

a. Economic, Workforce, and Workforce Development Activities Analysis

The Unified or Combined State Plan must include an analysis of the economic conditions, economic development strategies, and labor market in which the State's workforce system and programs will operate.

1. Economic and Workforce Analysis

A. Economic Analysis

The Unified or Combined State Plan must include an analysis of the economic conditions and trends in the State, including sub-State regions and any specific economic areas identified by the State. This must include-

i. Existing Demand Industry Sectors and Occupations

Provide an analysis of the industries and occupations for which there is existing demand.

ii. Emerging Demand Industry Sectors and Occupation

Provide an analysis of the industries and occupations for which demand is emerging.

iii. Employers' Employment Needs

With regard to the industry sectors and occupations identified in 1 and 2 above, provide an assessment of the employment needs of employers, including a description of the knowledge, skills, and abilities required, including credentials and licenses.

(i) Existing Demand Industry Sectors and Occupations

Provide an analysis of the industries and occupations for which there is existing demand.

This section analyzes Idaho's high-demand industries and provides an overview of Idaho's Target Sectors. It also covers Idaho's high-demand occupations, including an analysis of Idaho's "Hot Jobs" list.

High-Demand Industries

High demand industries can be defined in several ways. Most commonly they are industries with the largest number of workers. However, for the purpose of analyzing Idaho's industrial make-up to determine what industries might be the best to target, that industry's employment as a percentage of nonfarm employment and its rate of job growth over a period of time will also be part of the equation. Employment in the government sectors will not be included in the discussion of job growth and target industries. Government employment is important but its jobs are not actively created but the most often support efforts in private industry. There are industries that cross multiple sectors and are not considered "official" industries in the North

American Industrial Classification System, commonly known as NAICS. Two of these often referred to are tourism and high tech. These hybrid industries do have an impact on Idaho's economy but are a combination of several industrial sectors. Just as these two industries are made up of smaller industrial classifications, specific occupations can be found many industries. That is why it is important that in the analysis of demand industries is not limited just to those with the highest number of workers.

Idaho Department of Labor preliminary data shows Idaho had 754,500 nonfarm payroll jobs in 2019. Supersectors include a variety of related industries. As per Table 1 (detailed data is in *Data Appendix Table 1 - Nonfarm Jobs*), the seven highest-demand supersectors—based on both the number of jobs and percent of nonfarm jobs—accounted for nearly two-thirds of nonfarm jobs in Idaho in 2019. These seven supersectors are health care and social services; retail trade; manufacturing; accommodation and food services; construction; administrative support services and waste management services; and professional, scientific and technical services. The number of jobs in these seven supersectors range from 97,400 to 41,900.

Employment growth and trends since 2007 illustrate the effects of the last recession as well as the recovery. Since 2007, each of the seven supersectors has shown significant growth. The number of nonfarm jobs increased by 99,800 over the past 12 years. The recession caused a dramatic loss of 51,500 jobs between 2007 and 2010. After that, Idaho's economy created 151,300 new jobs. The seven supersectors accounted for 68 percent of the growth from 2007. Health care and social services added the most jobs—32,000, while manufacturing added the fewest—3,900. Construction, like manufacturing, experienced devastating job losses during the recession but grew significantly after 2010. However, construction, which the recession hit hardest of all sectors, remains 1,700 jobs below its 2007 level.

Table 1: Employment in Idaho Private Supersectors Adding the Most Jobs, 2010-2019

Supersectors	Numeric Change				
	2007	2010	2019*	2007-19	2010-19
Health Care & Social Services	65,400	73,900	97,400	32,000	23,500
Retail Trade	83,500	74,900	88,900	5,400	14,000
Manufacturing	66,400	53,300	70,300	3,900	17,000
Accommodation & Food Services	54,200	49,500	67,800	13,600	18,300
Construction	52,000	31,300	50,300	-1,700	19,000
Administrative Support Services & Waste Mgmt	45,200	39,700	49,700	4,500	10,000

Professional, Scientific & Technical Services	31,800	29,900	41,900	10,100	12,000
Idaho Nonfarm Payroll Jobs	654,700	603,200	754,500	99,800	151,300

* 10-month average

Another way to determine demand industries is by the percent increase in the number of jobs. Following the recession, jobs in six supersectors grew more than 30 percent, while total nonfarm jobs grew 25.1 percent between 2010 and 2019. They were construction (60.8 percent); professional, scientific and technical services (40.1 percent); accommodation and food services (36.9 percent); arts, entertainment and recreation (33.8 percent); manufacturing and health care and social services (both at 31.9 percent). Table 2 provides information on both the numeric and percentage growth of those supersectors.

Table 2: Employment in Idaho's Six Fastest-Growing Private Supersectors, 2010-2019

Supersectors	2007	2010	2019*	Numeric Change		Percent Change	
				2007-19	2010-19	2007-19	2010-19
Construction	52,000	31,300	50,330	-1,670	19,030	-3.2%	60.8%
Professional, Scientific & Technical Services	31,800	29,900	41,890	10,090	11,990	31.7%	40.1%
Accommodation & Food Services	54,200	49,500	67,790	13,590	18,290	25.1%	36.9%
Arts, Entertainment & Recreation	9,100	8,500	11,370	2,270	2,870	24.9%	33.8%
Manufacturing	66,400	53,300	70,320	3,920	17,020	5.9%	31.9%
Health Care & Social Services	65,400	73,900	97,440	32,040	23,540	49.0%	31.9%
Idaho Nonfarm Payroll Jobs	654,700	603,200	754,500	99,800	151,300	15.2%	25.1%

* 10-month average

Idaho Target Sectors

In 2019 Idaho Department of Labor staff began discussing potential target industries for the state. The group analyzed the number of current jobs and gross domestic product (GDP) in each supersector. Table 3 ranks the supersectors by employment and gross domestic product. Retail trade ranked highest in both categories but many of its jobs are entry-level and require very little training. Education, whose jobs are that primarily in the government sector, ranked low in both categories but is vital because it provides training for Idaho's current and future work force.

Table 3: Ranking of Private Supersectors by Employment and GDP: 2019

Industry Sector	2019**	Rank	GDP	Rank
Total Private Nonfarm Payroll Jobs	627,840		\$66,869.3	
Health Care & Social Services	97,440	1	\$6,437.1	3
Retail Trade	88,880	2	\$5,992.8	4
Manufacturing	70,320	3	\$8,607.4	2
Accommodation & Food Services	67,790	4	\$2,506.4	11
Construction	50,330	5	\$5,110.4	5
Administrative Support Services & Waste Mgmt	49,650	6	\$2,975.5	10
Professional, Scientific & Technical Services	41,890	7	\$4,185.3	7
Wholesale Trade	30,070	8	\$4,565.1	6
Finance & Insurance	28,630	9	\$3,455.3	8
Other Services	26,300	10	\$1,541.4	14
Transportation & Warehousing	22,410	11	\$2,332.2	12
Arts, Entertainment & Recreation	11,370	12	\$633.5	17
Educational Services	10,940	13	\$600.9	18
Real Estate & Rental & Leasing	9,010	14	\$10,655.9	1
Information	8,230	15	\$1,581.0	13
Management of Companies & Enterprises	7,290	16	\$865.0	16
Natural Resources*	3,510	17	NA*	
Mining, Quarrying, & Oil & Gas Extraction	NA*		\$298.1	19
Agriculture, Forestry, Fishing & Hunting	NA*		\$3,133.2	9
Utilities	3,070	18	\$1,392.9	15

*Natural Resources includes the agriculture and mining industries

Employment projections, wages paid and the multiplier impact of supersectors on Idaho's economy are also important areas to look at. Staffing patterns of the potential supersectors were analyzed by high demand, hot jobs and wages. Based on those criteria, the analysis identified five especially promising supersectors: health care and social services; manufacturing; accommodation and food services; construction and professional scientific and technical services.

The Research and Analysis Bureau presents economic findings on a quarterly basis regarding Idaho's target supersectors to the Workforce Development Council. These findings and data are discussed at the Council level to monitor the continued relevance of these clusters in real time and measure their impact on Idaho's economy and workforce.

The five target supersectors are projected to grow significantly during the next 10 years. Growth also will occur in other supersectors including retail trade; transportation and warehousing; educational services; wholesale trade; and administrative support services and waste management. It should be pointed out that education is vital to all industries because it provides the training required by all occupations from high school diplomas to postsecondary certificates to college degrees.

Table 4: Private Supersectors Ranked by Projected Employment Growth, 2016-2026

	2016	2026	Growth		% Change	
	Jobs	Jobs	#	Rank	%	Rank
Supersector	735,429	841,050	105,621		14.4%	
Health Care & Social Assistance	94,539	116,480	21,941	1	23.2%	4
Accommodation & Food Services	61,499	71,225	9,726	3	15.8%	6
Construction	39,479	46,787	7,308	5	18.5%	5
Manufacturing	63,769	69,666	5,897	7	9.2%	16
Professional, Scientific & Technical Services	34,368	38,428	4,060	8	11.8%	13

Together, these target supersectors provide more than 40 percent of Idaho jobs. The largest is health care and social assistance currently providing 13 percent of all jobs and projected to increase to 14 percent of the jobs. The smallest is professional, scientific and technical services at nearly 5 percent. Table 4 shows that each of the target superstores will continue to grow and provide job opportunities for Idaho's work force.

- **Health Care and Social Services** comprises ambulatory medical care, hospitals, nursing, residential care, child care, vocational rehabilitation services and mental health services. Many of the services provided by this sector are delivered by trained professionals. All establishments have labor inputs of health practitioners or social workers with the requisite expertise. This supersector, which include public and private employment, provides 13 percent of Idaho's jobs. Although this sector includes only four major industry categories, it includes more than 150 occupations.

(Data Appendix Tables 10a and 10b – Health Care & Social Services Industries and Occupations, Appendix X)

- **Manufacturing** includes a wide range of activities—from food processing and wood processing to making computer, and electronic products, and building transportation equipment. Food processing and transportation equipment are the fastest growing manufacturing sectors. Many of Idaho’s “high tech” jobs are in the manufacturing supersector. The percent of nonfarm jobs in manufacturing averaged 9.2 percent from 2007 to 2019. (Data Appendix Tables 11a and 11b - Manufacturing Industries and Occupations, Appendix X)
- **Accommodation and Food Services** comprises eight industries - three in the accommodation sector and five in food services. Restaurants employ the most people in this supersector. The percentage of Idaho’s nonfarm jobs in the supersector grew from 8.3 percent in 2007 to 9.3 percent in 2019. (Data Appendix Tables 12a and 12b – Accommodation and Food Services Industries and Occupations, Appendix X)
- **Construction** comprises nine industries, ranging from residential and highway construction to special trade contractors such as electricians and plumbers. Construction employment as a percent of nonfarm employment peaked in 2007 at 8 percent but fell to a low of 4.8 percent in 2011-2012 as a result of the recession. Since then the percent of jobs increased each year, reaching 6.6 percent by 2019. (Data Appendix Tables 13a and 13b - Advance Manufacturing Industries and Occupations, Appendix X)
- **Professional, Scientific and Technical Services** comprises nine industries including: legal services; accounting and tax preparation; architectural and engineering; computer systems design; consulting; scientific research; and advertising. There are nearly 200 occupations in this supersector, which consistently provides slightly more than 5 percent of Idaho’s nonfarm jobs and some of the highest paid occupations. (Data Appendix Tables 14a and 14b – Professional, Scientific and Technical Services Industries and Occupations, Appendix X)

These targeted sectors may also cross occupations. A listing of Hot Jobs within the target sector industries can be found in Data Appendix Table 15 - Hot Jobs for Target Industries (Appendix X). This table sorts the Hot Jobs by annual openings, which includes openings due to exits, transfers and new, through 2026. Each occupation is followed by the target sector(s) that includes it. Additional information about Idaho’s Hot Jobs follows the discussion of Idaho’s high-demand occupations below.

