**PLANNING COMMISSION AGENDA**
**COEUR D'ALENE PUBLIC LIBRARY**
**LOWER LEVEL, COMMUNITY ROOM**
**702 E. FRONT AVENUE**

**JUNE 9, 2020**

<div style="border:1px solid black">

Due to social distancing requirements, the Planning Commission meeting will limit in-person participation to commissioners and staff. Everyone else will participate using Zoom. See login below.

Join by Computer: https://zoom.us/s/96599466475
Join by Phone (Toll Free): 888-475-4499 or 877-853-5257
Meeting ID: **965 9946 6475**
Password: **570653**

</div>

**12:00 P.M. CALL TO ORDER**:


**ROLL CALL**:  Messina, Fleming, Ingalls, Luttropp, Mandel, Rumpler, Ward


**PLEDGE:**


**APPROVAL OF MINUTES:  \*\*\*ITEM BELOW IS CONSIDERED TO BE AN ACTION ITEM.**
April 14, 2020


**STAFF COMMENTS:**


**ADMINISTRATIVE:**          **\*\*\*ITEMS BELOW ARE CONSIDERED TO BE ACTION ITEMS.**

1.      Applicant:      Rivers Edge Apartments, LLC
         Request:       A one-year extension request for PUD-2-19 & S-2-19


2.      Applicant:      Atlas Mill Development Corporation/Rivers Edge Apartments, LLC
         Request:       A one-year extension request for SP-1-17


3.      Applicant:      Ben Widmyer
         Request:       A one-year extension request for SP-1-19


**ENVISION CDA UPDATE:**

Brief update on project plus the Economic study results presented by Alisa Pyszka (Bridge Economics), Alex Dupey, (MIG), and Sean Holm
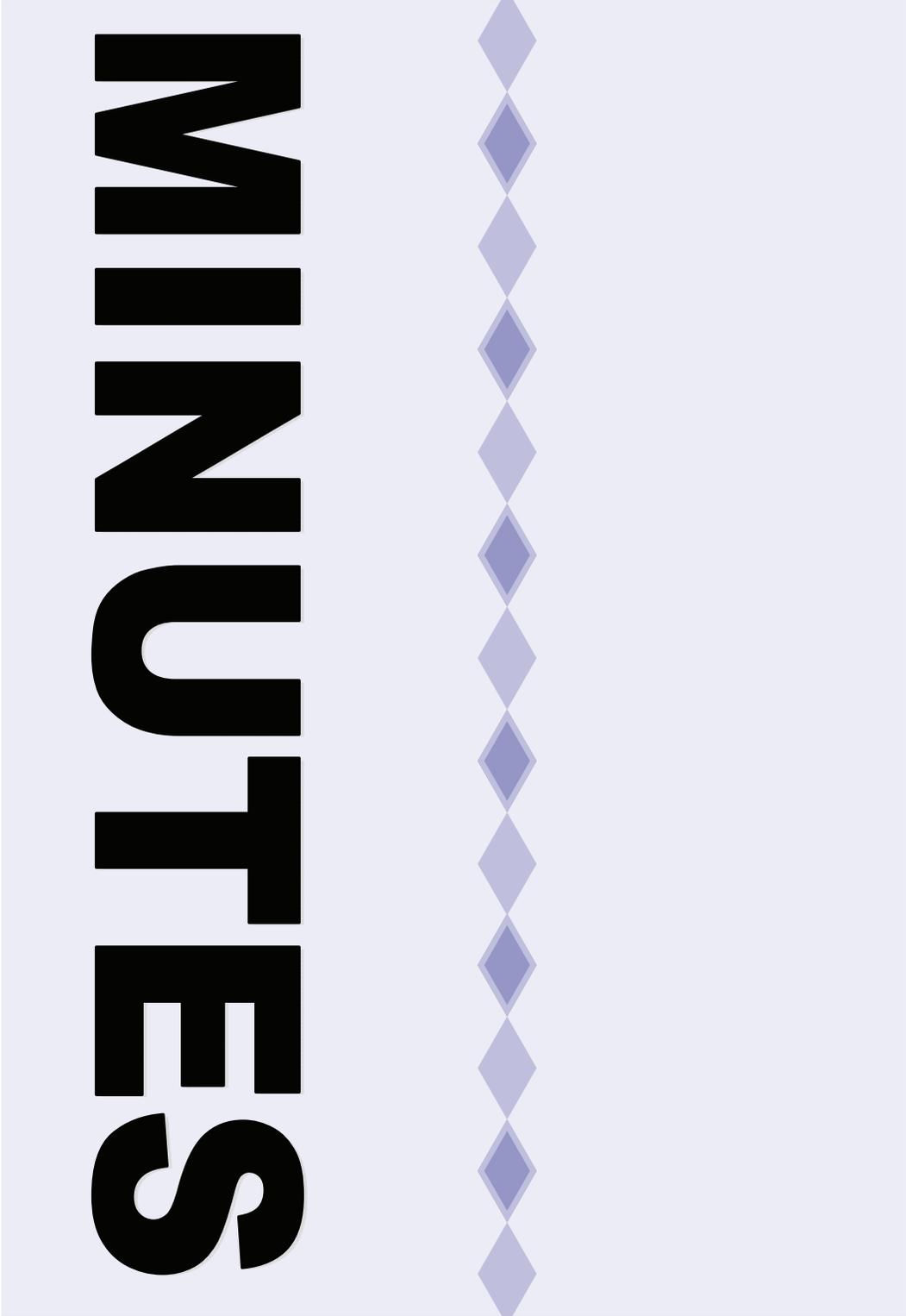

**COMMISSION COMMENTS:**


**ADJOURNMENT/CONTINUATION:**

Motion by _____, seconded by _____ ,
to continue meeting to _____, ___, at __ p.m.; motion carried unanimously.
Motion by _____,seconded by _____ , to adjourn meeting; motion carried unanimously.

# MINUTES

# PLANNING COMMISSION
# MINUTES
# VIRTUAL MEETING
# APRIL 14, 2020

**COMMISSIONERS PRESENT:**

Tom Messina, Chairman
Jon Ingalls, Vice-Chair (Zoom)
Lynn Fleming (Zoom)
Michael Ward (Zoom)
Peter Luttropp (Zoom)
Lewis Rumpler (Zoom)
Brinnon Mandel (Zoom)

**STAFF MEMBERS PRESENT:**

Hilary Anderson, Community Planning Director
Tami Stroud, Associate Planner (Zoom)
Sean Holm, Senior Planner
Mike Behary, Associate Planner (Zoom)
Shana Stuhlmiller, Public Hearing Assistant
Randy Adams, Deputy City Attorney (Zoom)

**COMMISSIONERS ABSENT:**

**CALL TO ORDER:**

The meeting was called to order by Chairman Messina at 5:30 p.m.

**APPROVAL OF MINUTES:**
March 10, 2020

Motion by Luttropp, seconded by Ward, to approve the minutes of the Planning Commission meeting on March 10, 2020.  Motion approved.

**STAFF COMMENTS:**

Hilary Anderson, Community Planning Director, provided the following comments:

- She welcomed everyone to the first Zoom virtual Planning Commission Meeting.
- She asked persons wanting to provide public comment to sign up using the linked located on the agenda.
- She explained that staff will do a mass swearing in by having people raise their "virtual hand" located on the Zoom task bar.  There will be a presentation from staff, the applicant and then the public will be able to provide comments, with the applicant doing a rebuttal to have a chance to answer any remaining questions not answered earlier.
- She reminded the participants that if they are not speaking, to please mute their audio source which would help to reduce background noises.

**PUBLIC HEARINGS**

1.  Applicant:    Lake City Engineering
    Location:    4301 N. Crown Avenue
    Request:     A proposed zone change from C-17L to C-17
                 QUASI-JUDICIAL, (ZC-1-20)

Mike Behary, Associate Planner stated the applicant is requesting approval of a zone change from C-17L (C-17 Commercial Limited) to C-17 (C-17 Commercial) zoning district.

Mr. Behary provided the following statements:

*   The property is located between US Highway 95 and Crown Avenue.

*   There is an existing auto dealership sales facility on the southern portion of the subject site and the property has been used for retail sales of vehicles and RV's for many years.

*   The northern portion of the property is vacant and currently undeveloped.  The prior use of the vacant portion of the lot was RV sales.

*   Prior to 1982, the subject site was located within the unincorporated area of the County.  In 1982, the City of Coeur d'Alene applied for a large area of land to be annexed into the City in conjunction with zoning in Item ZC-7-82A.

*   The total land area that was annexed at that time consisted of 638 acres and included the subject property.  The annexation/zoning request was approved by City Council on November 1, 1982. Through this action, the subject property was zoned R-12.

*   In 1984, a request to change the zoning classification from R-12 to C-17L on the southern portion of the subject property was made in Item ZC-12-84SP and was subsequently approved.

*   In 1998, a request to change the zoning classification from R-12 to C-17L on the northern portion of the subject property was made in Item ZC-9-98SP, and that was also subsequently approved.

*   The zoning ordinance requires auto dealerships that want to locate in the C-17L Zoning District to be approved by a special use permit.  In the C-17 Zoning District, auto dealerships are allowed as a permitted use.

*   All uses located in the C-17L and the C-17 zoning districts are required to meet the City's Commercial Design standards. The applicant has indicated that they would like to expand the existing auto dealership into the vacant northern portion of the subject property.

*   The applicant is aware that site improvements, commercial design standards, and paving of display lots and maneuvering areas are required in order to expand into the vacant portion of the property.

*   Mr. Behary stated that the Comprehensive Plan designation for the property is US 95 Corridor.

*   He noted the various Comprehensive Plan goals and objectives that might apply for the project.

*   He referenced the various staff comments located in the staff report indicating that all departments don't have any issues with the project.

*   He stated that there were no conditions.

Mr. Behary concluded his presentation.

**Commission Comments:**

Commissioner Ingalls asked if staff did a project review with the applicant. Mr. Behary answered that they did.

Commissioner Ingalls asked why the applicant chose to do a zone change rather than a Special Use Permit. Mr. Behary explained that if the applicant wanted to do an expansion or something else, they would have to come back through the public hearing process.  With a zone change to C-17, that use is already allowed so if they wanted to do an expansion they would not have to come back to the City for approval.

Commissioner Ingalls stated that the benefits of a special use permit are tied to a specific use, rather than approving a "full blown" C-17, which lists many uses that may not be desirable.  Mr. Behary responded that was correct.

Commissioner Luttropp asked what are the C-17 properties in the area. Mr. Behary said there are C-17 properties to the north, south and west of the properties.

Commissioner Mandel said that she had the same concerns as Commissioner Ingalls and that the answer was clarified by staff.

**Public testimony open.**

Drew Dittman, Applicant, provided the following statements:
- He stated that the property is off of Crown Avenue, just off of Highway 95 north of Super One Foods, and that he is asking for a zone change from C17 L to C-17.
- He added that as long as he has lived here, the property has been either an auto or RV sales for as long as he can remember.
- He stated that Nissan has recently purchased the property with the intent to expand the dealership to the north in the future.
- He explained the reason for choosing a zone change over a Special Use Permit is that auto dealerships are not allowed in C-17L, but are allowed in C-17.  He added that by choosing a special use permit, if the applicant intended to expand, they would have to do another public hearing, but with a zone change that is not required.
- He commented that they recently did a project review where traffic was discussed and it is not an issue.
- He stated that he thinks it is a fairly straightforward request.

The applicant concluded his presentation.

**Commission Comments:**

Commissioner Ingalls said he understands if the goal is to legitimize the auto dealership and enable expansion for auto sales, which could be done with a special use permit. He added that in the future the property could be sold and another type of use could be put on the property that is allowed in C-17.

Mr. Dittman explained that a special use permit is only good for a year and if the applicant wanted to expand, they would have to come back for approval from the Planning Commission. Mr. Behary explained that once a special use permit is granted, the applicant has a year to prove that he is doing something on the property and, if not, would need to get an extension.  He concurred that if there was to be an expansion which was not part of the original special use permit, the applicant would have to go back through the public hearing process.

Commissioner Luttropp asked if staff has received any public comments for the property. Mr. Behary replied that none where received.

**Public testimony closed**.

**Discussion:**

Commissioner Fleming said that she concurred with Commissioner Ingalls that by approving the property as C-17, it would leave them "wide open" to other undesirable uses on the property.

Commissioner Ingalls said that he thinks it's a great fit, but is not sure if the zone change is the right tool to use to get there.

Commissioner Mandel replied that she feels the property is compatible.

Commissioner Ingalls said that he is comfortable with the property as a car dealership and a possible expansion and asked why it couldn't be done by using a special use permit. He explained that if the zone change is approved as a C-17, it could open up the parcel to all uses allowed in the C-17 zoning district that might not be compatible.

Commissioner Rumpler noted that from Kathleen to Dalton is "auto dealer row" and he is comfortable with that particular area that has become dedicated to auto sales and service. He said that the doesn't see another alternative use for the property and doesn't see a need for a special use permit.

Chairman Messina noted on a map showing the property the connecting streets getting to the property and commented that it looks like the only entrance to the property is off of Crown Avenue. He asked if, in the future, there will be other entrances to the property like the other dealerships in the area.

Mr. Behary noted on the map the different access points to the property of all of the dealerships which have to exit US 95 to get to them.

Commissioner Ingalls concurred that the property will probably remain a car dealership and thought there might be another tool to use so the property would not be allowed for any undesirable uses in the future which are allowed within the C-17 zoning designation.

**Motion by Rumpler, seconded by Mandell, to approve Item ZC-1-20. Motion approved.**

ROLL CALL:

| | | |
|---|---|---|
| Commissioner Fleming | Voted | Aye |
| Commissioner Ingalls | Voted | Aye |
| Commissioner Mandel | Voted | Aye |
| Commissioner Luttropp | Voted | Aye |
| Commissioner Rumpler | Votes | Aye |
| Commissioner Ward | Voted | Aye |

Motion to approve carried by a 6 to 0 vote.

2.     Applicant:     ETD Enterprises, LLC
         Location:      Lots 1-2 Block 1 Bunker Park

A proposed Commercial Recreation/Sales special use permit in the LM (Light Manufacturing) zoning district
QUASI-JUDICIAL, (SP-3-20)

Tami Stroud, Associate Planner, and Jake Plagerman, Planning Technician, stated that David Shrontz, Architect, is requesting approval of a total of six (6) activity uses (three (3) service activities and three (3) commercial activities) via the Special Use Permit process, to allow for the following uses in a Light Manufacturing (LM) zone. Note: The applicant has made this request for two (2) separate parcels as described by the Bunker Park legal description.

Ms. Stroud and Mr. Plagerman provided the following comments:

- They noted that the Comprehensive Plan designates the area as Ramsey-Woodland (Stable Established)
- They referenced the Comprehensive Goals and Objectives in the staff report.
- They presented a map showing the approved Special Use Permits in the area.
- They explained the various building renderings.
- They noted where the various staff comments were located, with all departments stating that the use is appropriate and can be served.
- They noted that there are 12 conditions if the request is approved.

Ms. Stroud and Mr. Plagerman concluded their presentation.

**Commission Comments:**

Commissioner Mandel said there are twelve conditions and asked if the applicant feels they are reasonable. Chairman Messina said that the applicant would be able to answer that question.

**Public testimony open.**

Dave Shrontz provided the following statements:

- He said they are proposing a use that is allowed under Light Manufacturing; specifically, commercial recreation that will be proposed for the first phase.
- He described Safe Splash as a franchise specializing in swim lessons that provides opportunities for triathletes to train year around.
- He said at the front of the property will be plans for future retail developments to include a coffee shop, or professional services.
- He indicated a potential future use on the opposite side of the property to provide retail on Schreiber Way with more office space on the opposite side.
- He showed a rendering of what the building will look like and noted that it will be a 7,500 sq. ft. single story building, and explained the floor plan.
- He stated that it is straightforward project and not out of the ordinary and, hopefully, will be approved.

The applicant concluded his presentation.

**Commission Comments:**

Commissioner Mandel asked if the applicant accepted all the conditions.

Mr. Shrontz stated that they accept all of the conditions in the staff report.

**Public testimony closed**.

**Discussion:**

**Motion by Ingalls, seconded by Fleming, to approve Item SP-3-20.  Motion approved.**

ROLL CALL:

| | | |
|---|---|---|
| Commissioner Fleming | Voted | Aye |
| Commissioner Ingalls | Voted | Aye |
| Commissioner Mandel | Voted | Aye |
| Commissioner Luttropp | Voted | Aye |
| Commissioner Rumpler | Votes | Aye |
| Commissioner Ward | Voted | Aye |

Motion to approve carried by a 6 to 0 vote.

| | |
|---|---|
| Applicant: | Connie Krueger, Stonehenge |
| Location: | W. of Atlas Rd., N. of the future ext. of Hanley Ave at N. Downing Ln & W. Andesite Way |
| Request: | |
| | A.  A proposed PUD known at "Enclave at the Trails" QUASI-JUDICIAL, (PUD-1-20) |
| | B.  A proposed 76-lot preliminary plat know at "Enclave at the Trials" QUASI-JUDICIAL, (S-2-20) |

Tami Stroud, Associate Planner, said that Lakeside Real Estate Holdings, LLC is requesting approval of a gated residential Planned Unit Development and a 76 lot, 10 tract, preliminary plat to be known as "Enclave at the Trails" within the Trails 4th Addition.

Ms. Stroud provided the following statements:
- The existing 19.4-acre site is currently vacant and within the "Trails 4th Addition."
- The proposed Planned Unit Development (PUD) will be comprised of 76 residential lots with private open space areas for residents of the development.
- The PUD is proposed as a private gated community with private roads.  In addition to the proposed gate for vehicle access, there are also two proposed pedestrian gated access points.
- The applicant is proposing to install the streets and the subdivision infrastructure for the project in one phase.
- The applicant has indicated that construction of the PUD/subdivision infrastructure is anticipated to commence and be completed in 2020, with home construction beginning in the third or fourth quarter of 2020.
- The proposed PUD will have a density of 3.91 units per acre. The property is currently zoned R-8 and the current zoning allows for a density at 8 units per acre.
- The proposed PUD will have two proposed lot types: Type A and B.
- Type A is 6,000 sq. ft. with average dimensions of 50' x 120', and are rear-loaded lots.
- There are 50 Type A lots proposed.
- Type B is 7,920 sq. ft. with average dimensions of 72' x 110' and are front-loaded lots
- There are 26 Type B lots proposed within the development.

The applicant is requesting the following deviations from existing standards:

---

- Front Setback: 10' rather than 20'
- Rear Setback: 10' rather than 25'
- Side Yard Setback: 5' and 5' rather than the 5' and 10' required for lots without alley access.
- Private gated vehicle access rather than open access for the public.
- Private streets rather than public streets.
- Right-of-Way width: Street Typical Section A: 44' rather than 55'
- Right-of-Way width: Street Typical Section B: 26' rather than 55'
- Sidewalk on only one side of the street for Street Typical A
- No sidewalks, curb or gutter on street for Street Typical B
- Ms. Stroud said that the Comprehensive Plan designates the area s Atlas-Prairie-Transition.
- She noted the various Comprehensive Plan Goals and Objectives for the PUD and Subdivision.
- She stated that the various city departments have commented on the project and noted in the staff report where those comments were located.
- She stated that if the application is approved, there are 18 conditions needed for approval.

Ms. Stroud concluded her presentation.

**Commission Comments:**

Commissioner Ingalls complimented staff on a great report. He noted that the applicant has asked for deviations for setbacks, gates and private streets. He asked if the past projects with deviations that have been approved in the last year are consistent with the project. Ms. Stroud said that the project is consistent with past Planned Unit Developments (PUD). Commissioner Ingalls if staff receives any feedback on how the recently approved projects are performing. Ms. Stroud said that sometimes they have received feedback in the past regarding snow storage, which is a requirement from the Fire Department to show on the plan which is discussed with the applicant.

Commissioner Fleming said that in the applicant's narrative they show the Type A home with 3- car garages, which looks like the garage will take up the width of the home. She asked if staff could explain how it can be done on a narrow lot. Ms. Stroud commented that she spoke with the applicant before the meeting and they will be providing the three-car garage as an option and suggested that Commissioner Fleming ask the applicant for clarification.

Commissioner Luttropp asked if the setbacks for the residents to the north are similar. Ms. Stroud said that in the Landings development they have standard setbacks. Commissioner Luttropp asked if all the streets in those developments are private. Ms. Stroud pointed out on a map of the surrounding areas where the public/private streets are located. Commissioner Luttropp asked if the applicant provided renderings showing the style of homes to be built in the development and asked if those styles will be the only ones required per the PUD. Ms. Stroud explained that the requirement for submittal for a PUD is that the applicant has to submit a rendering or drawing of what the character of the development will be.

Chairman Messina commented that many developments approved in the are a PUD and asked if that would be a true statement. Ms. Stroud said that most of the developments in the area are straight subdivisions with no modifications.

Commissioner Ward asked if the dividing line for the school district is on the east side of Carrington and if the Post Falls District starts on the other side. Ms. Stroud explained that she didn't receive any background information on that and the school district didn't submit anything either, but that it is a question that possibly the applicant will be able to answer.

**Public testimony open.**

Connie Krueger, applicant representative provided the following statements:

- She introduced Gabe Gallinger, who is the Civil Engineer for the project.
- She commented that the project is really a redesign of the Trails Fourth Addition and it is important to note that the Trails overall is an approved subdivision with 470 units, which has been constructed in phases.
- She showed an aerial photo of The Trails, showing the development that will provide a lot of greenspace and commented that this type of project is quite appealing to folks that are nearing retirement or with children who have left the nest, and also to the younger buyer.
- She said they had a pre-application meeting with the City that provided feedback from the various City departments to discuss where they felt the pinch points are with the development, and noted that, usually, there's going to be an issue with snow removal which was addressed and explained at that meeting.
- She said that they have read through the conditions and approve all of them.
- She stated the development is intended to be a gated community to appeal to the client who wants privacy.
- She provided a few slides showing the various renderings of the homes to be built in the development.
- She added that they recently met with the school district regarding a signal placement and to discuss the proposal.

Gabe Gallinger provided the following statements:
- He stated they put a lot of time into the project.
- He addressed the question regarding fitting a 3-car garage on narrow lots and explained on the perimeter the lots are 72 feet wide, and with the proposed side foot side yard setbacks that would allow a 60-foot-wide structure. That would facilitate any of the homes in the Trails subdivision with a third car option on the base plan.
- He stated by having a number of trails around the area they are trying to move that active use and outdoor use away from the homes and into the common areas, which is why they have provided additional parking.
- They have provided access locations that connect the trail in the common open space along Downing Avenue that connects to the Prairie Trail.

Mr. Gallinger concluded his presentation.

**Commission Comments:**

Commissioner Messina asked if the applicant could explain how they intend to provide a three-car garage on a narrow lot. Ms. Kruger explained there will be a minimum 20-foot driveway approach in concrete that is the width of the garage which would provide an additional three parking spaces off of the street,

Commissioner Luttropp said that in a PUD it is designed as a tool intended to facilitate the creation of better living environments. He asked Ms. Krueger to explain what will be the better living environment for the PUD. Ms. Krueger said that the subdivision is meant for the people that don't necessarily own a lawn mower and would like to have a Homeowners Association to do it for them, and still be able to use the outside space and not take care of it.

Commissioner Luttropp inquired how connectivity will be maintained. Ms. Krueger pointed out within the development the various connection points to various subdivisions that will connect to the Prairie Trail.

Commissioner Ward asked if the applicant could explain the three-car garage concept.

Mr. Gallinger explained that on the narrow lots the garages will be set back 20' feet from the narrow section and will provide three interior spaces in the garage structure, for a total of six spaces, by providing additional space to keep the garage clean.

Commissioner Ward asked if the lot count is the same, versus the old plan. Ms. Krueger explained with the plan they are proposing 76 lots versus 71 lots with the original proposal.

Commissioner Ward asked if Carrington Street is still the dividing line for the Post Falls and Coeur d'Alene School Districts and if both school districts are aware of the request.

Ms. Krueger said that the boundary line has changed and recently had a conversation with both school districts and they didn't have any issue with the request.

Barbara Yeager stated that she lives in the area and is concerned with three things. First, is the notice that was posted on the property was very hard to see and she questioned if the project was posted in the paper. The second thing is eliminating the common area and putting in gates, and the third item is she wondered when they would be getting their park on Hanley Avenue.

Ms. Anderson explained that the notice in the newspaper is placed 15 days in advance of the hearing and a copy of the notice is mailed to people within 300 feet of the property and posted on the site. She explained how the posted notice includes the necessary information to learn more and participate in the meeting, and commented that she appreciates feedback on a way that they can make it better. She noted that the other two questions would be best to be answered by the applicant.

**Rebuttal**:

Ms. Krueger provided the following statements:
- She said that it is a large development and not unusual to see changes over time, and commented that it is too bad to hear it is a shock to some people but she is hoping that by providing the information tonight, it shows what was originally approved and how the development will be close to that.

**Public testimony closed**.

**Discussion:**

Commissioner Fleming said she sees no issues and her question would be if they will be able to build it out. She said that the project is a good end to the piece of the puzzle.

Commissioner Luttropp said he has concerns with connectivity, private roads and gates and that the project doesn't seem to fit in with the area. He said that, for him, private roads and gated communities are not consistent with the Comprehensive Plan.

Commissioner Ingalls said that he feels there should be another comment in the Comprehensive Plan that states they should have housing types, and that most planners value having a variety of housing types. He said that he lives in a gated community within Coeur d'Alene Place which is a similar size, and they worked to provide housing choice, which is very important.

**Motion by Lewis, seconded by Ward, to approve Item PUD-1-20. Motion approved.**

ROLL CALL:

Commissioner Fleming          Voted   Aye
Commissioner Ingalls          Voted   Aye

| Commissioner Mandel | Voted | Aye |
| Commissioner Luttropp | Voted | NO |
| Commissioner Rumpler | Votes | Aye |
| Commissioner Ward | Voted | Aye |

Motion to approve carried by a 6 to 0 vote.

**Motion by Mandel, seconded by Fleming, to approve Item S-2-20.  Motion approved.**

ROLL CALL:

| Commissioner Fleming | Voted | Aye |
| Commissioner Ingalls | Voted | Aye |
| Commissioner Mandel | Voted | Aye |
| Commissioner Luttropp | Voted | Yes |
| Commissioner Rumpler | Votes | Aye |
| Commissioner Ward | Voted | Aye |

Motion to approve carried by a 6 to 0 vote.


4.  Applicant:  AT&T
    Location:  215 W. Anton
    Request:  A proposed Wireless Communication Facility Tower special use permit
    QUASI-JUDICIAL, (SP-2-20)

Mike Behary, Associate Planner, stated the applicant is requesting approval for a special use permit to allow a wireless communications (Cell Tower) facility in the C-17 Zoning District.

Mr. Behary provided the following statements:
- The applicant is proposing to build a 90-foot-tall mono-pole wireless communication facility.  The applicant has indicated that the proposed cell tower is intended to fill a significant gap in AT&T's 4G LTE coverage and capacity experienced by its customers in the surrounding area.
- The subject site is currently used by the owner of the property (General Construction Services) for outdoor storage and offices to support BCR Land Services' construction, site work, snow services, and trucking operations.
- There are three separate parcels and three addresses, but the site functions as one for the BCR operations.  The two parcels that are part of the request support an office building, a shop building, nine shipping containers, eight storage buildings, and construction materials and equipment.
- The applicant is proposing to locate the 90-foot cell tower in the northeast corner of the property, primarily on parcel C-2680-001-003-B with access through parcel C-4095-000-004-A.
- A portion of the cell tower facility may also extend into the larger parcel.  It is unclear from the site plan.  The tower and accessory ground equipment cabinets will meet the setbacks for wireless communications facilities in the C-17 Zoning District.
- The applicant has indicated that the proposed cell tower will not be stealth in design.
- The stealth design is not a requirement in the C-17 Zoning District.   The applicant has also provided a map illustrating the coverage area that the proposed cell tower will serve.
- While it does not affect the cell tower request, the construction operations on the subject property and adjacent lot (205 W. Anton Way) may not be in compliance with the Building Code, Water and Sewers Code, and Zoning Code.  Those potential issues will be addressed with the property owner separate from the Special Use Permit request.

- Mr. Behary referenced a map submitted by the applicant showing cell coverage without the proposed tower/and with the proposed tower.
- He noted the various findings required for the application.
- He stated that the Comprehensive Plan designates the area as US 95 Corridor.
- The applicant has requested that the ancillary ground equipment be screened by a sight-obscuring fence without buffer landscaping and irrigation.
- Mr. Behary provided a copy of the applicant's rendering showing the placement of the cell tower on the property.
- He said that all City departments have reviewed the project and noted where the comments where in the staff report.
- He said if the application is approved there are five conditions for consideration.

Mr. Behary concluded his presentation.

**Commission Comments:**

Commissioner Luttropp said that he thought that the City required all cell towers placed within the City must be a Stealth Tower. Mr. Behary explained that within the C-17 zoning district a Stealth Tower is not a requirement.

**Public testimony open.**

Sharon Gretch, representative for AT&T, provided the following statements:
- She thanked the commission and staff for doing a Zoom meeting in order to move the item forward. She introduced Sara Springer, also a representative for AT&T, and said she was available for questions.
- She explained the reasoning behind why they chose the northwest corner; specifically, because it will help minimize the visual impacts of the facility and meets the setback requirements and is surrounded by C-17.
- She said that they will be leasing a 30' x 30' fenced area surrounded by a 6' foot chain link fence with privacy slats with all equipment be located within that leased fence area.
- She explained that they will place a diesel generator within the 30' x 30' area that will run for approximately 5 minutes a month for testing and will only be used for emergency services.
- She said they are proposing a 90' foot mono-pole per code to provide additional space for two carriers to locate on the tower.
- The tower will be painted using a mat foundation that is anti-glare.
- She explained the amount of coverage need was determined by their engineers who proposed the upper center north location in order for the facility to work appropriately. She added that the tower had to be located on elevated terrain that was located near US 95 and I-90 in order to provide a strong signal dominance needed for commercial and residential establishments that will provide uninterrupted wireless service with less dropped calls and improved access for emergency 911 calls throughout the area.
- She presented a map showing cell tower coverage and stated that once the facility is constructed, the area will be covered.
- She commented that the next step would be to apply for a building permit and it may take a few months to construct the tower.

Ms. Springer commented that the facility is a wireless facility identified and recognized as an essential infrastructure under the State's Order to Self-Isolate requirement that is incorporated under the Department of Homeland Security.

The applicant concluded her presentation.

**Commission Comments:**

Commissioner Fleming said that she understands it is a leased portion of land that is owned by someone else and asked if the applicant will provide a Knox box and access to the lot for an afterhours situation.

Ms. Gretch said that it is one of the conditions in the staff report and she fully supports the request. Commissioner Fleming asked if the owner is aware of the condition. Ms. Gretch said that AT&T is aware and will fulfill the conditions. Commissioner Fleming said that she was referring to the owner of the property and if they are aware of A T & T providing a Knox box. Ms. Gretch explained that the Knox Box would go on the AT&T equipment and that the property owners have seen the proposed plan and have agreed to what they are proposing. She said that it was a good question and she will bring it up with the property owner.

Commissioner Ingalls said that this is the second tower the commission has seen in two months and feels that nobody is fond of cell towers but the reality is we need them. He asked what would happen if they couldn't find a spot in the vicinity for coverage.

Ms. Springer stated that every cell site they have is finite, so it can only handle so much volume and so many different users. She explained that when they propose a new cell phone tower site, they look at what is out there and make sure they have stretched their existing towers as much as possible by adding additional antennas and radio units, but at some point, they can't add anymore. She continued that they then have to look at the best option possible and see what is out there to relocate on which is location dependent and they have to be centered to provide coverage. She said that every site can handle only so much and they look at what is there and make sure to add additional antennas to existing stuff, but sometimes that doesn't work. Their next step is to look for what they can find that is existing.

**Public testimony closed**.

**Discussion:**

Commissioner Rumpler said they have recently have seen two cell towers come before the commission in the last two months. He understands that the applicants are trying to achieve better cell coverage and fully supports the request. He concurred that it might be a good idea to change the code in the C-17 zone to address Stealth Towers.

