1,644	-1	1.87	1.94
321-Wood Product Manufacturing	2,692	1,326	-1,366	2.30	1.82
111-Crop Production	1,862	1,898	36	1.71	1.80
451-Sporting Goods, Hobby, Book, and Music Stores	2,208	2,478	270	1.49	1.79
926-Administration of Economic Programs	2,355	2,559	204	1.93	1.71
923-Administration of Human Resource Programs	2,299	2,555	255	1.54	1.65
311-Food Manufacturing	4,326	4,760	434	1.43	1.63
454-Nonstore Retailers	3,027	3,836	808	1.25	1.51
561-Administrative and Support Services	24,388	23,953	-435	1.22	1.41
316-Leather and Allied Product Manufacturing	74	90	16	0.89	1.38
237-Heavy and Civil Engineering Construction	3,573	2,823	-750	1.47	1.35
442-Furniture and Home Furnishings Stores	1,735	1,218	-517	1.38	1.29
453-Miscellaneous Store Retailers	2,840	2,628	-212	1.22	1.23
443-Electronics and Appliance Stores	1,693	1,255	-438	1.45	1.19
921-Executive, Legislative, and Other General Government Support	6,833	7,248	416	1.10	1.19
551-Management of Companies and Enterprises	5,760	4,361	-1,400	1.60	1.18
441-Motor Vehicle and Parts Dealers	4,814	4,074	-739	1.16	1.15
444-Building Material and Garden Equipment and Supplies Dealers	3,926	2,661	-1,265	1.44	1.14
519-Other Information Services	340	723	383	0.68	1.13
531-Real Estate	9,454	8,411	-1,044	1.24	1.12
925-Administration of Housing Programs, Urban Planning, and Community Development	170	198	28	0.87	1.12
624-Social Assistance	7,006	7,836	830	1.05	1.11
238-Specialty Trade Contractors	20,590	11,554	-9,036	1.56	1.10
622-Hospitals	10,408	12,599	2,191	0.92	1.07
621-Ambulatory Health Care Services	12,242	14,699	2,456	0.96	1.06
515-Broadcasting (except Internet)	783	659	-124	1.12	1.06
423-Wholesale Trade, Durable Goods	7,164	6,109	-1,055	1.09	1.05
484-Truck Transportation	3,904	3,691	-214	1.01	1.04
452-General Merchandise Stores	6,569	6,337	-233	1.08	1.04
447-Gasoline Stations	1,358	1,704	345	0.77	1.03
524-Insurance Carriers and Related Activities	5,213	4,986	-227	1.01	1.02
811-Repair and Maintenance	3,975	3,721	-254	0.99	1.01
424-Wholesale Trade, Nondurable Goods	3,978	4,169	191	0.91	1.00
236-Construction of Buildings	6,159	3,654	-2,505	1.25	0.97
722-Food Services and Drinking Places	18,820	18,293	-527	0.97	0.96
812-Personal and Laundry Services	5,654	6,112	458	0.76	0.92
522-Credit Intermediation and Related Activities	5,402	4,775	-626	0.90	0.91
813-Religious, Grantmaking, Civic, Professional, and Similar Organizations	2,443	2,768	325	0.78	0.91
711-Performing Arts, Spectator Sports, and Related Industries	1,717	2,270	553	0.60	0.90
221-Utilities	1,042	1,468	426	0.63	0.89
532-Rental and Leasing Services	1,379	1,035	-343	0.95	0.88
448-Clothing and Clothing Accessories Stores	2,490	2,597	107	0.77	0.88
541-Professional, Scientific, and Technical Services	17,551	18,175	623	0.82	0.87
928-National Security and International Affairs	902	1,026	124	0.84	0.87
611-Educational Services	19,611	21,587	1,976	0.79	0.86
713-Amusement, Gambling, and Recreation Industries	2,977	3,094	117	0.81	0.86
485-Transit and Ground Passenger Transportation	1,188	1,452	264	0.70	0.85