High-Demand Occupations

Occupations generally cross industries. Some will be more prominent in specific industries but can be found to a lesser degree in others. For example, although most nurses work in health care, some work in manufacturing, retail, education and other superstores. Similarly,

food service workers mostly work at restaurants and related businesses, but some work at school cafeterias, retail stores, hospitals, and nursing homes.

Occupations are considered “high-demand.” if they have at least 100 openings annually. Average annual opening reflect churn in the labor force. Openings includes those individuals that left that particular occupation for some reason, those individuals that transferred out of a particular occupation to another one and then openings that are new due to growth in that particular occupation. Table 5 lists the top ten high-demand occupations, ranked by the number of annual openings –which include transfers, exits and new jobs. Table 6 lists the top ten high-demand occupations, ranked by the number of new jobs.

Table 5. Top 10 High-Demand Occupations Ranked by Annual Openings

Occupational Title	2016 Jobs	2026 Projected Jobs	Annual Exits	Annual Transfers	New Jobs	Annual Openings*	Median Hourly Wage	Ed Level**
Combined Food Preparation & Serving Workers, inc. Fast Food	19,207	24,176	1,921	2,009	497	4,427	\$8.92	LHS
Retail Salespersons	24,451	27,696	1,651	2,069	324	4,044	\$11.04	LHS
Customer Service Representatives	22,696	25,684	1,237	1,815	299	3,351	\$13.71	HSDE
Cashiers	16,541	17,991	1,621	1,582	145	3,348	\$9.36	LHS
Personal Care Aides	12,228	16,755	1,157	871	453	2,481	\$10.20	HSDE
Office Clerks, General	15,628	16,159	933	909	53	1,895	\$13.70	HSDE
Cooks, Fast Food	12,898	13,062	760	1,038	16	1,814	\$8.55	LHS
Heavy & Tractor-Trailer Truck Drivers	12,279	14,747	573	849	247	1,669	\$18.33	PNDA
Janitors & Cleaners, exc. Maids &	9,922	11,289	690	667	137	1,494	\$10.96	LHS

Housekeeping
Cleaners

Laborers &
Freight, Stock, &
Material
Movers, Hand

8,677

9,959

462

797

128

1,387

\$12.60

LHS

* Annual Openings include openings due to exits, transfers and projected growth

Table 6. Top 10 High-Demand Occupations Ranked by Number of New Jobs

Occupational Title	2016 Jobs	2026 Projected Jobs	New Jobs	Median Hourly Wage	Education Level**
Combined Food Preparation & Serving Workers, inc. Fast Food	19,207	24,176	497	\$8.92	LHS
Personal Care Aides	12,228	16,755	453	\$10.20	HSDE
Registered Nurses	13,180	17,045	386	\$29.90	BD
Retail Salespersons	24,451	27,696	324	\$11.04	LHS
Customer Service Representatives	22,696	25,684	299	\$13.71	HSDE
Heavy & Tractor-Trailer Truck Drivers	12,279	14,747	247	\$18.33	PNDA
General & Operations Managers	11,670	13,475	180	\$31.53	BD
Nursing Assistants	7,420	9,031	161	\$11.93	PNDA
Cashiers	16,541	17,991	145	\$9.36	LHS
Janitors & Cleaners, exc. Maids & Housekeeping Cleaners	9,922	11,289	137	\$10.96	LHS

Although the occupation “combined food preparation and serving workers, including fast food” ranks number one on both tables, the addition of registered nurses, general operation managers and nursing assistants provides a different perspective of high demand jobs. Churn should always be considered but the number of new job opportunities should be a priority.

The Idaho Department of Labor identifies Idaho’s Hot Job— the jobs that generally require some training, pay a better wage and are predicted to be in high demand. Specifically, the criteria used to determine which jobs are included on the “Hot Jobs” list include (1) the number of annual openings, (2) median wage, and (3) projected growth. Some Hot Jobs have fewer than 50 openings a year, but make the list due to their high wages and projected growth.

For example, the occupation of “physician assistant” has only 20 annual openings, but the median wage and growth rate are very high. The top 20 Hot Jobs are listed below. A complete list of all 50 of Idaho’s Hot Jobs is included in Data Appendix X Table 9 - Idaho Hot Jobs.

Table 7: Top 20 “Hot Jobs” by Hot Job Ranking

Hot Job Ranking	Occupational Title	2026 Projected Employment	Percent Change	Annual Openings*	Median Wage	Education Level**
1	Registered Nurses	17,045	29.3%	1,147	\$29.90	BD
2	Software Developers, Applications	2,639	30.2%	208	\$38.15	BD
3	Nurse Practitioners	890	35.1%	60	\$46.19	MD
4	Physician Assistants	818	32.8%	57	\$45.22	MD
5	Information Security Analysts	671	30.3%	56	\$41.95	BD
6	Industrial Machinery Mechanics	2,927	23.2%	282	\$24.58	HSDE
7	Market Research Analysts and Marketing Specialists	1,798	27.7%	191	\$24.23	BD
8	Pharmacists	1,825	16.7%	98	\$56.85	DPD
9	Physical Therapists	1,120	26.3%	63	\$37	DPD
10	Loan Officers	3,339	20.3%	300	\$26.13	BD
11	Respiratory Therapists	912	51.2%	66	\$26.47	AD
11	Healthcare Social Workers	751	25.4%	82	\$25.65	MD
13	Industrial Engineers	1,282	15.4%	93	\$43.41	BD
14	Occupational Therapists	534	25.4%	34	\$35.71	MD
15	Management Analysts	2,026	15.2%	186	\$30.69	BD
16	Accountants and Auditors	4,800	14.5%	453	\$29.54	BD
17	Diagnostic Medical Sonographers	411	35.2%	29	\$33.99	AD
18	Heavy and Tractor-Trailer Truck Drivers	14,747	20.1%	1,669	\$18.33	PNDA
19	Cost Estimators	1,337	17.7%	139	\$25.71	BD
20	Radiologic Technologists	1,108	23.0%	72	\$25.27	AD

Source: Idaho Department of Labor Occupation Employment Statistics Program

The list below shows major occupational groups and how many of Idaho's 50 Hot Jobs each includes and the projected annual openings from those occupations.

- **Architecture and Engineering** – One occupation requiring a bachelor's degree , 93 openings
- **Business and Finance** - Nine occupations all requiring a bachelor's degree, 1,883 openings
- **Community and Social Service** - Two occupations requiring a master's degree or a bachelor's degree, 167 openings
- **Computer and Mathematical** - Four occupations—three requiring a bachelor's degree and one an associate's degree, 384 openings
- **Construction and Extractions** - Two occupations both requiring a high school diploma or equivalent, 889 openings
- **Education, Training and Library** - Four occupations requiring a bachelor's degree or a doctoral or professional degree, 1,377 openings
- **Healthcare Practitioners and Technical** - Fourteen occupations—one requiring at least a high school diploma for one occupations while the others range from postsecondary non-degree training to a doctoral or professional degree, 2,013 openings
- **Healthcare Support** - One occupation requiring a postsecondary non-degree, 465 openings
- **Installation, Maintenance and Repair** - Five occupations all requiring a high school diploma or equivalent, 936 openings
- **Office and Administrative Support** - One occupation requiring a high school diploma or equivalent, 183 openings
- **Production** – One occupation requiring a high school diploma or equivalent, 433 openings
- **Sales and Related** - Five occupations—four requiring a high school diploma or equivalent and one requiring a bachelor's degree, 1,181 openings
- **Transportation and Material Moving** - One occupation requiring a postsecondary non-degree award, 1,669 openings

Of the 50 Hot Jobs, 36 require some type of training beyond high school, and only one of the top 20 do not. Projected growth of these occupations, coupled with education data and direct input from representatives of Idaho industries, lend strong support to the state's goal to increase educational attainment beyond high school. It is vital that Idaho's labor force seek

educational opportunities to qualify for the Hot Jobs that will be available over the next 10 years.

The Research Bureau in the Idaho Department of Labor publishes a monthly job listing report. The report provides current data on the number of job openings in Idaho for each month, the number of new openings and the number of jobs that have been unfilled for 90 days or more. The jobs are ranked by the monthly average listings. “New listings” are those listed for the first time that month. The number of listings open 90 days or more are considered “hard to fill.” The wages are presented as the median annual wage rather than the median hourly rate because that is what is published monthly. Many of the top 20 job listings are also on the high demand occupations based on occupational employment projections. Most of those occupations show up at the top of the job listings every month because they remain in strong demand. However, some such as forest and conservation technicians and construction laborers are seasonal. The top 20 job listings for 2019 are listed below.

Table 8: Average Monthly Job Listing, 2019

Rank	Occupational Title	2019 Average Job Listings	2019 Average New Job Listings	2019 Average Job Listings Open 90 Days or More	Median Annual Wage (OES)	Education Level**
Total, All Occupations		26,725	8,925	6,443	\$34,260	
1	Registered Nurses	3,907	1,344	329	\$66,780	BD
2	Customer Service Representatives	824	233	215	\$30,920	HSDE
3	Retail Salespersons	795	186	234	\$24,020	LHS
4	First-Line Supervisors of Retail Sales Workers	788	153	243	\$38,530	HSDE
5	Heavy and Tractor-Trailer Truck Drivers	646	305	117	\$39,280	PNDA
6	Stock Clerks and Order Fillers	534	176	125	\$26,000	HSDE
7	First-Line Supervisors of Food Preparation and Serving Workers	389	62	94	\$28,830	HSDE
8	Maintenance and Repair Workers, General	333	131	66	\$34,010	HSDE

9	Light Truck or Delivery Services Driver	325	91	70	\$29,960	HSDE
10	Physicians & Surgeons, Other	323	64	126	*	DPD
11	Cashiers	323	78	76	\$21,370	LHS
12	Combined Food Preparation and Serving Workers, Including Fast Food	313	70	78	\$18,960	LHS
13	Software Developers, Applications	305	98	80	\$83,510	BD
14	Forest & Conservation Technicians	295	106	174	\$33,400	AS
15	Nursing Assistants	291	91	84	\$26,770	BD
16	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	281	120	66	\$24,180	LHS
17	First-Line Supervisors of Office and Administrative Support Workers	267	106	52	\$48,470	HSDE
18	Computer Occupations, All Other	254	93	53	\$78,090	BD
19	Construction Laborers	244	130	47	\$30,970	LHS
20	Computer User Support Specialists	230	80	47	\$44,730	SCND

(ii) Emerging Demand Industry Sectors and Occupations

Provide an analysis of the industries and occupations for which demand is emerging.

This section analyzes emerging demand industry sectors and occupations by way of examining high growth industries and occupations. In several cases, industries and occupations that have previously been discussed as high demand are also high growth. For example: health care and social services, retail trade and accommodation and food services are all high growth industrial sectors as well as having current high demand.

However, there are some occupations that are not currently high demand, but are growing—such as pharmacists or market research analysts. Additionally, subsectors within a high-demand industry may be emerging. For example, ample evidence collected recently through community forums, business conferences and other discussions indicate Idaho’s small manufacturers are experiencing growth and have the ability to grow even more. Additionally, over one-third of the growth in the health care field is projected to occur in ambulatory health care services, which include doctor’s offices, outpatient care centers, home health care and laboratories. These and other trends are discussed in greater depth under “Growth Industries” and “Growth Occupations” below.