Commissioner Ingalls said that Commissioner Luttropp made a good point but, in fairness to the applicant, they have met the City code and can't make that change tonight. He suggested that if the commission feels like the code should be changed to require a Stealth Tower in C-17, they should ask staff to bring forward an ordinance request to make that change.

Commissioner Ward said that he supports Commissioners Ingalls and Luttropp to allow Stealth Towers in the C-17 zoning district and added that before they make the requirement to provide that type of tower to look at the surrounding area to see if it will blend with the surroundings. He stated that in the proposed area, a mono-pole makes sense since there are no trees in the area and a tower looking like a tree would look out of place.

Commissioner Fleming said that she concurred with all the comments.

Ms. Anderson stated that staff will look at the code to allow Stealth Towers to be included in the C-17 zone and they should look at the code and then include Legal to see if the request could be added to allow Stealth Towers.

**Motion by Fleming, seconded by Ingalls, to approve Item SP-2-20. Motion approved.**

ROLL CALL:

| | | |
|---|---|---|
| Commissioner Fleming | Voted | Aye |
| Commissioner Ingalls | Voted | Aye |
| Commissioner Mandel | Voted | Aye |
| Commissioner Luttropp | Voted | Aye |
| Commissioner Rumpler | Votes | Aye |
| Commissioner Ward | Voted | Aye |

Motion to approve carried by a 6 to 0 vote.

**ADJOURNMENT:**

Motion by Luttropp, seconded by Ingalls, to adjourn the meeting. Motion approved.

The meeting was adjourned at 8:30 p.m.

Prepared by Shana Stuhlmiller, Public Hearing Assistant

# ADMINISTRATIVE

# PLANNING COMMISSION
## STAFF REPORT

**FROM:**       HILARY ANDERSON, COMMUNITY PLANNING DIRECTOR

**DATE:**       JUNE 9, 2020

**SUBJECT:**    EXTENSION OF PLANNING COMMISION APPROVAL FOR RIVER'S EDGE PUD-2-19 and S-2-19

**LOCATION:**   22.32 ACRES LOCATED AT 3528 W. SELTICE WAY

## DECISION POINT:
River's Edge Apartments, LLC, is requesting a one (1) year extension of PUD-2-19 and S-2-19 approved July 9, 2019.

## GENERAL INFORMATION:
The above-noted approvals are set to expire on July 9, 2020, according to City records.  Due to active and ongoing dialogue with the City on a possible land swap involving the subject property, the applicant is requesting an extension of the PUD and subdivision approvals that would allow a 250-unit apartment facility, a mini-storage facility, and private gated residential community, and a 29-lot preliminary plat for one (1) additional year to **July 9, 2021**, which would allow additional time to come to mutually agreeable terms with the City**.**

It should be noted that the applicant's attorney, Edward A. Lawson of Lawson Laski Clark, PLLC, has indicated in the extension request letter that they believe their pending Request for Reconsideration extends the time for both the PUD and preliminary plat approval on the subject property, and that an extension is not required at this time.  They have, however, requested the extension to ensure that the approvals remain valid during the negotiations.

## DISCUSSION:
Since the PUD and subdivision were approved in 2019, there have been ongoing and active discussions regarding a possible land exchange between the applicant and City of Coeur d'Alene for property owned by the City of Coeur d'Alene (former railroad right-of-way) and the 3.84-acre parcel located at 2772 W. Seltice Way.  The possible land exchange would have an effect the subject property.  Additionally, the applicant had submitted a Request for Reconsideration to the City based on its opinion that the City Council public hearing and decision on a zone change and density increase request for the subject property in 2019 were flawed.  The City Council recently voted to deny the Reconsideration Request for the subject property that would have allowed a new public hearing before the Council on previous requests for zone changes and density increases.  These circumstances have delayed the applicant from moving forward to finalize the Final Development Plan for the PUD approval or the final plat (PUD-2-19 and S-2-19).

Section 17.09.478 of the City's code allows the Planning Commission to extend the Planned Unit Development approval for one year, without public notice, upon written request filed at any time before the permit has expired. The Commission, in its order, must state the conditions requiring the extension.  Similarly, Section 16.20.040 of the City's code allows the Planning Commission to extend the subdivision/preliminary plat approval for one year, without public notice, upon written request filed at any time before the permit has expired. The Commission must find that the preliminary plat complies with current development requirements and all applicable conditions of approval.

**PROPERTY LOCATION MAP:**



**CITED CODES:**

For PUD:
**17.09.478: FINAL DEVELOPMENT PLAN:**

A. Time Limitation: After one year from the date of the public hearing, the approval of the planned unit development shall terminate unless the applicant files a final development plan for the entire development or for the appropriate phase of development, when submission in stages has been authorized by the Planning Commission in its approval of the development plan, for the first unit or stage of development. The approval period may be extended by the Planning Commission for one year without public notice upon written request filed before said period has expired and upon stating conditions requiring the extension.

For Subdivision:
**16.20.040: LAPSE OF APPROVAL OF PRELIMINARY PLAT APPROVAL:**

Preliminary plat approval, whether conditional or not, shall be effective for twelve (12) months from the date of planning commission approval or from the date of recordation of the final plat for the preceding phase of the development in an approved phased subdivision. The planning commission, upon written request, may grant up to five (5) extensions of twelve (12) months each upon a finding that the preliminary plat complies with current development requirements and all applicable conditions of approval. The planning commission may modify and/or add conditions to the final plat to ensure conformity with adopted policies and/or ordinance changes that have occurred since the initial approval. A request for an extension of a preliminary plat approval must be received by the planning director no later than ninety (90) days after the date that the approval lapsed and must be accompanied by the required fee. (Ord. 3485, 2014)

**PRIOR CONDITIONS OF APPROVAL:**

1. The first phase of the project must include the installation of the Public Open Spaces along the river and the sixteen-foot-wide trail.

2. A Lighting Plan must be submitted as part of the building permit for the self-storage facility indicating full cut off lighting throughout the self-storage site.

3. An Open Space and Public Access easement with the City of Coeur d'Alene must be recorded prior to construction.

4. The developer will provide the standpipes adequate to serve future dock construction together with access for the Fire Department. The Fire Department shall approve the number and location of the standpipes.

5. Any additional water main extensions and/or fire hydrants and services will be the responsibility of the developer at its expense.

6. Any additional water service will require cap fees due at building permitting.

7. An unobstructed City approved "all-weather" access shall be required over all public sewers.

8. Payment of the Mill River Lift Station Surcharge Fee per EDU shall be required on all building permits.

9. This PUD shall be required to comply with the City's One Lot-One Lateral Rule.

10. All public sewer plans require IDEQ or QLPE Approval prior to construction.

11. Build a 16' shared-use path on either the City's property or on the subject property with a wall.

12. Use 'Driveway Mix' asphalt in the construction of the trail.

13. Sterilize the ground with herbicide before laying down gravel and asphalt.

14. Soften the trail curve on the west end of the development to meet MUTCD standards.
    Build a 16' shared-use path on either the City's property or on the subject property with a wall.

15. The City and applicant will explore a preferred open space alternative that may locate and/or combine the open space tracts to the east and/or west ends of the project within the R-12 property along the waterfront to optimize public access, if fire access can be maintained and if the locations are in the best interests of the City.

16. The vehicular gates will be moved to the north edge of the R-12 property, and the applicant will grant a public access easement to the City's 3.62-acre property from Seltice Way on the private

**COMMISSION ALTERNATIVES:**

➢ The Planning Commission may, by motion, grant additional one-year extensions to River's Edge Apartments, LLC, for the approved PUD and Subdivision or,

➢ The Planning Commission may, by motion, deny the extension request.

Staff recommends approval of the extension requests because of the ongoing discussions related to a possible land exchange with the City, which has delayed the project.

# APPLICANT'S NARRATIVE

EDWARD A. LAWSON
EAL@LAWSONLASKI.COM

# LAWSON LASKI CLARK

ATTORNEYS AT LAW

April 27, 2020

Ms. Hilary Anderson
Community Planning Director
City of Coeur d'Alene
710 E. Mullan Avenue
Coeur d'Alene, ID 83814

Re:  Request for Approval of Extension River's Edge Apartments
     PUD-2-19 and S-2-19
     Our File No. 11708-001

Dear Hilary:

On behalf of River's Edge Apartments, LLC ("Applicant") request is hereby made for an extension of the above referenced approvals granted by the City of Coeur d'Alene ("City"). The request is made in response to your suggestion that an extension is needed. However, the Applicant contends that the pending Request for Reconsideration extends the time for both the PUD and preliminary plat approval. Accordingly, this request for an extension is made with the express reservation of all rights, including the right to have the applications for PUD and subdivision approval subjected only to the laws in effect at the time of application. In any event extending the time period for the subject approvals is warranted because of the pending Request for Reconsideration and the continuing negotiations between the City and the Applicant on a possible exchange of property.

Please advise if you have any questions or need additional information. Our check is enclosed payable to the City in the amount of $100 for your fees. Thank you.

Sincerely,

LAWSON LASKI CLARK, PLLC

Edward A. Lawson

Pdf:   Client
       M. Gridley

# PLANNING COMMISSION
## STAFF REPORT

**FROM:** HILARY ANDERSON, COMMUNITY PLANNING DIRECTOR

**DATE:** JUNE 9, 2020

**SUBJECT:** EXTENSION OF PLANNING COMMISION APPROVAL FOR SP-1-17 DENSITY INCREASE TO R-34 FOR A PROPOSED MULTI-FAMILY APARTMENT COMPLEX IN THE C-17 COMMERCIAL DISTRICT

**LOCATION:** A 3.84 ACRE PARCEL LOCATED AT 2772 W. SELTICE WAY

## DECISION POINT:

Atlas Mill Development Corporation/River's Edge Apartments, LLC, is requesting a one (1) year extension of SP-1-17 (R-34 Density Increase Special Use Permit) approved January 10, 2017, which went into effect on June 4, 2017, when the annexation agreement and annexation ordinance were recorded.

## GENERAL INFORMATION:

The above-noted special use permit is set to expire on June 4, 2020.  Due to active and ongoing dialogue with the City on a possible land swap involving the subject property, the applicant is requesting an extension of the SUP approval for one (1) additional year to **June 4, 2021**, which would allow additional time to come to mutually agreeable terms with the City**.** (It should be noted that the applicant's extension request was received before the expiration date and, therefore, allows this matter to be discussed)

## DISCUSSION:

Section 17.09.230 of the City's code allows the Planning Commission to extend the Special Use Permit approval for one year, without public notice, upon written request filed at any time before the permit has expired upon a showing of unusual hardship not caused by the owner/applicant.

## PROPERTY LOCATION MAP:

## CITED CODE:
### 17.09.230: ADHERENCE TO APPROVED PLANS:

A special use permit shall be subject to the plans and other conditions upon the basis of which it was granted. Unless a different termination date is prescribed, the permit shall terminate one year from the effective date of its granting unless substantial development or actual commencement of authorized activities has occurred, or if there is a cessation of use or occupancy for two (2) years. However, such period of time may be extended by the planning commission for one year, without public notice, upon written request filed at any time before the permit has expired and upon a showing of unusual hardship not caused by the owner or applicant. (Ord. 1691 §1(part), 1982)

## PRIOR CONDITIONS OF APPROVAL:

### ENGINEERING:
1. Traffic islands will be required to prohibit left turns on Eastbound Seltice Way. Acceleration/Deceleration lanes will not be required.

2. Sidewalk connections to the proposed shared-use path on Seltice Way shall be routed to avoid crossing the parking lot areas.

3. Coordinate with the City Engineer to redesign access onto Seltice Way and submit a revised site plan for administrative review and approval prior to moving forward with the site improvement process

### WATER:
4. Any improvements required to meet service delivery and fire flow will be the responsibility of the developer at his/her expense.

### WASTEWATER:
5. The applicant will need to demonstrate that the peak wastewater flows generated from the increased density will not compromise the public sewer main's downstream capacity all the way to the Wastewater Treatment Plant.

### PLANNING:
6. The ingress/egress as shown on the proposed site plan may require modification due to the Seltice Way Redevelopment Project which is currently underway. Therefore, staff recommends that if the Special Use Permit is approved, it is not tied to the site plan.

7. If approved, the Special Use Permit will not be valid until the Annexation Agreement and Annexation Ordinance are finalized and recorded.

## COMMISSION ALTERNATIVES:

➢ The Planning Commission may, by motion, grant an additional one-year extension to Atlas Mill Development Corporation/River's Edge Apartments, LLC, for the approved SUP to allow for additional time to come to mutually agreeable terms with the City on a possible land swap, or

➢ The Planning Commission may, by motion, deny the extension request.

Staff recommends approval of the SUP extension because of the ongoing discussions related to a possible land exchange with the City, which has delayed the project and resulted in an unusual hardship not caused by the property owner.

# APPLICANT'S NARRATIVE

EDWARD A. LAWSON
EAL@LAWSONLASKI.COM

# LAWSON LASKI CLARK

ATTORNEYS AT LAW

April 27, 2020

Ms. Hilary Anderson
Community Planning Director
City of Coeur d'Alene
710 E. Mullan Avenue
Coeur d'Alene, ID 83814

Re: Request for Approval of Extension of River's Edge Apartments
Special Use Permit SP-1-17
Our File No. 11708-002

Dear Hilary:

On behalf of River's Edge Apartments, LLC ("Applicant") request is hereby made for a one-year extension of the approval granted by the City of Coeur d'Alene ("City") of the Special Use Permit for the Stimson site. The request is made in order to facilitate the continuing negotiations between the City and the Applicant on a possible exchange of property which to date has resulted in an unusual hardship not caused by the Applicant and otherwise has delayed development.

Please advise if you have any questions or need additional information. Thank you in advance for your anticipated cooperation.

Sincerely,

LAWSON LASKI CLARK, PLLC

Edward A. Lawson

Pdf:   Client
       M. Gridley

**PLANNING COMMISSION**
**STAFF REPORT**

| | |
|---|---|
| **FROM:** | HILARY ANDERSON, COMMUNITY PLANNING DIRECTOR |
| **DATE:** | JUNE 9, 2020 |
| **SUBJECT:** | EXTENSION OF PLANNING COMMISION APPROVAL FOR SP-1-19 DENSITY INCREASE TO R-34 FOR A PROPOSED MIXED-USE MULTI-FAMILY APARTMENT COMPLEX IN THE C-17L COMMERCIAL DISTRICT AND THE R-17 RESIDENTIAL DISTRICT |
| **LOCATION:** | A 1.26 ACRE PARCEL LOCATED AT 1715 N GOVERNMENT WAY |

**DECISION POINT:**
The Widmyer Corporation is requesting a one (1) year extension of SP-1-19 (R-34 Density Increase Special Use Permit).

**GENERAL INFORMATION:**
The Planning Commission hearing on the density increase was in April of 2019. The request was approved and subsequently appealed. The appeal hearing with the City Council took place on June 4, 2019. The City Council upheld the Planning Commission decision to approve the request.

Based on the appeal hearing date, the above-noted special use permit is set to expire on June 4, 2020. Due to ongoing efforts to review project costs, feasibility reports and financing options, the applicant is requesting an extension of the SUP approval for one (1) additional year to **June 4, 2021.**

**DISCUSSION:**
Section 17.09.230 of the City's code allows the Planning Commission to extend the Special Use Permit approval for one year, without public notice, upon written request filed at any time before the permit has expired upon a showing of unusual hardship not caused by the owner/applicant.

**PROPERTY LOCATION MAP:**

## CITED CODE ITEMS:

### 17.09.230: ADHERENCE TO APPROVED PLANS:

A special use permit shall be subject to the plans and other conditions upon the basis of which it was granted. Unless a different termination date is prescribed, the permit shall terminate one year from the effective date of its granting unless substantial development or actual commencement of authorized activities has occurred, or if there is a cessation of use or occupancy for two (2) years. However, such period of time may be extended by the planning commission for one year, without public notice, upon written request filed at any time before the permit has expired and upon a showing of unusual hardship not caused by the owner or applicant. (Ord. 1691 §1(part), 1982)

## PRIOR CONDITIONS OF APPROVAL:

### Water:

1. Any additional main extensions and/or fire hydrants and services will be the responsibility of the developer at their expense.

2. Any additional service will have cap fees due at building permitting.

### Wastewater:

3. This project will be required to utilize or reconnect to the existing public sewer connection in Government Way.

4. This project will be required to the abandon all unused sewer lateral connections at the public sewer main.

### Planning:

5. The applicant must meet the parking requirements for the commercial and residential uses per 17.44 of the Zoning Code.

6. A lot consolidation must be completed prior to obtaining a building permit.

7. A Special Use Permit (SUP) would be required if commercial parking for the mixed-use project would be on the R-17 lots.  The SUP approval would be required prior to obtaining building permits for the project.

8. If the project is 50,000 square feet or larger, it will be required to go through the Design Review Commission for review and approval for compliance with the Commercial Design Guidelines.

### Parks:

9. Where right of way trees conflict with construction. The Applicant must obtain approval for removal of any conflicting trees with the Urban Forestry division, City Code: 12.36.200.    If the trees are found to be healthy and in the public right of way, they must be protected in accordance with City Code: 12.36.460, 12.36.440

10. Street trees must be included in this project in accordance with city codes: 12.36.115, 12.36.405, 12.36.400, 12.36.410, 12.36.415, 12.36.445.   All trees must be selected off of the approved street tree list.

## COMMISSION ALTERNATIVES:

➢ The Planning Commission may, by motion, grant an additional one-year extension of the approved SUP, or,

➢ The Planning Commission may, by motion, deny the extension request.

Staff recommends approval of the SUP extension because the project has experienced an unusual hardship not caused by the property owner.

# APPLICANT'S NARRATIVE

# WIDMYER
CORPORATION

May 18, 2020

Hilary Anderson, Community Planning Director

City of Coeur d'Alene

710 E. Mullan Avenue

Coeur d'Alene, Idaho 83814

handerson@cdaid.org


SUBJECT: SP-1-19 Request for Extension


We would like to request an extension of our Special Use Permit for our project located on Government Way and Davidson Avenue. We are continuing to go through project costs, feasibility reports and financing options. Due to events outside of our control these tasks have taken longer than expected. Thanks

Benjamin Widmyer

330 E. Lakeside Ave Suite 201
Coeur d'Alene, ID 83814
www.widmyercorp.com

P: 208-664-5081
F: 208-620-3066
info@widmyercorp.com

# Economic Development Analysis

May 2020

# TABLE OF CONTENTS

This page intentionally left blank

# EXECUTIVE SUMMARY

The City of Coeur d'Alene is well known for its surrounding beauty and natural environment, which has established it as a successful tourist and retirement destination. However, the year-round residents want a diverse and sustainable economy that will serve the entire community. There is a desire for more industries in addition to tourism. They especially want to focus on more educational partnerships to enhance opportunities for the existing residents, and provide opportunities for the youth to return to viable careers. Fortunately, Coeur d'Alene has many assets that will help achieve the economic development vision of the community. The following analysis outlines how these assets can be leveraged and developed to achieve the desired direction.

# BACKGROUND

The City of Coeur d'Alene is updating the Comprehensive Plan, and one objective of the Plan is to strategically prepare for land use and infrastructure investments that will support economic development across the City. This document provides an overview of economic development trends, City demographics, Coeur d'Alene's industry strengths, and anticipated areas of employment growth. Recommendations are based on data research and interviews with economic development and tourism stakeholders, business owners, government officials, and real estate professionals across the community.

A strong economic development analysis must be devised by and for the community it serves. While looking at national and state trends and conducting a data analysis are important to determining trends, assets, and challenges, soliciting input from local businesses and community members gives this analysis much-needed context. By providing a platform for community members and business leaders to share their lessons and new ideas, we hope to generate a universal understanding among public, private, and governmental partners. To identify Coeur d'Alene's economic development priorities, the following five steps were followed:

**Examine national and state trends.** Discuss with stakeholders the current national trends driving economic development and how they align with local development priorities and trends.

**Benchmark and compare the City to its peers.** Provide quantitative data regarding the community profile and demographics to establish a foundation of existing conditions. This data is contrasted with peer communities to provide context.

**Conduct Discussions.** For a strategy to be inclusive – for the community, by the community – diverse voices and perspectives must be brought to the table. Extensive outreach in person via five stakeholder meetings, a digital survey, and community feedback on preliminary recommendations at an open house provided a variety of perspectives.

**Identify Key Themes.** It is essential that areas for investment and growth are built upon shared principles and community values that are conveyed through survey responses and stakeholder

meeting feedback. Consistent messages create key themes of focus and direction that are unique to the community.

**Develop Goals and Objectives.** By developing a "playbook" of direction that includes priority goals and objectives, the City can identify where they should focus time and monetary resources to most effectively foster business growth and expansion.

# ECONOMIC DEVELOPMENT OVERVIEW

In preparing an economic development analysis, it is important to have a common understanding of terminology and desired outcomes. This section provides the foundational background that informs the final recommendations.

Economic development can be defined as efforts that seek to improve the economic well-being and quality of life for a community by creating and/or retaining middle and high-income jobs and supporting or growing incomes and the tax base through diversification of the local economy. These jobs are generally defined as two different categories with distinct needs in terms of workforce and business location. In addition, these sectors require different types of support and investments from various stakeholders. These sectors are distinguished for clarification regarding strategy objectives and actions.

## TRADED SECTOR VS. LOCAL SECTOR JOBS

Traded sector (also referred to as an export or basic sector) businesses include industries and employers which produce goods and services that are consumed outside the region where they are produced and therefore bring in new income to the area (e.g., metals and machinery, food processing). Workers in the traded sector tend to have higher educational attainment, work more hours, and earn higher average wages than local sector business.

As the traded sector increases employment and wages, it also fosters an environment that allows entrepreneurs to develop skills and resources while on the job that may encourage them to start a new business and increase employment opportunities within the region. Furthermore, certain traded sector companies foster a supply chain effect that creates the need for additional companies to supply components of a product that is manufactured.

Local sector business consists of industries and firms that are in every region. They produce goods and services that are consumed locally in the region where they were made, and therefore circulate existing income in the area (e.g., breweries, physician offices, banks). These businesses are important as they make a community distinct and provide amenities to attract young professionals and families that drive the new economy. A sampling of traded vs. local sector businesses in the City of Coeur d'Alene is indicated in Table 1.

*Table 1. Representative Traded Sector and Local Sector Coeur d'Alene Businesses*

| Traded Sector | Local Sector |
|---|---|
| CASCADIA CUSTOM MOLDING | TAPHOUSE UNCHAINED COEUR D'ALENE, ID |
| FluentEdge Technologies, Inc. | PILGRIM'S MARKET Est. 1999 |
| Continuous™ Composites | Riverstone DENTAL CARE |

The following table highlights the average wage difference between traded sector jobs and local sector jobs across the United States. As the job base expands, a community is more attractive to employees because they have more options for career growth. In turn, once the employment base grows, competition will occur and ultimately increase wages. Highlighting the strength of traded-sector jobs, the US employment base currently consists of 36% traded-sector jobs, which has 50% of the income[1].

*Table 2. Annual Average Wage Comparison, USA, 2018*

| NAICS | Industry | US Average Annual Wage 2018 |
|---|---|---|
| **TRADED SECTOR** | | |
| 55 | Management of Companies and Enterprises | $85,430 |
| 54 | Professional, Scientific, and Technical Services | $83,370 |
| 51 | Information | $76,990 |
| 42,48-49 | Wholesale Trade, Transportation and Warehousing | $53,340 |
| 31-33 | Manufacturing | $53,020 |
| 11 | Agriculture, Forestry, Fishing | $32,300 |
| **LOCAL SECTOR** | | |
| 23 | Construction | $55,290 |
| 71 | Arts, Entertainment, and Recreation | $37,810 |
| 44-45 | Retail Trade | $33,720 |
| 72 | Accommodation and Food Services | $26,890 |

*Source: Bureau of Labor Statistics, QCEW data*

---

[1] US Cluster Mapping

# TARGET INDUSTRY CLUSTERS

A cluster is a geographic concentration of related industries in a particular location. Clusters are a foundational element to regional economies, making them uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.  Various cities across the US have unique clusters making them distinct: Boston, MA has biotech whereas Spartanburg, SC has textiles. Industry clusters function on a regional metropolitan statistical area (MSA) level because assets such as workforce and transportation infrastructure are not constrained by local municipal boundaries. Therefore, in order to effectively grow an industry cluster, it is important to leverage existing assets and collaborate on a regional and state level.

An industry cluster is comprised of the following elements, with some being more important than others depending on the industry. A city plays the important of role of providing the necessary infrastructure and zoned land to allow various types of industry to thrive.

*Figure 1. Elements of an Industry Cluster*



**Higher Education**
- Degree programs tied to industry
- R&D spurring innovation tied to industry
- Strong commercialization and tech transfer focus

**Infrastructure**
- Physical: roads, utility availability
- Digital: broadband
- Sites: Buildings and sites where talent and business wants to go

**Industry**
- LQ over 1.0 that shows there is substantive base of industry
- Robust supply chain

**Talent Base**
- Robust workforce at all levels
- Strong local training programs tied to cluster

*Source: Bridge Economic Development*

# IMPORTANCE OF TALENT

The national economy is becoming increasingly more talent/knowledge-based than resource-based, meaning that people, rather than raw materials, are the most important asset to a company's value and prospects for growth. This applies to all industries, including manufacturing, professional services, and technology. This is not to suggest that Coeur d'Alene needs to focus their industrial base entirely on technology companies, but to understand that the modern economy depends upon highly skilled people to thrive. For this reason, a company's number one priority today is attracting talent. Verifying

this is the Duke Fuqua School of Business CFO Global Business Outlook Survey[2]. The school has conducted the survey 95 consecutive quarters since July 1996. The years 2017 -2019 are the first time that CFO's cited attracting and retaining qualified employees was their number one concern over other factors such as input costs or regulations.

A significant cohort of the talent in demand consists of the "millennial" generation (generally ages 23 to 39 in 2020), made up of approximately 76 million people – the largest demographic group our country has seen. As this generation shapes our talent-based economy, it is important to understand what motivates them and the communities they choose in such a highly mobile environment. This desired talent is attracted to a great place with jobs. Such an environment includes the following elements:

**Job Base** Talent moving to a new community wants to know that there are other opportunities if the job that brought them there does not fulfill expectations.

**Simple Commute** Many millennials are not defined by the automobile, and do not want to drive if they don't have to. As reported in Urban Land Institute (ULI) Emerging Trends 2016, miles traveled by car for those people 34 years old or younger are down 23 percent nationally. The American Automobile Association reports that the percentage of high school seniors with driver's licenses declined from 85 percent to 73 percent between 1996 and 2010, with federal data suggesting that the decline has continued since 2010.

**Housing Options** All talent, including millennials, desire affordable housing near employment. In order to maximize opportunities for talent attraction and retention is important for communities to provide a variety of options to meet a diversity of population needs.

**Urban Environment** Almost all talent, including millennials, prefer an environment with housing options, amenities, density with alternative transportation modes and retail near the work place. This urban lifestyle does not mean that an entire community must conform to urban densities. What is important is that some element of an urban lifestyle through either a healthy Main Street in a traditional downtown or denser town centers in suburbs is provided. Global commercial real estate firm Newmark Knight Frank (NKF) recently recognized that "office property owners who create a 'best of both worlds' environment by offering options to work/live/play in a walkable setting stand to capitalize the most. Corporate occupiers should keep this in mind and consider locations that offer urban amenities in a suburban setting—a blend of the active environment and convenience that today's workers, including millennials, prize"[3].

**Amenities** Millennials are looking for ample amenities, especially restaurants and access to outdoor recreation.

---

[2] https://www.cfosurvey.org/

[3] Population Data Suggests a Suburban Office Rebound Is Coming, Newmark Knight Frank, November 2018

**Diversity** Millennials embrace social or ethical causes[4] and communities that are more diverse, accepting, and open to change.

# THE CITY'S ROLE

A municipality does not create jobs. It creates a great environment so that business can easily invest and create jobs. With that understanding, the City should focus on the following elements to promote economic development.

**Sites and Infrastructure** Businesses need to go into buildings and develop on sites with adequate infrastructure. Furthermore, similar types of businesses like to physically group together to build a destination and allow for collaboration. Where an employer locates depends on the industry. Software is dependent on highly-skilled talent and will locate where talent wants to be. In addition, because of the lower capital investments and less dependence on transporting finished products, they can afford higher rents that allow them to locate in more urban/downtown locations.  In contrast, manufacturing, while also needing talent, must consider access to transportation infrastructure and lower land and building costs to off-set capital equipment investment costs. Additionally, some manufacturing is dependent on rail infrastructure to lower operational costs. Aligning industry clusters with available subareas (sites with appropriate infrastructure) is an important role for the City to convey genuine support for economic growth.

**Focus on Current Residents** As the community makes significant commitments to land use designations and infrastructure funding, it is important to make sure that the existing residents and businesses also benefit. Coeur d'Alene should support and promote programs that allow existing residents to start their own businesses or gain skills that improve opportunities to work at expanding companies. As indicated in the following figure, the majority of job growth across the United States comes from local start-ups and expansions of existing businesses. This is not to say business attraction is not important, however it should be done strategically in balance with retaining and growing existing businesses in the region.

---

[4] Brookings Institution, 11 Facts about the Millennial Generation, June 2014

*Figure 2. Sources of Job Growth Across the United States*



A small fraction of jobs are attracted from out-of-state

3%

11%

86%

**3%**
from out-of-state relocations

**11%**
from out-of-state expansions

**86%**
from in-state startups and expansions

*Source: Center on Budget and Policy Priorities, 2016*
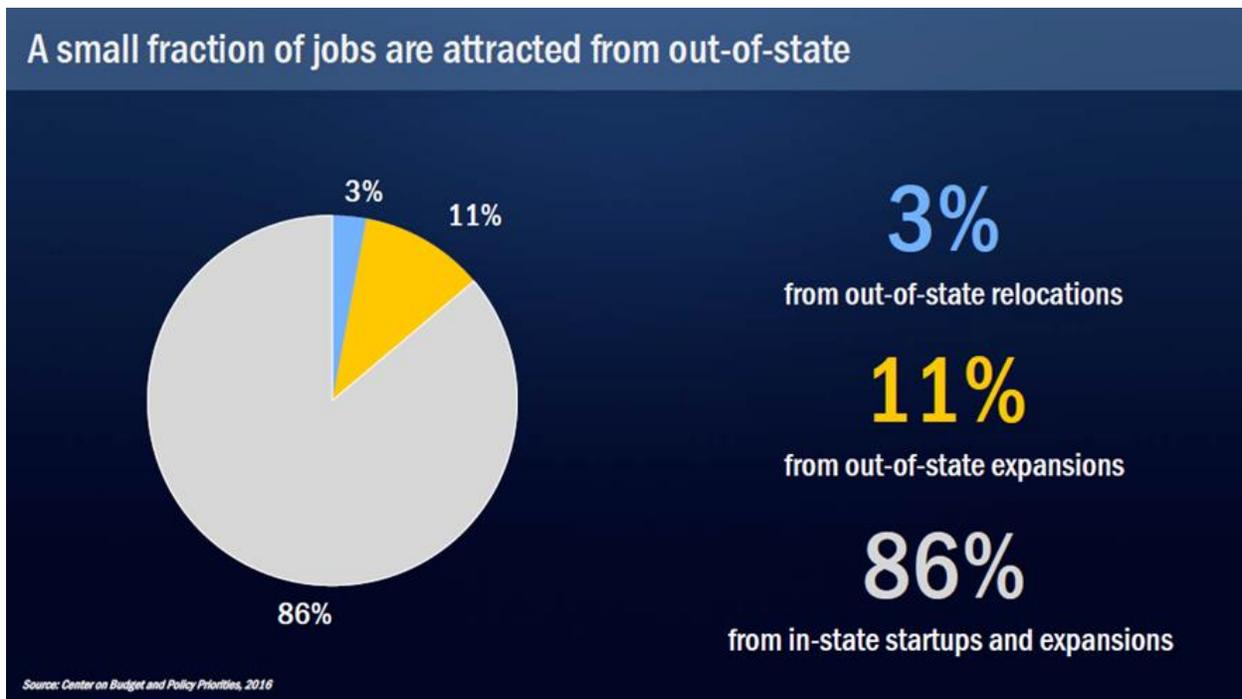
*Source: Brookings, 2018*

# CITY PROFILE AND TRENDS

Demographic and economic statistics for a single place are unhelpful for strategy development unless presented in the context of meaningful comparisons. The following information presents data pertaining to Coeur d'Alene in contrast it with others cities likely to be in similar economic situations. The following information is a summary of the more detailed information regarding the peer cities is provided in Attachment A.