## Appendix A:

### Location Quotient - 3-Digit Industry Sub-sector Table cont.

3-Digit Industry	2006 Employment	2010 Employment	2006-2010 Net Change	2006 LQ	2010 LQ
511-Publishing Industries	1,737	1,408	-328	0.88	0.85
492-Couriers and Messengers	1,360	1,152	-208	0.91	0.84
491-Postal Service	1,142	1,087	-55	0.73	0.83
425-Electronic Markets and Agents and Brokers	1,437	1,311	-126	0.85	0.78
517-Telecommunications	1,454	1,452	-2	0.72	0.78
312-Beverage and Tobacco Product Manufacturing	168	282	114	0.42	0.76
518-ISP's, Search Portals, and Data Processing	511	445	-65	0.58	0.75
562-Waste Management and Remediation Services	523	602	79	0.64	0.74
445-Food and Beverage Stores	4,724	4,252	-472	0.80	0.73
623-Nursing and Residential Care Facilities	4,553	4,849	296	0.72	0.72
339-Miscellaneous Manufacturing	1,071	879	-192	0.74	0.69
523-Securities, Commodity Contracts, and Other Financial Investments and Related Activities	1,295	1,486	191	0.59	0.69
446-Health and Personal Care Stores	1,393	1,507	114	0.63	0.69
493-Warehousing and Storage	624	880	256	0.48	0.68
327-Nonmetallic Mineral Product Manufacturing	720	500	-220	0.69	0.66
113-Forestry and Logging	190	145	-45	0.80	0.64
323-Printing and Related Support Activities	795	641	-154	0.59	0.62
114-Fishing, Hunting and Trapping	93	105	12	0.51	0.60
922-Justice, Public Order, and Safety Activities	2,117	2,197	80	0.58	0.58
332-Fabricated Metal Product Manufacturing	1,669	1,483	-187	0.52	0.56
488-Support Activities for Transportation	595	761	166	0.39	0.56
481-Air Transportation	679	516	-164	0.67	0.55
512-Motion Picture and Sound Recording Industries	544	479	-65	0.59	0.54
336-Transportation Equipment Manufacturing	2,297	1,476	-821	0.64	0.54
315-Apparel Manufacturing	175	192	18	0.33	0.53
337-Furniture and Related Product Manufacturing	1,009	394	-615	0.87	0.53
721-Accommodation	2,203	1,810	-393	0.57	0.49
712-Museums, Historical Sites, and Similar Institutions	189	202	12	0.44	0.45
333-Machinery Manufacturing	1,306	843	-463	0.54	0.42
487-Scenic and Sightseeing Transportation	18	26	8	0.27	0.41
814-Private Households	192	425	233	0.18	0.34
212-Mining (except Oil and Gas)	220	129	-91	0.48	0.31
525-Funds, Trusts, and Other Financial Vehicles	73	49	-24	0.37	0.27
322-Paper Manufacturing	183	208	25	0.19	0.26
326-Plastics and Rubber Products Manufacturing	446	303	-143	0.28	0.24
313-Textile Mills	40	52	12	0.10	0.22
314-Textile Product Mills	77	50	-28	0.23	0.21
335-Electrical Equipment, Appliance, and Component Manufacturing	81	126	45	0.09	0.17
325-Chemical Manufacturing	179	227	48	0.10	0.14
533-Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	49	6	-44	0.83	0.11
213-Support Activities for Mining	38	41	3	0.07	0.07
331-Primary Metal Manufacturing	68	41	-28	0.07	0.06
999-Unknown	15	16	1	0.03	0.05
483-Water Transportation	3	7	4	0.02	0.05
211-Oil and Gas Extraction	0	0	0	0.00	0.00
324-Petroleum and Coal Products Manufacturing	0	0	0	0.00	0.00
482-Rail Transportation	0	0	0	0.00	0.00
486-Pipeline Transportation	34	0	-34	0.41	0.00
521-Monetary Authorities - Central Bank	0	0	0	0.00	0.00
927-Space Research and Technology	0	0	0	0.00	0.00

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

# Appendix A:

## Shift-Share - 3-Digit Industry Sub-sector Table

**Table A3. Boise City-Nampa MSA Shift-Share Analysis by 3-Digit Industry**

3-Digit Industry	2006 Employment	2010 Employment	Employment Change 2006 - 2010	National Effect	Industry Mix	Competitive Effect
561-Administrative and Support Services	24,388	23,953	-435	-1,152	-2,185	2,902
622-Hospitals	10,408	12,599	2,191	-492	1,094	1,588
611-Educational Services	19,611	21,587	1,976	-926	1,444	1,458
621-Ambulatory Health Care Services	12,242	14,699	2,456	-578	1,723	1,311
812-Personal and Laundry Services	5,654	6,112	458	-267	-312	1,037
541-Professional, Scientific, and Technical Services	17,551	18,175	623	-829	577	875
711-Performing Arts, Spectator Sports, and Related Industries	1,717	2,270	553	-81	-98	732
454-Nonstore Retailers	3,027	3,836	808	-143	331	621
311-Food Manufacturing	4,326	4,760	434	-204	97	541
921-Executive, Legislative, and Other General Government Support	6,833	7,248	416	-323	291	447
221-Utilities	1,042	1,468	426	-49	55	420
447-Gasoline Stations	1,358	1,704	345	-64	-3	413
451-Sporting Goods, Hobby, Book, and Music Stores	2,208	2,478	270	-104	-13	388
813-Religious, Grantmaking, Civic, Professional, and Similar Organizations	2,443	2,768	325	-115	91	350
424-Wholesale Trade, Nondurable Goods	3,978	4,169	191	-188	32	347
624-Social Assistance	7,006	7,836	830	-331	825	335
519-Other Information Services	340	723	383	-16	115	284
448-Clothing and Clothing Accessories Stores	2,490	2,597	107	-118	-46	271
493-Warehousing and Storage	624	880	256	-29	29	256
485-Transit and Ground Passenger Transportation	1,188	1,452	264	-56	74	246
488-Support Activities for Transportation	595	761	166	-28	-30	224
523-Securities, Commodity Contracts, and Other Financial Investments and Related Activities	1,295	1,486	191	-61	44	208
814-Private Households	192	425	233	-9	48	194
112-Animal Production	1,447	1,677	230	-68	133	166
923-Administration of Human Resource Programs	2,299	2,555	255	-109	216	148
312-Beverage and Tobacco Product Manufacturing	168	282	114	-8	-3	125
713-Amusement, Gambling, and Recreation Industries	2,977	3,094	117	-141	138	120
446-Health and Personal Care Stores	1,393	1,507	114	-66	61	118
491-Postal Service	1,142	1,087	-55	-54	-111	110
517-Telecommunications	1,454	1,452	-2	-69	-31	97
518-ISP's, Search Portals, and Data Processing	511	445	-65	-24	-138	97
332-Fabricated Metal Product Manufacturing	1,669	1,483	-187	-79	-202	94
111-Crop Production	1,862	1,898	36	-88	48	76
315-Apparel Manufacturing	175	192	18	-8	-46	72
562-Waste Management and Remediation Services	523	602	79	-25	34	69
325-Chemical Manufacturing	179	227	48	-8	-7	64
335-Electrical Equipment, Appliance, and Component Manufacturing	81	126	45	-4	-10	59
484-Truck Transportation	3,904	3,691	-214	-184	-85	56
322-Paper Manufacturing	183	208	25	-9	-21	54
811-Repair and Maintenance	3,975	3,721	-254	-188	-116	50
115-Support Activities for Agriculture and Forestry	1,645	1,644	-1	-78	35	42
925-Administration of Housing Programs, Urban Planning, and Community Development	170	198	28	-8	-7	42
316-Leather and Allied Product Manufacturing	74	90	16	-3	-12	32
313-Textile Mills	40	52	12	-2	-13	27
928-National Security and International Affairs	902	1,026	124	-43	142	24
323-Printing and Related Support Activities	795	641	-154	-38	-139	23
114-Fishing, Hunting and Trapping	93	105	12	-4	2	15
487-Scenic and Sightseeing Transportation	18	26	8	-1	0	9
999-Unknown	15	16	1	-1	-5	7
522-Credit Intermediation and Related Activities	5,402	4,775	-626	-255	-377	5