Growth Industries

This section examines Idaho's industries in terms of projected employment growth. The industrial Supersectors projected to have the largest net job growth between 2016 and 2026 are:

- Health Care and Social Assistance – 21,941
- Retail Trade - 10,612
- Accommodation and Food Services – 9,726
- Transportation & Warehousing – 7,904
- Construction – 7,308
- Educational Services (include private and government jobs) - 7,068

The graphs in Figures 1 and 2 on the following page present data on both the net growth and relative growth of the industries listed above, as well as several other industries. Specific information for these and other high-growth industries is provided after the following graphs.

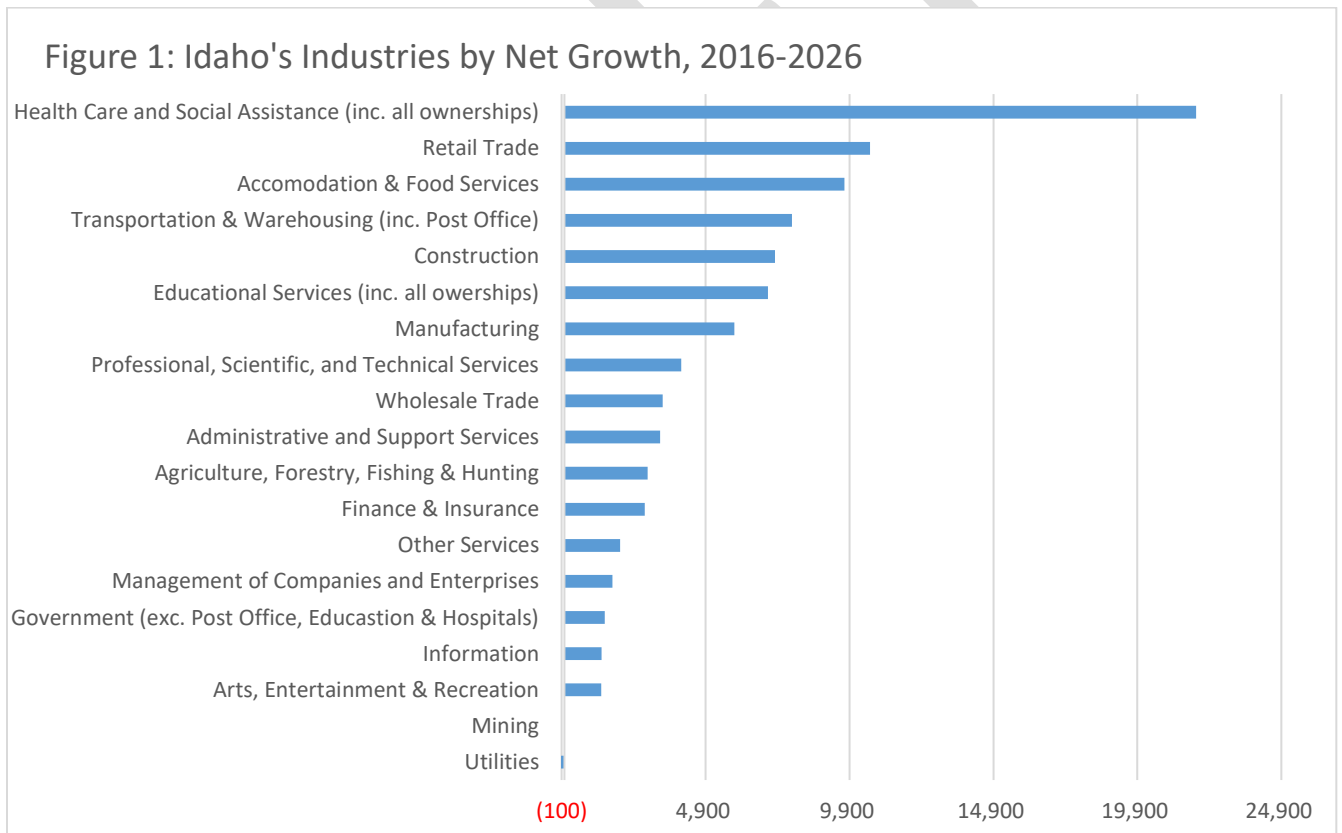
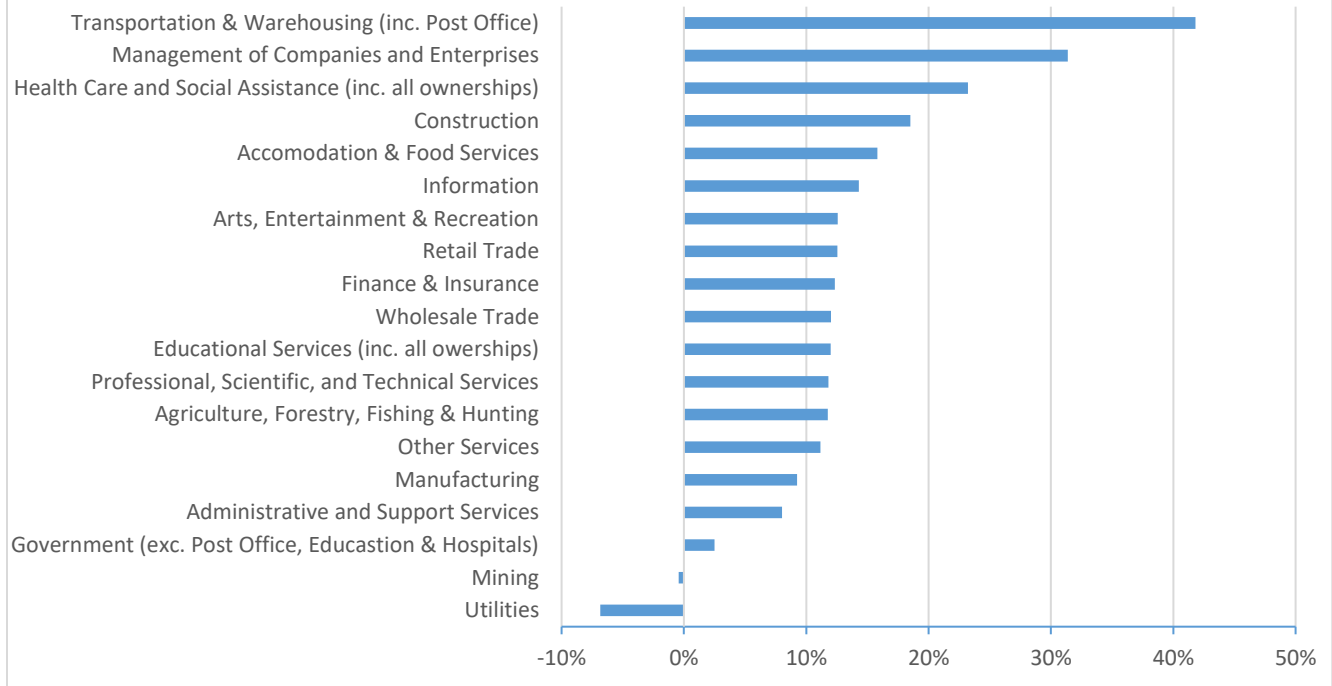


Figure 2: Idaho's Industries by Relative Growth, 2016-2026



Most of these industries are already among Idaho's largest. However, the new emerging and revitalized industries could be identified as manufacturing; professional, scientific and technical services; wholesale trade; and administrative and support services. Each of these emerging industries are projected to add more than 3,000 jobs to its work force by 2026. An analysis of the growth in each industry sector follows.

Health Care and Social Assistance: Over the long-term, the health care and social assistance sector is projected to add the most new jobs at 21,941. However, it ranks 4th in percentage growth at 23%. The aging workforce and in-migration of retirees will continue to drive significant growth in this sector. Over 46 percent of the growth is projected to occur in hospitals - general, surgical, psychiatric and substance abuse facilities. Ambulatory health care services, which include doctor's offices, outpatient care centers, home health care and laboratories, is projected to grow by nearly 24 percent, nearly 5,200 jobs, over the next 10 years. Nursing homes and residential care facilities will add 3,200 jobs by 2026. Social assistance is projected to add nearly 3,400 jobs, growing 15 percent, as more individuals and families are seeking counseling, services for the elderly and disabled, assistance with retraining, emergency food and shelter, and day care services. The growth and aging of Idaho's population will foster this industry's growth. Idaho's health care will grow about 23 percent between 2016 and 2026. Its rapid growth has led to shortages in many health care occupations. More than half of the high demand jobs are in the health care industry with the education ranging from a professional degree to less than a high school education.

Retail Trade: Jobs in retail trade will expand as the population grows and the overall economy continues to expand. Retail employment ranked second in fastest growth and but 9th in net job growth. The number of new jobs added by 2026 will be just over 10,500 with a 12.6 percent growth rate. Nearly 43 percent of the job growth is projected to be at general merchandise stores, in spite of many major brick and mortar stores closing. Employment growth is projected to be nearly 15 percent at motor vehicle and parts dealers, the next largest sector in retail trade. Retail employment is dominated by retail salespeople and cashiers, two of the top four high-demand occupations, Other high-demand occupations include first-line supervisors and managers of retail sales workers; bookkeepers, accounting and auditing clerks, stock clerks and order filers. Most of these jobs will require little education beyond high school.

Accommodation and Food Services: Accommodation and food services industries, the largest part of the leisure and hospitality sector, is projected add more than 9,700 jobs between 2016 and 2026. Jobs in the food services industry will account for 80 percent of this growth. Its estimated 7,800 job openings will include waiters and waitresses, food preparation and serving workers, counter attendants, dishwashers and cooks. Only restaurant cooks require more than short-term training. Most of these jobs require interaction with the public so good people skills are vital. Growth in Idaho's population and increased tourism activity will contribute to the employment increase.

Transportation and Warehousing: Transportation and warehousing—a component of the trade, transportation and utilities sector—makes up about 17 percent of the sector's employment. Retail trade is the largest part of the sector. Transportation and warehousing ranks fourth in numeric growth but first in percentage growth at nearly 42 percent. Most of the growth will come from the trucking industry. Heavy and tractor-trailer truck drivers rank 8th among Idaho's high demand jobs and require a postsecondary non-degree certification

Construction: Construction employment is projected have the fifth largest percentage growth at 29 percent, resulting in the addition of 7,300 new jobs. Nearly 50 percent of the new jobs will be in specialty trades including painting, electrician, and plumbing businesses. Nonresidential building will have the smallest uptick at 906 jobs. With the demand for new homes and the improved financial climate, jobs in residential building construction are predicted to increase by over 2,000. Construction employment in 2026 is projected to be 46,800, still below the 2007 high of 52,000 jobs. Eight construction occupations are in the top 100 high demand. Construction laborers will be the highest demand, ranking 20th, with less than a high school degree acceptable. Carpenters and electricians are in the top 50.

Education Services: Education services are forecast to add over 7,000 jobs, 12 percent increase, by 2026, in both public and private schools from kindergarten through postsecondary. Education accounts for more than half of government jobs. As Idaho's population continues to grow, student populations will rise. Although Idaho's economy is growing, schools continue to experience budget constraints. Some school districts have passed bond and levy elections to help ease local budgets and upgrade facilities and equipment, however, local school districts in many rural areas of Idaho continue to struggle with their

budgets. Inadequate public school facilities and overcrowding--which is expensive to address and can become a barrier to attracting new residents to an area. The current budget pressures on public education will have a direct effect on the structure of Idaho's economy. Secondary and elementary school teachers are among the top 50 high demand occupations.