## DEMOGRAPHICS

Located in Kootenai County, Idaho, Coeur d'Alene is the largest community in the county and the key economic center. The following outlines the key takeaways from the analysis of Coeur d'Alene's demographics:

**Growing Population** As of 2017, nearly 49,000 residents call Coeur d'Alene, home, a 7.9% increase since 2013 – a gain of 3,600 residents.

**Older Population** As communities outline their future economic development priorities, millennial talent is coveted as they are the future workforce. Coeur d'Alene's median age is 36.4, ranking it as the second oldest city among the benchmarks. Millennials make up 24% of the city's population – ranking 10th among the benchmark communities. The city's Millennial population has increased 5.8%,

slightly faster than the U.S. average but much slower than peer benchmarks such as Bend, Castle Rock, Boulder, and Bozeman.

*Figure 3: Median Age, 2017*
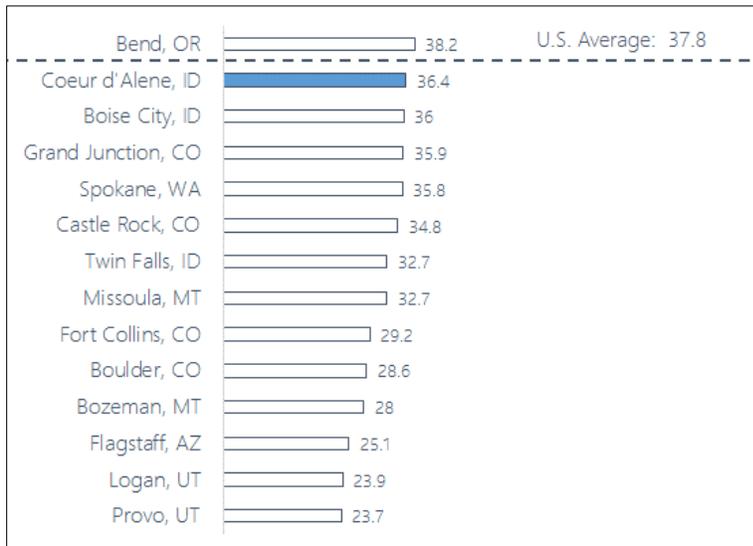


*Source: U.S. Census American Community Survey 2017*

**Diversity** Strong demographic diversity creates stronger innovation and global linkages, and creates more resilience and adaptability within a community. The Census Bureau does not categorize Hispanic/Latino as "Race" but rather as an origin. Therefore, the Hispanic/Latino population is categorized across races and is called out separately. Approximately 2,600 Coeur d'Alene residents are Hispanic (5.3% of the population) – ranking third from the bottom of the benchmark cities.  Since 2013, Coeur d'Alene's Hispanic population has increased just 3%, compared to 11% for the U.S. average. Just 2.3% of Coeur d'Alene residents are foreign-born, ranking last among the benchmark cities.

*Figure 4: Racial and Ethnic Breakdown, 2017*
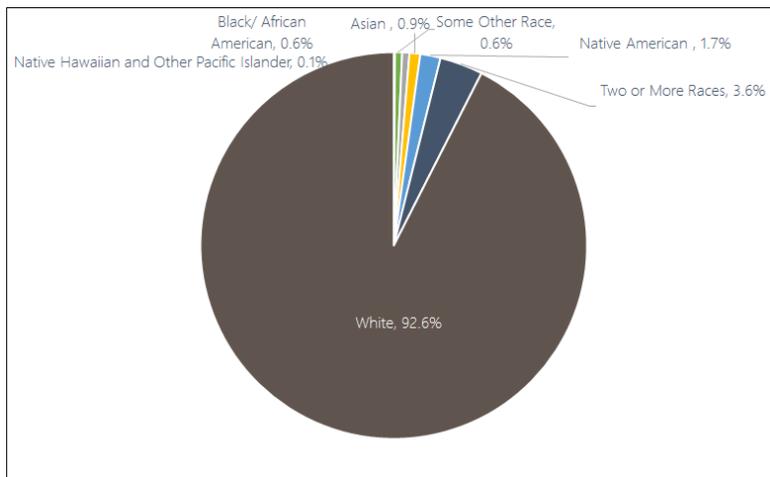


*Source: U.S. Census American Community Survey 2017*

**Figure 5: Hispanic Population (Share of Residents), 2017**



| | |
|---|---|
| Flagstaff, AZ | 19.4%   U.S. Average: 17.6% |
| Grand Junction,... | 17.0% |
| Provo, UT | 16.3% |
| Twin Falls, ID | 16.1% |
| Logan, UT | 15.1% |
| Fort Collins, CO | 11.8% |
| Castle Rock, CO | 10.2% |
| Boulder, CO | 9.3% |
| Bend, OR | 9.1% |
| Boise City, ID | 8.7% |
| Spokane, WA | 6.2% |
| Coeur d'Alene,... | 5.3% |
| Missoula, MT | 3.1% |
| Bozeman, MT | 2.8% |
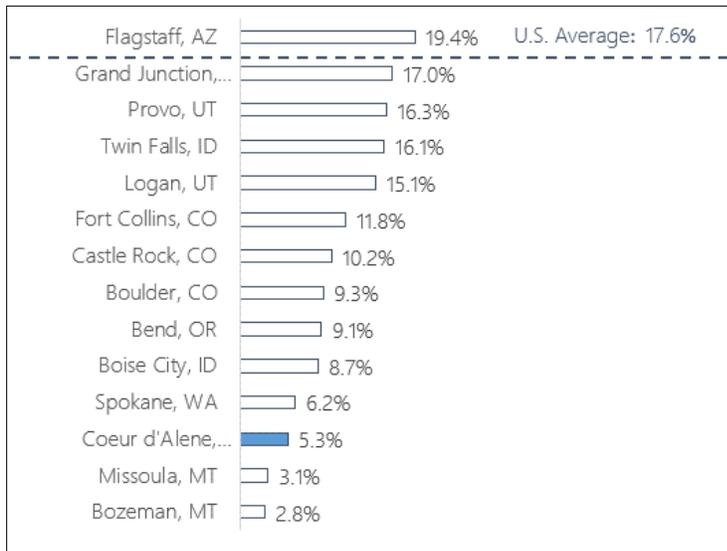
*Source: U.S. Census American Community Survey 2017*

**Figure 6: Foreign Born Population (share of residents), 2017**



| | |
|---|---|
| | U.S. Average: 13.4% |
| Boulder, CO | 11.2% |
| Logan, UT | 10.5% |
| Provo, UT | 10.5% |
| Twin Falls, ID | 9.9% |
| Boise City, ID | 7.0% |
| Fort Collins, CO | 6.4% |
| Spokane, WA | 6.2% |
| Flagstaff, AZ | 6.1% |
| Grand Junction,... | 5.0% |
| Castle Rock, CO | 4.5% |
| Bend, OR | 4.4% |
| Bozeman, MT | 4.1% |
| Missoula, MT | 3.0% |
| Coeur d'Alene,... | 2.3% |
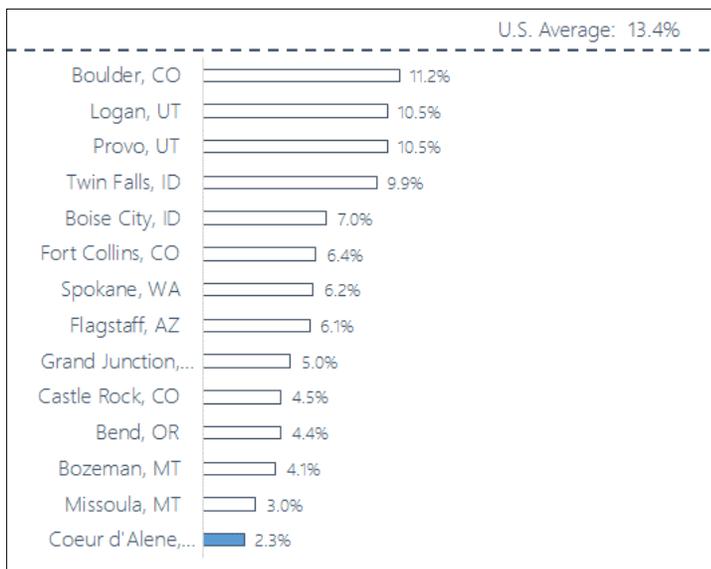
*Source: U.S. Census American Community Survey 2017*

# INCOME

Coeur d'Alene's residents have experienced ups and downs as it relates to median household income, family income, and individual wages. This can be attributed to the City's dependence on hospitality, tourism and local retail sectors, which can be highly cyclical and dependent on other sectors of the economy. The following are key takeaways about Coeur d'Alene's various income metrics based on 2017 U.S. Census American Community Survey data:

**Median Household Income** Coeur d'Alene's median household income has increased 18% (nearly 2x the U.S. average) since 2013 to approximately $47,606. This represents the largest increase for all benchmark cities.

**Per Capita Income** Coeur d'Alene's per capita income of $20,743 is 15% less than the national average and ranks ninth among the benchmark cities (on par with Spokane and Flagstaff).

**Average Family Income** Coeur d'Alene's average family income increased 19.3% (ranking first among cities) since 2013 to $43,806.  This income level is still nearly 15% less than the U.S. average.

**Individual Wages: Men versus Women** Men working full-time in Coeur d'Alene earn approximately $43,800, ranking tenth among the benchmark cities. Women working full-time in Coeur d'Alene earn nearly $35,400 annually – 15% less than the U.S. average.  This ranks tenth among the benchmarks.

# INCLUSIVE PROSPERITY

As the Coeur d'Alene grows in population and income, it is important to understand if everyone is benefiting.  Noted previously, Coeur d'Alene as a vacation destination is highly dependent on the hospitality and tourism sector.  With this sector, low-wage service work is often main type employment that is available, leaving many residents living below the poverty-line without health insurance and needing to seek out government support to supplement incomes.

**Poverty Levels** Coeur d'Alene's poverty levels are above the U.S. average: 12.4% of all families live below the poverty line and 20.5% of those with children.  This ranks the city third highest among the benchmark cities.

*Figure 7: Share of Families with Children Living Below the Poverty Line, 2017*
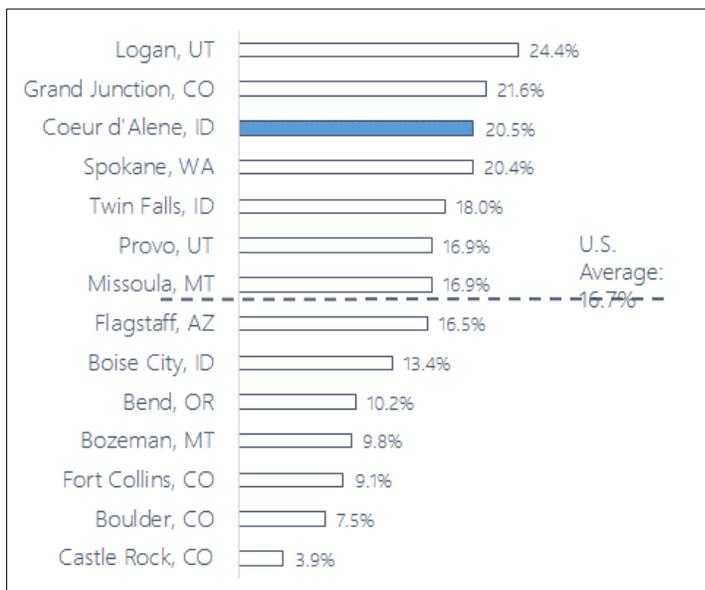


Source: U.S. Census American Community Survey 2017

**Health Insurance** Nearly 13% of Coeur d'Alene's population does not have health insurance. This ranks third among the benchmarks.

**Cash Public Assistance** Five percent of Coeur d'Alene's population receives cash public assistance; this is two times the U.S. average.

**SNAP and Food Stamp Benefits** Fourteen percent of Coeur d'Alene's population receives SNAP or food stamp benefits. This ranks third among the benchmarks.

**Housing Values** With a housing value of $316,000, Coeur d'Alene is one of the most affordable communities among the benchmark cities; less than one-third of homeowners spend more than 30% of their income on housing.

**Gross Rent** Coeur d'Alene's monthly gross rent is $882 – 11% less than the U.S. average. Forty-four percent of the city's renters pay more than 30% of their monthly income on housing costs.

# EDUCATIONAL ATTAINMENT

To compete in today's knowledge economy, talent matters.  Educational metrics offer a look into capabilities of a community. A detailed analysis follows:

**No High School Diploma** Approximately 2,500 Coeur d'Alene residents (25 or older) do not have a high school diploma – nearly 8% of the workforce. This ranks fourth highest among the benchmark cities, on par with Spokane and Provo.

**High School Diploma** Twenty-five percent of Coeur d'Alene 's workforce only has a high school diploma, ranking second among the benchmark cities.

**Associate's Degree** Four in ten Coeur d'Alene residents (25 or older) has an associate's degree or some college; this ranks second among the benchmarks.  The community has experienced a 17% increase in the level of this talent base.

**Bachelor's Degree or Higher** Nearly 8,700 Coeur d'Alene residents have a bachelor's degree or higher, 26.8% of the workforce and less than the U.S. average (30.9%). Since 2013, the number of residents with a BA or higher in Coeur d'Alene has increased 23%, ranking third among the community comparisons.

## *Figure 8: Bachelor's Degree or Higher (% of Residents), 2017*



Boulder, CO — 73.8%
Bozeman, MT — 56.9%
Fort Collins, CO — 53.6%
Castle Rock, CO — 48.9%
Missoula, MT — 47.4%
Flagstaff, AZ — 45.1%
Bend, OR — 42.6%
Provo, UT — 42.5%
Boise City, ID — 40.9%
Logan, UT — 35.7%
Grand Junction, CO — 32.9%        U.S. Average: 30.9%
Spokane, WA — 29.5%
Coeur d'Alene, ID — 26.8%
Twin Falls, ID — 19.4%
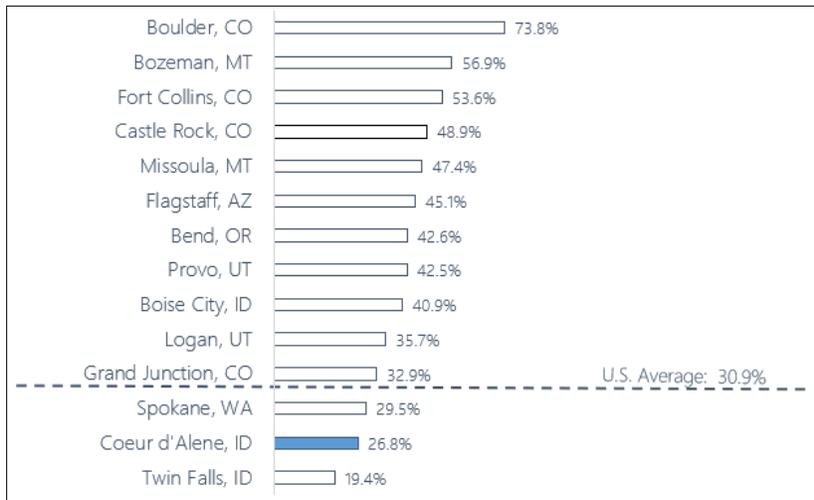
*Source: U.S. Census American Community Survey 2017*

# COMMUTE PATTERNS

In 2017, Post Falls, Hayden, and Spokane were the primary work locations for Coeur d'Alene residents outside of the city itself. There were approximately 29,467 people employed in Coeur d'Alene, with 9,518 (32.3%) employees living in Coeur d'Alene and the remaining 19,949 (67.7%) commuting into Coeur d'Alene. For those traveling into Coeur d'Alene for employment, Post Falls, Hayden, and Rathdrum are the primary home locations.

Table 3 shows where Coeur d'Alene residents commute for their primary employment. Of the 11,062 (53.8%) Coeur d'Alene residents who commute to cities outside of Coeur d'Alene, 1,717 (8.3%) commute to Post Falls, 1,394 (6.8%) commute to Hayden, and 1,210 (5.9%) commute to Spokane.

**Table 3: Work Locations of Coeur d'Alene Residents, 2017**

| Places | Count | Share |
|---|---|---|
| Coeur d'Alene | 9,518 | 46.2% |
| Post Falls | 1,717 | 8.3% |
| Hayden | 1,394 | 6.8% |
| Spokane | 1,210 | 5.9% |
| Spokane Valley | 882 | 4.3% |
| Boise city | 336 | 1.6% |
| Liberty Lake | 309 | 1.5% |
| Rathdrum | 239 | 1.2% |
| Dalton Gardens | 217 | 1.1% |
| Moscow | 206 | 1.0% |
| All Other Locations | 4,552 | 22.1% |

*Source: US Census On the Map, 2017*

Table 4 shows the commute distance for Coeur d'Alene residents. Most Coeur d'Alene residents (13,838 (67.2%)) commute less than 10 miles to their primary employment. The remaining residents travel 10 to 50 miles to work. About 2,246 (10.9) travel more than 50 miles to their jobs each day. 8 in 10 Coeur d'Alene residents drive to work. Coeur d'Alene commute time is 17.9 minutes – 9 minutes shorter than the U.S. average.

**Table 4: Distance from Home to Work - Coeur d'Alene Residents**

| Distance | Count | Share |
|---|---|---|
| Less than 10 mi | 13,838 | 67.2% |
| 10 to 24 mi | 2,160 | 10.5% |
| 25 to 50 mi | 2,336 | 11.4% |
| Greater than 50 mi | 2,246 | 10.9% |
| Total | 20,580 | 100% |

*Source: US Census On the Map, 2017*

# INDUSTRY STRENGTH

Business markets and work-sheds do not adhere to geo-political boundaries. Therefore, Coeur d'Alene's economic strength is intertwined with the overall region and State of Idaho. As the city pursues economic development efforts and investments, it is important to align with ongoing federal, regional and state opportunities to maximize the return on efforts.

## FEDERAL ALIGNMENT

The federal government recognizes the importance of regional collaboration to fostering economic development. It therefore has encouraged regions across the country to adopt an Economic Development District (EDD). EDDs are multi-jurisdictional entities, commonly composed of multiple counties and in certain cases even cross-state borders. They help lead the locally-based, regionally driven economic development planning process that leverages the involvement of the public, private and non-profit sectors to establish a strategic blueprint (i.e., an economic development roadmap) for regional collaboration.
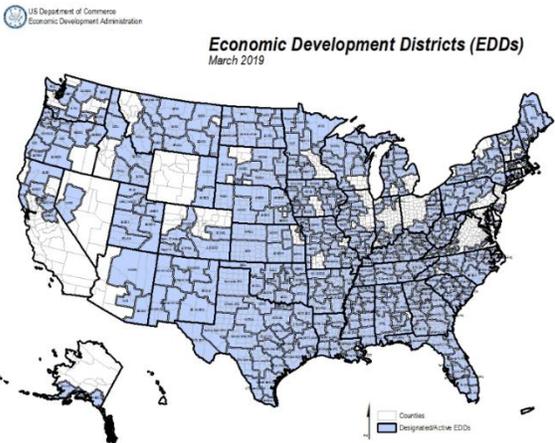


The strategic blueprint, known as a Comprehensive Economic Development Strategy (CEDS), is a strategy-driven plan for regional economic development. A CEDS is the result of a "regionally-owned" planning process designed to guide the economic prosperity and resiliency of an area or region. It provides a coordinating mechanism for individuals, organizations, local governments, and private industry to engage in a meaningful conversation and debate about the economic direction of their region.

Coeur d'Alene is part of the Panhandle Area Council EDD, which recently updated their CEDS in 2017. The benefit of a CEDS, beyond establishing a regional economic development direction, is that it facilitates a city's application for federal Economic Development Administration (EDA) grants, such as the Public Works grants of up to $3 million to fund public infrastructure or strategic projects to foster traded-sector industry[5] (not housing, tourism, or retail) growth. Therefore, if the city intends to utilize such resources, it is important to identify and focus on traded-sector businesses and continue to collaborate regionally.

---

[5] Health care is traditionally defined as a local center industry as is typically serves the regional community and does not bring in new outside revenue and spur innovation and startups in the region like a traditional traded-sector industry. A presence of a strong higher-education presence providing research and development (R&D) tied to health care shifts the industry toward a traded-sector industry.

# STATE AND REGIONAL OPPORTUNITIES

The State of Idaho has identified competitive clusters based on employer strength, workforce and industry assets such as land and infrastructure. In addition, the regional economic development organization, Coeur d'Alene Economic Development Corporation (CDA EDC), has identified specialized industry clusters for the region. Identifying alignment between the state, region and local industry strengths is important to maximize future marketing and talent development across all levels of government.

The US Cluster Mapping database provides over 50 million open data records on industry clusters and regional business environments in the U.S. to promote economic growth and national competitiveness.  It is led by Harvard Business School's Institute for Strategy and Competitiveness in partnership with the U.S. Department of Commerce and U.S. Economic Development Administration. The tool defines the following industry strengths for the Coeur d'Alene region, which is comprised of Kootenai County. Understanding the regional strengths allows Coeur d'Alene to focus its efforts on industry clusters that are supported by are larger regional network of supply chains and skilled workforce that provide more resilience for the overall economy.  Investing in strong regional clusters not only helps businesses that locate in Coeur d'Alene thrive but the overall region as well, thereby fostering a more resilient economy.

A location quotient (LQ) is a way of discovering the traded-sector industries or occupations that are truly unique and specialized in your regional economy (compared to the national average). LQ is calculated by comparing an industry's or an occupation's share of regional employment with its share of national employment. Any LQ over 1.0 is considered a strength.  According to US Cluster Mapping, the CDA region has the following traded-sector industry strengths[6].

*Table 5: Coeur d'Alene Region Industry Cluster Strength*

| Industry | Employment | Industry LQ | Establishments |
|---|---|---|---|
| *Wood Products* | 680 | 6.21 | 24 |
| *Lighting* | 395 | 4.57 | 5 |
| *Upstream Metals* | 515 | 4.49 | 7 |
| *Downstream Metals* | 480 | 3.81 | 10 |
| *Hospitality* | 2,486 | 2.58 | 44 |
| *Information Technology* | 635 | 1.86 | 6 |
| *Marketing* | 460 | 1.14 | 35 |

*Source: US Cluster Mapping, Information based on Kootenai County*

---

[6] Health care is traditionally defined as a local-sector industry as it typically serves the regional community and does not bring in new outside revenue or spur innovation and startups in the region like a traditional traded-sector industry.

# CITY OF COEUR D'ALENE STRENGTHS

Considering Coeur d'Alene's existing employer strength, we recommend focusing on the following clusters that will leverage the regional and state efforts to bolster these industries. Firms and workers in these targeted industries can draw competitive advantage from their proximity to growing competitors, skilled workforce, specialized suppliers, and a shared base of research driven knowledge within each growing segment. A detailed description of each industry is further outlined below.

*Figure 9: State, Regional and City Industry Cluster Focus*

| State of Idaho Key Industries | Panhandle Area Council CEDS | CDA EDC Target Industries | City Proposed Clusters |
|---|---|---|---|
| Advanced Manufacturing | | High-Tech Manufacturing | **Advanced Manufacturing** (Aerospace and High-Tech) |
| Aerospace | Aerospace | Aerospace and Aviation | |
| | Wood Products | | **Wood Products** |
| Technology & Innovation | | Information Technology | **Information Technology** |
| Back Office/Shared Services | | Financial and Service Center | **Professional Services** |
| | Health Care | Bioscience and Health Care | **Health Care** |
| Outdoor Recreation | Tourism | | |
| | | Distribution and Warehousing | |
| Food Production | | | |
| Energy | Mining | | |

*Source: Bridge Economic Development*

**Advanced Manufacturing** The state and region have identified the aerospace industry as an area of focus. For Coeur d'Alene this represents Tier 3-5 manufacturers that are making parts (such as bolts and machined parts.) that go into aerospace components (such as the seats, trays, luggage bins, etc.). The identified Metals and Lighting (Relay and Industrial Controls, Electrical Components) Manufacturing clusters represent some of these manufacturing suppliers. We recommend focusing more generally on Advanced Manufacturing to encompass all manufacturers in the region including high-tech companies. The State of Idaho anticipates the following job growth within the high-tech sector across the various regions.

*Table 6: High Tech Job Growth by Region*

| Region | 2016 | 2026 | Growth | Growth Rate |
|---|---|---|---|---|
| *Northern* | 3,647 | 4,601 | 954 | 26.2% |
| *North Central* | 1,246 | 1,682 | 436 | 35.0% |
| *Southwestern* | 24,821 | 28,134 | 3,313 | 13.3% |
| *South Central* | 2,106 | 2,576 | 470 | 22.3% |
| *Southeastern* | 3,160 | 4,113 | 953 | 30.2% |
| *Eastern* | 2,813 | 3,038 | 225 | 8.0% |

*Source: Idaho Department of Labor, Idaho Knowledge Report*

**Wood Products** Wood products is a legacy industry for the State of Idaho and Coeur d'Alene. It is appropriate then that this remains the region's strongest industry (excluding hospitality) in terms of LQ and employment. The industry is anchored by the Idaho Forest Group (IFG) which is headquartered in CDA, and has consolidated small operations into a cutting-edge, state-of-the-art company to become one of American's largest lumber producers.

**Information Technology** According to the Idaho Technology Council 2019 Idaho Knowledge Report (IKR), the CDA region's robust telecommunications network is based on fiber-optic backbone services from strong telecom providers - Intermax, Fatbeam and Frontier. Intermax just won a $11 million FCC initiative to extend fixed-wireless broadband service into rural parts of the region. This infrastructure is a critical element in fostering this industry and will help to attract remote workers that are drawn to mountain-and-lake country yet close to a major airport in Spokane with more affordable housing costs than Seattle or Silicon Valley.

**Professional Services** As the largest city in the northern Idaho panhandle region, with the presence of higher education institutes, CDA serves as a region hub for the greater area. Professional services will find the access to a large customer base, diverse industries and access to talent a compelling opportunity to stay and grow in the area. With the rise of remote work, CDA's quality of life and amenities-rich community may also be appealing to a knowledge workforce that is more flexible than ever before. As identified in Table 5, the region has a competitive advantage in marketing, which could be advantageously coupled with the information technology industry for a focus opportunity in digital marketing.

**Health Care** As a regional hub, this cluster is a growing, local cluster (not a traded-sector) for CDA; however, there are long-term growth possibilities for research with the two medical schools in

Spokane and Kootenai Health's partnership with the universities for internships and residencies.  The short-term economic development opportunity regarding health care pertains to workforce development concentration to skill the existing residents to go into health care, which has strong livable wages, averaging $89,660 for Healthcare Practitioners and $33,060 for Healthcare Support[7].

### Industries Not Recommended

As the city allocates staff and monetary resources toward economic development it is helpful to recognize that there are industries that can be fostered by the market and do not warrant additional city resources.  We identified the following industries as appropriate for development by the market and other important stakeholders.

- Distribution: Distribution is growing within the region because of the population and labor growth in the Pacific NW, as well as the SW Canadian provinces. It is, however, not yet showing-up in US Cluster Mapping data. Development of these facilities may be pursued by the market, but they are not an industry cluster that requires dedicated staff to foster skills training development or talent attraction. Therefore, it is not included as a focus industry cluster.

- Hospitality/Tourism: While hospitality does bring new outside revenue into the region (thereby making a traded-sector cluster as identified by US Cluster Mapping), it does not encourage innovation or provide livable wages with career ladder opportunities. It is also not a highly resilient industry as evidenced by the recent global impacts of Covid-19. So, although the Tourism Industry is an important cluster in the region, we recommend that the city look to organizations whose historical focus is to promote tourism and recreation (i.e., CVB, the Chambers, the Hospitality Industry; Idaho Tourism, etc.) to continue to promote this industry.

# OCCUPATIONS AND SKILLS

As outlined earlier in the analysis, access to a talented workforce is the first priority for businesses. The desired workforce must have knowledge-based skills to perform in the increasingly complex economy. The following information outlines local strengths and opportunities for growth. A look at the occupational clusters provides an overview of the orientation of the broad skills of a community, while the skills analysis offers us an insight into the specific skills and talents that are driving CDA's economy.

## CITY OCCUPATION SECTORS

There are 3 broad set of skills that drive today's economy: knowledge, service, and working sector. As indicated below, Coeur d'Alene has a predominance of service sector jobs tied to retail and accommodations. This means that if the Coeur d'Alene economy is going to diversify, focused attention on attracting new residents or training existing ones in the knowledge and working, blue-

---

[7] https://www.bls.gov/oes/current/oes_17660.htm#31-0000

collar, sectors will be very important as a strategy focus. Knowledge and working sector jobs also offer higher-paying employment opportunities for local residents.

**Service Sector** Five in ten Coeur d'Alene workers (47.9%) have skills associated with the service sector – a share that ranks second among the benchmark cities and above the U.S. average (41.5%). Coeur d'Alene's service sector has increased 6% since 2013, two times the national average. Service sector occupations include: healthcare support; protective services; food preparation; personal care; sales; and office and administrative support

*Figure 10: Coeur d'Alene Service Sector, 2017*



| City | Percentage |
|------|-----------|
| Flagstaff, AZ | 48.6% |
| Coeur d'Alene, ID | 47.9% |
| Spokane, WA | 45.6% |
| Twin Falls, ID | 45.3% |
| Provo, UT | 44.4% |
| Missoula, MT | 44.0% |
| Grand Junction, CO | 43.8% |
| Logan, UT | 42.4% |
| Bend, OR | 42.2% |
| Boise City, ID | 41.5% |
| Fort Collins, CO | 41.0% |
| Bozeman, MT | 40.5% |
| Castle Rock, CO | 39.4% |
| Boulder, CO | 35.9% |

U.S. Average: 41.5%
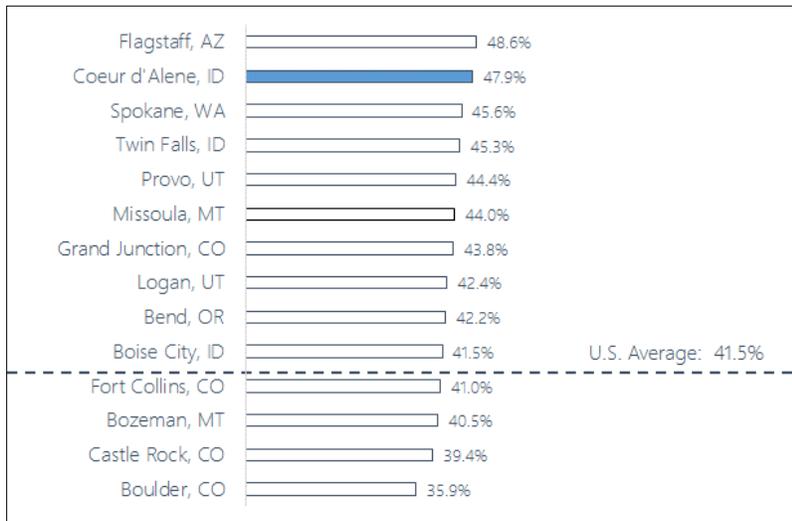
*Source: U.S. Census American Community Survey 2017*

**Working Sector** Approximately 4,500 Coeur d'Alene residents make up the city's working sector (20%) – skills associated production/ manufacturing, transportation, and maintenance.  This is the fourth highest share among the benchmark cities.  There's be a 1% decrease in the working sector since 2013.