# Appendix A:

## Shift-Share - 3-Digit Industry Sub-sector Table cont.

3-Digit Industry	2006 Employment	2010 Employment	Employment Change 2006 - 2010	National Effect	Industry Mix	Competitive Effect
483-Water Transportation	3	7	4	0	0	4
712-Museums, Historical Sites, and Similar Institutions	189	202	12	-9	18	3
211-Oil and Gas Extraction	0	0	0	0	0	0
324-Petroleum and Coal Products Manufacturing	0	0	0	0	0	0
482-Rail Transportation	0	0	0	0	0	0
521-Monetary Authorities - Central Bank	0	0	0	0	0	0
927-Space Research and Technology	0	0	0	0	0	0
213-Support Activities for Mining	38	41	3	-2	5	-1
314-Textile Product Mills	77	50	-28	-4	-17	-8
524-Insurance Carriers and Related Activities	5,213	4,986	-227	-246	29	-10
331-Primary Metal Manufacturing	68	41	-28	-3	-12	-13
453-Miscellaneous Store Retailers	2,840	2,628	-212	-134	-63	-15
924-Administration of Environmental Quality Programs	2,861	2,879	19	-135	169	-15
525-Funds, Trusts, and Other Financial Vehicles	73	49	-24	-3	0	-20
922-Justice, Public Order, and Safety Activities	2,117	2,197	80	-100	200	-20
327-Nonmetallic Mineral Product Manufacturing	720	500	-220	-34	-162	-24
486-Pipeline Transportation	34	0	-34	-2	4	-37
113-Forestry and Logging	190	145	-45	-9	2	-37
533-Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	49	6	-44	-2	-2	-39
326-Plastics and Rubber Products Manufacturing	446	303	-143	-21	-74	-48
623-Nursing and Residential Care Facilities	4,553	4,849	296	-215	559	-48
515-Broadcasting (except Internet)	783	659	-124	-37	-38	-49
512-Motion Picture and Sound Recording Industries	544	479	-65	-26	11	-50
441-Motor Vehicle and Parts Dealers	4,814	4,074	-739	-227	-459	-53
339-Miscellaneous Manufacturing	1,071	879	-192	-51	-70	-72
212-Mining (except Oil and Gas)	220	129	-91	-10	-5	-75
511-Publishing Industries	1,737	1,408	-328	-82	-169	-77
532-Rental and Leasing Services	1,379	1,035	-343	-65	-182	-96
442-Furniture and Home Furnishings Stores	1,735	1,218	-517	-82	-331	-104
492-Couriers and Messengers	1,360	1,152	-208	-64	-30	-114
481-Air Transportation	679	516	-164	-32	-11	-120
425-Electronic Markets and Agents and Brokers	1,437	1,311	-126	-68	74	-132
333-Machinery Manufacturing	1,306	843	-463	-62	-142	-259
337-Furniture and Related Product Manufacturing	1,009	394	-615	-48	-303	-264
237-Heavy and Civil Engineering Construction	3,573	2,823	-750	-169	-309	-273
336-Transportation Equipment Manufacturing	2,297	1,476	-821	-108	-439	-274
443-Electronics and Appliance Stores	1,693	1,255	-438	-80	-66	-292
423-Wholesale Trade, Durable Goods	7,164	6,109	-1,055	-338	-415	-302
721-Accommodation	2,203	1,810	-393	-104	28	-317
452-General Merchandise Stores	6,569	6,337	-233	-310	398	-320
926-Administration of Economic Programs	2,355	2,559	204	-111	671	-356
321-Wood Product Manufacturing	2,692	1,326	-1,366	-127	-865	-374
445-Food and Beverage Stores	4,724	4,252	-472	-223	197	-446
722-Food Services and Drinking Places	18,820	18,293	-527	-889	925	-563
444-Building Material and Garden Equipment and Supplies Dealers	3,926	2,661	-1,265	-185	-346	-734
531-Real Estate	9,454	8,411	-1,044	-446	366	-963
236-Construction of Buildings	6,159	3,654	-2,505	-291	-1,103	-1,111
551-Management of Companies and Enterprises	5,760	4,361	-1,400	-272	496	-1,624
334-Computer and Electronic Product Manufacturing	14,876	9,024	-5,851	-702	-1,629	-3,520
238-Specialty Trade Contractors	20,590	11,554	-9,036	-972	-3,046	-5,017