Manufacturing: Manufacturing t struggled the first few years of the decade following the recession, but rebounded after 2011. By 2026 employment is projected to reach nearly 70,000, an increase of nearly 6,000 jobs ranking it 7th in growth. Food processing will account for 44 percent of the growth. The computer industry's employment is projected to fall 7 percent.

Professional, Scientific and Technical Services: Professional, Scientific and Technical Services—a major component of the Professional and Business Services sector—is projected to add 4,000 jobs ranking 8th for the number of jobs added and 13th for percentage growth. This industry includes accounting, legal, engineering services, computer system design, management consulting services and scientific research. More broadly, the professional and business services sector is forecast to add 9,000 jobs over the next seven years. This growth includes an estimated demand for 3,000 workers by administrative services. Within this industry, fastest growing occupations are computer-related, including software engineers and network analysts. Accountants and other types of financial workers will be in strong demand. Demand for workers in scientific research should continue to grow.

Growth Occupations

This section examines Idaho's occupations both in terms of net growth (number) and relative growth (percentage). An occupation with large relative growth may not necessarily add a large number of jobs. A total of 20 occupations are projected to experience very high relative growth between 2016 and 2026, defined as an increase of 20 percent or more in total number of jobs. However, the majority of these high-growth occupations have less than 500 annual openings. Openings do not just come from the addition of new jobs but also from the need to replace workers that are exiting the occupation or transferring out of the state. Of the 70 fastest growing occupations, only 14 have at least 1,000 annual openings but only four are shown in Table 9. Of the 20 occupations listed below, only six have more than 100 new job openings and eight require more than a high school education.

Table 9: Idaho Demand Occupations by Projected Relative Growth, 2016-2026

Rank	Occupational Title	2016 Empl	2026 Projected Empl	Net Change	New Jobs	Annual Openings*	Percent Change	Median Hourly Wage	Ed Level
	Total, All Occupations	686,864	780,732	93,868	9,387	90,300	13.7%	\$15.77	
1	Home Health Aides	1,888	2,624	736	74	325	39.0%	\$9.87	HSDE
2	Personal Care Aides	12,228	16,755	4,527	453	2,481	37.0%	\$10.20	HSDE
3	Medical and Health Services Managers	1,873	2,357	484	48	208	30.2%	\$38.36	BD
4	Registered Nurses	13,180	17,045	3,865	386	1,147	29.3%	\$29.90	BD
5	Financial Managers	2,076	2,638	562	56	227	27.1%	\$38.26	BD
6	Combined Food Preparation & Serving Workers, inc. Fast Food	19,207	24,176	4,969	497	4,427	25.9%	\$8.92	LHS
7	Software Developers, Applications	2,027	2,639	612	61	208	25.8%	\$38.15	BD
8	Maids & Housekeeping Cleaners	3,893	4,846	953	95	663	24.5%	\$9.77	LHS
9	Medical Assistants	3,274	4,062	788	79	465	24.1%	\$14.66	PNDA
10	Hotel, Motel & Resort Desk Clerks	1,514	1,868	354	35	296	23.4%	\$10.32	HSDE
11	Industrial Machinery Mechanics	2,376	2,927	551	20	282	23.2%	\$24.58	HSDE
12	Cleaners of Vehicles and Equipment	2,411	2,939	528	53	423	21.9%	\$9.55	LHS
13	Nursing Assistants	7,420	9,031	1,611	161	1,077	21.7%	\$11.93	PNDA
14	Bus and Truck Mechanics & Diesel Engine Specialists	1,701	2,058	357	36	201	21.0%	\$18.70	HSDE
15	First-Line Supervisors of Construction Trades & Extraction Workers	3,031	3,657	626	63	381	20.7%	\$26.90	HSDE

16	Carpenters	4,980	6,005	1,025	102	596	20.6%	\$16.71	HSDE
17	Loan Officers	2,776	3,339	563	56	300	20.3%	\$26.13	BD
18	Cooks, Restaurant	1,238	1,489	251	25	214	20.3%	\$11	LHS
19	Heavy and Tractor-Trailer Truck Drivers	12,279	14,747	2,468	247	1,669	20.1%	\$18.33	PNDA
20	Cement Masons and Concrete Finishers	1,759	2,110	351	35	240	20.0%	\$17.04	LHS

Source: Idaho Department of Labor, 2016-2026 Occupation Projections

- **High Demand:** The highest demand industries and occupations are clustered around health care, retail trade, food services and construction. Many of these occupations are considered high-demand because high employee turnover causes them to have more than 100 openings per year. However, many of these highest-demand occupations are also the lowest-paying and require the least skill and education.
- **High Growth:** Many of the occupations projected to experience the most growth also have relatively high wages and require more education and training. However, for many of these occupations, the number of new jobs is projected to remain below 100, even after accounting for future growth.

B. Workforce Analysis

The Unified or Combined State Plan must include an analysis of the current workforce, including individuals with barriers to employment, as defined in section 3 of WIOA.* This population must include individuals with disabilities among other groups** in the State and across regions identified by the State. This includes: Individuals with barriers to employment include displaced homemakers; low-income individuals; Indians, Alaska Natives, and Native Hawaiians; individuals with disabilities, including youth who are individuals with disabilities; older individuals; ex-offenders; homeless individuals, or homeless children and youths; youth who are in or have aged out of the foster care system; individuals who are English language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers; farmworkers (as defined at section 167(i) of WIOA and Training and Employment Guidance Letter No. 35-14); individuals within 2 years of exhausting lifetime eligibility under the Temporary Assistance for Needy Families program; single parents (including single pregnant women); and long-term unemployed individuals. ** Veterans, unemployed workers, and youth, and others that the State may identify.

i. Employment and Unemployment

Provide an analysis of current employment and unemployment data, including labor force participation rates, and trends in the State.

ii. Labor Market Trends

Provide an analysis of key labor market trends, including across existing industries and occupations.

iii. Education and Skill Levels of the Workforce

Provide an analysis of the educational and skill levels of the workforce.

iv. Skill Gaps

Describe apparent 'skill gaps'.

(i) Employment and Unemployment Trends

Provide an analysis of current employment and unemployment data and trends in the State.

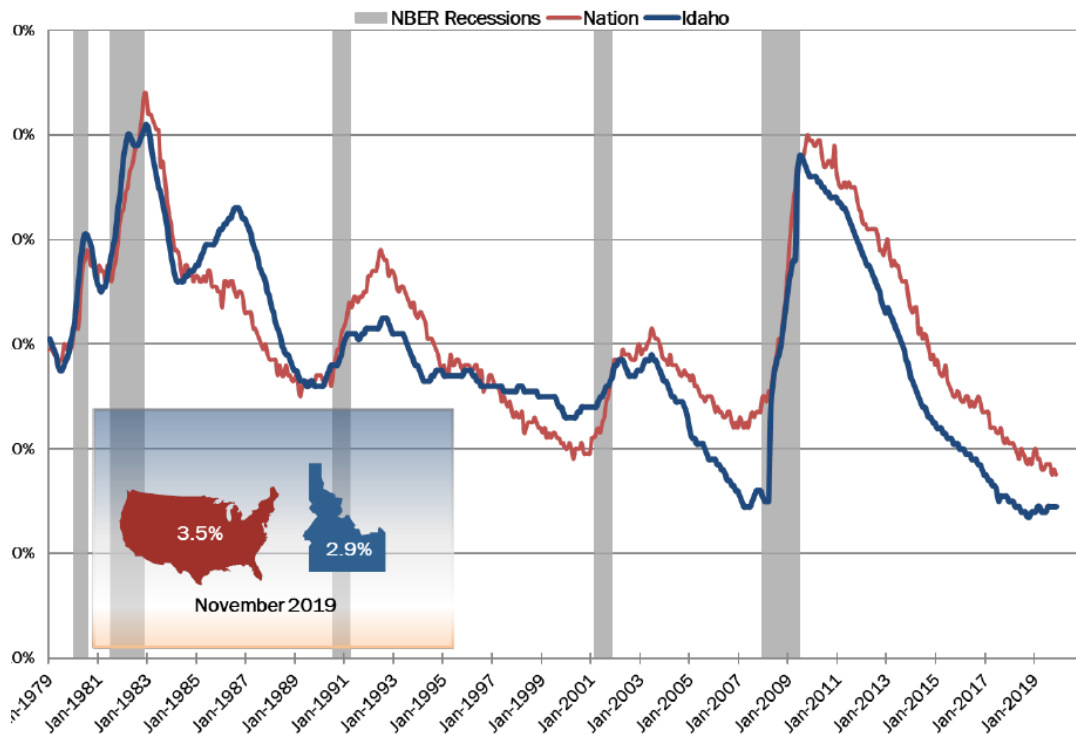
This part of Section(II)(a)(1)(B) examines employment and unemployment trends in general for the state, followed by a discussion of employment trends for specific subpopulations, as well as a more in-depth analysis of employment for Idahoans with disabilities.

General Employment Trends

In Idaho, jobs grew at a healthy pace from 2003 through 2006. By mid-2007, the growth began to slow and ended in August when the number of people employed began to decline, and continued to decline through mid-2009. The seasonally adjusted unemployment rate increased from a record low of 2.9 percent in March 2007 to 9.6 percent in June 2009. At this point, the unemployment rate reached its highest level and remained at this level for the longest amount of time since the recession in 1982 and 1983 when the rate peaked at 10.2 percent in December 1982.

However, Idaho's economy has now fully recovered. Idaho's unemployment experienced a record low seasonally adjusted unemployment rate, 2.7 percent, in September and October 2018. The rate has since fluctuated between 2.8 percent and 2.9 percent. Idaho's seasonally adjusted unemployment rate has stayed below the national rate since August 2009 as evidenced by the graph below.

Figure 3: Comparison of Seasonally Adjusted Unemployment Rate



Sources: Bureau of Labor Statistics, Idaho Department of Labor

Idaho's economy has been exhibiting strong healthy growth. The year-over-year number of employed workers has increased and the year-over-year number of unemployed workers has decreased each month since the recession ended in July 2009, with a few minor upticks early on in the recovery. The upward trend has continued for more than 90 straight months.

Unemployment characteristics were easily obtained for the five target sectors. Between 2010 and 2019 all major industrial sectors experienced a decline in the number of new claimants filing for unemployment. Construction and manufacturing reported the most significant decreases. Construction reported 6,113 unemployment workers in 2019 compared to 20,991 in 2010. Manufacturing reported 4,593 unemployed workers down from 15,480 in 2010. In spite of the decrease in the number unemployed across all industries, construction and manufacturing continue to be the sectors with the highest percent of total unemployed, 17.5 percent and 13.2 percent respectively.

Many of the construction occupations are in two categories – construction and extraction and installation, maintenance and repair – reported 7,338 unemployed in 2019 compared to 22,847 in 2010. Manufacturing's occupation are primarily in the production group, which reported 2,980 unemployed workers in 2019 compared to 10,827 in 2010.

Health care and social services, the only sector posting steady growth through the recession, experienced a decline in unemployment with a very slight uptick in 2017. Healthcare practitioners and technician and healthcare support, the occupation groups that encompass the

majority of health care's occupations, accounted for only 3.36 percent of the unemployed in 2019.

Some characteristics of the unemployed are: 64 percent are male, 16 percent are Hispanic (an ethnic group), 75 percent are white and 65 percent are between the ages of 25 and 54. (Detail data is in *Data Appendix Table 16 – UI-Claimant Characteristics*).