*Figure 11: Coeur d'Alene Working Sector, 2017*



| City | Percentage |
|------|-----------|
| Twin Falls, ID | 27.4% |
| Logan, UT | 22.9% |
| Grand Junction, CO | 20.0% |
| Coeur d'Alene, ID | 19.9% |
| Spokane, WA | 19.2% |
| Bozeman, MT | 17.4% |
| Bend, OR | 14.8% |
| Missoula, MT | 14.6% |
| Boise City, ID | 14.5% |
| Provo, UT | 13.8% |
| Fort Collins, CO | 13.3% |
| Flagstaff, AZ | 13.2% |
| Castle Rock, CO | 12.3% |
| Boulder, CO | 7.2% |

U.S. Average: 21.5%
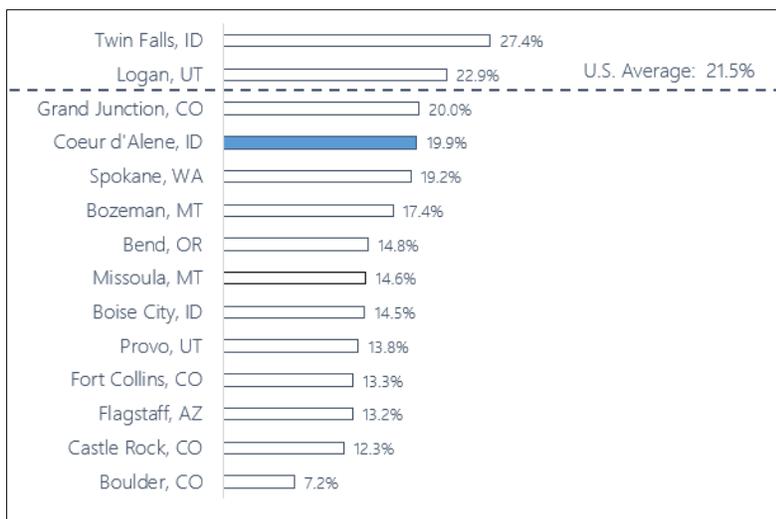
*Source: U.S. Census American Community Survey 2017*

**Knowledge Sector** Coeur d'Alene's knowledge class (32.3%) – workers with skills in technology, arts/culture, professional services, and education – ranks second to last among the benchmark cities and is well below the U.S. average (37.4%). That said Coeur d'Alene's knowledge class has grown more than 20% since 2013, ranking fourth and on par with similar growth rates of Bend, Castle Rock, and Bozeman.

*Figure 12. Coeur d'Alene Knowledge Sector, 2017*



| City | Percentage |
|------|-----------|
| Boulder, CO | 56.8% |
| Castle Rock, CO | 48.3% |
| Fort Collins, CO | 45.7% |
| Boise City, ID | 44.0% |
| Bend, OR | 43.0% |
| Bozeman, MT | 42.1% |
| Provo, UT | 41.8% |
| Missoula, MT | 41.4% |
| Flagstaff, AZ | 38.1% |
| U.S. Average: 37.4% | |
| Grand Junction, CO | 36.2% |
| Spokane, WA | 35.2% |
| Logan, UT | 34.7% |
| Coeur d'Alene, ID | 32.3% |
| Twin Falls, ID | 27.3% |
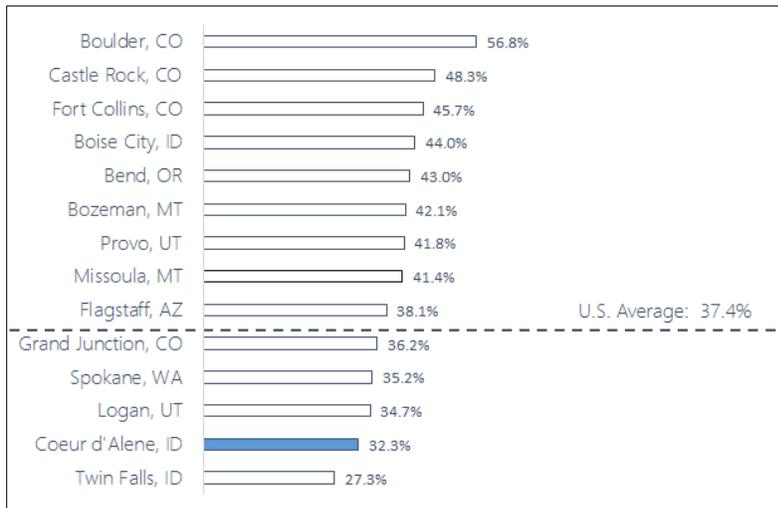
*Source: U.S. Census American Community Survey 2017*

# CITY SKILLS

As noted above, a skill analysis allows us to determine if Coeur d'Alene has the appropriate talent base to support the recommended traded and local clusters in the strategy. Generally, Coeur d'Alene skill specializations (as defined by the location quotients) are as follows:

- Construction (1.48)
- Healthcare Support Services (1.27)
- Food Preparation (1.22)
- Sales (1.12)
- Office and Administration (1.12)
- Health Practitioners (1.09)
- Building and Grounds Keeping (1.04)

Given the recommended target sectors and demands of the CDA economy, the following skills clusters are important to the community's future growth:

**Production:** Representing nearly 6% of CDA's employment, there are more than 3,900 workers with production skills. There are also an additional 3,000 workers with skills related to transportation and 2,700 with those tied to installation and repair. Each of these sectors are will be important talent pools for CDA's growing advanced manufacturing and wood products sectors.

**Construction:** Coeur d'Alene's workforce with construction skills has increased (31%) the most of all occupational sectors from 2014 to 2019. This sector also represents the greatest skill specialization for the region — 48% larger than the U.S. average (for a community its size). This skill set will be important as the community continues to build, develop and address its housing supply.

**Computer/ IT and Tech Skills:** Approximately 1,000 workers in Coeur d'Alene have technology skills; while the share of these workers is less than the U.S. average, this skill cluster has expanded by 21% from 2014 to 2019 and is projected to grow an additional 12% by 2024.  On average, CDA technology workers earn $61,200 annually.

**Management and Business and Financial Operations:** More than 6,500 workers in Coeur d'Alene have management and business and financial operation skills; this represents 9% of the workers in CDA.  These skill clusters have experienced growth over 20% from 2014 to 2019, and will grow between 8 and 11% percent by 2024.

**Healthcare Skills:** With more than 4,300 workers, the region boasts a specialization for healthcare practitioners that is 9% greater than the U.S. average. Likewise, the Coeur d'Alene's healthcare support cluster is 27% larger than the U.S. average, employing 2,450 workers. Both skill clusters also represent two fast-growing sectors for the region.

**Science Expertise:** Coeur d'Alene's science occupational cluster is the most specialized creative/ knowledge sector for the community — 19% more concentrated than the U.S. average – and the second fastest growing sector.  However, it employs less than 1,000 workers. This sector offers an opportunity to support a growing local healthcare sector as it transitions into an export industry for the community.

# BUILDING AND RETAINING TALENT

As discussed above, the number one priority for businesses is the ability to retain and attract talent. As talent can go anywhere, it desires a "place" that consists of amenities (restaurants, entertainment, and retail) and access to outdoors in addition to a job. Coeur d'Alene is fortunate to have a strong foundation for both of these elements to make an exceptional place that can set it apart from other communities across the country also working hard to retain and attract talent. Additionally, because of its size, Coeur d'Alene offers the opportunity for aspiring talent – especially millennial talent – the opportunity to connect with local business community and City leadership to have an impact. Enhancing these elements of place – both physical and community - in conjunction with growing a diverse job base, is an important area of focus for the City.

In addition to promoting quality of place as talent attraction, Coeur d'Alene must also examine the training and on-ramp opportunities that it presents to prospective talent. A diverse, highly-skilled workforce is an important asset for any community. In order to weather the inevitable booms and busts of the economy, as well as cycles in the tourism sector, Coeur d'Alene must provide skills training and pathways to job opportunities that offer residents (and prospective residents) to tap into the community's industry opportunities. While this will not eliminate income stratification or workforce

skills gaps, it will allow individual residents to achieve their full economic potential, thereby improving Coeur d'Alene's fiscal growth and sustainability for the future.

The City of Coeur d'Alene is fortunate to have two higher-education assets that include North Idaho College (NIC) and the University of Idaho. Leaders from these institutions are already working with industry clusters and should continue that relationship. It also is important to align the K-12 system with industry to foster an opportunity to build a local talent pipeline with Coeur d'Alene students that do not want to go to college and would like stay in the community. These students must see that there is an obvious path from developing educational and skills development to job placement in order to retain them.

# EDUCATION ALIGNMENT

The following matrix of education assets tied to specific industry clusters serves as a guide for future actions outlined under the Goals and Objectives section. Focused discussions with education stakeholders are important to understand and promote programs that support the CDA economy and opportunity for youth to grow a career in their hometown. At the same time, stakeholders should work with industry leaders to determine what skills are needed and if certain programs could be developed.

*Figure 13: Industry Cluster and Education Program Alignment Matrix*

| Industry | CDA School District 217 | | NIC | | U of I CDA | |
|---|---|---|---|---|---|---|
| *Cluster* | *Existing Program* | *Potential Program* | *Existing Program* | *Potential Program* | *Existing Program* | *Potential Program* |
| Advanced Manufacturing | | CTE - wood/tech shop | Aerospace Technology Advanced Manufacturing: <br>• Aviation Maintenance Technology <br>• Computer Numerical Control (CNC) Mill Operation <br>• Composite Fabrication <br>• Composite Technician <br>• Repair and Quality Assurance <br>• Technology Core | | | |
| Wood Products | | CTE - wood/tech shop | | | | Renewable Materials, BS (Moscow Campus) |
| Information Technology | | Coding Courses | • Computer Information Technology, Associate <br>• Computer Science, Associate | | Computer Science, BS | |
| Professional Services | | | • Business Management <br>• Web design | | | |
| Health Care | | Nursing Pathway Program | • Medical Assistants <br>• Nursing <br>• Pre-Med | | | |

*Source: Bridge Economic Development*

# STARTUP ECOSYSTEM

Small businesses are critical to Coeur d'Alene's community. Not only do they provide employment for residents, but they help to create an authentic destination experience for Coeur d'Alene's visitors. Fostering an environment that encourages and celebrates small business growth is an important aspect to a resilient and diverse economy.

## BUSINESS ESTABLISHMENTS

From 2012 to 2016, Coeur d'Alene experienced a 7.5% increase in the number of business establishments, while the U.S. average was a 4.4% increase. Figure 15 defines the amount of industry sectors making all of the businesses (traded and local) making up Coeur d'Alene's business establishments.

*Figure 14. Total Business Establishments, 5-Year Growth, 2012-2016*



Bend, OR — 17.2%
Provo, UT — 16.7%
Castle Rock, CO — 14.8%
Bozeman, MT — 12.5%
Logan, UT — 10.3%
Fort Collins, CO — 9.7%
Boise City, ID — 9.0%
Coeur d'Alene, ID — 7.5%
Boulder, CO — 7.4%
Missoula, MT — 6.0%
Spokane, WA — 5.9%
Twin Falls, ID — 5.4%    U.S. Average: 4.4%
Flagstaff, AZ — 4.3%
Grand Junction, CO — -3.2%
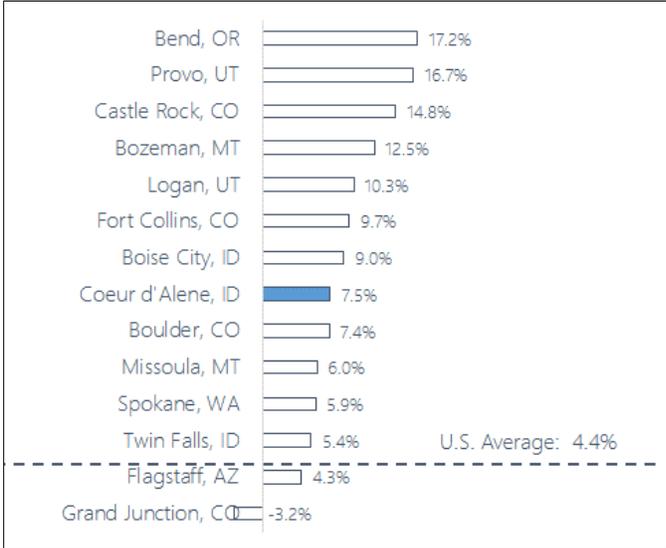
*Source: U.S. County Business Patterns 2016*

*Figure 15. Coeur d'Alene Business Establishments, 2016*



| Industry | Percentage |
|---|---|
| Construction | 15.5% |
| Retail Trade | 12.5% |
| Health Care and Social Assistance | 10.8% |
| Professional Services | 10.6% |
| Accommodation and Food Services | 8.4% |
| Other Services | 7.3% |
| Finance and Insurance | 5.9% |
| Real Estate and Rental and Leasing | 5.7% |
| Manufacturiing | 5.2% |
| Administrative and Support | 5.2% |
| Wholesale Trade | 3.5% |
| Transportation and Warehousing | 2.3% |
| Arts, Entertainment and Recreation | 2.0% |
| Information | 1.5% |
| Educational Services | 1.3% |
| Agriculture | 1.0% |
| Management of Companies and... | 0.5% |
| Utilities | 0.3% |

*Source: U.S. County Business Patterns 2016*

# BUSINESS INVESTMENT

In 2018 Kootenai County had 30 total deals, which is comprised of private investment firms financing a company, valued at $249 million. This makes it the second highest amount of deal flow after Ada County, which had 81 deals valued at $1,356 million, in the State of Idaho[8].

As identified above, Coeur d'Alene has competitive industrial advantages within information technology and other high-tech industries. In order to encourage new startups in these sectors, it will be important to foster an environment that has access to venture capital. Venture capital (VC) firms are focused on traded-sector industries that have an opportunity to scale into national and global firms that can be sold or "go public" through an Initial Public Offerings (IPO). Therefore, VC firms rarely invest local-sector firms.  Additionally, different VC firms specialize in different types of companies, so it is important to understand which firms are already working with startups in the identified CDA clusters.  The economic stakeholders should foster strong relations with the VC firms to encourage additional investment in emerging businesses within the same clusters.

# KEY THEMES

In preparing the strategy, the City hosted local stakeholders for two days of stakeholder interviews. Attachment D provides a summary of the feedback. These meetings were supplemented by the distribution of a digital survey, which received over 300 responses.  The following key themes emerged as important topics amongst stakeholders or were identified through research as unique assets to the City that should be considered.

---

[8] Idaho Knowledge Report, Idaho Technology Council, 2019

- Provide more emphasis on year-round economy

- We need more than just living-wage jobs

- Don't focus too much on business

- Attract and develop industries, not resort centered

- More educational partnerships

**Outdoors and Environment** This is overwhelmingly the most defining and cherished asset of Coeur d'Alene. It is why people vacation here and choose to stay. Further embracing the outdoor beauty, clean air and climate, and experiential recreation is a significant advantage that should be leveraged to diversify the economic base.

**"Homecomer" Population** A homecomer is defined by Wendell Berry, the Kentucky writer and farmer, as someone who spent some time away, usually to pursue better opportunities in cities, and then choose to return to their rural roots. This is an emerging theme across rural and micropolitan communities across the country and should be embraced.

**Downtown Core** The downtown area is a charming element of the community that provides desired amenities such as restaurants and retail. Focused attention on supporting the existing businesses and catering to the local community is important.

# GOALS AND OBJECTIVES

In order to prepare a community to proactively engage with rapidly changing trends, it must have a strategy in place. Without a strategy, efforts are often reactive, non-collaborative, and not connected for meaningful impact. For an economic development plan to succeed, numerous partners and organizations must be engaged and collaborate toward common goals. At the same time, it is essential for public and private entities to recognize that they are partners in economic development efforts, as one cannot be sustained without the other. To efficiently and effectively align goals, a community must understand, document, and achieve consensus on its vision, values, opportunities, and objectives, which is being done within the overall comprehensive plan.

The world's economy is changing rapidly. An established "playbook" provides enough broad goals to recognize opportunities when they arise. Clear direction regarding Coeur d'Alene's roles will help determine projects that should be pursued and those that should be set aside. To effectively implement a strategy, it is as important to say "no" to certain opportunities as it is to say "yes" to others.

In addition, it is important to annually revisit the document to determine where progress is being made and where other areas are deficient. It will be necessary to update the document every three to five years in keeping with the rapid pace of change in the economy.

The following goals, objectives and actions were developed in collaboration with the Coeur d'Alene community, project staff, and expertise of the consulting team. Specific actions that are highlighted in

blue are from the Panhandle CEDS document, which indicates opportunities for local and regional collaboration and potential EDA grant funding.

# GOAL 1: RETAIN, EXPAND, AND ATTRACT BUSINESSES

### *Why this Goal?*

Diversifying the economic base beyond the retail and tourism industry is critical to sustain the health of Coeur d'Alene. Diversification will provide alternative job opportunities with middle-income wages. Furthermore, companies within manufacturing or professional services have the opportunity to scale up and often encourage new companies to spin-off. Attracting new businesses is challenging and even more so in smaller communities. Therefore, the most efficient way to grow the economic base is to support existing companies by understanding their barriers to growth and talent needs. Additionally, companies that start in a community are more likely to stay and grow there.

### *Objective 1.1: Convene industry cluster working group comprised of business leaders, workforce providers and economic development professionals to define needs*

Businesses tied to similar industries should be convened to discuss what they need to grow. Focused meetings such as these build collaboration and foster cross-pollination of opportunities and ideas. In addition, the meetings result in specific action items necessary to address business growth needs. Community partners can then effectively work to remove barriers and provide meaningful support to businesses. The businesses will also inform what type of sites/buildings and infrastructure is needed to foster growth. As indicated in comments from business leaders (Attachment D), gathering business leaders to promote industry is desired.

*Actions:*

- Identify a key city staff person that will monitor and implement identified actions in this analysis. Implementation should be done collaboration with other city staff in public works, planning, city manager's office, etc.
- Convene industry cluster working groups comprising business leaders, workforce providers and economic development professionals and to define needs.
- List all businesses within each cluster and supporting regional assets to identify cluster strengths and supply chain needs
- Convene a meeting at least once a year with businesses within each different cluster. Include industry associations, universities, colleges, and K-12 institutions at the meetings.
- Listen to businesses and document consistent needs to inform unique strategies for each cluster.
- Identify competing local communities with each different cluster and what they do well. Visit the communities to assess best practices.
- Promote local businesses products and services with a "Know your Local' campaign.
- Connect industry supply chains by identifying local sub-suppliers that can provide parts/materials/services to local end-product manufacturers.

## Objective 1.2: Provide adequate sites and infrastructure for business expansion based on needs

The City has a unique role in economic development pertaining to site and infrastructure development. In understanding what businesses need, time and resources can effectively go toward addressing the needs and growing the economic base. If business operations involve complex manufacturing processes, it is helpful to engage fire and building officials to proactively problem solve potential regulation hurdles.

*Actions:*

- Identify 10 traded-sector companies to visit annually (generally 1 per month) and understand physical barriers and opportunities for growth.
- Develop a systematic business visitation program and report out key findings to area economic development stakeholders.
- Share with them new workforce programs or internship needs to enhance collaboration.
- Continue to invest in Health Corridor urban renewal district to support the medical industry poised for growth of living-wage jobs.
- Develop economic incentives to attract new businesses or encourage business startup and development activities that respond to feedback from businesses.
- If traded-sector companies contemplate locating in the Atlas Mill, coordinate with EDA to determine if a public works grant for infrastructure construction is an opportunity that can be pursued.

## Objective 1.3: Support local businesses by providing technical education, permit assistance, and expand opportunities for affordable entry into the market

Local businesses provide the important amenities that make a community distinct and help to attract and retain talent. They also serve as an onramp for minority and women entrepreneurs, especially through food and personal service businesses. Removing the barriers to entry is critical for improving equity and access to wealth for all Coeur d'Alene residents.

*Actions:*

- Continue to allow for and encourage food carts in distinct locations. This is a low-risk and low-cost way for startups to enter the market and test new products. It also introduces diversity and vibrancy for customers. Work with existing food cart operators to determine what they need to expand operations such as a commercial kitchen.
- Provide a System Development Charge (SDC) Assistance Program that lets tenants lease sewer capacity on a monthly basis rather than purchase it up front. Lease payments are attached to a monthly utility bill and are calculated as a percentage of the total SDC assessment.
- Host a Small Business Month with targeted meetings. Include a focus for training/education on relevant topics determined by the attendees through polling. (Examples include storefront merchandising, identifying grant/loan opportunities, tax help, etc.)

# GOAL 2: GROW AND ATTRACT TALENT

*Why this Goal?*

Talent is the number one asset and driver for business in deciding where to expand and grow. A community that easily attracts talent has a significant competitive advantage for business. Intentional efforts to attract and grow your own talent is vital. Without a skilled workforce, local businesses cannot grow and thrive.

## Objective 2.1 Prepare Youth for Economic Opportunity through coordinated STEM and CTE programs and internship/ apprenticeship opportunities

Educational attainment is one of the significant factors in determining income growth and access to career pathways. Engaging youth early regarding career opportunities is a critical component in high school graduation success rates and preparation for higher education. Research has demonstrated that access to quality Career Connected Learning (CCL) or access to apprenticeship programs increases graduation rates and enrollment in postsecondary certification, credential, and degree programs. For this objective to succeed, both business and education leaders must be committed to its success.

*Actions:*

- Support STEM (science, technology, engineering, math) education in elementary, middle, high school and college programs. Make regional businesses aware of programs to provide internships or tours.
- Work with K-12 and hospital to establish a career pathway program into health care. Include Coeur d'Alene Tribe in these meetings to foster opportunities for diverse population.
- Consider hosting a STEM fair focused on showcasing CTE machining and construction projects or robotics competition
- Publicize the availability of vocational/non-credit courses that are designed to respond to business needs.
- Engage retirees in mentorship programs at the high school and college levels to take advantage of learned experience.

## Objective 2.2 Invest in higher education skill and degree programs that align with the city's export sectors and workforce needs

Complex issues driving income stratification and workforce skills gaps are making it more difficult for all residents to realize positive personal economic growth in keeping with business growth. To plan for this modern economy, communities must consciously foster a resilient economy that is derived from a diverse industry base and skilled workforce to weather inevitable negative portions of economic cycles. This is a long-term goal that requires significant collaboration and investment between education, government and businesses.

*Actions:*

- Provide support to STEAM[9]-related and other IT programs in our schools for regional gaps in program delivery.
- Identify the gaps in program delivery and prioritize UI Extension, NIC, Workforce Training Center.
- Meet regularly with industry clusters to determine necessary skills training and include higher education providers to develop curriculum as necessary.
- Encourage business owners to help craft and instruct skills programs.
- Support initiatives for entry level workers to maintain their employment status through good workforce behavior and interpersonal skill training. Provide complementary program components for participating employers with tools to reduce turnover costs for their entry level workforce.
- Develop plans and seek funding to address workforce issues when living wage skill gaps in targeted industry sectors are identified.

### *Objective 2.3 Launch an initiative focusing on attracting talent back to the community*

Talent is the number one asset and driver for business in deciding where to expand and grow. A community that easily attracts talent has a significant competitive advantage for business. There is already an emerging trend of returning "homecomers" intent on contributing to the community. Intentional efforts to build of this trend through networks to lower barriers to entry into community, business, and social networks is important.

In recruiting new talent, employers often struggle to secure management positions that are typically filled by people that are 35 – 45 years old due to work experience. Often these people are just starting out or have established a family and therefore are focused on living in a community with family-oriented amenities. Public investment and retail amenities that serve this group is important to retain experienced talent.

*Actions:*

- Create a Task Force (including North Idaho Higher Education collaborative) of diverse local residents that are the demographic make-up of the target audience.
- Attract and retain educated and trained youth. Create a market for youth to want to be here by identifying job opportunities through high school counselors.
- Educate school administration and teachers about the career pathways available in CDA, including advanced manufacturing, IT, and healthcare.
- Develop specific recruitment strategies for targeted industries and employers that provide benefited living wage jobs.
- Build different types of housing to provide diverse and affordable options for young talent.

---

[9] STEAM is a term coined by Massachusetts Institute of Technology (MIT) and Rhode Island School Design (RISD) that emphasizes the need to integrate design and art with technology. It stands for Science, Technology, Engineering, Arts and Math.

# GOAL 3: ENHANCE THE STARTUP ECOSYSTEM

***Why this Goal?***

New businesses account for nearly all net new job creation and almost 20 percent of gross job creation. Furthermore, companies less than one-year-old have created an average of 1.5 million jobs per year over the past three decades[10]. People generally start businesses in the places they are already located, and many of the resources they access are at the local or regional level. These businesses need exposure to capital and industry networks for collaboration and support. It is important to support an ecosystem where startups are supported and celebrated to create new jobs.

***Objective 3.1 Convene startup working group comprised of business leaders, workforce providers and economic development professionals and to define needs.***

Business has different needs depending on its size and age.  Startups often have very different needs so hearing from them directly is important. For example, as identified in the stakeholder feedback, one business highlights the important of marketing and promotion. This is a low-cost and straightforward action that can be provided and address distinct needs.  Listening and responding to startups is an important way to foster the startup ecosystem.

*Actions:*

- Sponsor and support quarterly meet-ups of remote workers/professional startups.  This encourages peer to peer networking and addressing problems within the industry. (Keep it exclusive to the professional industry. This is not intended for service providers to network/solicit business).
- Map the CDA startup ecosystem, identifying relationship and connections between educators, investors, founders, talent and "anchor" organizations[11].  Ex: Endeavor's NYC Tech Map
- Engage with Coeur d'Alene Tribe to bring diverse ideas and opportunities into the startup ecosystem.
- Activate hidden CDA investors (those who led successful careers and have retired in the community) to provide expertise and potential capital to local startup enterprises.
- Encourage the creation local capital funds through "angel investors", crowd funding strategies, and other mechanisms to support business startup, growth and retention.

***Objective 3.2 Develop public-private partnerships to develop the types of office space and amenities desired by startups.***

Businesses are not real estate developers. They need others to build desired space for them.  The city can play an important role in fostering the development of needed space through different

---

[10] The Importance of Young Firms for Economic Growth, Kaufman Foundation, September 13, 2015

[11] Anchor institutions are nonprofit institutions that once established tend not to move location.  They are often referred to as "eds and meds" or higher education and medical institutions.

regulations as well as fostering public-private relationships. At the same time startups need affordable space, which can be typically found in remodeled existing buildings.

*Actions:*

- If the industry deems it necessary, work with private developers to expand office co-working space.
- Verify if industry leaders would like more creative office space. Target investments in East Sherman Avenue, Downtown and locations that have existing buildings that can be renovated more cost-effectively than building new structures.
- Develop an Adaptive Reuse Program to incentivize redevelopment of long-vacant structures, including historic buildings, and buildings located on brownfield sites that are out of compliance with existing code.
- Consider applying for an Environmental Protection Agency (EPA) brownfield grant to assist with evaluation of potential brownfield sites to remove uncertainty and incentivize redevelopment.
- Develop an Adaptive Reuse Program to incentivize redevelopment of long-vacant structures, including historic buildings, and buildings located on brownfield sites that are out of compliance with existing code.
- Support and encourage private development of incubators, "makerspaces" and similar activities to encourage entrepreneurialism, innovation, and business startups as part of larger industry sector/cluster strategies.

### *Objective 3.3 Promote Access to Outdoors for Remote Workers*

Coeur d'Alene is fortunate to be in the middle of gorgeous mountain-and-lake country with clean air, abundant water, and a four-season climate. At the same time, it is very well connected with quick access to a major airport in Spokane and a strong broadband network. Therefore, it is well positioned to host remote workers seeking an exceptional quality of life while retaining easy access to career and business networks. Other cities such as Tulsa, Oklahoma are attempting to attract this desired set of workers through the Tulsa Remote program.  CDA has a far more distinct community and opportunity and could easily do the same.

*Actions:*

- Market Coeur d'Alene as a unique outdoor environment to work remotely.
- Include the Coeur d'Alene tribe in this messaging to integrate importance of environmental stewardship to maintain natural resources such as the lake.
- Develop a competitive identify for Coeur d'Alene that resonates with prospective talent centered on the community's outdoor ethos and quality of place
- Encourage businesses to support K-12 sporting clubs (e.g. hiking, biking, skiing) to build connection between outdoor recreation and career opportunities to retain future employees.

***Objective 3.4 Expand partnerships with North Idaho College, such as opportunities to use the community maker space and rapid prototyping (Gizmo) facilities.***

Innovation is a critical component in fostering a resilient economy. The strength of the regional startup ecosystem depends on the ability to produce new ideas and companies. Investment in testing and lab space to off-set significant costs for startups is a significant asset that makes Coeur d'Alene distinct. Further investment and promotion in these assets are important.

*Actions:*

- Create workspace, pathways and connections for innovators, entrepreneurs and thought leaders to bring ideas to fruition and new products to market.
- Continue the momentum (Innovation Den, eHub, Gizmo, Fab Lab, Business Center, Inland Northwest Food Network)

# ATTACHMENT A: Peer City Benchmarking

# COEUR D'ALENE COMPETITIVE BENCHMARKING

### SEPTEMBER/ OCTOBER 2019

# BENCHMARKS

# BENCHMARKS

- Bend, OR
- Boise City, ID
- Boulder, CO
- Bozeman, MT
- Castle Rock, CO
- Flagstaff, AZ
- Fort Collins, CO
- Grand Junction, CO
- Logan, UT
- Missoula, MT
- Provo, UT
- Spokane, WA
- Twin Falls, ID

# DEMOGRAPHICS

# TAKEAWAYS

- **Population Growth Two Times the National Average.**
  Nearly 49,000 residents call Coeur d'Alene, home, a 7.9% increase since 2013 – a gain of 3,600 residents.

- **Millennial Population.**
  Millennials make up 24% of the city's population – ranking 10th among the benchmark communities. The city's Millennial population has increased 5.8%, slightly faster than the U.S. average but much slower than peer benchmarks such as Bend, Castle Rock, Boulder, and Bozeman.

- **Older Median Age.**
  Coeur d'Alene's median age is 36.4, ranking it as the second oldest city among the benchmarks.

- **Hispanic Residents.**
  Approximately 2,600 Coeur d'Alene residents are Hispanic (5.3% of the population) – ranking third from the bottom of the benchmark cities. Since 2013, Coeur d'Alene's Hispanic population has increased just 3%, compared to 11% for the U.S. average.

- **Foreign-Born Residents.**
  Just 2.3% of Coeur d'Alene residents are foreign-born, ranking last among the benchmark cities.