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; U.S. Census Bureau, Non-employer Statistics

# Appendix A: Quadrant—All 3-Digit Industries

Table A4. Quadrant - 3 Digit NAICS, Boise City-Nampa MSA, 2006-2010

Transforming Industries			Growing Base Industries		
Three Digit Title	Competitive Effect	2010 LQ	Three Digit Title	Competitive Effect	2010 LQ
924-Administration of Environmental Quality Programs	-15	4.37	112-Animal Production	166	3.73
334-Computer and Electronic Product Manufacturing	-3,520	4.09	115-Support Activities for Agriculture and Forestry	42	1.94
321-Wood Product Manufacturing	-374	1.82	111-Crop Production	76	1.80
926-Administration of Economic Programs	-356	1.71	451-Sporting Goods, Hobby, Book, and Music Stores	388	1.79
237-Heavy and Civil Engineering Construction	-273	1.35	923-Administration of Human Resource Programs	148	1.65
442-Furniture and Home Furnishings Stores	-104	1.29	311-Food Manufacturing	541	1.63
453-Miscellaneous Store Retailers	-15	1.23	454-Nonstore Retailers - (newspapers, online retailers, door-to-door, etc.)	621	1.51
443-Electronics and Appliance Stores	-292	1.19	561-Administrative and Support Services	2,902	1.41
551-Management of Companies and Enterprises	-1,624	1.18	316-Leather and Allied Product Manufacturing	32	1.38
441-Motor Vehicle and Parts Dealers	-53	1.15	921-Executive, Legislative, and Other General Government Support	447	1.19
444-Building Material and Garden Equipment and Supplies Dealers	-734	1.14	519-Other Information Services - (news syndicates, libraries, web search portals, etc)	284	1.13
531-Real Estate	-963	1.12	925-Administration of Housing Programs, Urban Planning, and Community Development	42	1.12
238-Specialty Trade Contractors	-5,017	1.10	624-Social Assistance	335	1.11
515-Broadcasting (except Internet)	-49	1.06	622-Hospitals	1,588	1.07
423-Wholesale Trade, Durable Goods	-302	1.05	621-Ambulatory Health Care Services	1,311	1.06
452-General Merchandise Stores - (stores which sell a variety of merchandise)	-320	1.04	484-Truck Transportation	56	1.04
524-Insurance Carriers and Related Activities	-10	1.02	447-Gasoline Stations	413	1.03
			811-Repair and Maintenance	50	1.01
			424-Wholesale Trade, Nondurable Goods	347	1.00
Declining Industries			Emerging Industries		
Three Digit Title	Competitive Effect	2010 LQ	Three Digit Title	Competitive Effect	2010 LQ
236-Construction of Buildings	-1,111	0.97	611-Educational Services	1,458	0.86
722-Food Services and Drinking Places	-563	0.96	812-Personal and Laundry Services	1,037	0.92
445-Food and Beverage Stores	-446	0.73	541-Professional, Scientific, and Technical Services	875	0.87
721-Accommodation	-317	0.49	711-Performing Arts, Spectator Sports, and Related Industries	732	0.90
336-Transportation Equipment Manufacturing	-274	0.54	221-Utilities	420	0.89
337-Furniture and Related Product Manufacturing	-264	0.53	813-Religious, Grantmaking, Civic, Professional, and Similar Organizations	350	0.91
333-Machinery Manufacturing	-259	0.42	448-Clothing and Clothing Accessories Stores	271	0.88
425-Electronic Markets and Agents and Brokers	-132	0.78	493-Warehousing and Storage	256	0.68
481-Air Transportation	-120	0.55	485-Transit and Ground Passenger Transportation	246	0.85
492-Couriers and Messengers	-114	0.84	488-Support Activities for Transportation	224	0.56
532-Rental and Leasing Services	-96	0.88	523-Securities, Commodity Contracts, and Other Financial Investments and Related Activities	208	0.69
			814-Private Households - (households which employ cooks, gardeners, maintenance workers, etc.)	194	0.34
511-Publishing Industries	-77	0.85	312-Beverage and Tobacco Product Manufacturing - (includes both alcoholic and non-alcoholic beverages)	125	0.76
212-Mining (except Oil and Gas)	-75	0.31	713-Amusement, Gambling, and Recreation Industries	120	0.86
339-Miscellaneous Manufacturing	-72	0.69	446-Health and Personal Care Stores	118	0.69
512-Motion Picture and Sound Recording Industries	-50	0.54	491-Postal Service - (National Post Office and its subcontractors)	110	0.83
623-Nursing and Residential Care Facilities	-48	0.72	517-Telecommunications	97	0.78
326-Plastics and Rubber Products Manufacturing	-48	0.24	518-ISP's, Search Portals, and Data Processing	97	0.75
533-Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	-39	0.11	332-Fabricated Metal Product Manufacturing	94	0.56
113-Forestry and Logging	-37	0.64	315-Apparel Manufacturing	72	0.53
486-Pipeline Transportation	-37	0.00	562-Waste Management and Remediation Services	69	0.74
327-Nonmetallic Mineral Product Manufacturing	-24	0.66	325-Chemical Manufacturing	64	0.14
922-Justice, Public Order, and Safety Activities	-20	0.58	335-Electrical Equipment, Appliance, and Component Manufacturing	59	0.17
525-Funds, Trusts, and Other Financial Vehicles	-20	0.27	322-Paper Manufacturing	54	0.26
331-Primary Metal Manufacturing	-13	0.06	313-Textile Mills	27	0.22
314-Textile Product Mills	-8	0.21	928-National Security and International Affairs	24	0.87
213-Support Activities for Mining	-1	0.07	323-Printing and Related Support Activities	23	0.62
211-Oil and Gas Extraction	0	0.00	487-Scenic and Sightseeing Transportation	9	0.41
521-Monetary Authorities - Central Bank	0	0.00	522-Credit Intermediation and Related Activities	5	0.91
927-Space Research and Technology	0	0.00	483-Water Transportation	4	0.05
			712-Museums, Historical Sites, and Similar Institutions	3	0.45