Overall Labor Force Participation

The labor force consists of individuals who are in the workforce employed or looking for work. Idaho's civilian labor force participation rate—percentage of civilians 16 years and over who are employed or looking for work—in 2018 was 62.1 percent, down from Idaho's highest participation rate of 66.5 percent in 2008. Idaho's labor force participation rates have consistently been below the national rates since 2009. In 2008 the state's participation rate was 66.6 percent compared to the national rate of 65.9 percent. Idaho's participation rate has been between 62.3 percent in 2015 to 62.0 percent in 2016. The national rate has hovered around 63.2 during the same period.

The labor force participation rate varies by age group and gender. The most notable difference between 2008 and 2018 was the decrease in the participation rate of Idahoans 16 to 24 years of age. Interestingly, the oldest age group's participation rate increased.

Table 10 - 2018 Labor Force Participation Rates Compared to 2008 Rates

	2018 Civilian Population (Thousands)	2018 Civilian Labor Force (Thousands)	2018 Labor Force Participation Rate	2008 Civilian Population (Thousands)	2008 Civilian Labor Force (Thousands)	2008 Labor Force Participation Rate
Population 16 and Over	1,357	843	62.1%	1,158	771	66.6%
16-24	214	133	62.3%	199	132	66.5%
25-54	649	527	81.2%	610	505	82.9%
55-64	215	137	63.8%	167	108	64.4%
65 and older	279	46	16.3%	182	26	14.4%
Population 20 to 64 Years	980	754	76.9%	881	699	79.3%
Men	495	409	82.7%	446	389	87.2%
Women	485	345	71.1%	435	310	71.2%

Source: Bureau of Labor Statistics – 1-year estimates employment status of the civilian, noninstitutionalized population for 2008 and for 2018

Employment Trends by Population

The table below provides employment information for Idaho's labor force by age, race, and gender, taken from the American Community Survey (ACS) five-year estimates for 2014-2018. This information provides insight into whether specific groups may face barriers to employment. Specific trends are discussed below the table.

The American Community Survey (ACS) five-year data is the only source for detailed information on unemployment rate by age, race and ethnicity. The Census Bureau released the 2014-2018 estimates in December 2019.

Table 11: Idaho Labor Force by Age, Race and Gender (ACS 5-year, 2014-2018)

Population Subgroups	Total Population	Civilian Labor Force	Employed	Unemployed	Unemployment Rate
Population 16 Years and Older	1,298,537	810,287	768,734	38,083	4.7%
<i>Civilian Labor Force</i>		<i>806,373</i>	<i>768,701</i>	<i>37,672</i>	<i>4.7%</i>
Age					
16 to 19 years	95,886	43,724	36,820	6,777	15.5%
20 to 24 years	113,385	88,327	80,050	7,331	8.3%
25 to 29 years	111,480	87,735	81,938	4,738	5.4%
30 to 34 years	108,726	85,459	81,871	2,906	3.4%
35 to 44 years	209,204	171,338	164,853	5,654	3.3%
45 to 54 years	199,059	160,641	155,465	4,819	3.0%
55 to 59 years	105,507	76,809	74,488	2,304	3.0%
60 to 64 years	101,489	55,007	53,079	1,925	3.5%
65 to 74 years	153,600	35,328	34,099	1,201	3.4%
75 years and over	100,201	6,112	5,912	214	3.5%
Race & Hispanic or Latino Origin					
White Alone	1,186,723	735,768	700,167	32,374	4.4%
Black Alone	8,481	5,682	4,715	636	11.2%
American Indian & Alaska Native Alone	17,128	9,934	8,752	1,182	11.9%
Asian Alone	19,382	11,862	11,377	356	3.0%

Native Hawaiian & Other Pacific Islander Alone	2,182	1,353	1,187	88	6.5%
Some Other Race Alone	37,630	27,658	26,190	1,355	4.9%
Two or More Races	27,011	17,584	15,801	1,723	9.8%
Hispanic or Latino Origin of any race	137,536	97,238	91,461	5,445	5.6%
White Alone, not Hispanic or Latino	1,095,852	672,853	641,073	28,933	4.3%
Gender					
Male	646,704	438,106	417,289	20,817	4.6%
Female	651,833	368,267	351,412	16,855	4.8%

As Table 11 shows, the largest age cohort for Idaho workers is those 35 to 44 years old. The age group experiencing the highest unemployment rate is teens 16 to 19 years old, while the group with the lowest unemployment rate are 45 to 59 years old.

It is important to note that the youth listed in this table are those who are part of the workforce and actively looking for work. The state is implementing several strategies designed to increase employment, education and skill attainment opportunities needed by this struggling youth demographic.

More than 90 percent of Idaho's labor force is White alone, and this group has an unemployment rate of 4.4 percent—the second lowest among racial and ethnic groups. The lowest unemployment rate was among Asian alone at 3 percent. Native Hawaiian and Other Pacific Islander alone make up the smallest portion of Idaho's labor force at 0.2 percent, and have a 6.5 percent unemployment rate. The highest unemployment rate—11.9 percent— was reported for American Indian and Alaska Native alone, who make up 1.2 percent of Idaho's labor force. The Black alone also experienced double-digit unemployment rates, 11.2 percent.

People of Hispanic or Latino origin—a designation which crosses multiple racial groups— represent 12 percent of Idaho's workforce and had an unemployment rate of 5.6 percent.

Men in the workforce were unemployed at a rate of 4.6 percent compared to 4.8 percent for women.

Veterans, another important demographic group in Idaho, totaled 115,045 according to the American Community Survey 2014-2018 data. Over 95 percent of Idaho's veterans are White. Males account for 92 percent of the veterans. About 42 percent of veterans are between the ages of 35 and 64. They are an educated group with 41 percent having some college or an associate degree and 26 percent with a bachelor's degree or higher. The unemployment rate for veterans was 4.5 percent, just above the state's average rate. Additional information is found in *Data Appendix Table 18 - Idaho's Veterans (Appendix X)*.

Idaho is home to five Indian reservations - the Coeur d'Alene and the Kootenai (both in northern Idaho), the Nez Perce (north central Idaho), the Shoshone-Paiute (Duck Valley on the Idaho-Nevada border) and the Shoshone-Bannock (Fort Hall in southeastern Idaho). Total statewide reservation population is 33,887 and includes a variety of races outside of Native American. The largest race is White at 22,973, or 68 percent of the total reservation population. The American Indian and Alaska Native population is second with 9,320, or 28 percent. Most of the workers are in management, business, science and arts occupations. Education services, health care and social assistance provide the largest number of jobs at 2,840. Arts, entertainment and recreation, and accommodations and food services has the second largest number of jobs with over 1,500. Four other industry groups—agriculture, forestry, fishing, hunting and mining; manufacturing; retail trade; and public administration (government) employ more than 1,000 workers. One-third of the reservations' population 25 years and over has a high school diploma or equivalency. Over 53 percent have some college or more. *Data Appendix Tables 16a and 16b - Idaho Indian Reservations (Appendix 2)* detail further information specific to reservations.

Idahoans with Disabilities

The Workforce Innovation and Opportunity Act calls for enhanced services and opportunities for individuals with disabilities in the workforce system. As a result, this population has been analyzed in greater detail in Idaho's Combined State Plan. The information below provides a deeper look at Idaho's population of people with disabilities and the employment trends therein. Data is sourced from the American Community Survey estimates unless otherwise noted.

The number of people with disabilities in Idaho is growing. The American Community Survey one-year estimates of individuals with disabilities in Idaho increased from 204,780 in 2014 to 233,494 in 2018, representing an increase of 14 percent over four years. This indicates Idaho's population of people with disabilities is increasing at a rate faster than growth in the general population.

According to data from the 2018 American Community Survey, 13.5 percent of Idaho civilians living in the community report having a disability, including 11.6 percent of residents of working age (18-64). The prevalence of disability in Idaho roughly corresponds to that of the United States, with estimates all within one-percentage point each of the past eight-years, with the exception of 2015. These estimates are also in line with bordering states with the exception of Utah's rate of 9.6 percent (the lowest disability percentage in the United States). National rates of reported disability range from the low in Utah of 9.6 percent to a high of 19.1 percent in West Virginia. (need to verify the ranking of state's)

Table 12: Civilians Living in the Community by Age and Disability Status

Civilian Population	Total	With Disability		Without Disability	
		Number	Percent	Number	Percent
US Population	322,249,485	40,637,764	12.6%	281,611,721	87.4%
Idaho Population	1,733,484	233,494	13.5%	1,499,990	86.5%
Under 5 Years	113,693	1,171	1.0%	112,522	99.0%
5 to 17 Years	330,828	17,799	5.4%	313,029	94.6%
18 to 34 Years	385,145	33,109	8.6%	352,036	91.4%
35 to 64 Years	629,208	84,452	13.4%	544,756	86.6%
65 to 74 Years	167,252	42,386	25.3%	124,866	74.7%
75 Years and Over	107,358	54,577	50.8%	52,781	49.2%

Source: 2018 American Community Survey 1-Year Estimates, (B18101)

The table above demonstrates that the percentage of Idahoans who experience disability varies significantly by age. While this variance can be attributed to a number of factors, in general this rate increases over time with substantial increases both early in life as congenital disabilities are initially identified, and later in life as disabilities are acquired through events or emerge due to the natural aging process. This trend is illustrated in Table 12 above, with only 5.4 percent of individuals aged 5 to 17 experiencing disability compared to 13.4 percent for those aged 35 to 64 and 35.3 percent for those aged 65 or older. Because the 35 to 64 age group is quite large, the variance within that group is large as well: around half as many individuals age 18 to 34 experienced a disability.

When conducting its research, the American Community Survey includes questions related to six disability categories. Residents are asked if they have difficulty in any of the following areas:

- Hearing: deaf or having serious difficulty hearing.
- Vision: blind or having serious difficulty seeing, even when wearing glasses.
- Cognitive: difficulty remembering, concentrating, or making decisions due to physical, mental, or emotional problem.
- Ambulatory: serious difficulty walking or climbing stairs.
- Self-care: difficulty bathing or dressing.
- Independent living: difficulty doing errands alone such as visiting a doctor's office or shopping due to physical, mental, or emotional problem.

Table 13 provides information about the prevalence of these various disability types in Idaho. Self-report of disability category can include responses in multiple categories and therefore exceed 100 percent. The presence of co-occurring disabilities has a negative relationship with competitive, integrated employment.

Table 13: Civilians Aged 18 to 64 Living in the Community by Disability Type

Disability Category	Number of Idahoans Reporting a Disability*	Percent of Idaho's Total Population (18-64)	Percent with a Disability Reporting a Disability within a Category
Hearing	31,407	3.1%	26.7%
Vision	23,844	2.4%	20.3%
Cognitive	56,814	5.6%	48.3%
Ambulatory	49,209	4.9%	41.9%
Self-Care	19,925	2.0%	16.9%
Independent Living	40,716	4.0%	34.6%

Source: 2018 American Community Survey 1-Year Estimates, (B18120)

*Many disabilities can be co-occurring. Therefore, the sum of “Number of Idahoans Reporting a Disability” is a duplicated sum. The unduplicated total of Idahoans reporting disabilities is 105,862.