# DEMOGRAPHICS

### Population, 2017

| City | Population |
|------|-----------|
| Boise City, ID | 220,859 |
| Spokane, WA | 212,982 |
| Fort Collins, CO | 159,150 |
| Provo, UT | 116,199 |
| Boulder, CO | 106,271 |
| Bend, OR | 87,167 |
| Missoula, MT | 70,847 |
| Flagstaff, AZ | 69,903 |
| Grand Junction,… | 60,882 |
| Castle Rock, CO | 57,274 |
| Logan, UT | 49,957 |
| Coeur d'Alene, ID | 48,618 |
| Twin Falls, ID | 47,340 |
| Bozeman, MT | 43,132 |
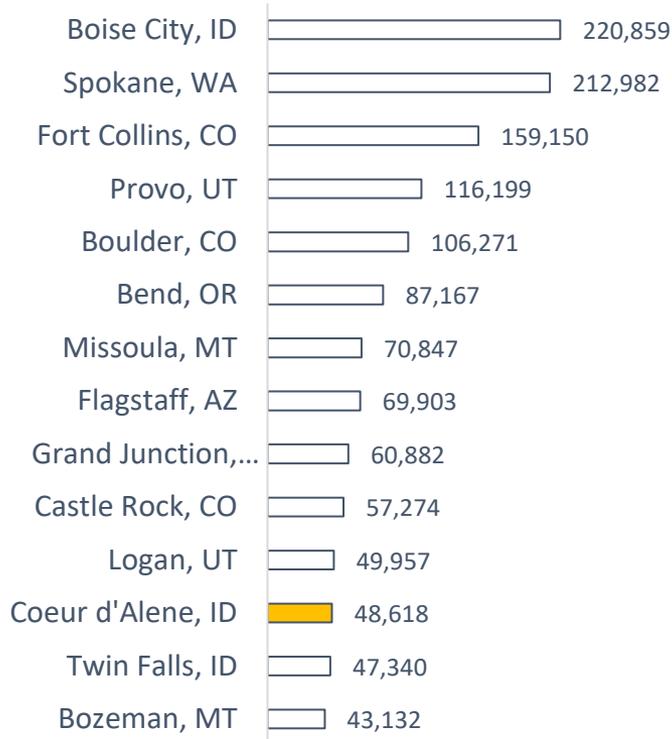
Source: U.S. Census American Community Survey 2017

### Population 5-Year Growth, 2013-2017

| City | Growth |
|------|--------|
| Castle Rock, CO | 14.6% |
| Bozeman, MT | 12.9% |
| Bend, OR | 11.6% |
| Fort Collins, CO | 8.4% |
| Coeur d'Alene, ID | 7.9% |
| Boulder, CO | 5.9% |
| Twin Falls, ID | 5.8% |
| Boise City, ID | 5.3% |
| Flagstaff, AZ | 5.0% |
| Missoula, MT | 4.6% |
| Logan, UT | 2.9% |
| Grand Junction,… | 2.4% |
| Provo, UT | 1.8% |
| Spokane, WA | 1.7% |

U.S. Average: 3.0%

Source: U.S. Census American Community Survey 2017-2013

6

# DEMOGRAPHICS

## Median Age, 2017

| City | Median Age |
|------|-----------|
| Bend, OR | 38.2 |
| Coeur d'Alene, ID | 36.4 |
| Boise City, ID | 36 |
| Grand Junction, CO | 35.9 |
| Spokane, WA | 35.8 |
| Castle Rock, CO | 34.8 |
| Twin Falls, ID | 32.7 |
| Missoula, MT | 32.7 |
| Fort Collins, CO | 29.2 |
| Boulder, CO | 28.6 |
| Bozeman, MT | 28 |
| Flagstaff, AZ | 25.1 |
| Logan, UT | 23.9 |
| Provo, UT | 23.7 |

U.S. Average: 37.8

Source: U.S. Census American Community Survey 2017

8

# DEMOGRAPHICS

**Racial and Ethnic Breakdown, 2017**

Black/ African American, 0.6%

Native Hawaiian and Other Pacific Islander, 0.1%

Asian , 0.9%

Some Other Race, 0.6%

Native American , 1.7%

Two or More Races, 3.6%

White, 92.6%
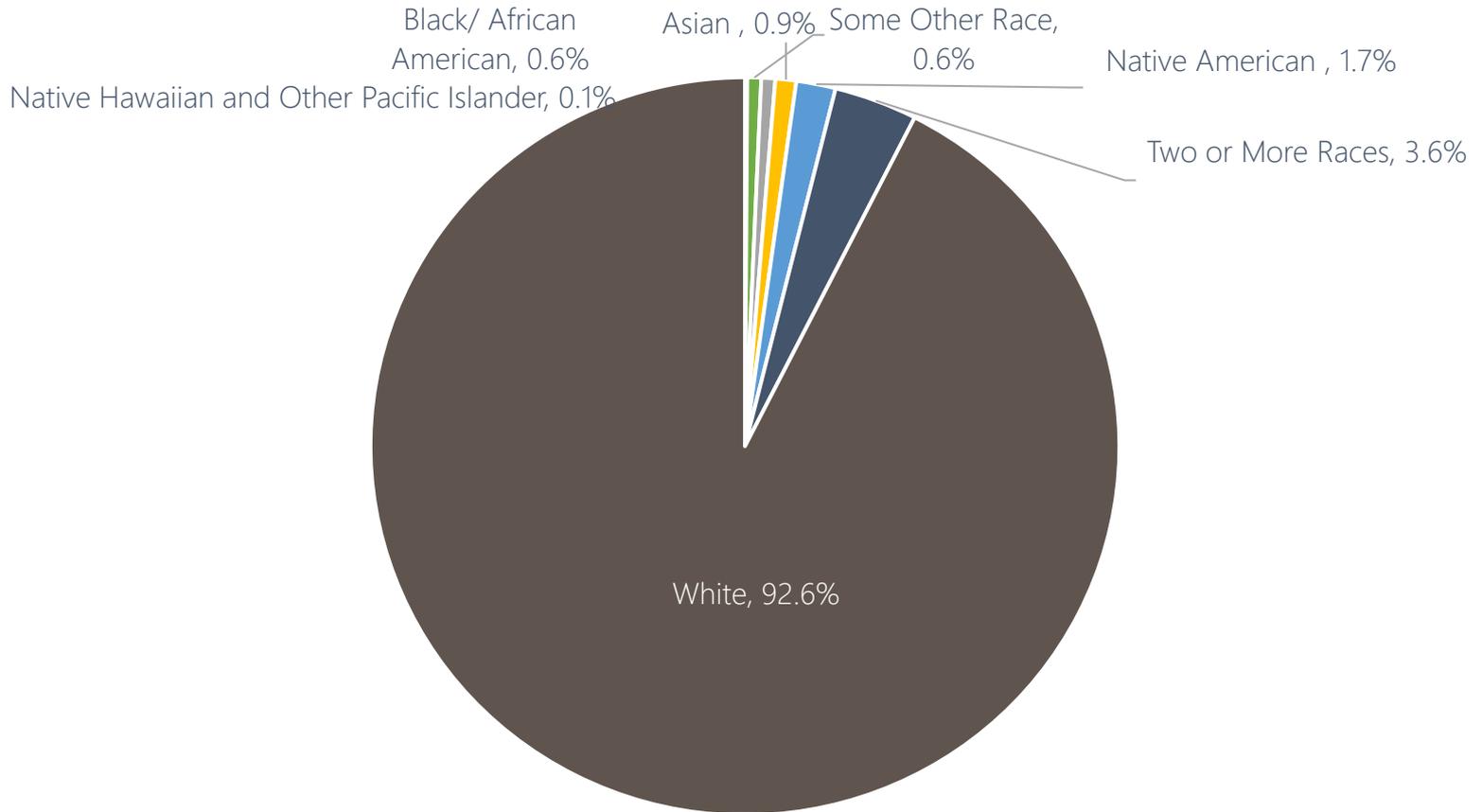
Source: U.S. Census American Community Survey 2017

# DEMOGRAPHICS

## Hispanic Population (Share of Residents), 2017

| City | Share | |
|------|-------|---|
| Flagstaff, AZ | 19.4% | U.S. Average: 17.6% |
| Grand Junction,… | 17.0% | |
| Provo, UT | 16.3% | |
| Twin Falls, ID | 16.1% | |
| Logan, UT | 15.1% | |
| Fort Collins, CO | 11.8% | |
| Castle Rock, CO | 10.2% | |
| Boulder, CO | 9.3% | |
| Bend, OR | 9.1% | |
| Boise City, ID | 8.7% | |
| Spokane, WA | 6.2% | |
| Coeur d'Alene, ID | 5.3% | |
| Missoula, MT | 3.1% | |
| Bozeman, MT | 2.8% | |

Source: U.S. Census American Community Survey 2017

11
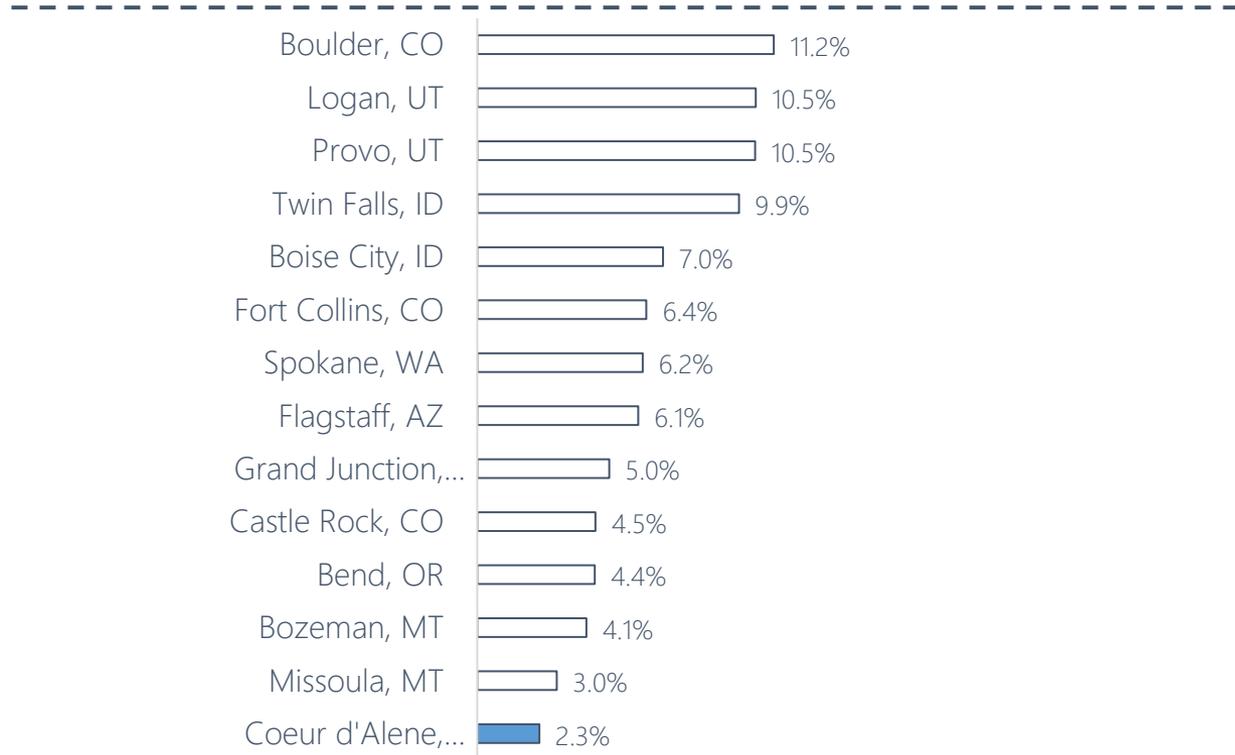
# INCOME

# TAKEAWAYS

- **Median Household Income.**
  Coeur d'Alene's median household income has increased 18% (nearly 2x the U.S. average) since 2013 to approximately $47,606.  This represents the largest increase for all benchmark cities.

- **Per Capita Income.**
  Coeur d'Alene's 's per capita income of $20,743 is 15% less than the national average and ranks ninth  among the benchmark cities (on par with Spokane and Flagstaff).

- **Average Family Income.**
  Coeur d'Alene's  average family income increased 19.3% (ranking first among cities) since 2013 to $43,806.  This income level is still nearly 15% less than the U.S. average.

- **Men Median Wage.**
  Men working full-time in Coeur d'Alene earn approximately $43,800, ranking tenth among the benchmark cities.

- **Women Median Wage.**
  Women working full-time in Coeur d'Alene earn nearly $35,400 annually – 15% less than the U.S. average.  This ranks tenth among the benchmarks.

# INCOME

## Median Household Income, 2017

| City | Income |
|------|--------|
| Castle Rock, CO | $101,122 |
| Boulder, CO | $64,183 |
| Bend, OR | $60,563 |
| Fort Collins, CO | $60,110 |
| Boise City, ID | $54,547 |
| Flagstaff, AZ | $51,758 |
| Bozeman, MT | $49,217 |
| Grand Junction,… | $47,824 |
| Coeur d'Alene, ID | $47,606 |
| Twin Falls, ID | $46,283 |
| Spokane, WA | $44,768 |
| Provo, UT | $44,312 |
| Missoula, MT | $43,602 |
| Logan, UT | $38,412 |

U.S. Average: $57,652
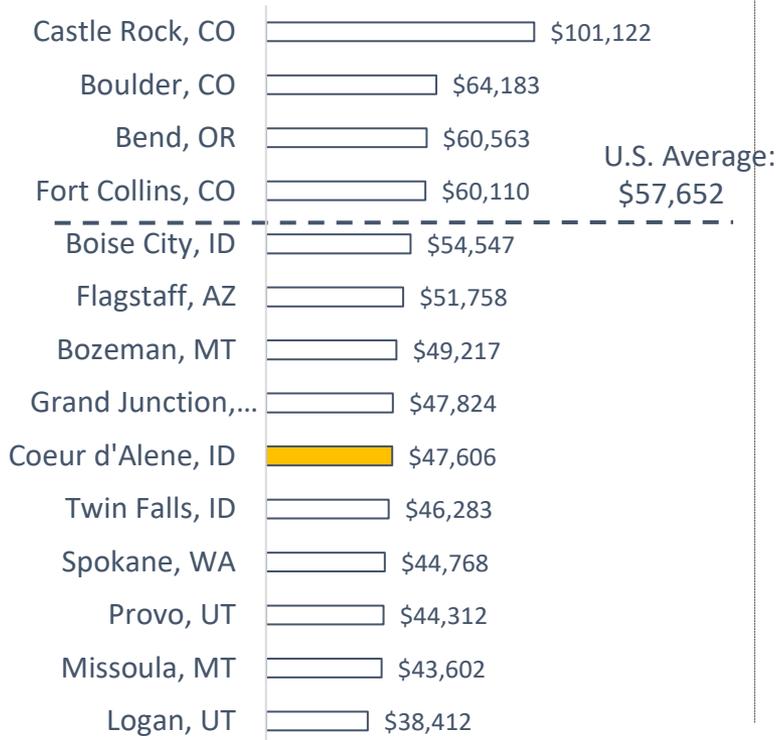
Source: U.S. Census American Community Survey 2017

## Median Household Income 5-Year Growth, 2013-2017

| City | Growth |
|------|--------|
| Coeur d'Alene, ID | 17.6% |
| Castle Rock, CO | 17.2% |
| Bend, OR | 14.2% |
| Boulder, CO | 14.0% |
| Boise City, ID | 12.4% |
| Fort Collins, CO | 11.8% |
| Provo, UT | 11.7% |
| Bozeman, MT | 10.3% |
| Twin Falls, ID | 9.0% |
| Missoula, MT | 7.2% |
| Spokane, WA | 6.4% |
| Logan, UT | 6.3% |
| Flagstaff, AZ | 4.0% |
| Grand Junction,… | 2.1% |

U.S. Average: 8.7%
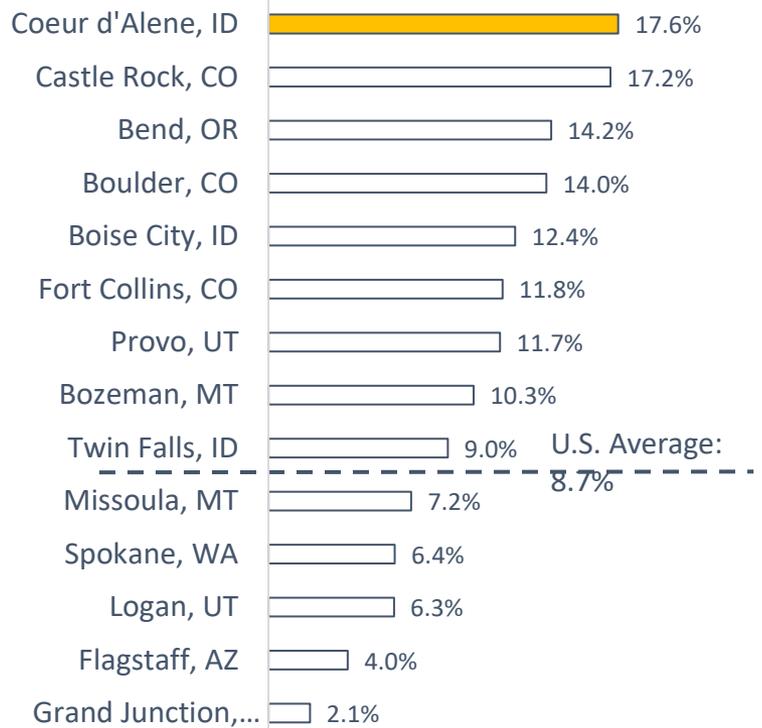
Source: U.S. Census American Community Survey 2017-2013

# INCOME

## Per Capita Income, 2017

| City | Income |
|------|--------|
| Boulder, CO | $40,895 |
| Castle Rock, CO | $40,236 |
| Bend, OR | $33,619 |
| Boise City, ID | $32,147 |
| Fort Collins, CO | $31,686 |
| Bozeman, MT | $29,097 |
| Missoula, MT | $28,426 |
| Grand Junction,... | $27,475 |
| Coeur d'Alene, ID | $26,586 |
| Spokane, WA | $26,464 |
| Flagstaff, AZ | $25,738 |
| Twin Falls, ID | $21,704 |
| Provo, UT | $19,385 |
| Logan, UT | $17,870 |

U.S. Average: $31,177
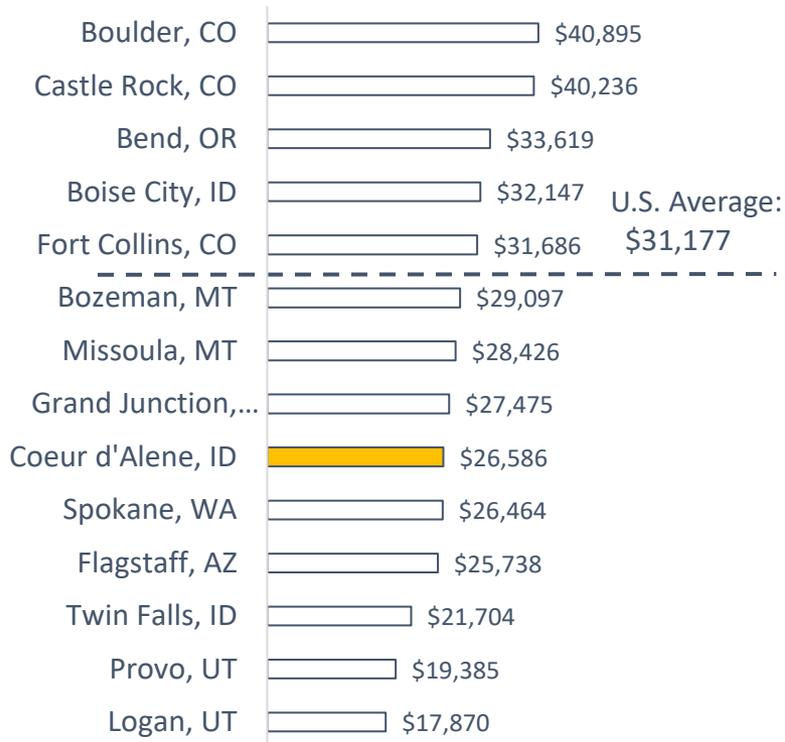
Source: U.S. Census American Community Survey 2017

## Per Capita Income 5-Year Growth, 2013-2017

| City | Growth |
|------|--------|
| Coeur d'Alene, ID | 18.0% |
| Boise City, ID | 14.9% |
| Castle Rock, CO | 14.4% |
| Missoula, MT | 14.2% |
| Provo, UT | 14.2% |
| Bend, OR | 13.4% |
| Twin Falls, ID | 12.7% |
| Bozeman, MT | 10.5% |
| Spokane, WA | 10.4% |
| Fort Collins, CO | 10.3% |
| Boulder, CO | 9.7% |
| Flagstaff, AZ | 5.2% |
| Logan, UT | 4.7% |
| Grand Junction,... | 2.5% |

U.S. Average: 10.7%

Source: U.S. Census American Community Survey 2017-2013

16

# INCOME

## Average Family Income, 2017

| City | Income |
|------|--------|
| Boulder, CO | $146,381 |
| Castle Rock, CO | $130,158 |
| Fort Collins, CO | $104,631 |
| Boise City, ID | $98,756 |
| Bozeman, MT | $96,821 |
| Flagstaff, AZ | $95,213 |
| Bend, OR | $93,855 |
| Missoula, MT | $88,078 |
| Grand Junction,… | $80,323 |
| Spokane, WA | $77,000 |
| Coeur d'Alene, ID | $75,127 |
| Provo, UT | $71,812 |
| Twin Falls, ID | $65,580 |
| Logan, UT | $59,965 |

U.S. Average: $95,031
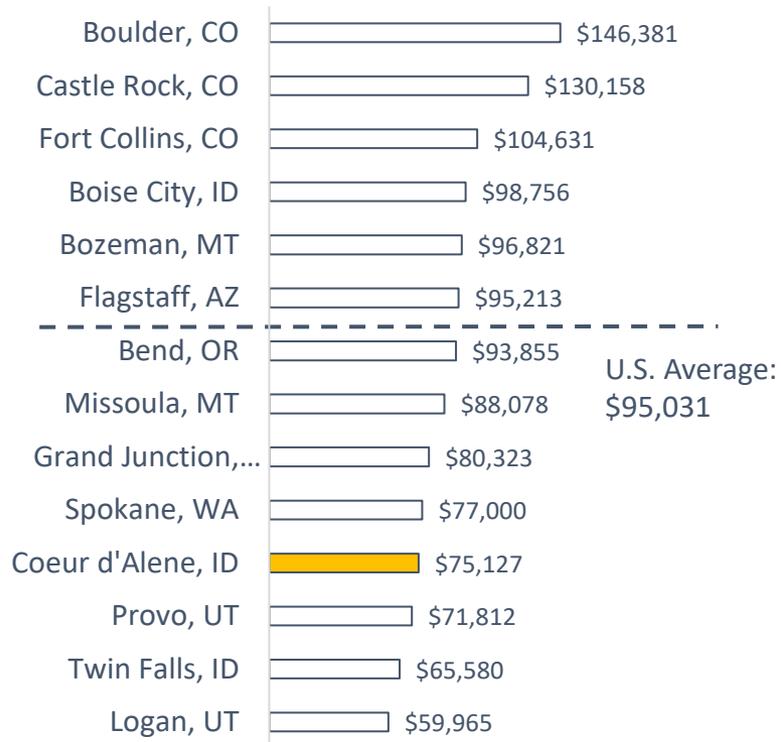
Source: U.S. Census American Community Survey 2017

## Average Family Income 5-Year Growth, 2013-2017

| City | Growth |
|------|--------|
| Coeur d'Alene, ID | 19.3% |
| Boise City, ID | 19.0% |
| Twin Falls, ID | 15.9% |
| Castle Rock, CO | 15.8% |
| Missoula, MT | 14.7% |
| Bozeman, MT | 13.8% |
| Flagstaff, AZ | 13.0% |
| Spokane, WA | 11.1% |
| Bend, OR | 11.0% |
| Fort Collins, CO | 10.8% |
| Provo, UT | 10.5% |
| Boulder, CO | 7.8% |
| Logan, UT | 6.4% |
| Grand Junction,… | 2.0% |

U.S. Average: 11.0%

Source: U.S. Census American Community Survey 2017-2013

17

# INCODE

**Men: Median Full-Time Earning, 2017**

| City | Earning |
|------|---------|
| Castle Rock, CO | $76,591 |
| Boulder, CO | $61,882 |
| Fort Collins, CO | $51,870 |
| Grand Junction,… | $50,955 |
| Bend, OR | $50,332 |
| Boise City, ID | $48,875 |
| Spokane, WA | $45,585 |
| Flagstaff, AZ | $45,302 |
| Coeur d'Alene, ID | $43,806 |
| Bozeman, MT | $41,704 |
| Twin Falls, ID | $41,079 |
| Missoula, MT | $40,546 |
| Provo, UT | $38,473 |
| Logan, UT | $35,639 |

U.S. Average: $50,859

Source: U.S. Census American Community Survey 2017

**Men: Median Full-Time Earning 5-Year Growth, 2013-2017**

| City | Growth |
|------|--------|
| Logan, UT | 11.8% |
| Bend, OR | 7.7% |
| Twin Falls, ID | 7.6% |
| Boise City, ID | 7.5% |
| Flagstaff, AZ | 6.6% |
| Coeur d'Alene, ID | 6.2% |
| Spokane, WA | 4.5% |
| Bozeman, MT | 4.2% |
| Grand Junction, CO | 3.7% |
| Castle Rock, CO | 2.5% |
| Missoula, MT | 1.2% |
| Fort Collins, CO | 0.3% |
| Boulder, CO | -1.3% |
| Provo, UT | -4.7% |

U.S. Average: 3.6%

Source: U.S. Census American Community Survey 2017-2013

18
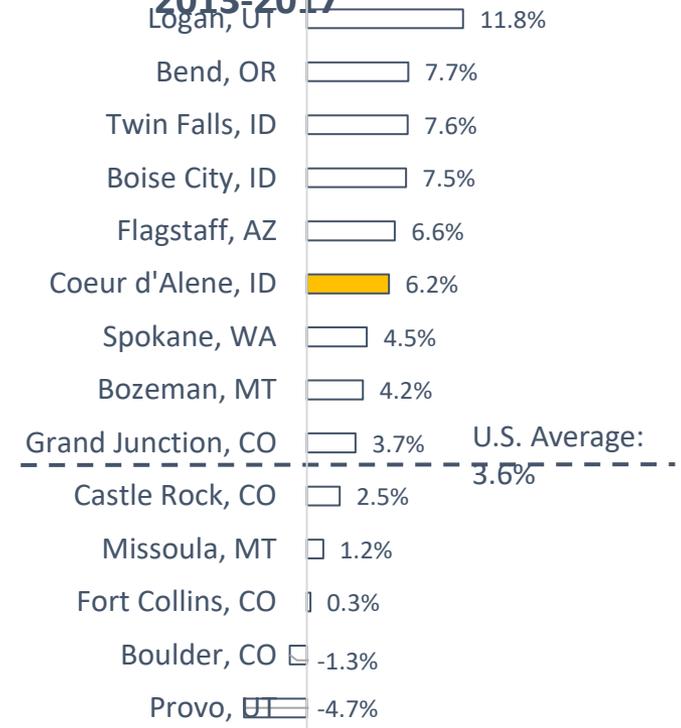
# INCOME

## Women: Median Full-Time Earning, 2017

| City | Earning |
|------|--------|
| Castle Rock, CO | $53,094 |
| Boulder, CO | $52,146 |
| Fort Collins, CO | $40,968 |
| Boise City, ID | $39,920 |
| Bend, OR | $39,110 |
| Grand Junction,… | $38,481 |
| Bozeman, MT | $37,960 |
| Spokane, WA | $36,861 |
| Flagstaff, AZ | $36,737 |
| Coeur d'Alene, ID | $35,408 |
| Missoula, MT | $32,135 |
| Provo, UT | $28,794 |
| Twin Falls, ID | $28,744 |
| Logan, UT | $28,161 |

U.S. Average: $40,760
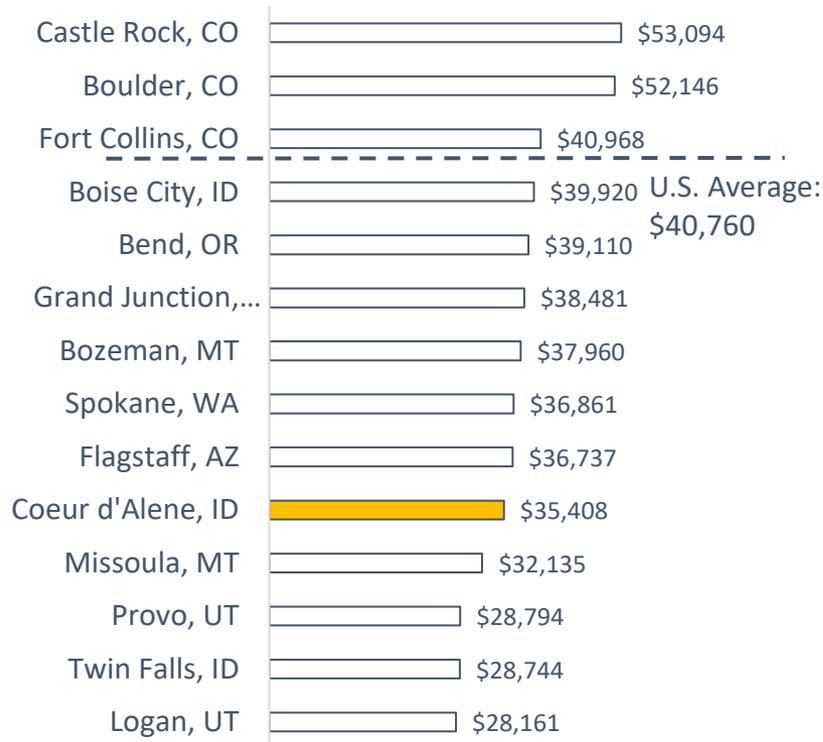
Source: U.S. Census American Community Survey 2017

## Women: Median Full-Time Earning 5-Year Growth, 2013-2017

| City | Growth |
|------|--------|
| Coeur d'Alene, ID | 18.5% |
| Bozeman, MT | 18.2% |
| Boulder, CO | 11.0% |
| Castle Rock, CO | 8.1% |
| Bend, OR | 7.2% |
| Boise City, ID | 7.0% |
| Logan, UT | 6.9% |
| Spokane, WA | 5.4% |
| Twin Falls, ID | 5.3% |
| Fort Collins, CO | 4.3% |
| Grand Junction, CO | 4.0% |
| Provo, UT | 2.5% |
| Missoula, MT | 1.6% |
| Flagstaff, AZ | -1.9% |

U.S. Average: 5.5%

Source: U.S. Census American Community Survey 2017-2013

19
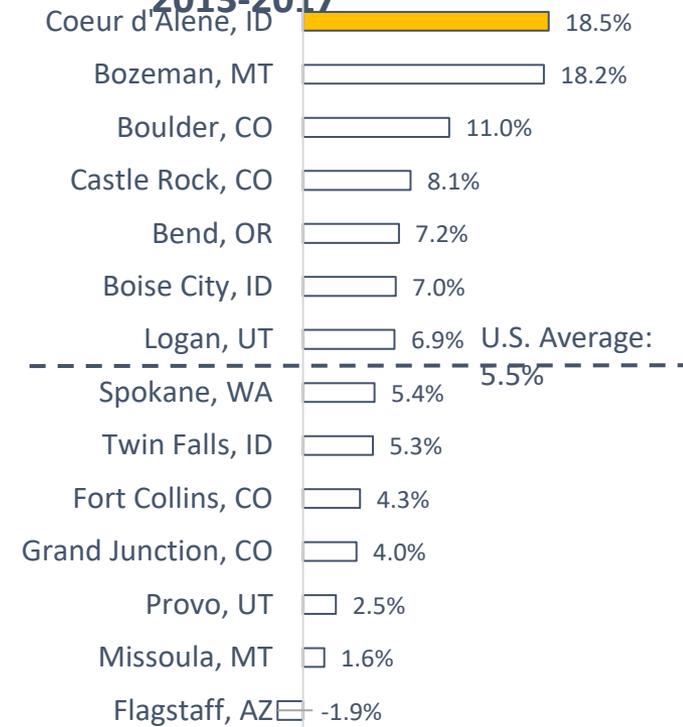
# INCLUSIVE PROSPERITY

# TAKEAWAYS

- **Poverty Levels.**
  Coeur d'Alene's poverty levels are above the U.S. average: 12.4% of all families live below the poverty line and 20.5% of those with children. This ranks the city third highest among the benchmark cities.

- **Health Insurance.**
  Nearly 13% of Coeur d'Alene's population does not have health insurance. This ranks third among the benchmarks.

- **Cash Public Assistance.**
  Five percent of Coeur d'Alene's population receives cash public assistance; this is two times the U.S. average.

- **SNAP and Food Stamp Benefits.**
  Fourteen percent of Coeur d'Alene's population receives SNAP or food stamp benefits. This ranks third among the benchmarks.

- **Housing Values.**
  With a housing value of $316,000, Coeur d'Alene is one of the most affordable communities among the benchmark cities; less than one-third of homeowners spend more than 30% of their income on housing.

- **Gross Rent.**
  Coeur d'Alene's monthly gross rent is $882 – 11% less than the U.S. average. Forty-four percent of the city's renters pay more than 30% of their monthly income on housing costs.