# Appendix A: Food Processing Cluster Maps

**Figure A1. Cluster Map of Frozen Potato Processing in Boise City-Nampa MSA**

<b>Final Markets</b>	Retail - grocery outlets	Food Service - restaurants both fast food and high-end restaurants	Institutional - schools, airlines, cruise ships, hospitals	Industrial - sells product to go into further processing - potatoes into canned soup	Animal feed for cattle/livestock
<b>Distribution Channels</b>	Food Distribution Center - not company owned - trucking/rail	Food Distribution Center - company owned - trucking/rail	Internal business distribution directly to customer - trucking	Contract trucking from factory to distribution center	Business owned trucks from factory to distribution center
<b>Export Products</b>	French fries - shoestring, lattice cuts, curly, etc.	Breakfast hash browns	IQF - Individually Quick Frozen products - Cubed or sliced potatoes		
<b>Suppliers</b>	Raw Commodity from Idaho, Oregon, and Washington - proximity is important	Cooking Oil from outside Idaho	Non-food contact packaging materials - cardboard boxes to ship bulk supply of product - Some from Idaho	Food contact packaging materials - plastic sheathing around frozen French fries - Not in Idaho	Food processing equipment; in Treasure Valley and Idaho
<b>Specialized Community Infrastructure</b>	Irrigation Network; Snake River	State grants for employee training	Power	Road network	water
<b>Threats</b>	Sewage Treatment and road infrastructure	Urban/Rural Conflict noise, odor, population expansion pushing ag further into periphery	Workforce development; Higher-end labor - engineers, management	Focus on high-tech and other industries from government - neglect of agriculture - leads to a lack of infrastructure projects and funding to bolster ag	Health related concerns
					Waste handling

# Appendix A: Food Processing Cluster Maps cont.

**Figure A2. Cluster Map of Dairy Processing in Boise City-Nampa MSA**

<b>Final Markets</b>	Retail —grocery outlets	Food Service - restaurants both fast food to high-end restaurants	Institutional - schools, airlines, cruise ships, hospitals	Industrial - sells product to go into further processing - e.g. potatoes into canned soup or casserole
<b>Distribution Channels</b>	Food Distribution Center - not company owned - trucking/rail	Food Distribution Center - company owned - trucking/rail	Internal business distribution directly to customer - trucking	Business owned trucks from factory to distribution center
<b>Export Products</b>	Cultured products - sour cream and cottage cheese	Fluid milk	Powdered milk	Italian Cheese
<b>Suppliers</b>	Raw milk - mostly from Idaho and some from neighboring states, but pretty much from Idaho	Different cultures to make cheese or butter; not in Idaho	Packaging materials	buttermilk
<b>Specialized Community Infrastructure</b>	Irrigation Network; Snake River	State grants for employee training	Power	Road network
<b>Threats</b>	Sewage Treatment and road infrastructure	Urban/Rural Conflict - noise, odor, population expansion pushing ag further into periphery	Workforce development; Higher-end labor - engineers, management	Focus on high-tech and other industries from government - neglect of agriculture - leads to a lack of infrastructure projects and funding to bolster ag
				Water
				Waste handling



## Appendix B: Industry Sector Histories

# Appendix B: Industry Sector Histories

The following subsection contains the industry histories and findings stemming from the industry interviews with those industries within the Transforming quadrant. Four industries were selected for interviews: 1) Computer and Electronic Manufacturing; 2) Heavy and Civil Engineering Construction; 3) Wood Product Manufacturing; and 4) Furniture and Home Furnishings.