Table 14: Employment Status by Disability Status and Type, ages 18-64

Disability Type	Total	Number Employed	Number Unemployed	Unemployment Rate for those in Labor Force	Number Not in Labor Force	Percent Not in Labor Force
Cognitive	56,814	16,778	3,762	18.3%	35,409	62.3%
Hearing	31,407	18,884	2454	11.5%	12,175	38.8%
Self-care	19,925	4,543	630	12.2%	14,752	74.0%
Vision	23,844	11,255	1417	11.2%	11,172	46.9%
Ambulatory	49,209	14,512	2,333	13.8%	32,364	65.8%
Independent living	40,716	8,532	1,234	12.6%	30,950	76.0%
All Disabilities	117,561	49,464	6,842	12.2%	61,255	52.1%
No disability	896,792	700,555	23,615	3.3%	172,622	19.2%

Source: ACS 1-year Estimates 2018, Table B18120

Table 14 shows the employment status of Idahoans by self-reported disability type. Variation in employment between disability categories is substantial. For example, those individuals with hearing impairments participate in the labor force at a rate of 53 percent, and of those only 11.2 percent are unemployed. Whereas those with a cognitive disability participate in the labor force at a rate of 36 percent, and 18.3 percent are unemployed. When taken as a group, Idahoans with disabilities participated in the labor force at a rate of 48 percent, compared to

80 percent for people without disabilities, and the unemployment rate for Idahoans with disabilities was 12.2 percent, on average, compared to 3.3 percent for those without disabilities.

The employment gap between people with and without disabilities remains extensive, however recent figures suggest significant gains toward closing this gap in Idaho: Data from ACS table B18120 (2016) indicate that adults aged 18-64 in Idaho without disabilities are employed at an overall rate of 77.1 percent. In comparison, adults with disabilities in Idaho are employed at a rate of 43.3 percent. Idaho's disability employment gap of 33.8 percent has dropped significantly since Idaho's 2013 gap of 45 percent. This 11.2 percent shift drops Idaho's disability employment gap well below the national average of 40.9 percent. 2016 ACS 1-year estimates range from a low of 28.2 percent in Alaska, to a high of 48.6 percent in Rhode Island. This shift, in part, can be attributed to an exceptionally strong labor market across Idaho, resulting in the lowest unemployment rate on record for the State (2.8 percent) as of October 2017. Idaho experienced the largest percentage reduction in the disability employment gap of any state (2015-2016) at -8.3 percent.

Disability is also negatively correlated with full-time, year-round employment. The ACS 2016 one-year data estimate Idahoans with disabilities make up only 6.4 percent of the full-time year-round workforce. Idaho had the lowest disability earnings gap of any state according to the 2016 ACS at \$5,242. While this is certainly welcome news, it is important to note that Idaho also had the lowest median earnings across the 50 states, making this achievement easier to attain. That said, this represents a 30 percent reduction in the disability wage gap over the past three years. Those with disabilities also make substantially less than their counterparts without a disability, with median earnings of people with disabilities at \$22,189 compared to \$27,431, a shortfall of 19 percent.

Disability is also strongly associated with poverty: Of adults with disabilities in Idaho, 27.4% fall below the poverty threshold, compared to 12.2% of adults without a disability. This represents a

15.2 percentage point poverty rate gap in Idaho. This gap is decreasing, down from a 2013 poverty rate gap of 16 points.

Finally, it is worth noting that 71 percent of Idaho's growth can be attributed to people moving to the state. Further analysis of population trends by age across time suggest a significant portion of Idaho's population growth can be attributed to people age 65 and over moving to the state to enjoy a comparatively cheaper cost of living during retirement. These individuals, due to their age, are more likely to report experiencing a disability, and are less likely to be seeking employment than Idaho's population on average (US Census Bureau, Population Division, 2016 Annual Estimates).

(ii) Labor Market Trends

Provide an analysis of key labor market trends, including across existing industries and occupations.

This part of Section (II)(a)(1)(B) discusses general trends regarding Idaho's population and workforce, a discussion of in-migration to our state, as well as trends and changes in Idaho's population demographics. It also examines wage and income information, and finally, trends relating to Idaho's job market.

General Population Trends

Idaho's economy and workforce have historically been, and will continue to be, impacted by the state's geography and population distribution. Idaho is a large, sparsely populated state with a 2018 population of 1.754 million spread across more than 82,000 square miles. Idaho's average population density is 20.8 persons per square mile, though the population tends to cluster within the six urban counties mentioned above. The density in these counties is over 94.3 persons per square mile while density in the rest of the state is only 8.5 people per square mile. Ada County has the highest density at 433.9 persons per square mile. Camas County, one of Idaho's smaller counties, has the smallest density at 0.4 persons per square mile. The rural areas, often separated by large distances, mountain ranges and rivers from the nearest urban hubs, pose a challenge for service access and require special consideration in creating any statewide system.

The steady shift of Idaho's population from rural counties to urban counties continued in 2018. From 1920 until 1972, the population in rural Idaho exceeded that of urban counties. However, from the '70s on a new demographic era began as people increasingly moved from more rural to less rural areas resulting in increased concentrations in what today are Idaho's six most populous counties. The population of those six counties account for nearly two-third of the state's total population while one third is distributed among the other 38 counties.

Those six urban counties – Ada, Canyon, Kootenai, Bonneville, Bannock and Twin Falls – had a combined population of 1,145,043 in 2018, accounting for 80 percent of the growth in the state's population and 65 percent of overall population. Idaho's largest county, Ada, is located in Southwest Idaho. It is the only county with a population over 400,000.

The Boise Metropolitan Statistical Area (Ada, Boise, Canyon, Gem and Owyhee counties) ranked 8th out of 383 in percentage growth.

Idaho had four counties with a population of 10,000 or more that ranked nationally in the top 100 counties for percentage growth in 2018 – Jefferson and Valley (3.3 percent), Canyon (3.1 percent) and Bonner (2.5 percent).

Idaho's population and economy are expected to see continued growth. The forces that drove Idaho's expansion prior to the recession still exist as they did in the 1990s. Population has grown primarily through in-migration of people attracted by Idaho's quality of life—despite wage and income levels that rank near the bottom of the states. Many of those coming to Idaho are retirees over the age of 65. Increasing population—and an aging population—create more demand for goods and services, which has led to the predominance of the service sector. Our aging population has also increased demand for occupations in the health care industry.

Idaho's population has grown 38 percent since the turn of the century. The 2019 population estimate, released in December, showed the continuation of Idaho's strong growth with a 2.1 percent increase, making it the fastest-growing state. Its growth was much faster than the national growth rate of 0.5 percentage points. That was about seven percentage points below the state's growth in the 1990s but more than three times the growth rate in the last recession decade of the 1980s. Idaho's population increased by 36,529 in 2018 to 1,787,065. Idaho ranks 40th among the states in overall population, unchanged from 2010.

Despite the projection that Idaho's population will continue to grow, the Idaho Department of Labor projects a significant labor shortage due primarily to Idaho's aging population. According to the Department's 2016-2026 projections, the number of jobs is projected to grow by 94,000, while the workforce age 15 years and over is expected to grow by 191,000. This leaves a workforce gap of over 97,000 potential jobs needing to be filled. Idaho's population of 65 years and older is expected to grow by nearly 120,700 many of which will continue to be part of Idaho's workforce.

In-Migration

The 2019 population estimates show the net migration—the difference between people moving in and those moving out—in Idaho was 27,527, or 1.5 percent of total population. The recent state population data showed that more than 75 percent of the state's population growth was due to net migration. The rest of the growth comes from the difference between births and deaths.

The 2019 county population data will not be available until March 2020. In 2018 more people moved into 35 of Idaho counties than moved out, adding 27,131 people. The increase from net migration ranged from 11,056 in Ada County to just 1 in Bear Lake County. Nine counties—Butte, Lincoln, Fremont, Cassia, Clark Lewis, Gooding, Minidoka and Madison—experienced negative migration – in total, 1,355 more people left than moved in. The 13 counties that make up Idaho's six metropolitan statistical areas accounted for 87 percent of the state's net migration.

After more people moved out of Idaho between 2009 and 2010, in-migration returned in 2011 and climbed steadily through 2017. Net in-migration returned to the pre-recession levels of 2008 in 2018 with 27,527.

In-migration is expected to increase as Idaho's economy continues its growth as the state attracts new businesses and local companies expand. With the creation of additional jobs, more local job seekers stay in Idaho, reducing out-migration. At this point, there is a need for an influx of workers into the state.

The table below shows in-migration between 2010 and 2019. The recession caused the drop in net migration from 2009 to 2010. Domestic in-migration and out-migration consist of moves where both the origin and destination are within the United States. International migration accounts for any change of residence across the borders of the United States and Puerto Rico. Net international migration is estimated in four parts: foreign born, between the United States and Puerto Rico, of natives to and from the United States and movement of the Armed Forces

population between the United States and overseas. The largest component, net international migration of the foreign born, includes lawful permanent residents (immigrants), temporary migrants (such as students), humanitarian migrants (such as refugees) and people illegally present in the United States. Following net migration jumped in 2011 primarily due to the international portion. However, since 2012 net migration increases are largely due to the domestic portion. During the past few years, Idaho's unemployment rate has been low, which might lead one to believe that fewer people would move to Idaho because of the perception that the number of available jobs were low. However, as the population has increased so has the number of jobs indicating that there are jobs available for those with the necessary skills.

Table 15: Idaho Net Migration, July 2010 through June 2019

Time Period	Net Migration	Domestic	International
July 2010	-264	-378	114
July 2011	2,069	528	1,541
July 2012	806	-718	1,524
July 2013	5,325	3,543	1,782
July 2014	9,804	8,482	1,322
July 2015	9,761	6,763	2,998
July 2016	21,910	18,541	3,369
July 2017	26,525	25,007	1,518
July 2018	24,142	24,020	122
July 2019	27,527	27,360	167

Source: Annual Population Estimates, Estimated Components of Resident Change, U S Census Bureau, Population Division

International migration could be the reason that 10.7 percent of the population over the age of 18 speaks a language other than English – with the predominant language being Spanish. Of those who speak a language other than English, nearly 50 percent were foreign-born, 17 percent have incomes below the poverty level and 33 percent have less than a high school education.

Demographics Trends

According to EMSI, Idaho's population is expected to grow by 13.7 percent from 2016 to 2026, as Table 16a below shows. In the same period, Hispanics, the state's largest minority, will grow much faster at 23.9 percent as shown in Table 16b.

Over the next decade however, the major demographic impact in Idaho will come from the aging of the population. Although Idaho has a higher percentage of workers aged 24 and younger than the nation as a whole, the state will not be immune from an aging labor force as workers age 55 and older leave the workplace. This will encourage employers to provide a work environment that entices experienced and highly skilled workers to remain on the job and in the state.

The overall composition of the population is also changing. As shown below, projections indicate that Idahoans aged 55 to 59 years will decrease by 7.7 percent. The age group 10 to 14 will have the smallest growth at only 0.8 percent. The second smallest growth rate will be in the 25 to 29 year olds, 2.9 percent. Over time, this may mean fewer workers aging into the labor force to replace those aging out. While this trend was somewhat evident between 2000 and 2010, it will become much more pronounced as the youngest in the baby boomer generation pass the threshold of 65 in the coming decade. Even with an expanding cadre of older workers, Idaho has a relatively large number of young people entering or soon to enter the labor force.