# INCLUSIVE PROSPERITY

## Share of All Families Living Below the Poverty Line, 2017

| City | % |
|------|-----|
| Logan, UT | 18.1% |
| Provo, UT | 16.3% |
| Grand Junction,… | 13.3% |
| Spokane, WA | 12.8% |
| Coeur d'Alene, ID | 12.4% |
| Twin Falls, ID | 12.2% |
| Flagstaff, AZ | 10.4% |
| Missoula, MT | 10.2% |
| Boise City, ID | 8.0% |
| Bend, OR | 7.1% |
| Bozeman, MT | 6.8% |
| Fort Collins, CO | 6.4% |
| Boulder, CO | 5.6% |
| Castle Rock, CO | 3.1% |

U.S. Average: 10.5%
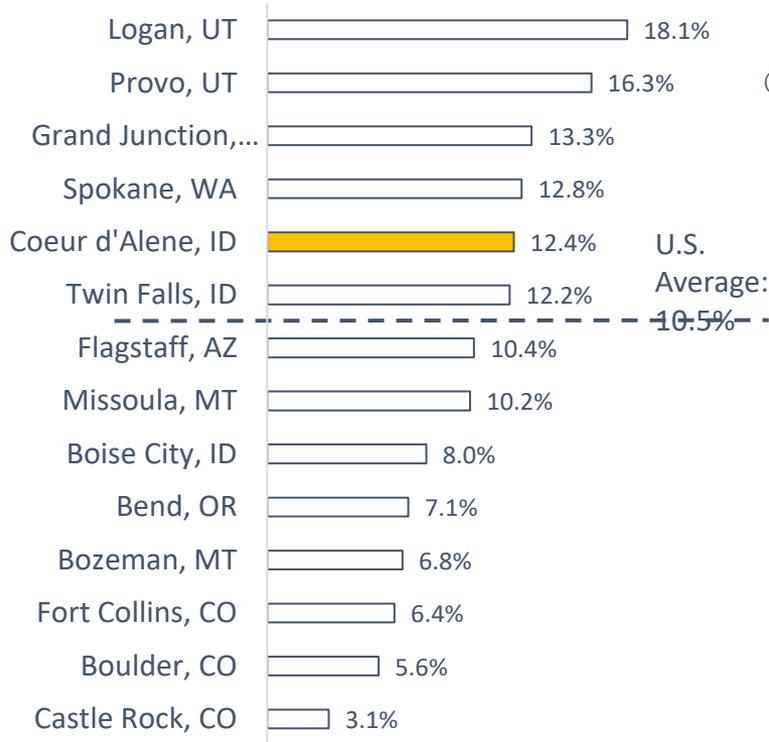
Source: U.S. Census American Community Survey 2017

## Share of Families with Children Living Below the Poverty Line 2017

| City | % |
|------|-----|
| Logan, UT | 24.4% |
| Grand Junction, CO | 21.6% |
| Coeur d'Alene, ID | 20.5% |
| Spokane, WA | 20.4% |
| Twin Falls, ID | 18.0% |
| Provo, UT | 16.9% |
| Missoula, MT | 16.9% |
| Flagstaff, AZ | 16.5% |
| Boise City, ID | 13.4% |
| Bend, OR | 10.2% |
| Bozeman, MT | 9.8% |
| Fort Collins, CO | 9.1% |
| Boulder, CO | 7.5% |
| Castle Rock, CO | 3.9% |

U.S. Average: 16.7%
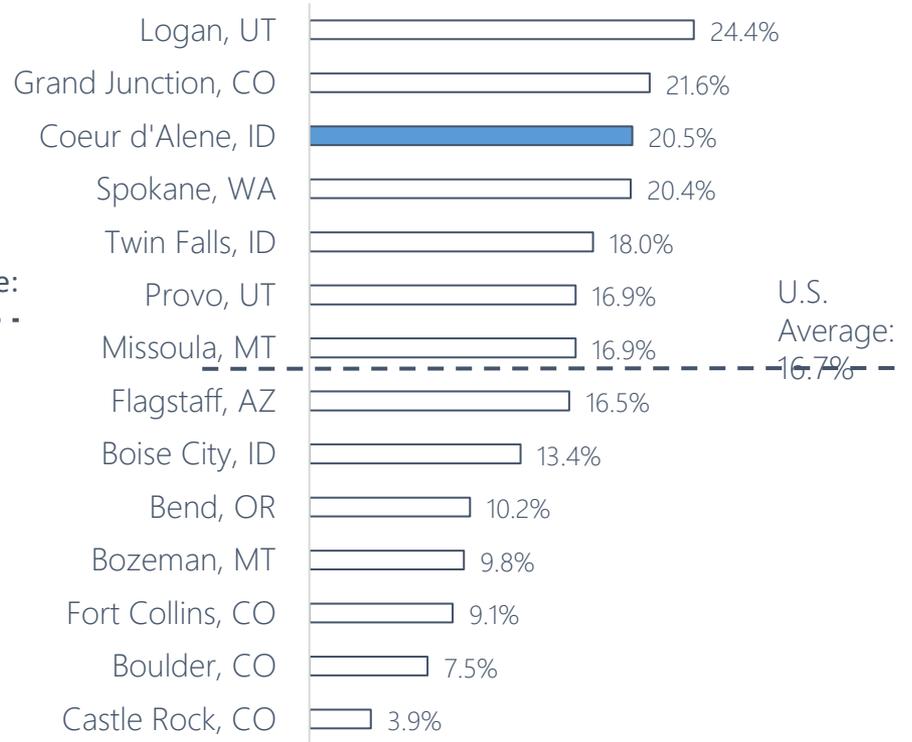
Source: U.S. Census American Community Survey 2017

# INCLUSIVE PROSPERITY

## Share of Residents with No Health Insurance, 2017
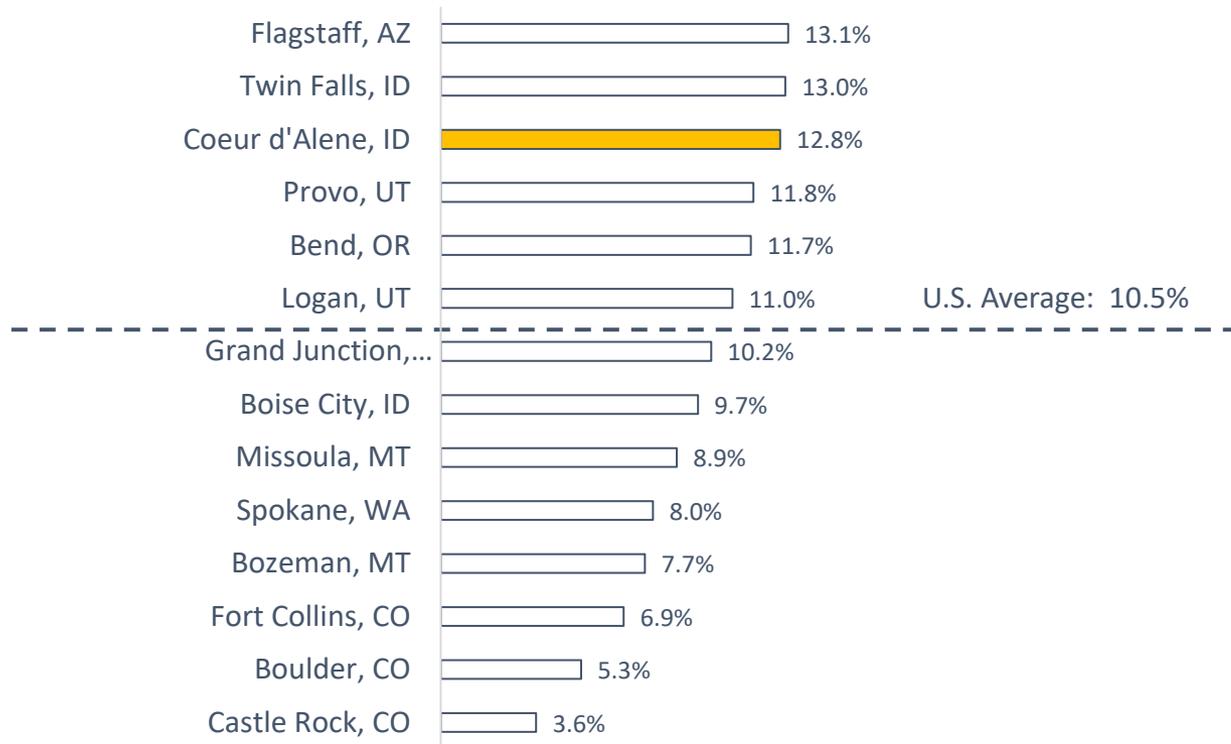
| City | Percentage |
|------|-----------|
| Flagstaff, AZ | 13.1% |
| Twin Falls, ID | 13.0% |
| Coeur d'Alene, ID | 12.8% |
| Provo, UT | 11.8% |
| Bend, OR | 11.7% |
| Logan, UT | 11.0% |
| Grand Junction,… | 10.2% |
| Boise City, ID | 9.7% |
| Missoula, MT | 8.9% |
| Spokane, WA | 8.0% |
| Bozeman, MT | 7.7% |
| Fort Collins, CO | 6.9% |
| Boulder, CO | 5.3% |
| Castle Rock, CO | 3.6% |

U.S. Average: 10.5%

Source: U.S. Census American Community Survey 2017

# INCLUSIVE PROSPERITY

**Share of Households Receiving
Cash Public Assistance, 2017**
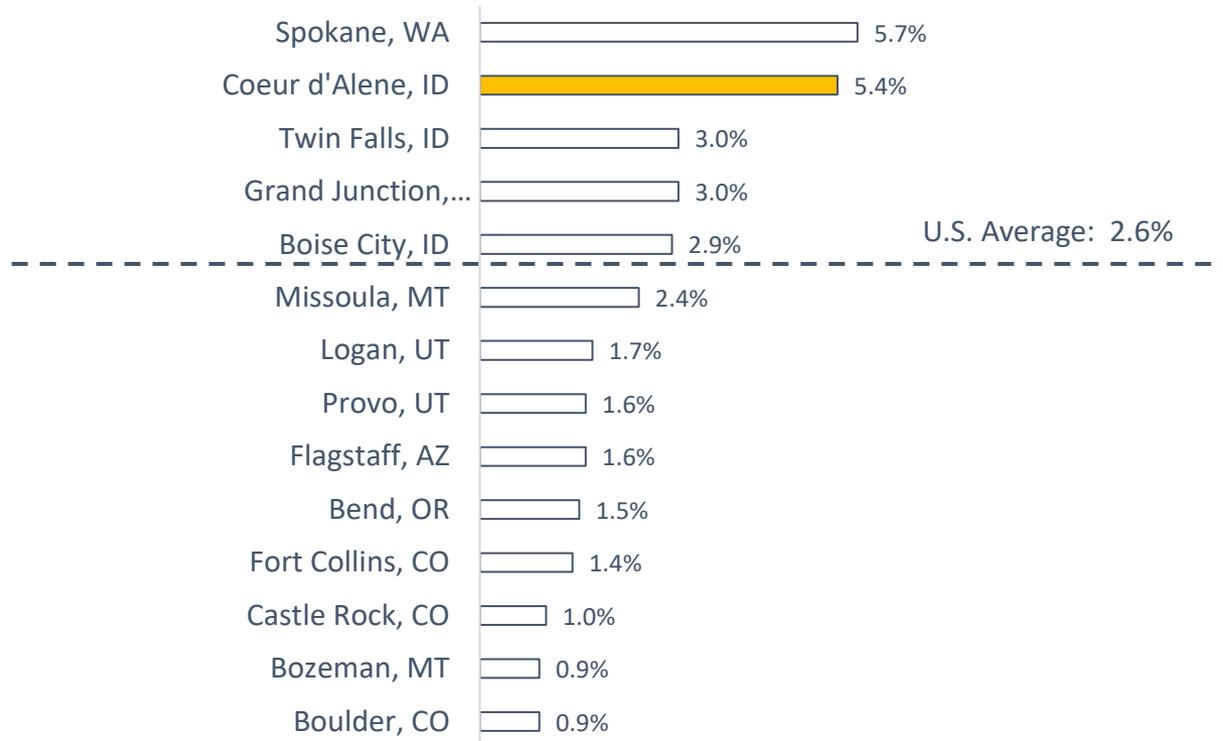
| City | Share |
|------|-------|
| Spokane, WA | 5.7% |
| Coeur d'Alene, ID | 5.4% |
| Twin Falls, ID | 3.0% |
| Grand Junction,… | 3.0% |
| Boise City, ID | 2.9% |
| Missoula, MT | 2.4% |
| Logan, UT | 1.7% |
| Provo, UT | 1.6% |
| Flagstaff, AZ | 1.6% |
| Bend, OR | 1.5% |
| Fort Collins, CO | 1.4% |
| Castle Rock, CO | 1.0% |
| Bozeman, MT | 0.9% |
| Boulder, CO | 0.9% |

U.S. Average: 2.6%

Source: U.S. Census American Community Survey 2017

# INCLUSIVE PROSPERITY

**Share of Households Receiving SNAP or Food Stamp Benefits, 2017**

| City | Percent |
|------|---------|
| Spokane, WA | 23.0% |
| Bend, OR | 14.7% |
| Coeur d'Alene, ID | 14.3% |
| Missoula, MT | 14.0% |
| Twin Falls, ID | 12.8% |
| Grand Junction,… | 11.7% |
| Logan, UT | 11.0% |
| Flagstaff, AZ | 10.0% |
| Boise City, ID | 9.5% |
| Provo, UT | 9.3% |
| Fort Collins, CO | 6.8% |
| Boulder, CO | 4.2% |
| Bozeman, MT | 3.8% |
| Castle Rock, CO | 3.0% |

U.S. Average: 12.6%

Source: U.S. Census American Community Survey 2017

25
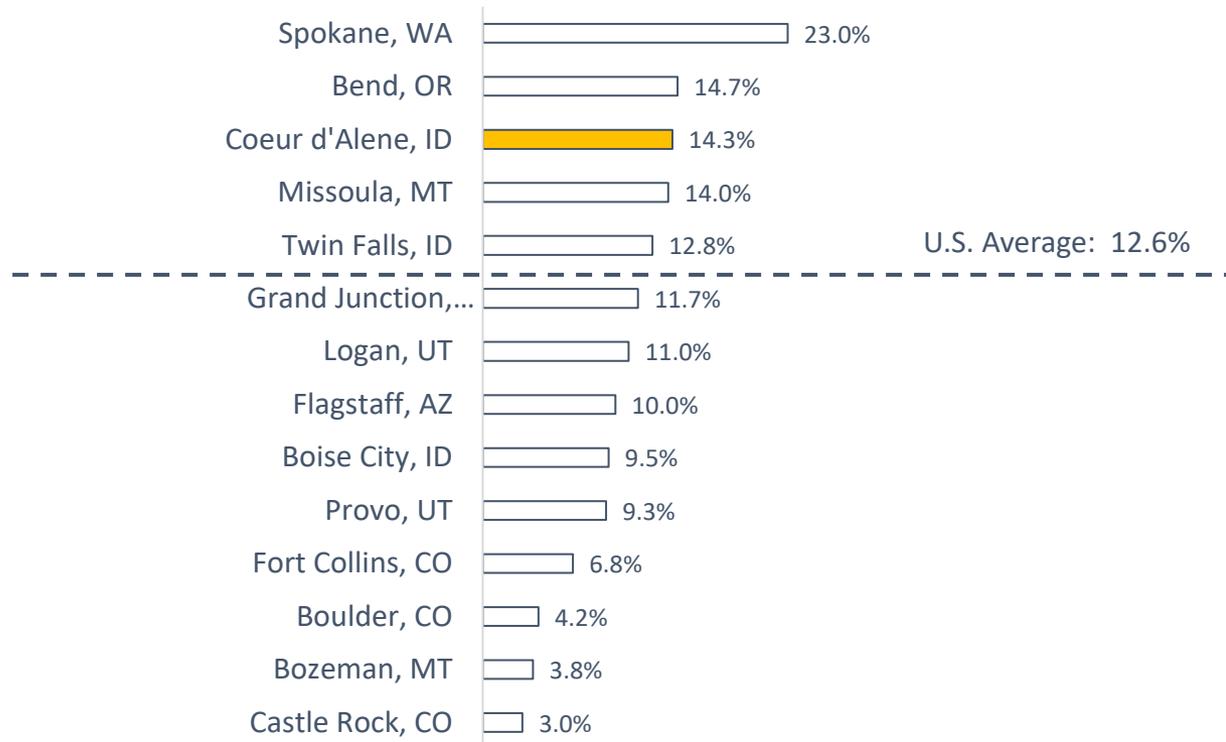
# INCLUSIVE PROSPERITY

**Median Housing Value, 2017**

| City | Value |
|------|-------|
| Boulder, CO | $819,200 |
| Castle Rock, CO | $486,000 |
| Bend, OR | $443,800 |
| Bozeman, MT | $439,700 |
| Fort Collins, CO | $404,500 |
| Flagstaff, AZ | $372,600 |
| Provo, UT | $324,500 |
| Coeur d'Alene, ID | $316,900 |
| Missoula, MT | $302,900 |
| Boise City, ID | $290,500 |
| Grand Junction,… | $240,700 |
| Logan, UT | $225,600 |
| Spokane, WA | $205,700 |
| Twin Falls, ID | $197,200 |
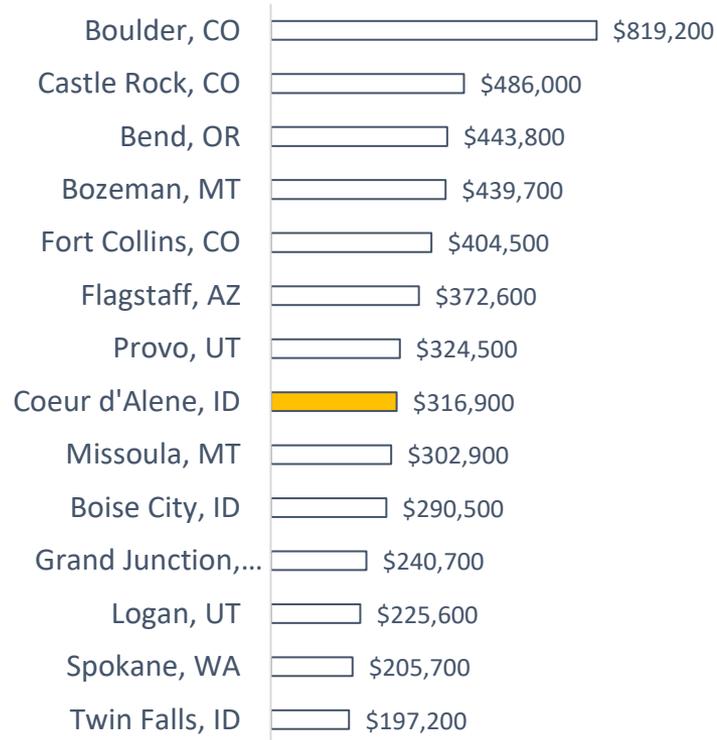
Source: Zillow 2018

# INCLUSIVE PROSPERITY

## Median Gross Rent, 2017

| City | Median Gross Rent |
|------|------------------|
| Castle Rock, CO | $1,430 |
| Boulder, CO | $1,412 |
| Fort Collins, CO | $1,191 |
| Flagstaff, AZ | $1,138 |
| Bend, OR | $1,107 |
| Bozeman, MT | $956 |
| Grand Junction,… | $888 |
| Coeur d'Alene, ID | $882 |
| Boise City, ID | $875 |
| Spokane, WA | $805 |
| Provo, UT | $793 |
| Missoula, MT | $785 |
| Twin Falls, ID | $757 |
| Logan, UT | $694 |

U.S. Average: $982

Source: U.S. Census American Community Survey 2017

27
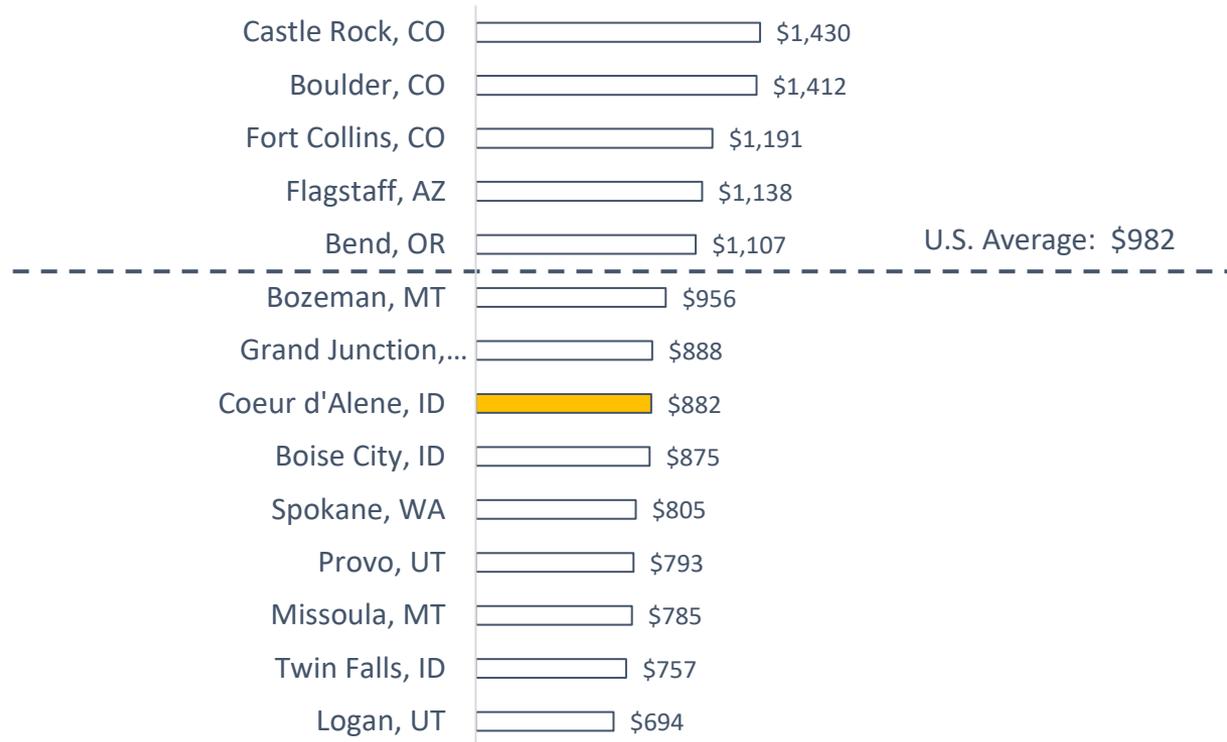
# INCLUSIVE PROSPERITY

**% of Households with a Mortgage Who's Monthly Costs is 30% or More of Household Income, 2017**

| City | Percentage |
|------|-----------|
| Bend, OR | 34.5% |
| Missoula, MT | 30.1% |
| Spokane, WA | 30.0% |
| Boulder, CO | 29.5%  —  U.S. Average: 29.5% |
| Grand Junction,… | 29.4% |
| Flagstaff, AZ | 29.0% |
| Provo, UT | 28.9% |
| Coeur d'Alene, ID | 27.3% |
| Bozeman, MT | 27.1% |
| Twin Falls, ID | 26.2% |
| Logan, UT | 26.0% |
| Fort Collins, CO | 24.5% |
| Castle Rock, CO | 23.8% |
| Boise City, ID | 23.3% |
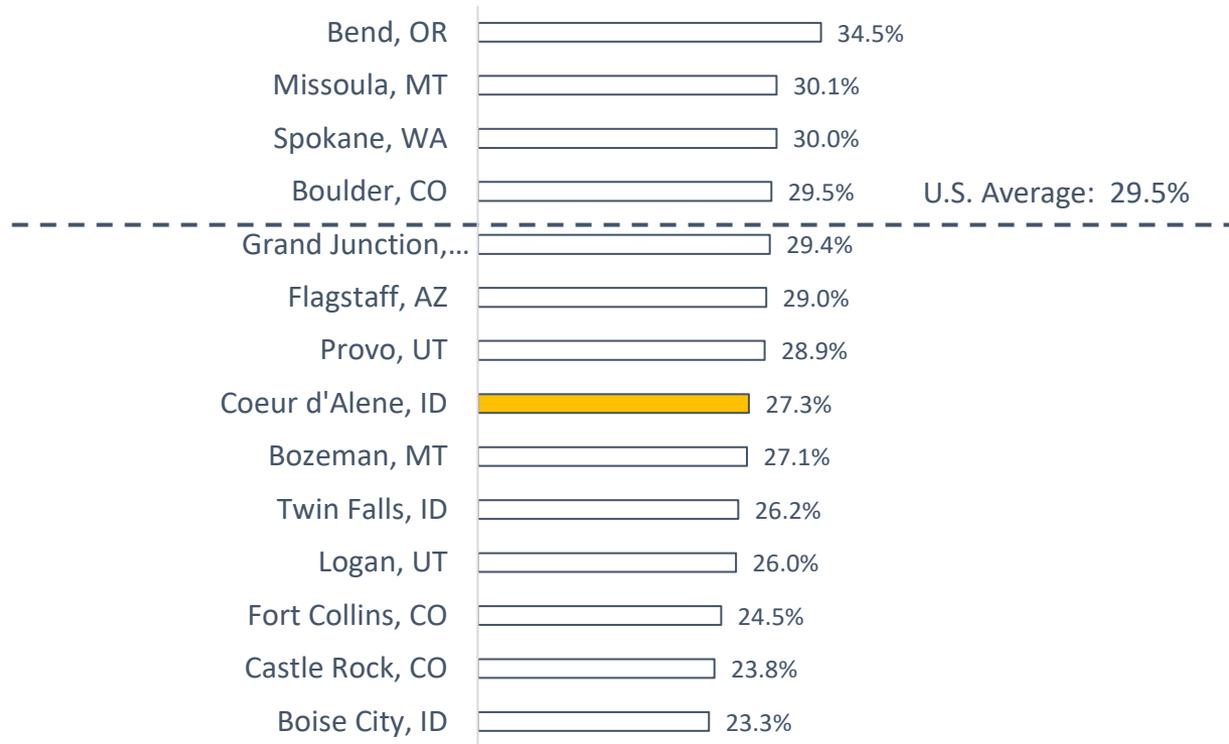
Source: U.S. Census American Community Survey 2017

# INCLUSIVE PROSPERITY

**% of Households Who's Gross Rent is 30% or More of Household Income, 2017**

| City | % |
|------|-----|
| Fort Collins, CO | 60.1% |
| Boulder, CO | 59.7% |
| Flagstaff, AZ | 57.5% |
| Grand Junction,… | 57.0% |
| Bozeman, MT | 55.3% |
| Provo, UT | 53.5% |
| Spokane, WA | 52.7% |
| Bend, OR | 52.3% |
| Missoula, MT | 51.5% |
| Logan, UT | 48.5% |
| Twin Falls, ID | 46.5% |
| Boise City, ID | 46.3% |
| Coeur d'Alene, ID | 44.7% |
| Castle Rock, CO | 44.2% |

U.S. Average: 50.6%
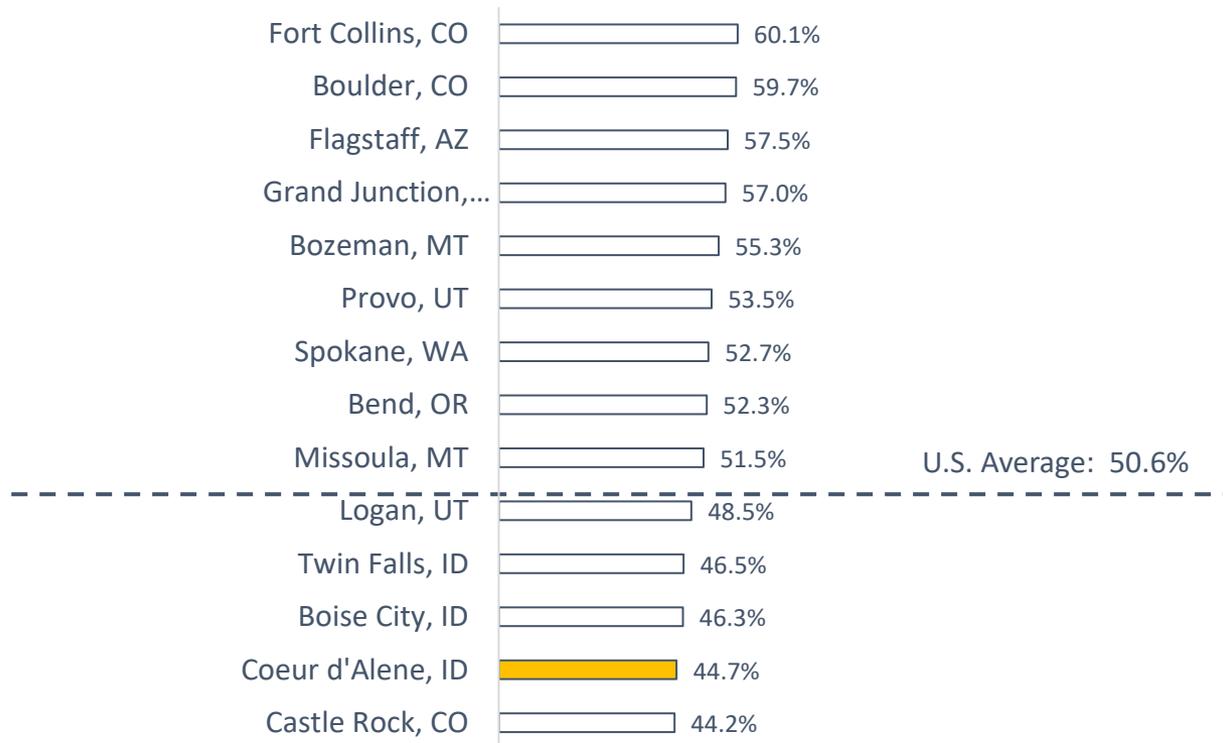
Source: U.S. Census American Community Survey 2017

# EDUCATIONAL ATTAINMENT

# TAKEAWAYS

- **No High School Diploma.**
  Approximately 2,500 Coeur d'Alene residents (25 or older) do not have a high school diploma – nearly 8% of the workforce. This ranks fourth highest among the benchmark cities, on par with Spokane and Provo.

- **High School Diploma.**
  Twenty-five percent of Coeur d'Alene 's workforce only has a high school diploma, ranking second among the benchmark cities.

- **Associate's Degree.**
  Four in ten Coeur d'Alene residents (25 or older)  has an associate's degree or some college; this ranks second among the benchmarks.  The community has experienced a 17% increase in the level of this talent base.

- **Bachelor's Degree or Higher.**
  Nearly 8,700 Coeur d'Alene residents bachelor's degree or higher, 26.8% of the workforce and less than the U.S. average (30.9%). Since 2013, the number of residents with a BA or higher in Coeur d'Alene has increased 23%, ranking third among the community comparisons.