## **Computer and Electronic Manufacturing Industry**

The Computer and Electronic Manufacturing industry in the Treasure Valley can be largely attributed to the decision of HP to build a new facility in Boise. In the 1970's, HP identified Boise as maintaining three of the four necessary criteria: 1) Be within two hours by air of California headquarters in Palo Alto; 2) Have a good work force; and 3) A good quality of life. The fourth criterion was good engineering, which the company determined would be possible to bring to the area.

Good engineering in the Treasure Valley had become a reality less than a decade later, as can be validated by the incorporation of Micron Technology in 1978. The company today is a leader in manufacturing memory components for computers and other related devices.

Several other companies have been established in the area due to the presence of these companies and the overall quality of life of the Treasure Valley. Some of these offshoots include Crucial Technology and SpecTek.

## **Heavy and Civil Engineering Construction**

Early in the 20th century, the population of the Treasure Valley was growing rapidly due to the investment in irrigation infrastructure. The economic activity which followed the population increase attracted John Tourtellotte and his business partner Charles Hummel. The two businessmen are responsible for the engineering and design of several buildings in downtown Boise, including the State Capital.

Around the same time, Harry Morrison and Morris Knudsen founded an engineering company which became a world leader in civil engineering projects such as dams, canals, bridges, and tunnels. The company performed work on the Hoover Dam and portions of the Trans-Alaska pipeline. Other engineering firms continued to establish themselves in the area, such as J-U-B in the 1950s, which now operates in several western states.

The construction of the New York Canal was, in part, a product of the work provided by the family which still owns Western State Caterpillar.

Sources: Boise's Sesquicentennial; KTVB Local News; Micron Technology, Inc.; Boise's Sesquicentennial; J-U-B Engineers, Inc.

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In addition, the interstate was a driving force in the industry as well, which continues to be expanded over time as the population increases in the Treasure Valley.

### **Wood Product Manufacturing**

Wood product manufacturing facilities are located primarily in integrated clusters in areas with ample timber resources due to increased access to wood fiber. Customers are building materials distribution, secondary manufacturers, retail lumber dealers, and home improvement centers. While Boise does not maintain a significant supply of commercial timber within its grasp, at the turn of the 20th Century the Boise National Forest had not yet been created and was readily available for extraction. Prior to truck transport of fallen logs, the industry utilized the river system to float its product to a processing mill downstream. The firm Boise-Cascade located itself in downtown Boise and after several decades was overseeing operations in multiple locations across Idaho and beyond.

Other firms, such as Idaho Timber and Boise-Cascade noted above, are located in Boise and oversee operations across the Treasure Valley, Idaho, and the nation. Between the relatively large number of jobs surrounding the administrative

function of such firms and the number of firms involved with secondary manufacturing, the Boise-City Nampa MSA maintains a high relative concentration of employment.

Since some of these firms are heavily reliant on the housing market, such as truss manufacturing and cabinet makers for example, the industry has been especially hit hard in the Boise City-Nampa MSA, which can explain the decline in the competitive position of the Wood Product Manufacturing industry in the area between 2006 and 2010.

### **Furniture and Home Furnishings**

The furniture and home furnishings industry appears to have blossomed between the late 1940s and early 1960s, with several local businesses opening their doors during this time, such as CHF Home Furnishings, Parma Furniture, and Ennis Fine Furniture. There are local ties to the well-known home furnishings industry cluster in High Point and Thomasville, NC, where the owner of Parma Furniture spent his childhood and several family members worked within the industry.

The industry has undergone significant changes in the last decade or so, as large-scale national businesses have entered the local market, such as RC Willey and Mor Furniture. This increased competition has required at least some adaptation

Sources: Boise Cascade; Idaho Timber; History of Idaho; North Carolina Online Encyclopedia; Ennis Furniture; Parma Furniture; CHF Home Furnishings; MOR Furniture

## Appendix B: Industry Sector Histories cont.

by those locally originated businesses in order to remain competitive in the local market.

### **Administrative and Support Services**

The administrative and Support Services industry includes several business types centered on providing services ranging from call centers, temporary staff workers, landscaping services, and security. Being such an all-encompassing industry makes it difficult to pin down a specific history, especially pertaining specifically to the Treasure Valley.

Looking just at call centers in the Treasure Valley, the industry subset is a major source of employment; there are over 20 call centers in the city employing more than 7,000 people and include: WDSGlobal, EDS, Teleperformance, DIRECTV and T-Mobile. A few reasons indicated through the interview process as to why these industries have been successful in the Treasure Valley is a combination of friendly people and low employment costs. Additionally, having an ample supply of workers ready to work in the industry is critical to meeting staffing needs and Boise is able to do this.

### **Agriculture and Food Processing Industry**

Agriculture in the Treasure Valley has been quite successful in large part due to irrigation infrastructure in place, as well as the damming of rivers which decreases seasonal fluctuations in water volumes. Plans for canals in the area predate Idaho's admission to the Union in 1890, which is the same year construction begun on the New York Canal. Federal funding through the Bureau of Reclamation further contributed to the expansion of agriculture in the area, extending the New York Canal, creating Lake Lowell, and building Arrowrock Dam.