Table 16a: Projected Population by Age for Idaho, 2016-2026

	2016	2026	Percent Change
Total Population	1,682,935	1,913,855	13.7%
Age			
Under 5 years	114,743	137,005	19.4%
5 to 9 years	123,004	130,355	6.0%
10 to 14 years	125,303	126,251	0.8%
15 to 19 years	120,786	131,912	9.2%
20 to 24 years	112,423	124,096	10.4%
25 to 29 years	112,158	115,379	2.9%
30 to 34 years	109,006	122,637	12.5%
35 to 39 years	108,863	122,739	12.7%
40 to 44 years	98,164	120,018	22.3%
45 to 49 years	98,203	113,755	15.8%
50 to 54 years	100,505	104,517	4.0%
55 to 59 years	106,767	98,565	-7.7%
60 to 64 years	100,604	103,706	3.1%

65 to 69 years	89,658	109,612	22.3%
70 to 74 years	63,153	97,255	54.0%
75 to 79 years	43,351	73,316	69.1%
80 to 84 years	28,360	46,562	64.2%
85 years and over	27,883	36,174	29.7%

Table 16b: Projected Population by Race/Ethnicity for Idaho, 2016-2026

	2016	2026	Percent Change
Total Population	1,682,935	1,913,855	13.7%
White, Non-Hispanic	1,383,956	1,539,158	11.2%
Black, Non-Hispanic	11,887	16,130	35.7%
American Indian or Alaskan Native, Non-Hispanic	18,782	20,796	10.7%
Asian, Non-Hispanic	23,912	31,621	32.2%
Native Hawaiian or Pacific Islander, Non-Hispanic	2,812	3,894	38.5%
Two or More Races, Non-Hispanic	32,475	43,272	33.2%
Hispanic (All Races)	209,109	258,984	23.9%

Source: Economic Modeling Specialist, Inc.

GDP and Personal Income

Another major economic factor in Idaho is wages and income. Although Idaho has a low unemployment rate, our state also tends to have lower average wages compared to the rest of the nation. Low wages may be attractive from the perspective of operating a business, but they also make it difficult to attract highly-skilled workers to our state. Idaho's low average wages can be attributed in large part to the relatively high share of jobs in the food service and retail sectors, where pay is typically low.

Personal income and gross product are indicators for measuring the business activity in a state and a broad measure of the state's economic wealth. As indicated in the table and chart below, personal income and gross state product rebounded in 2010 with yearly increases following a significant drop in 2009.

Data about gross state product and personal income indicate Idaho's economy has grown at a strong rate in recent years. The gross state product grew significantly after 2009 with the largest increase coming in 2013, when it grew 5.6 percent. Personal income also began to

increase following a 3.4 percent drop in 2009. A 3.5 percent surge occurred in 2010. Since then, the yearly increase has averaged 5.5 percent. Personal income increased 6.4 percent in 2018.

Figure 4 - Idaho Real GDP versus Idaho

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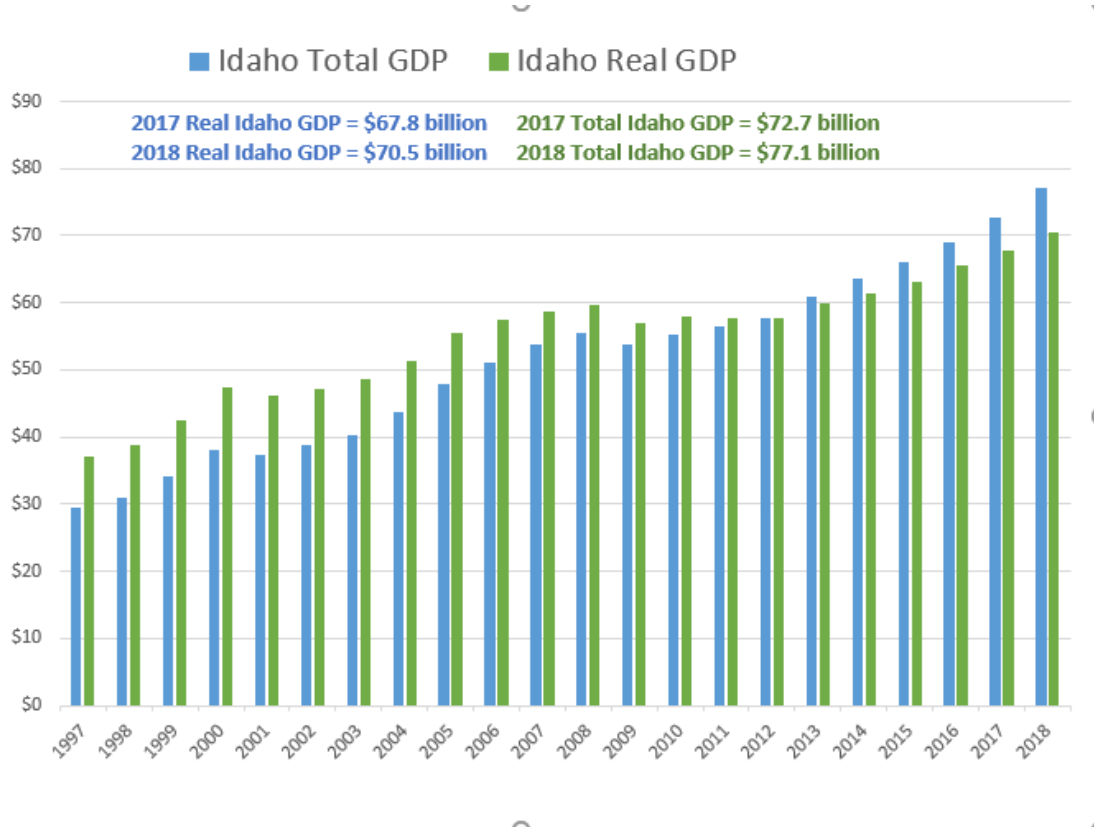


Table 13 - Idaho Gross Product and Personal Income 2008-2016, in thousands

Year	Gross Product	Percent Change from Previous Year	Total Personal Income	Percent Change from Previous Year
2008	\$55,546		\$50,205	NA
2009	\$53,775	-3.19%	\$48,477	-3.44%
2010	\$55,171	2.60%	\$50,197	3.55%
2011	\$56,488	2.39%	\$53,083	5.75%
2012	\$57,764	2.26%	\$56,140	5.76%
2013	\$61,018	5.63%	\$58,338	3.92%

2014	\$63,522	4.10%	\$61,827	5.98%
2015	\$66,004	3.91%	\$65,825	6.47%
2016	\$69,029	4.58%	\$68,445	3.98%
2017	\$72,723	5.35%	\$72,355	5.71%
2018	\$77,052	5.95%	\$77,012	6.44%

Job Market Trends

Idaho's industrial make-up shifted since the recession. The jobs losses between 2007 and 2010 primarily came from construction and manufacturing, while many of the jobs gains since 2010 came from accommodation and food services (18,300) and retail trade (14,000). Other industrial sectors that have recorded job growth in excess of 10,000 are health care and social assistance (23,500), construction (19,000), manufacturing (17,000), professional, scientific and technical services (12,000) and administrative support and waste management (10,000).

The bulk of the available jobs are low-wage low-skill jobs in the retail and food service industry. Although the current economic projections show that "combined food preparation and serving workers, including fast food" will show the most growth through 2026.

Retail salesperson was second but the model probably does not factor in the current retail shift to online sales. The state workforce agency has provided an increasing number of rapid response services in response to a large trend of national, regional and local retail closures. Despite the retail closures, a review of Idaho's real-time labor market information from Help Wanted Online for 2019 shows demand for retail workers. There were an average of 389 job openings for first-line supervisors of retail sales workers and 795 openings for retail salespersons, with an average of jobs opened for more than 90 days of 243 and 234 each month respectively.

Although manufacturing jobs have increased, the types of jobs available within the industry are different than before the recession. Micron Technology Inc., the former largest manufacturing employer in the state, moved most of its production out of the state. The growing number of food manufacturers in Idaho are building state-of-the-art facilities. These new facilities require fewer production workers with greater technical and troubleshooting skills. There is more emphasis on research and development, which require dedicated space and personnel to determine consumer choices. These workers require a different set of skills and more education than manufacturing workers in the past. Some of the demand occupations in food processing will be programmable logic control experts, operations research analysts, software developers and market research analysts.

Another fast growing sector in the manufacturing industry is transportation equipment. Occupations that will be needed are similar to those in the food processing sector. These

occupations cross multiple sectors within the manufacturing industry. However, there will continue to be a need for production workers, mechanics and maintenance workers.

Health care has continued to grow irrespective of economic conditions. There has been a continuous need for occupations at all skill levels - from certified nursing assistants to primary care physicians. According to Help Wanted Online, registered nurse is the hardest job to fill in Idaho - with an average of 3,907 openings in 2019 and 329 of the postings had continued for 90 days or more. After registered nurses, customer service representatives had an average of 824 openings, just over 20 percent of the openings for registered nurses. However, they ranked fourth in hard to fill with an average of 215 openings.

Retail supervisors and salesperson also were high on both the monthly listings and hard-to-fill lists. Truck drivers, both heavy and light, were always among the top ten jobs listing.

Unlike health care, the construction industry is highly affected by the economy. The recession had a devastating effect on this sector - dropping from nine percent of all jobs in 2006 to five percent in 2010. Although construction jobs account for only seven percent of total nonfarm jobs in 2019, the number of jobs have increased 62 percent since 2010, including 21 percent in the past three years alone.

(iii) Education and Skill Levels of the Workforce

Provide an analysis of the educational and skill levels of the workforce.

This part of Section (II)(a)(1)(B) outlines trends in Educational Attainment for Idaho's general population, as well as for specific populations with barriers, where data is available. All data is obtained from the American Community Survey 5-year 2014-2018 data.

Educational Attainment - General Population

In Idaho, a significant portion of the population participates in, and graduates from high school. For the population age 15-19 years old, about 86 percent are currently enrolled in school. For those age 18-24 years, 87 percent have at least a high school credential, and for those age 25 and older, 91 percent have at least a high school credential. However, as discussed further in the following sections, the trend towards high school graduation does not necessarily apply to specific populations with barriers to employment.

While high school participation is generally high in Idaho, participation drops off at the post-secondary level. Of Idahoans aged 18-24, 45 percent have some college or an associate degree, and 6.4 percent have a bachelor's degree or higher. For those age 25 and over, 26.4 percent have some college but no degree, 9.6 percent have an associate degree, and 26.9 percent have a bachelors or higher. In other words, the majority of Idaho's youth graduate from high school, while just over half (51.41 percent) of young adults age 18-24 participated in post-secondary education. And only about one third (36.5 percent) of Idaho's adults have an associate degree or higher.

Educational Attainment - By Race

The American Community Survey Data provides educational attainment by race for the groups listed below. While races other than white, in combination, make up only 9 percent of the state's population over the age of 25, these groups do have significant variances in Educational Attainment that are worth noting. For example, within the group of American Indian and Alaskan Natives, only 12 percent have a Bachelor's degree, compared to 28 percent of White individuals. Among those who identified as "Some Other Race" less than half had less than a high school diploma but the remaining 56 percent had at least a high school diploma or equivalency (however, this data point may be an outlier).

Educational attainment data is also available for the ethnic group, Hispanic, which includes all races. The data shows that like "Some other Race", only 40 percent have less than a high school education. It is possible that for the educational attainment questions, respondents classified themselves as "Some Other Race." The two groups have very similar educational attainment patterns.

Table 14: Educational Attainment by Race

Racial Group	Race Population	% of State Population	% of Race with Less than High School Diploma	% of Race with High School Diploma or Higher	% of Race with Bachelor's or higher
Total State Population 25 and Over	1,089,266	100%	9%	91%	27%
White alone	1,005,349	92%	8%	92%	28%
Black or African American alone	5,490	1%	12%	88%	26%
American Indian and Alaska Native alone	13,813	1%	14%	86%	23%
Asian alone	15,999	1%	12%	86%	43%
Native Hawaiian and Other Pacific Islander alone	1,640	0%	5%	95%	28%
Some other race alone	28,041	3%	44%	56%	5%
Two or more races:	18,934	2%	11%	89%	24%
Hispanic or Latino (All Races)	101,917	9%	37%	63%	9%

Educational Attainment – Individuals Age 55 and Over

According to data from the American Community Survey 2018 1- year estimates, individuals aged 55-64 participate in Idaho's workforce at a rate of 64 percent, and this age group makes up nearly 20 percent of Idaho's total workforce. Individuals aged 65 and older participate in the workforce at a much lower rate of 16 percent, but they make up 5 percent of the overall labor force in the state. When combined, these two groups make up nearly 21 percent of Idaho's total workforce.