# EDUCATIONAL ATTAINMENT

**Degree Breakdown, 2017**



- Graduate Degree
- No High School
- Bachelor's Degree
- High School Diploma
- Some College or Associate's Degree

7.3%
7.8%
19.5%
25.3%
40.1%

Source: U.S. Census American Community Survey 2017

32
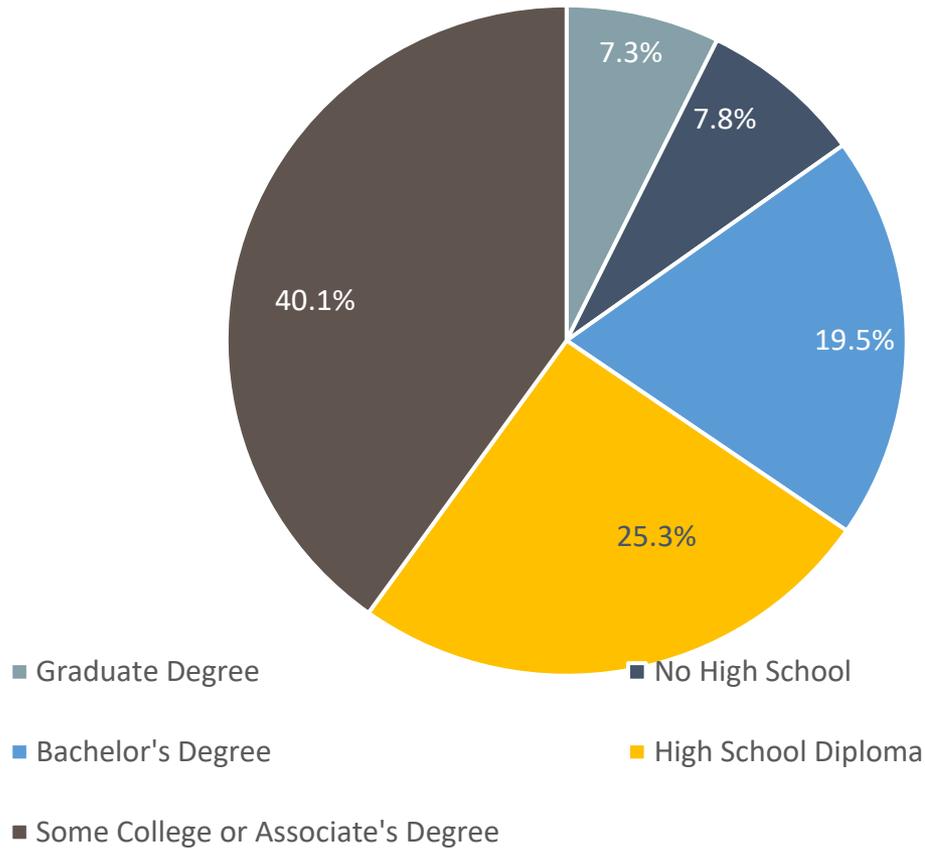
# EDUCATIONAL ATTAINMENT

**No High School Diploma
(% of Residents),
2017**

U.S. Average: 12.7%

| City | % |
|------|---|
| Twin Falls, ID | 11.5% |
| Logan, UT | 9.8% |
| Grand Junction,… | 9.3% |
| Coeur d'Alene, ID | 7.8% |
| Spokane, WA | 7.7% |
| Provo, UT | 7.6% |
| Flagstaff, AZ | 6.9% |
| Boise City, ID | 5.6% |
| Bend, OR | 4.9% |
| Missoula, MT | 4.3% |
| Fort Collins, CO | 3.6% |
| Boulder, CO | 3.5% |
| Castle Rock, CO | 2.5% |
| Bozeman, MT | 1.9% |
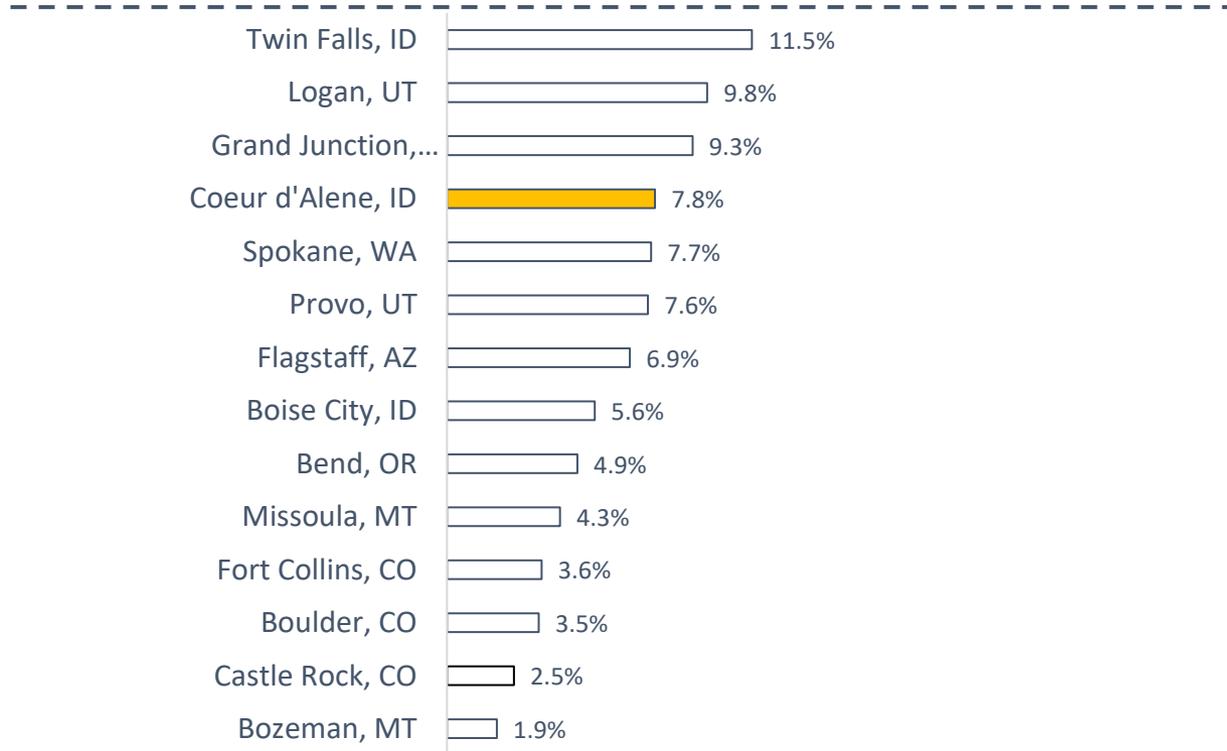
Source: U.S. Census American Community Survey 2017

# EDUCATIONAL ATTAINMENT

**High School Diploma (% of Residents), 2017**

U.S. Average: 27.3%

| City | % |
|------|---|
| Twin Falls, ID | 28.8% |
| Coeur d'Alene, ID | 25.3% |
| Grand Junction,… | 25.2% |
| Spokane, WA | 24.6% |
| Boise City, ID | 20.7% |
| Logan, UT | 19.7% |
| Missoula, MT | 17.8% |
| Bend, OR | 17.7% |
| Flagstaff, AZ | 16.1% |
| Fort Collins, CO | 15.2% |
| Castle Rock, CO | 14.6% |
| Provo, UT | 14.3% |
| Bozeman, MT | 13.3% |
| Boulder, CO | 7.1% |
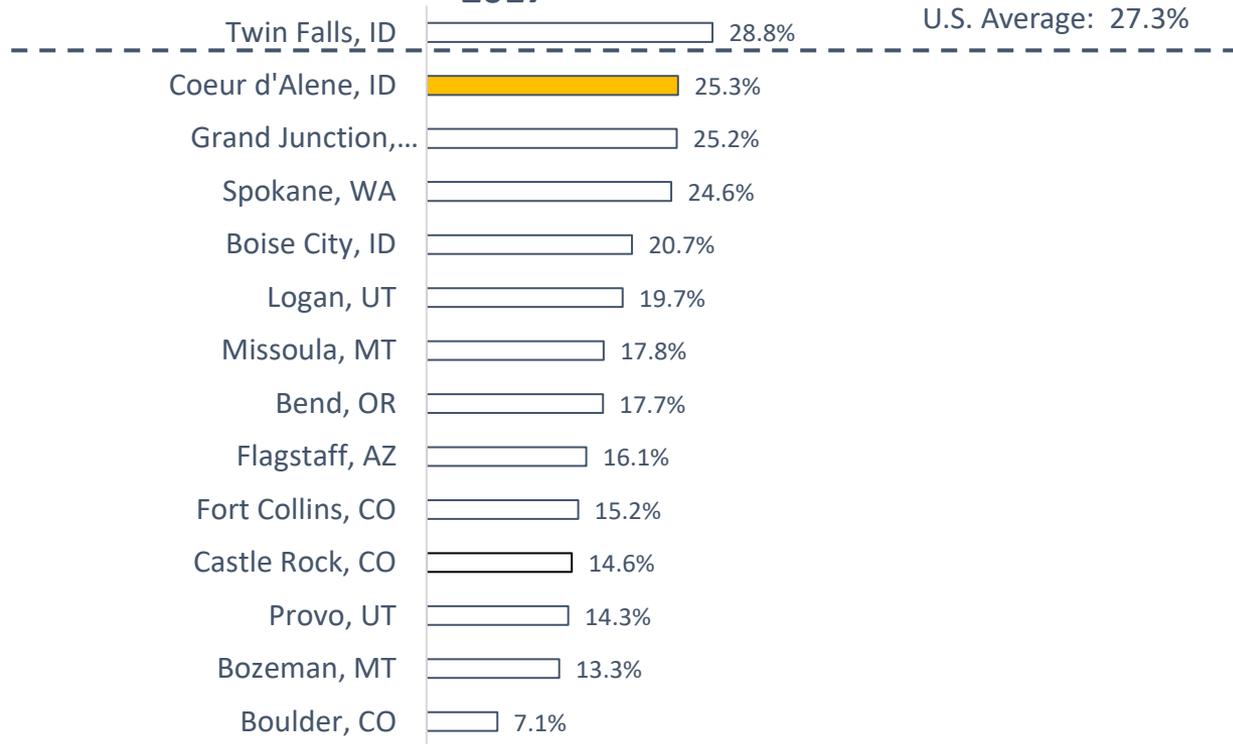
Source: U.S. Census American Community Survey 2017

# EDUCATIONAL ATTAINMENT

**Some College or Associate's Degree
(% of Residents),
2017**

| City | % |
|------|-----|
| Twin Falls, ID | 40.3% |
| Coeur d'Alene, ID | 40.1% |
| Spokane, WA | 38.2% |
| Provo, UT | 35.7% |
| Bend, OR | 34.8% |
| Logan, UT | 34.7% |
| Castle Rock, CO | 34.0% |
| Boise City, ID | 32.8% |
| Grand Junction,… | 32.7% |
| Flagstaff, AZ | 31.9% |
| Missoula, MT | 30.5% |
| Bozeman, MT | 27.9% |
| Fort Collins, CO | 27.5% |
| Boulder, CO | 15.6% |

U.S. Average: 29.1%

Source: U.S. Census American Community Survey 2017

35
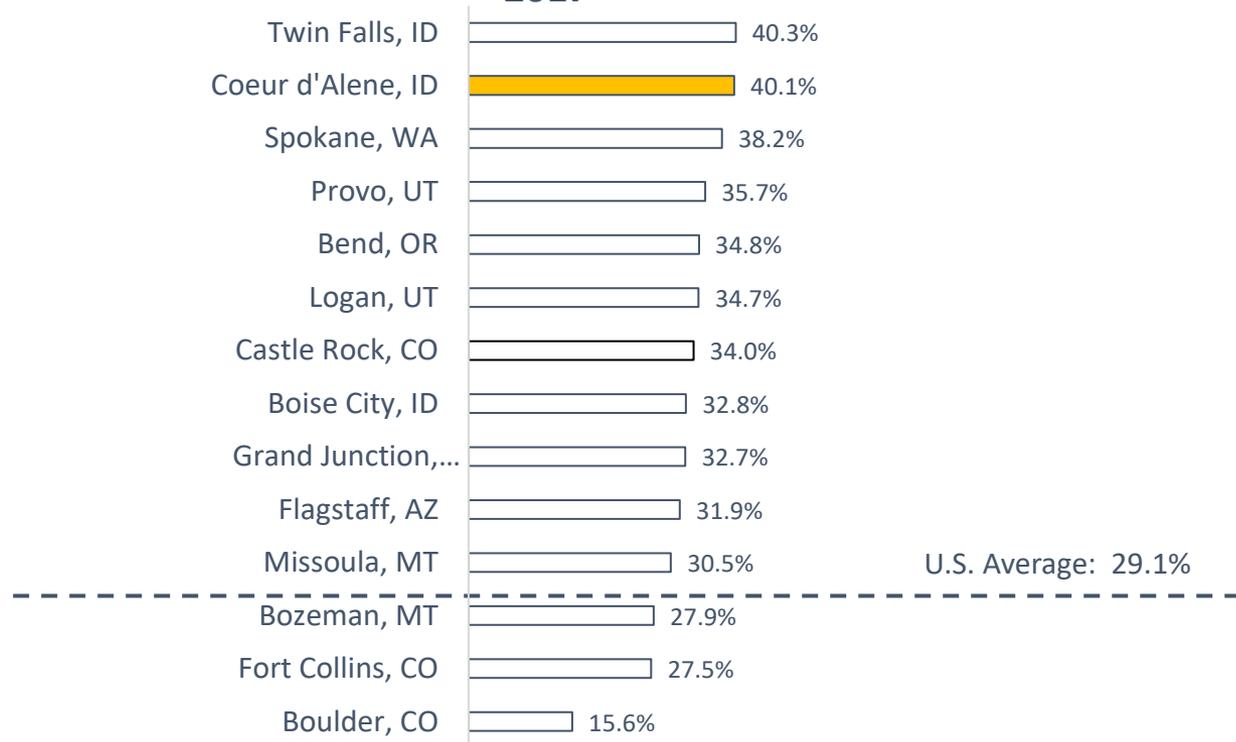
# EDUCATIONAL ATTAINMENT

**Bachelor's Degree or Higher**
**(% of Residents),**
**2017**

| City | % |
|---|---|
| Boulder, CO | 73.8% |
| Bozeman, MT | 56.9% |
| Fort Collins, CO | 53.6% |
| Castle Rock, CO | 48.9% |
| Missoula, MT | 47.4% |
| Flagstaff, AZ | 45.1% |
| Bend, OR | 42.6% |
| Provo, UT | 42.5% |
| Boise City, ID | 40.9% |
| Logan, UT | 35.7% |
| Grand Junction, CO | 32.9% |
| Spokane, WA | 29.5% |
| Coeur d'Alene, ID | 26.8% |
| Twin Falls, ID | 19.4% |

U.S. Average: 30.9%

Source: U.S. Census American Community Survey 2017

36
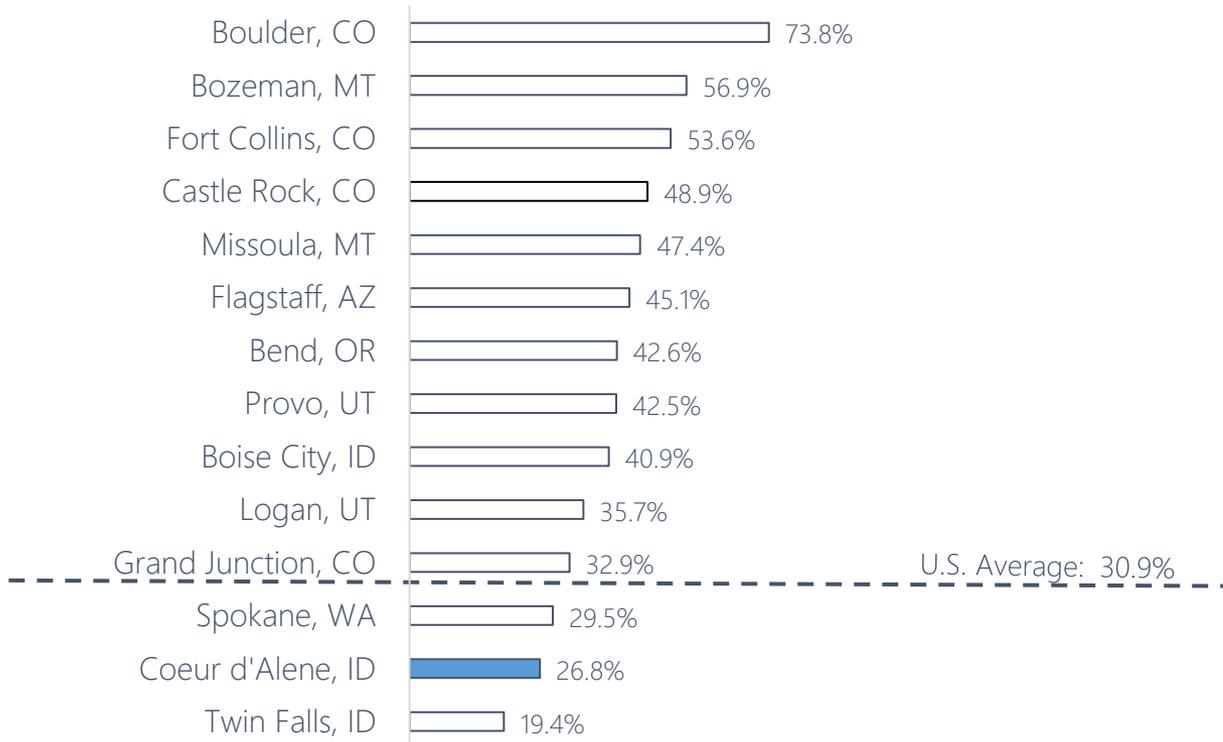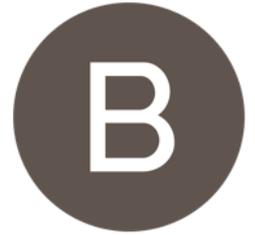
# BUSINESS ESTABLISHMENTS

# TAKEAWAYS

- **Growth in Business Establishments.**
  From 2012 to 2016, Coeur d'Alene experienced a 7.5% increase in the number of business establishments, while the U.S. experienced a 4.4% increase. Coeur d'Alene 's growth is comparable to Boulder and Missoula.

- **Construction.**
  Construction establishments make up 15.5% of all Coeur d'Alene businesses (the largest share)l; the sector experienced a 16% increase in number of businesses since 2012.

- **Retail and Hospitality Businesses.**
  Retail businesses make up the second largest share (12.5%) of Coeur d'Alene businesses. Combined with those establishments in hospitality (accommodation and food service), the share grows to more than 20%.

- **Manufacturing.**
  With 325 manufacturing establishments, Coeur d'Alene's share of manufacturing businesses ranks second among the benchmark cities, just behind Logan and nearly two times the U.S. average. The number of these establishments is 14% since 2012.

- **Professional Services.**
  Professional services businesses account for 10.6% Coeur d'Alene's business establishments, slightly below the U.S. average and eleventh among the benchmarks.

# BUSINESS ESTABLISHMENTS

**Coeur d'Alene Business Establishments, 2016**

| Category | Percent |
|----------|---------|
| Construction | 15.5% |
| Retail Trade | 12.5% |
| Health Care and Social Assistance | 10.8% |
| Professional Services | 10.6% |
| Accommodation and Food Services | 8.4% |
| Other Services | 7.3% |
| Finance and Insurance | 5.9% |
| Real Estate and Rental and Leasing | 5.7% |
| Manufacturiing | 5.2% |
| Administrative and Support | 5.2% |
| Wholesale Trade | 3.5% |
| Transportation and Warehousing | 2.3% |
| Arts, Entertainment and Recreation | 2.0% |
| Information | 1.5% |
| Educational Services | 1.3% |
| Agriculture | 1.0% |
| Management of Companies and... | 0.5% |
| Utilities | 0.3% |

Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

## Total Business Establishments, 5-Year Growth, 2016-2012



| City | Growth |
|------|--------|
| Bend, OR | 17.2% |
| Provo, UT | 16.7% |
| Castle Rock, CO | 14.8% |
| Bozeman, MT | 12.5% |
| Logan, UT | 10.3% |
| Fort Collins, CO | 9.7% |
| Boise City, ID | 9.0% |
| Coeur d'Alene, ID | 7.5% |
| Boulder, CO | 7.4% |
| Missoula, MT | 6.0% |
| Spokane, WA | 5.9% |
| Twin Falls, ID | 5.4% |
| Flagstaff, AZ | 4.3% |
| Grand Junction, CO | -3.2% |

U.S. Average: 4.4%
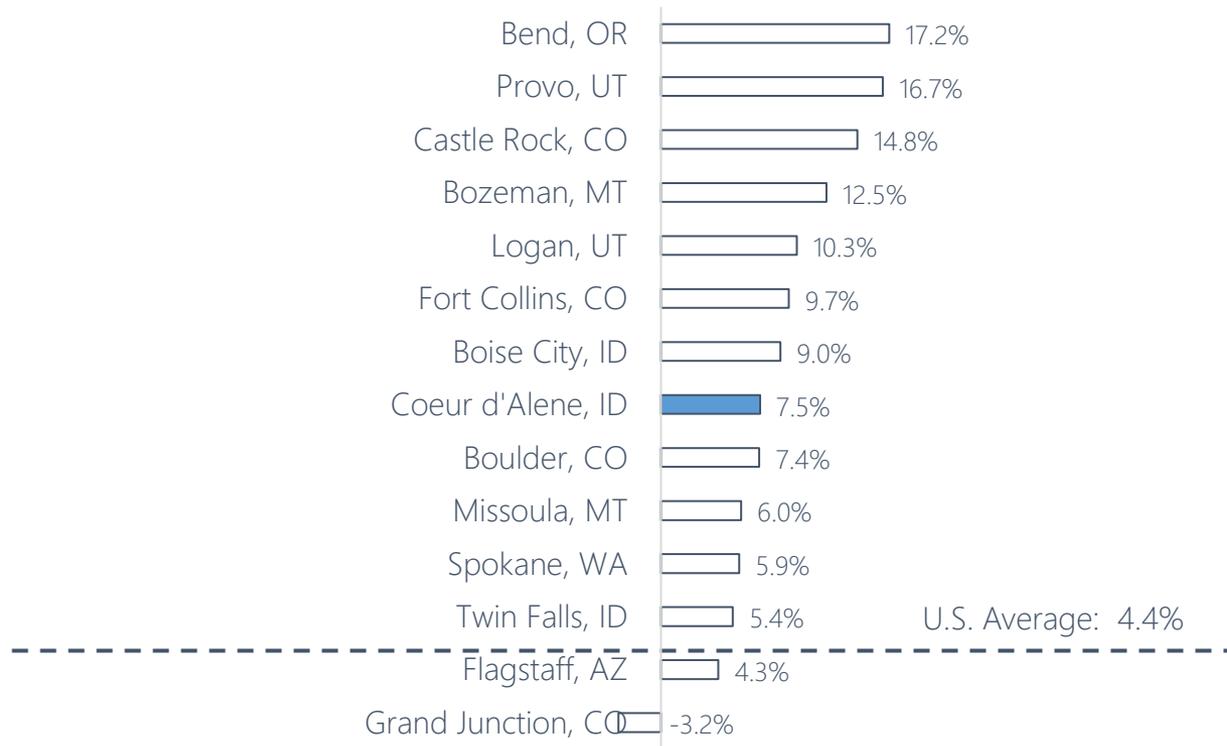
Source: U.S. County Business Patterns 2012- 2016

# BUSINESS ESTABLISHMENTS

**Agriculture
(% of Businesses), 2016**

| | |
|---|---|
| Missoula, MT | 1.0% |
| Coeur d'Alene, ID | 1.0% |
| Twin Falls, ID | 0.9% |
| Bend, OR | 0.6% |
| Bozeman, MT | 0.6% |
| Logan, UT | 0.3% |
| Castle Rock, CO | 0.3% |
| Flagstaff, AZ | 0.2% |
| Spokane, WA | 0.2% |
| Fort Collins, CO | 0.2% |
| Boulder, CO | 0.2% |
| Provo, UT | 0.1% |
| Grand Junction,... | 0.1% |
| Boise City, ID | 0.1% |

U.S. Average: 0.3%
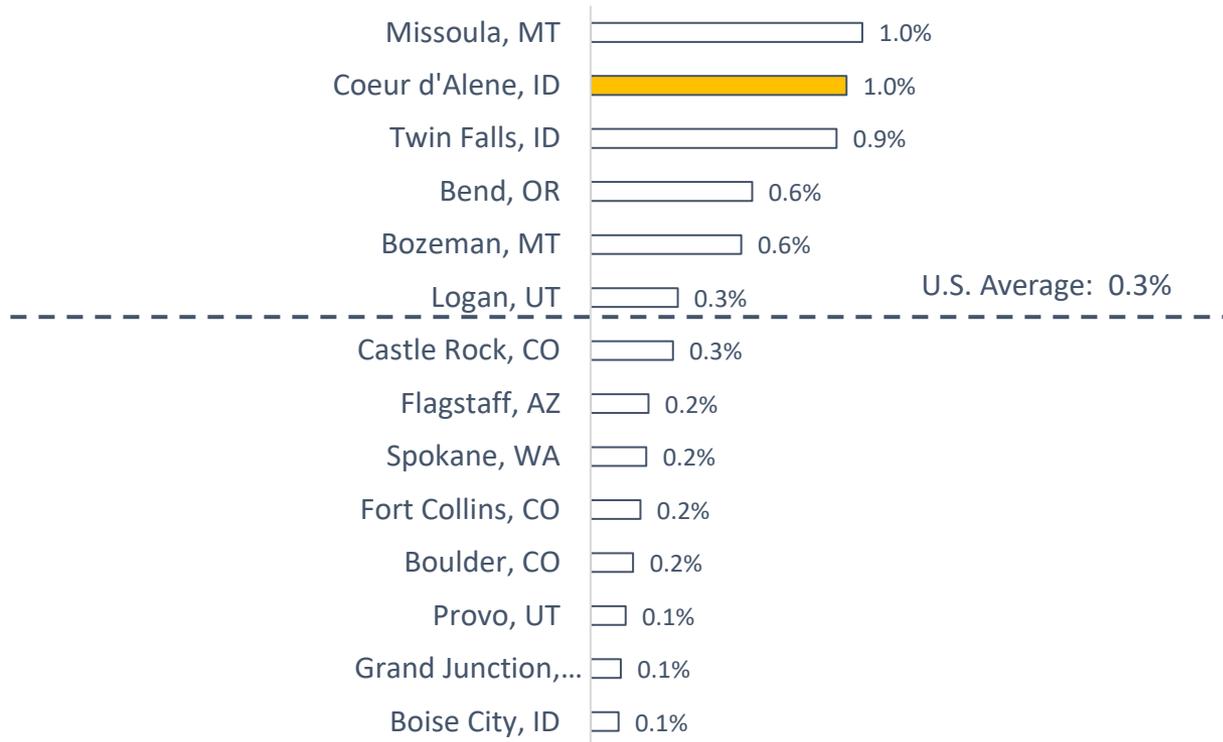
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

### Utilities
### (% of Businesses), 2016

| City | % |
|------|-----|
| Twin Falls, ID | 0.7% |
| Bend, OR | 0.4% |
| Flagstaff, AZ | 0.4% |
| Coeur d'Alene, ID | 0.3% |
| Grand Junction,... | 0.3% |
| Boise City, ID | 0.3% |
| Bozeman, MT | 0.3% |
| Missoula, MT | 0.2% |
| Logan, UT | 0.1% |
| Provo, UT | 0.1% |
| Boulder, CO | 0.1% |
| Spokane, WA | 0.1% |
| Fort Collins, CO | 0.1% |
| Castle Rock, CO | 0.1% |

U.S. Average: 0.2%
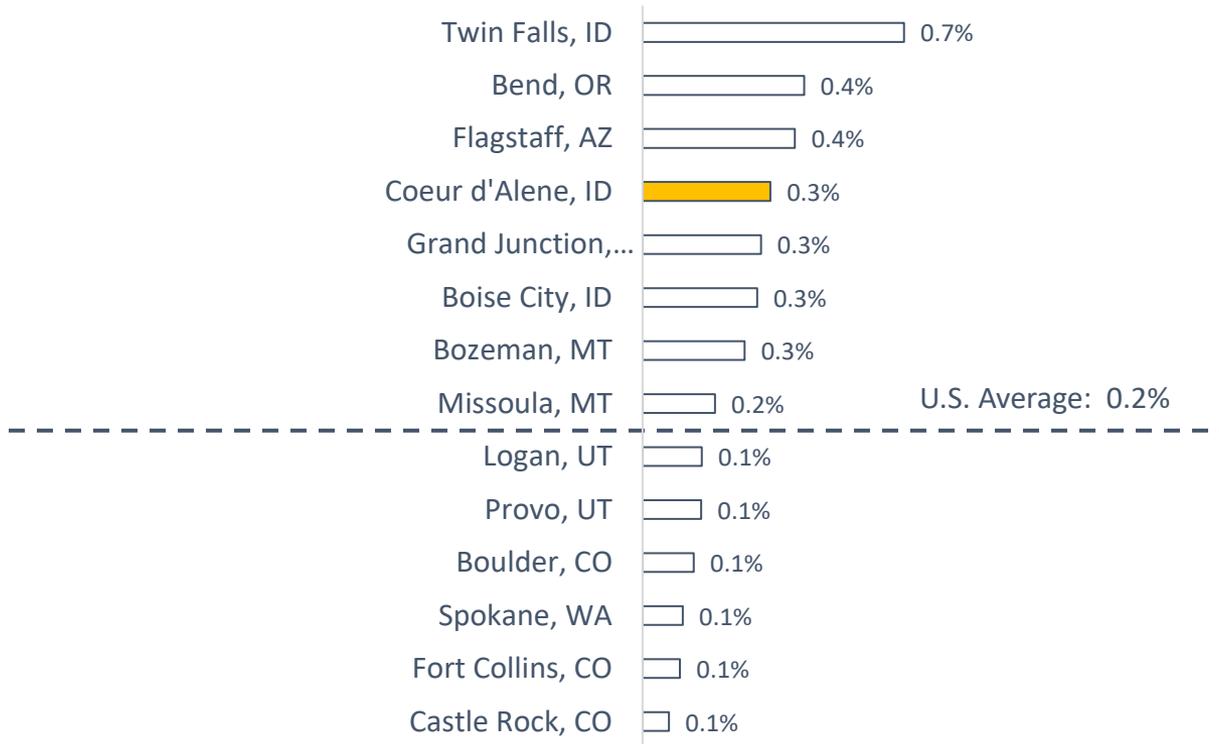
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Construction
(% of Businesses), 2016**

| City | % |
|------|-----|
| Bozeman, MT | 18.2% |
| Coeur d'Alene, ID | 15.5% |
| Bend, OR | 15.5% |
| Logan, UT | 13.8% |
| Provo, UT | 11.8% |
| Spokane, WA | 11.6% |
| Fort Collins, CO | 11.6% |
| Boise City, ID | 11.5% |
| Grand Junction,… | 11.4% |
| Twin Falls, ID | 11.3% |
| Missoula, MT | 11.0% |
| Castle Rock, CO | 9.9% |
| Flagstaff, AZ | 9.5% |
| Boulder, CO | 6.7% |

U.S. Average: 9.0%
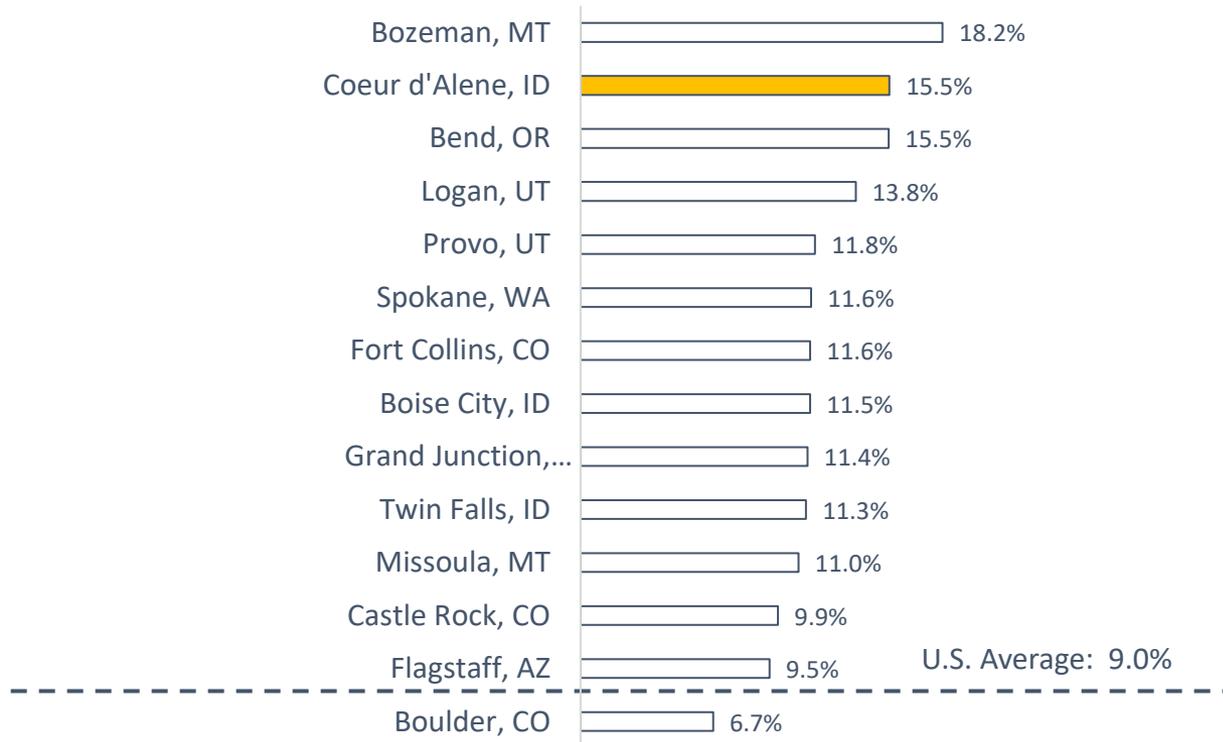
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Manufacturing**
**(% of Businesses), 2016**

| City | % |
|------|---|
| Logan, UT | 6.0% |
| Coeur d'Alene, ID | 5.2% |
| Bend, OR | 4.7% |
| Boulder, CO | 4.5% |
| Provo, UT | 4.3% |
| Fort Collins, CO | 4.1% |
| Bozeman, MT | 4.1% |
| Spokane, WA | 4.0% |
| Twin Falls, ID | 3.6% |
| Grand Junction,… | 3.3% |
| Boise City, ID | 3.0% |
| Missoula, MT | 2.8% |
| Flagstaff, AZ | 2.5% |
| Castle Rock, CO | 1.7% |