With crop and animal production in place, food processing became increasingly embedded within the Treasure Valley's economy. The 1940's saw increased capital investment in food processing in the Treasure Valley, when J. R. Simplot began mass producing frozen vegetables to supply to the military during World War II. This was also the time when the Amalgamated Sugar Company opened its doors for production of sugar. Other companies include Ore-Ida, which was established in 1952 and is the creator of the tater tot. Each of these facilities further spurred demand for agriculture in the Treasure Valley.

Sources: City of Boise Economic Development; National Park Service Historic American Buildings Survey; Boise Valley Economic Partnership; City-Data; History of Idaho; Boise's Sesquicentennial

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Today, even more national companies reside in the Valley and include Sorrento Lactalis, Nestle PowerBar, Bigelow Tea, and Land O'Lakes to name a few.

### **Sporting Goods, Hobby, Book, and Music Stores**

Boise is a nationally recognized outdoor city, cited as one of the best by publications like Outside Magazine, Men's Health, and National Geographic. The area offers a tremendous amount of recreational opportunities within its borders, such as biking, hiking, and rock climbing, and is geographically situated near even more recreational assets within close proximity, such as rafting, fishing, hunting, and camping. Companies, such as Idaho Mountain Touring, have been established by residents passionate about these activities and thereby contribute to the local employment base within this industry.

The area maintains a high concentration of cultural assets, such as a philharmonic, several galleries, Ballet Idaho, and Trey McIntyre Project. Music stores, while a subset of this larger cultural concentration, are dependent on the interests of the community in music performance.

### **Personal and Laundry Services**

Personal and Laundry Services maintains a long history in Boise and surrounding area, with some stores still in operation to this day. The personal launderer, Baird's Dry Cleaners began as a small operation in downtown Boise making deliveries by horse in the early 1900s. Other companies have roots in the area much more recent, such as Westco Martinizing, which began in the mid-1960s. This industry includes several other business types such as nail salons, pet care services, funeral homes, and parking garages.

### **Utilities**

The area's relatively unique resource base provides ample opportunity to explore alternative means of energy generation. Hot springs in the vicinity of Boise were tapped in the late 1800's to provide heat to buildings downtown. The company which provided this service downtown at the time ultimately became United Water of Idaho, the largest water provider in the Treasure Valley.

The low population density and number of river systems in Idaho provided the necessary operating environment for the establishment of several hydro-electric dams. One of Idaho's largest suppliers of electricity, Idaho Power, was established from five smaller firms in 1916.

Sources: RedSky Public Relations; New York Times; Idaho Mountain Touring; City Westco Dry Cleaning; Baird's Dry Cleaning; U.S. Census Bureau; United Water; City of Boise Economic Development; Intermountain Gas Company; Idaho Power Company

## Appendix B: Industry Sector Histories cont.

Today, Natural gas maintains a heavy presence in the area as well, with hundreds of thousands of residences and businesses in southern Idaho consuming gas daily. One of the largest companies, Intermountain Gas Company, serves more than just residences, which only account for small percentage of its sales. The majority of sales are actually produced from industrial customers using the resource in some facet of their production process.

Finally, the area also has a large number of irrigation canals, which are critical for agriculture and other water intensive industries. Half of the land in the Treasure Valley is irrigated agriculture, where nearly three-fourths are reliant on the abundance of irrigation canals that run through the area.

### **Performing Arts, Spectator Sports, and Related Industries**

Arts and other visual entertainment are well received in the Boise area and the industry continues to grow and diversify in the Treasure Valley over time. The area has a long history of classic music performance, maintaining an orchestra since the late 1880s and culminating in the establishment of the Boise Philharmonic 1960. Almost two decades later, the Shakespeare Festival provided its first play, A Midsummer Night's Dream. Ballet Idaho was also established during

that time which performs in conjunction with the Boise Philharmonic for select ballets. More recent expansions to the Boise area's performing arts offerings include the Trey McIntyre Project, a nationally recognized performing dance studio.

### **Professional, Scientific and Technical Services**

The Professional, Scientific, and Technical Services industry is broadly defined and includes legal, accounting, veterinary, marketing, advertising, computer programming services, environmental consulting, and other research services. Each facet of the broad industry maintains a different history, especially in the Treasure Valley

Law firms have a significant presence in the area, as Boise is the state capital and home to the state court house and Ada County court house. The city is also the largest population center in the state, where many of the services included in the Professional, Scientific, and Technical Services industry rely on large population base.

Others do not rely solely on the local population, such as many software and computer related services. The firm, QualityLogic, which provides software tools to analyze performance for a variety of electronic devices, is headquartered in Boise, with other locations in the Intermountain West and Northwestern states in the U.S. and other locations around the world. The company has been in operation for 26 years.

Sources: City of Ballet Idaho; Idaho Shakespeare; Boise Philharmonic; New York Times; U.S. Census NAICS; QualityLogic; MotivePower; Eccolink; Aptina

## Appendix B: Industry Sector Histories cont.

### **Transportation Equipment Manufacturing**

The industry Transportation Equipment Manufacturing has constantly evolved over the last several decades and is, in part, due to the innovative and forward thinking of local area business leaders. One of the most notable manufacturers in the Treasure Valley is MotivePower, which began as a subsidiary of Morrison Knudsen (MK), a native Boise engineering firm. Through acquisition of supplier companies over the decades, MotivePower has become one of Treasure Valley's major transportation equipment manufacturing employers.