While older individuals participate in the workforce at a lower rate than their younger counterparts, they have a relatively comparable mix of educational attainment. The education levels of older individuals in Idaho are generally comparable with those of other age groups. The primary area of difference is that individuals over the age of 65 are less likely to have an associate degree (8 percent as compared to 11 percent for those age 45-64 and 9 percent for those age 18-44).

Table 15a: Educational Attainment by Age Group by Percent of Total

	18 to 24 Years	25 to 34 Years	35 to 44 Years	45 to 64 Years	65 Years & Over
Total	165,091	228,080	219,713	416,513	279,441
Less than 9th grade	1%	2%	4%	5%	3%
9th to 12th grade, no diploma	14%	6%	5%	6%	6%
High school graduate (includes equivalency)	36%	29%	25%	27%	31%
Some college, no degree	37%	25%	23%	25%	28%
Associate's degree	5%	10%	11%	11%	8%
Bachelor's degree	6%	22%	20%	18%	16%
Graduate or professional degree	1%	6%	11%	9%	10%

Table 15b: Educational Attainment by Age Group and Gender by Percent of Total

	18 to 24 Years		25 to 34 Years		35 to 44 Years		45 to 64 years:		65 Years & Over	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Total	85,694	79,397	116,053	112,027	109,816	109,897	208,225	208,288	132,466	146,975
Less than 9th grade	1%	0%	2%	2%	4%	4%	5%	4%	3%	2%
9th to 12th grade, no diploma	16%	13%	6%	5%	6%	4%	7%	5%	6%	6%
High school graduate (inc equivalency)	42%	29%	32%	26%	29%	21%	28%	25%	27%	34%
Some college, no degree	32%	42%	26%	24%	22%	25%	24%	27%	28%	28%
Associate's degree	4%	6%	9%	11%	9%	13%	10%	12%	8%	8%
Bachelor's degree	4%	8%	18%	26%	18%	23%	17%	19%	16%	15%
Graduate or professional degree	0%	1%	7%	5%	11%	11%	10%	9%	13%	7%

Source: American Community Survey 1-Year Estimates - 2018

Tables 15a and 15b provide a breakdown of education attainment by age and gender. The blue highlighted percent is the largest percentage in that age group. In Table 15a the 18 to 24 age nearly two-thirds have a high school diploma and some college education. The largest share of the population in the other four age groups have a high school diploma. It is interesting to note that the 18 to 24 year old age group has the largest percent with less than a high school diploma. The 35 to 44 age group has the largest percentage of bachelor's degrees. About 10 percent of the age groups 25 to 64 have an associate degree. Over 40 percent of the age group 35 to 44 years have a least an associate degree. They also have the highest number of graduate or professional degrees.

Males had the highest percent of high school graduates in all age groups except 65 years and over. Females tended to have the highest percentage of some college, but no degree. In the age group 25 to 34 years old, females had the largest percentage (26 percent) with a bachelor's degree. The percentage of females with at least an associate's degree outpaced the males in all age groups except the over 65 group.

Educational Attainment - Low-Income Individuals

Of individuals age 25 and older in Idaho for whom poverty status could be determined, approximately 9 percent have income levels below poverty. As might be expected, educational attainment is skewed lower for those below poverty and higher for those above poverty. Individuals with less than a high school diploma represent 18 percent of those below poverty and only 8 percent of those at or above poverty. While individuals with Bachelor's degrees or higher represent only 13 percent of those below poverty and 30 percent of those at or above poverty. This data, available in Table 16 on the following page, reinforces the assumption that obtaining a high school credential is an important first step towards escaping poverty, while continuing on to post-secondary education provides important additional opportunities.

Table 16: Educational Attainment by Poverty Status

Income Level	Less than High School	High School Graduate	Some College or Associate	Bachelor's or Higher	Total
Number Below Poverty	18,744	37,605	34,954	13,966	105,269
Percent Below Poverty	18%	36%	33%	13%	9%
Number At or Above Poverty	55,984	146,562	180,427	141,071	1,023,578
Percent At or Above Poverty	8%	27%	36%	29%	91%

Educational Attainment - English Language Learners

Of those in Idaho's workforce, approximately 88 percent speak only English, while 12 percent speak some other language in the home. Additionally, those who speak a language other than English participate in the workforce at a rate of approximately 74 percent, compared to 62 percent for English-only speakers. – still trying to figure this one out☺

The most significant difference between these two populations, in terms of educational attainment, is with regard to high school graduation. For those in the workforce who speak only English in the home, just 4 percent have less than a high school diploma. For those in the workforce who speak another language at home, 32 percent have less than a high school diploma.

When the data is broken down further by specific languages (including Asian/Pacific Island, Indo-European, Spanish, and Other), an even greater discrepancy emerges. Specifically, for those in the workforce who speak Spanish in the home, 42 percent have less than a high school diploma. This is especially significant in that Spanish speakers represent a large majority (75 percent) of Idaho's non-English workforce population.

When taken in combination, this data would indicate a significant skills gap for non-English speakers in Idaho's workforce, especially for those who speak Spanish in the home.

Table 17: Educational Attainment by Language Spoken at Home for those in the Workforce

Language Spoken	Less than High School	High School Graduate	Some College or Associate	Bachelor's or Higher	Total
Speaks Only English (Number)	27,948	160,460	228,890	207,131	624,429
Speaks Only English (Percent of Total)	4%	26%	37%	33%	100%
Speaks Other Language* (Number)	27,663	20,736	20,702	16,704	85,805
Speaks Other Language* (Percent of Total)	32%	24%	24%	19%	100%

*Includes native English speakers who also speak another language at home, and other bi-lingual speakers

Educational Attainment - Individuals with Low Literacy (I did do this section last time and I can't address it)

Literacy Level is differentiated from Educational Attainment in that Literacy Level describes a person's demonstrated competency, while Educational Attainment describes the highest level of education that an individual has completed. For example, a student may have graduated from High School, but only demonstrate a literacy level equivalent to the 7th grade.

The American Community Survey does not break data down by literacy levels. In order to understand the Education and Employment trends of individuals with low levels of literacy, we have examined data provided by Idaho's Adult Education and Literacy Program (funded under Title II of WIOA, known as AEFLA). All students enrolled in the program have demonstrated literacy levels below the secondary (12th grade) level. The highest grade completed for Idaho's Adult Education population is available for Program Years 15-16 and 16-17 at this time. These figures include Adult Education students as well as English Language Learners. For these two years, the program served an average of 5,077 participants annually.

On average for the two-year period where data is available, about 20 percent of Title II participants had less than a 9th grade education upon enrollment in the program, 41.5 percent had a 9-12th grade education with no diploma, 19.5 percent had a high school credential or equivalent,

12.5 percent had some college or a post-secondary degree, and 6.5 percent did not report a highest level of education at intake.

The data suggests that the largest group of Adult Education students in Idaho have completed some high school but have not graduated. The second largest at 20 percent, is the group of students whose highest level of formal education is at 9th grade or below. 19.5 percent of participants have either a high-school credential or its equivalent. This data indicates that the majority of participants in the of Adult Education program do not hold a high school credential, or its equivalent. The adult education program is committed to serving adult learners with low literacy skills through program and policy alignment, career pathways, integrated education and training, and high quality professional development for adult educators.

(iv) Skills Gaps

Describe apparent "skill gaps."

Idaho's workforce development system seeks to prioritize its efforts around those industries and occupations that balance good wages with existing or projected demand for workers, as well as those industries which can have a larger overall effect on Idaho's economy. Such industries and occupations have been identified in Idaho's Target Sectors and Hot Jobs List.

However, as described in Section (II)(a)(1)(A) of this plan, a combined 21 percent of Idaho's jobs in 2019 were in the industries of accommodation food services and retail trade. Many of these jobs pay relatively low wages, require relatively little training or education, and lack a significant multiplier effect on Idaho's economy. As a result, many of Idaho's workers are in jobs which may not sufficiently prepare them to move into the types of careers that require additional skills and pay better wages. As such, these workers will need to access training and education outside of their current workplace if they want to advance their skills or careers.

With that being said, there are jobs within these two industries that require training beyond a high school education. Cooks, managers, maintenance workers just to name a few. Individuals in these industries that want to move up the career ladder need to have the opportunity to

move up such as a back house food pre worker to a chef or a clerk in a hotel to a manager of the hotel.

The analysis in Section (II)(a)(1)(A), coupled with education data and direct input from industry lend strong support to the state's goals to increase educational attainment beyond high school. It is vital that Idaho's labor force seek educational opportunities to qualify for the Hot Jobs that will be available over the next 10 years. Of the 50 Hot Jobs, 37 require some type of training beyond high school. Within the top 10 Hot Jobs, nine require some form of post-secondary education or training:

- Registered Nurses - Associate Degree
- Software Developers, Applications - Bachelor's Degree
- Nurse Practitioners - Master's Degree
- Physician Assistants - Master's Degree
- Information Security Analyst – Bachelor's Degree
- Market Research Analysts and Marketing Specialists - Bachelor's Degree
- Pharmacists - Doctoral or Professional Degree
- Physical Therapists - Doctoral or Professional Degree
- Loan Officers – Bachelor's Degree

There is a high probability that not enough workers can be trained for these in-demand occupations within the next ten years. For example, as the health care sector continues to expand, Idaho's colleges and universities are experiencing near record enrollments. Already some programs in nursing and medical technical jobs cannot expand to meet the demand due to lack of available instructors.

In addition to adequate availability of such programs, cost is one of the biggest challenges for Idaho workers in obtaining the training and education they need to meet the skill demands of the evolving job market. Wages in Idaho rank low in the country. In 2010, Idaho's average weekly wage \$671 was 75 percent of the national average and ranked 48th in the nation. Wages have not improved. In 2019, the average weekly wage at \$825, remaining at 75 percent of the national average but dropping to 50th in the country, just above Mississippi.

Idaho workers' educational credentials will need to increase in order to obtain higher-paying jobs. And yet, pervasive low wages can make it difficult for Idaho workers to access the training and education needed to upgrade their skills. Addressing the affordability of college education, expanding the "learn while you earn," model, and expanding registered apprenticeships may help address this opportunity gap, especially for populations with significant barriers to employment and education.

The Research Bureau collaborated with the Idaho Department of Transportation, Federal Highway Administration, Workforce Development Council and Associated General Contractors to conduct a highway construction skills gap report. Respondents provided some interesting information on skills that they felt were missing in job applicants. Most of these skills were generalized or soft skills and included math, reading, safety awareness good work ethic, showing up on time, communication, and problem solving. Too often training emphasis the technical skills and miss the opportunity to teach the importance of soft skills.

An enhanced focus on career pathways and stackable credentials may also help address this gap. Many jobs on the Hot Jobs list can be part of a career ladder and lend themselves to stackable credentials in education. A nurse could start as a certified nursing assistant or licensed practical nurse. A pharmacist technician could work while going to school to be a pharmacist and have inside knowledge of the job. Idaho's work on career ladders and stackable credentials is addressed in Section (II)(c)(1).

Finally, the analysis in Section (II)(B)(i) shows that youth ages 16-24 have a much higher unemployment rate than other age groups. As teens and young adults are finding it harder to get jobs in the current labor market, fewer are learning the basics of how to hold on to a job or getting the opportunity to learn about various occupations and industries by working or interning in them. The strategies identified above may also be appropriate to address this cohort of workers.