The Treasure Valley also has several firms involved with the manufacturing of lighting, sensors, and other safety and warning systems that are becoming more common in all vehicles. The business ECCO, located in Boise, manufactures directional lights, work lamps, and back-up alarms. Similar to MotivePower, ECCO has been in the area for 40 years.

Aptina, the result of an acquisition by Micron Technology in 2001, focuses on the production of imaging components that are more frequently being used in vehicle back-up systems. Utilizing similar production processes as those necessary for the creation of semiconductors, the imaging devices that display in a vehicle's rearview mirror

or dashboard can, at least in part, be attributed to the innovation that resides within the Treasure Valley.

### **Furniture and Related Product Manufacturing**

The Furniture and Related Product Manufacturing industry is fairly broad by definition, including cabinet manufacturers, manufacturers of office furniture, and mattress and window blind manufacturing. The industry is different from wood product manufacturing (321) in that the products that are built generally require a significant design element and the production of customized products.

There are several cabinet manufacturers in the Boise area, including Western Idaho Cabinets, JayMark Builders, and Cameron's Custom Cabinetry. This type of furniture and related product manufacturing comprises the majority of employment in the Treasure Valley. The industry has gone through significant employment changes since the decline in housing demand began several years ago and remains about one-third its size since 2006 in the Boise-Nampa region.

### **Machinery Manufacturing**

The Machinery Manufacturing industry is diverse

Sources: U.S. Census NAICS; U.S. Bureau of Labor Statistics Location Quotient Calculator; Idaho Department of Labor Correspondence; City U.S. Census Bureau; Yanke Machine; Top-Air; Drill Pro

## Appendix B: Industry Sector Histories cont.

and includes businesses involved in the creation of machinery for construction, general industrial and commercial use, HVAC systems, metalworking, transmissions, and other products such as elevators and escalators. The industry has changed over time through technological advances like computerization/automation of machinery.

The Treasure Valley maintains several businesses across several facets of the manufacture of machinery. Yanke machine shop, which has been in the region for more than 60 years, provides

metal fabrication and industrial machining services, including the information kiosks on Boise State University campus. Drill Pro International, Inc. manufactures drills involved in the mining industry. Top Air, Inc. manufactures harvesting equipment for the areas large number of onion farmers.



Farm Machinery  
Source: Microsoft Clip Art



## Appendix C: Industry History and Photo References

# Appendix C: Photo References

## **Cover Page**

Assortment of Microsoft Clip Art

## **Downtown Boise—Page 11**

Retrieved February 20, 2013 from <http://textbooks.org/2012/03/boise-state-bookstore-boise-textbooks/>

## **Housing Development in Boise—Page 16**

Retrieved February 20, 2013 from <http://www.thehelpprogram.com/boise/boises-real-estate-2012-forecast>

## **Boise High School, 2009—Page 19**

Retrieved February 20, 2013 from <http://www.randygridley.com/boise-school-district-and-boise-high-schools/>

## **Boise State Winter Commencement, 2009—Page 22**

Retrieved February 20, 2013 from <http://stateimpact.npr.org/idaho/2011/11/09/young-adults-face-big-hurdles/>

## **Boise State University Broncos Money Clip—Page 24**

Retrieved February 20, 2013 from <http://www.sportsmemorabilia.com/sports-products/boise-state-university-broncos-money-clip.html>

## **Boise Home—Page 26**

Retrieved February 20, 2013 from [http://money.cnn.com/galleries/2011/real\\_estate/1106/gallery.American\\_dream\\_home/5.html](http://money.cnn.com/galleries/2011/real_estate/1106/gallery.American_dream_home/5.html)

## **House for Sale—Page 28**

Microsoft Clip Art

## **Help Wanted Sign—Page 31**

Microsoft Clip Art

# Appendix C: Photo References

## **Commercial Building—Page 33**

Source: Microsoft Clip Art

## **Job Seekers at Job Fair in Boise—Page 34**

Retrieved February 20, 2013 from <http://stateimpact.npr.org/idaho/2012/03/01/idahos-2011-unemployment-rate-barely-lower-than-2010/>

## **Agricultural Land for Sale in Nampa—Page 36**

Retrieved February 20, 2013 from <http://www.realestatebook.com/Homes/usa/id/Nampa>

## **Glenn Oakley (Photographer). Ann Morrison Park, Boise—Page 39**

Retrieved February 20, 2013 from <http://www.grovehotelboise.com/photoGallery-en.html>

## **The Grove Hotel, Boise—Page 42**

Retrieved February 20, 2013 from <http://www.grovehotelboise.com/photoGallery-en.html>

## **Boy Studying Math—Page 45**

Source: Microsoft Clip Art

## **Business People Going Over Notes—Page 46**

Source: Microsoft Clip Art

## **Business People Meeting at Work Engaging in a Business Discussion—Page 54**

Source: Microsoft Clip Art

## **“Your Career” Sign—Page 66**

Source: Microsoft Clip Art

## **Farm Machinery—Page 81**

Source: Microsoft Clip Art

# Appendix C: Industry History References

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