U.S. Average: 3.8%

Source: U.S. County Business Patterns 2016

44
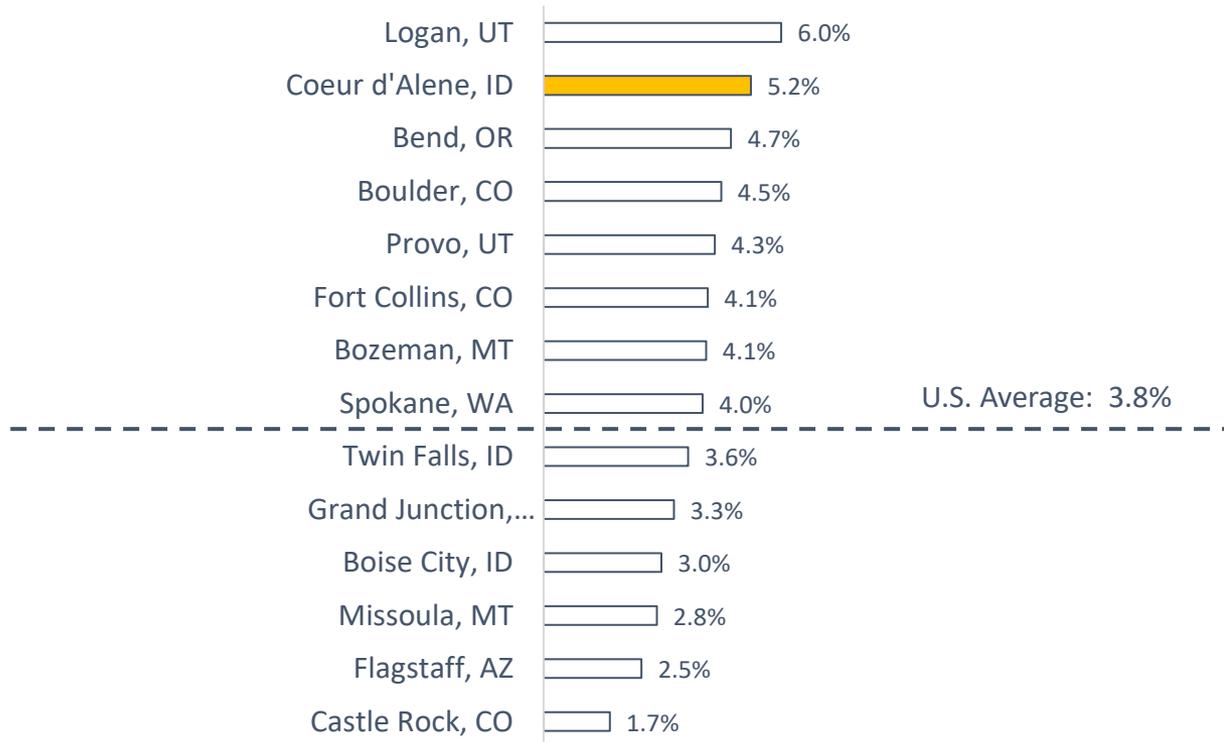
# BUSINESS ESTABLISHMENTS

**Wholesale Trade
(% of Businesses), 2016**

| City | % |
|------|------|
| Spokane, WA | 5.6% |
| Grand Junction,... | 5.5% |
| Twin Falls, ID | 5.5% |
| Boise City, ID | 5.2% |
| Logan, UT | 4.2% |
| Boulder, CO | 4.2% |
| Missoula, MT | 4.1% |
| Castle Rock, CO | 4.0% |
| Bend, OR | 3.8% |
| Provo, UT | 3.7% |
| Fort Collins, CO | 3.6% |
| Coeur d'Alene, ID | 3.5% |
| Bozeman, MT | 3.2% |
| Flagstaff, AZ | 2.8% |

U.S. Average: 5.3%
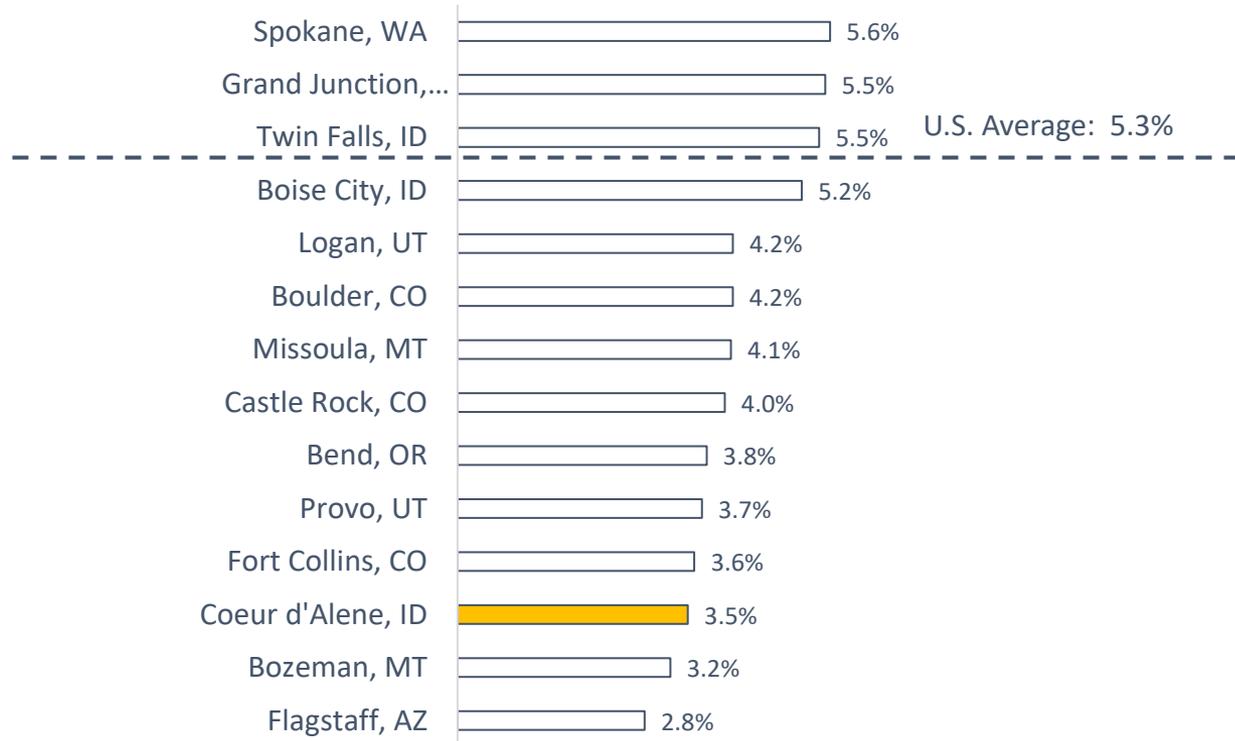
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Retail Trade
(% of Businesses), 2016**

| City | % |
|------|---|
| Flagstaff, AZ | 16.3% |
| Provo, UT | 14.7% |
| Twin Falls, ID | 14.0% |
| Logan, UT | 13.9% |
| Grand Junction,… | 13.3% |
| Missoula, MT | 13.1% |
| Spokane, WA | 12.7% |
| Coeur d'Alene, ID | 12.5% |
| Bend, OR | 11.8% |
| Fort Collins, CO | 11.7% |
| Boise City, ID | 11.4% |
| Bozeman, MT | 10.8% |
| Castle Rock, CO | 10.1% |
| Boulder, CO | 9.5% |

U.S. Average: 13.8%

Source: U.S. County Business Patterns 2016

46
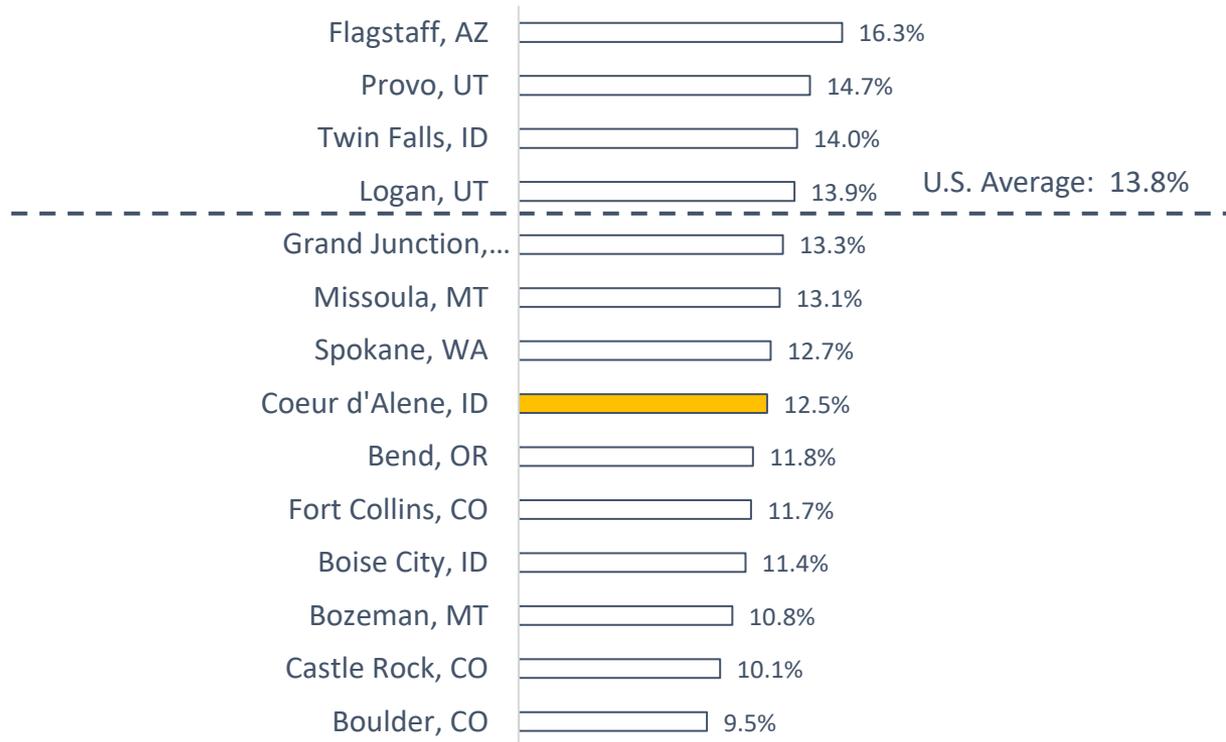
# BUSINESS ESTABLISHMENTS

**Transportation and Warehousing
(% of Businesses), 2016**



| City | % |
|------|---|
| Twin Falls, ID | 5.6% |
| Grand Junction,… | 4.1% |
| Missoula, MT | 3.3% |
| Flagstaff, AZ | 2.7% |
| Logan, UT | 2.5% |
| Boise City, ID | 2.4% |
| Spokane, WA | 2.3% |
| Bozeman, MT | 2.3% |
| Coeur d'Alene, ID | 2.3% |
| Bend, OR | 2.0% |
| Provo, UT | 1.9% |
| Fort Collins, CO | 1.8% |
| Castle Rock, CO | 1.1% |
| Boulder, CO | 0.7% |

U.S. Average:  3.0%
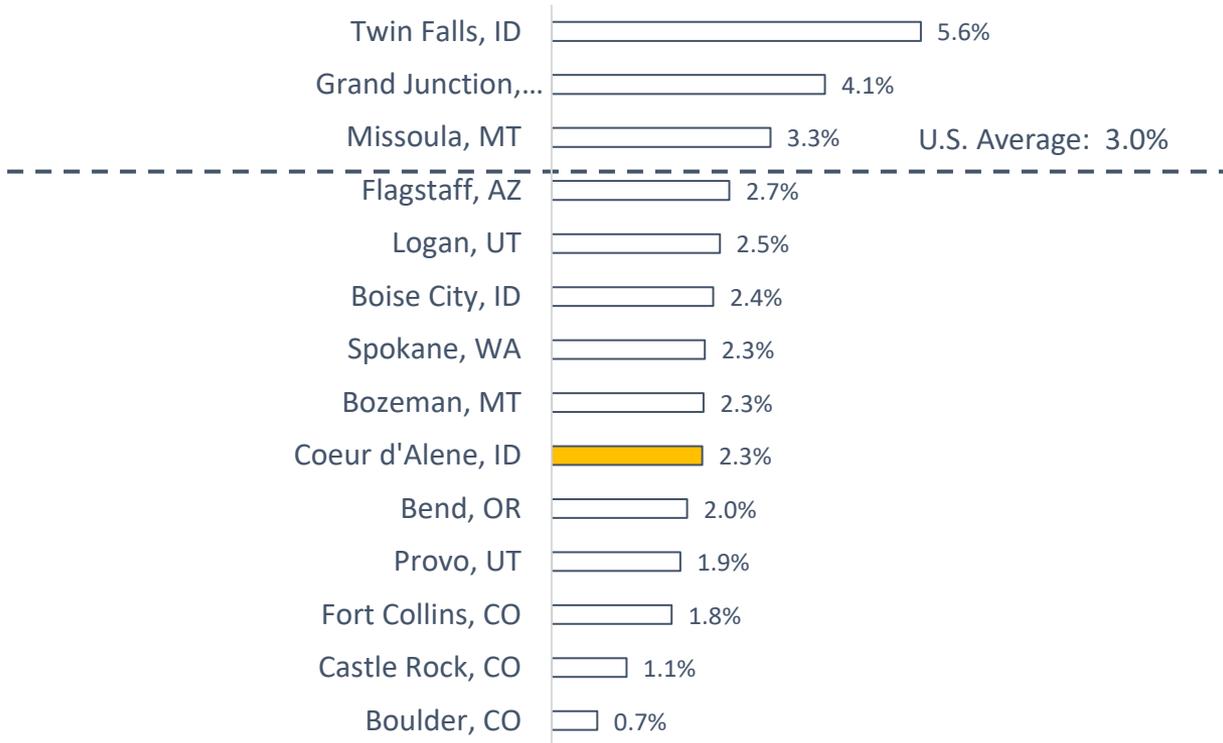
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Information**
**(% of Businesses), 2016**

| City | Information % |
|------|------|
| Provo, UT | 2.7% |
| Castle Rock, CO | 2.6% |
| Boulder, CO | 2.5% |
| Bend, OR | 2.2% |
| Bozeman, MT | 1.8% |
| Boise City, ID | 1.8% |
| Fort Collins, CO | 1.7% |
| Spokane, WA | 1.7% |
| Missoula, MT | 1.6% |
| Logan, UT | 1.6% |
| Coeur d'Alene, ID | 1.5% |
| Flagstaff, AZ | 1.5% |
| Grand Junction,… | 1.3% |
| Twin Falls, ID | 0.9% |

U.S. Average: 1.9%

Source: U.S. County Business Patterns 2016

48
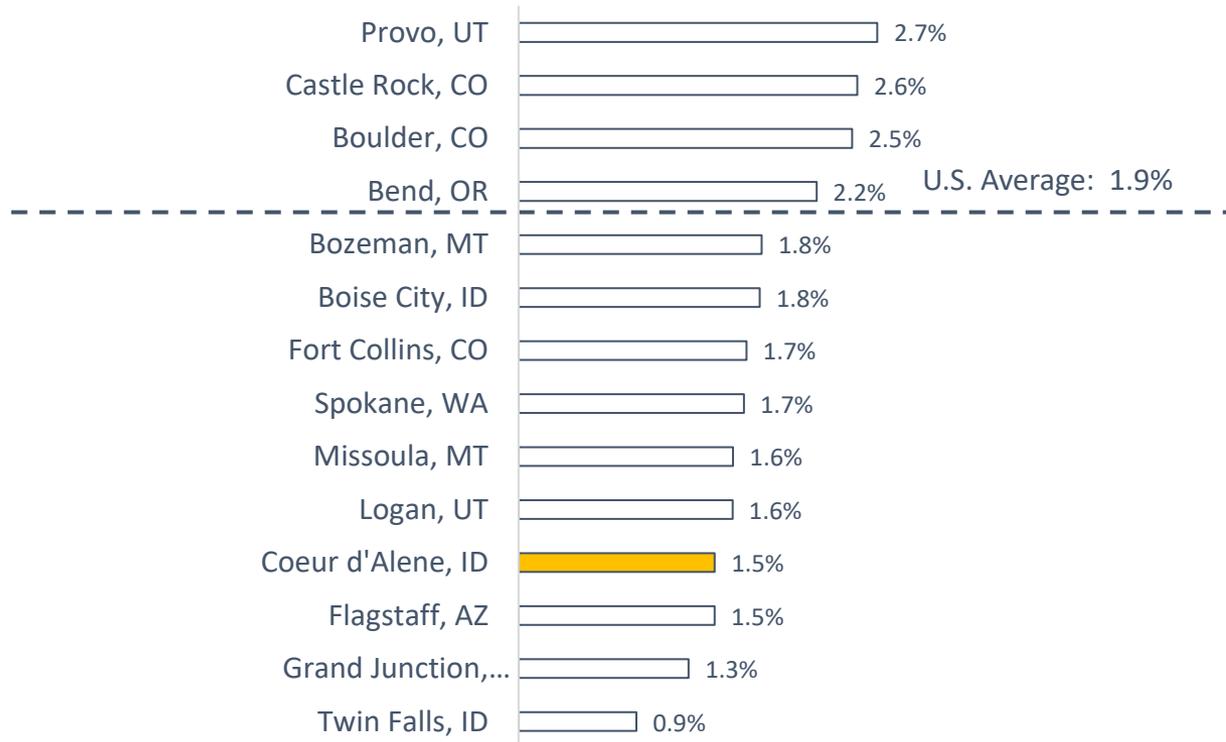
# BUSINESS ESTABLISHMENTS

**Finance and Insurance
(% of Businesses), 2016**

| City | % |
|------|---|
| Castle Rock, CO | 7.8% |
| Boise City, ID | 7.4% |
| Spokane, WA | 7.0% |
| Logan, UT | 6.1% |
| Provo, UT | 6.1% |
| Coeur d'Alene, ID | 5.9% |
| Grand Junction,… | 5.8% |
| Twin Falls, ID | 5.7% |
| Fort Collins, CO | 5.6% |
| Missoula, MT | 5.5% |
| Boulder, CO | 5.4% |
| Bend, OR | 4.6% |
| Flagstaff, AZ | 4.4% |
| Bozeman, MT | 4.2% |

U.S. Average: 6.1%

Source: U.S. County Business Patterns 2016

49
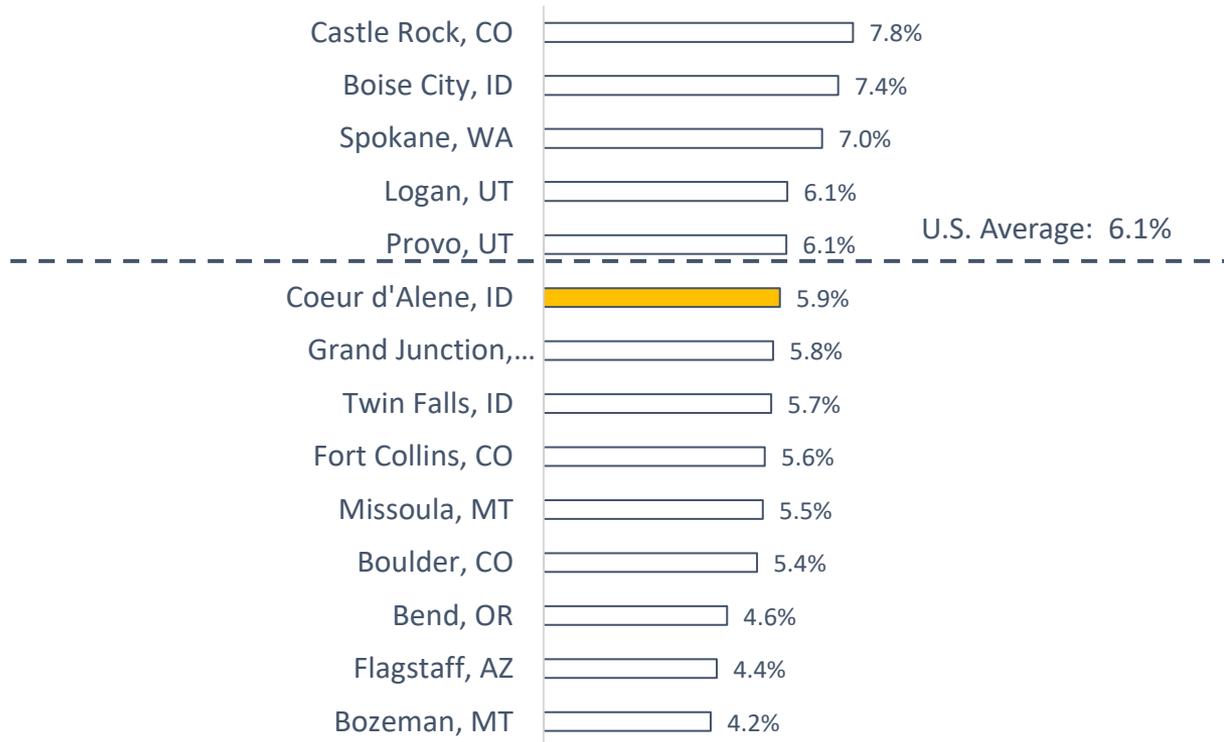
# BUSINESS ESTABLISHMENTS

**Real Estate and Rental and Leasing
(% of Businesses), 2016**

| City | % |
|------|------|
| Castle Rock, CO | 7.8% |
| Bozeman, MT | 7.6% |
| Bend, OR | 6.9% |
| Fort Collins, CO | 6.7% |
| Boise City, ID | 6.6% |
| Grand Junction,… | 6.6% |
| Provo, UT | 6.6% |
| Logan, UT | 6.5% |
| Flagstaff, AZ | 6.0% |
| Boulder, CO | 6.0% |
| Coeur d'Alene, ID | 5.7% |
| Missoula, MT | 5.4% |
| Twin Falls, ID | 5.3% |
| Spokane, WA | 5.1% |

U.S. Average: 5.0%
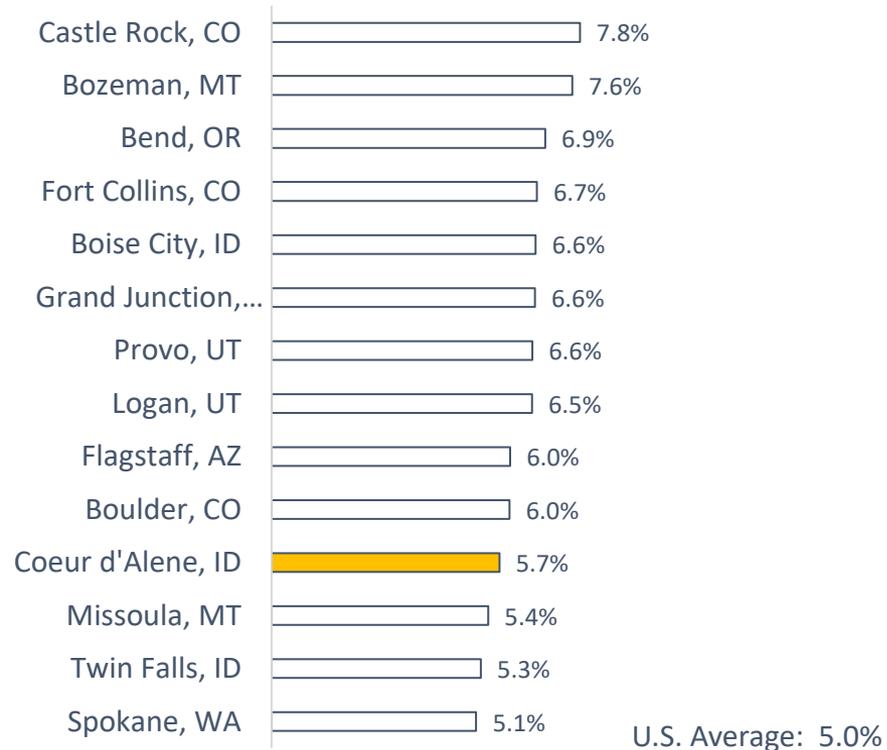
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Professional Services
(% of Businesses), 2016**

| City | % |
|------|---|
| Boulder, CO | 23.6% |
| Castle Rock, CO | 20.0% |
| Provo, UT | 15.7% |
| Fort Collins, CO | 15.2% |
| Bozeman, MT | 13.7% |
| Boise City, ID | 13.5% |
| Logan, UT | 12.7% |
| Missoula, MT | 12.6% |
| Bend, OR | 12.1% |
| Grand Junction,… | 11.3% |
| Coeur d'Alene, ID | 10.6% |
| Spokane, WA | 10.4% |
| Flagstaff, AZ | 9.6% |
| Twin Falls, ID | 9.1% |

U.S. Average: 11.6%
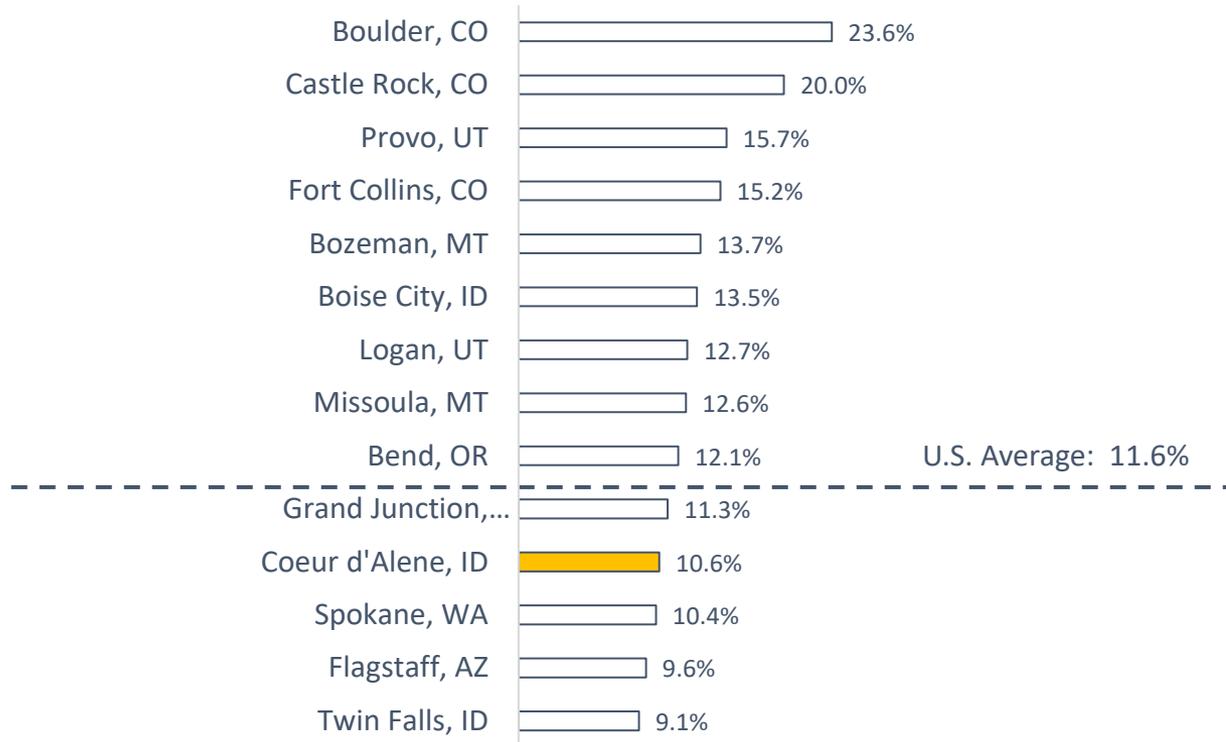
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Management of Companies and Enterprises
(% of Businesses), 2016**

| City | % |
|------|---|
| Boise City, ID | 0.9% |
| Spokane, WA | 0.7% |
| Castle Rock, CO | 0.6% |
| Twin Falls, ID | 0.5% |
| Coeur d'Alene, ID | 0.5% |
| Provo, UT | 0.5% |
| Missoula, MT | 0.5% |
| Boulder, CO | 0.5% |
| Fort Collins, CO | 0.4% |
| Bend, OR | 0.4% |
| Grand Junction,... | 0.4% |
| Logan, UT | 0.4% |
| Flagstaff, AZ | 0.3% |
| Bozeman, MT | 0.3% |

U.S. Average: 0.7%

Source: U.S. County Business Patterns 2016

52
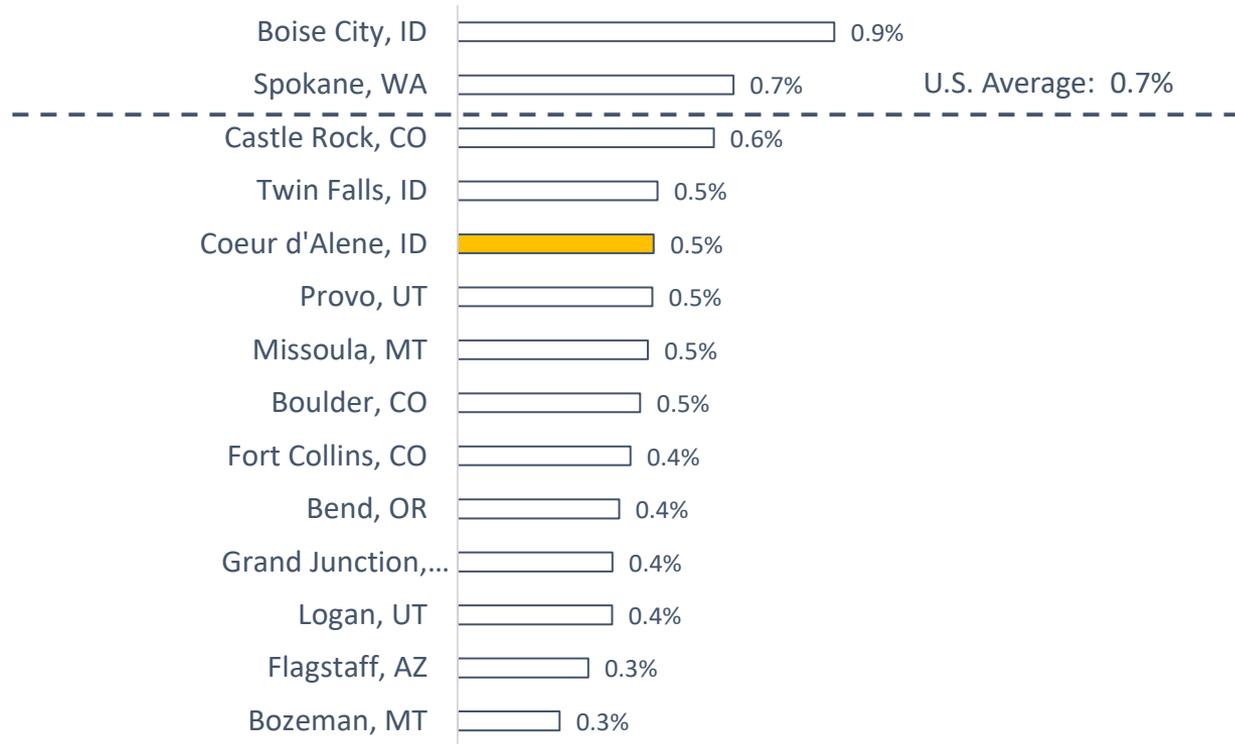
# BUSINESS ESTABLISHMENTS

**Administrative and Support
(% of Businesses), 2016**

| City | % |
|------|---|
| Boise City, ID | 6.0% |
| Bend, OR | 5.9% |
| Bozeman, MT | 5.6% |
| Castle Rock, CO | 5.5% |
| Fort Collins, CO | 5.5% |
| Missoula, MT | 5.5% |
| Spokane, WA | 5.4% |
| Provo, UT | 5.4% |
| Coeur d'Alene, ID | 5.2% |
| Logan, UT | 5.1% |
| Grand Junction,… | 5.0% |
| Boulder, CO | 4.9% |
| Twin Falls, ID | 4.5% |
| Flagstaff, AZ | 4.1% |

U.S. Average: 5.3%
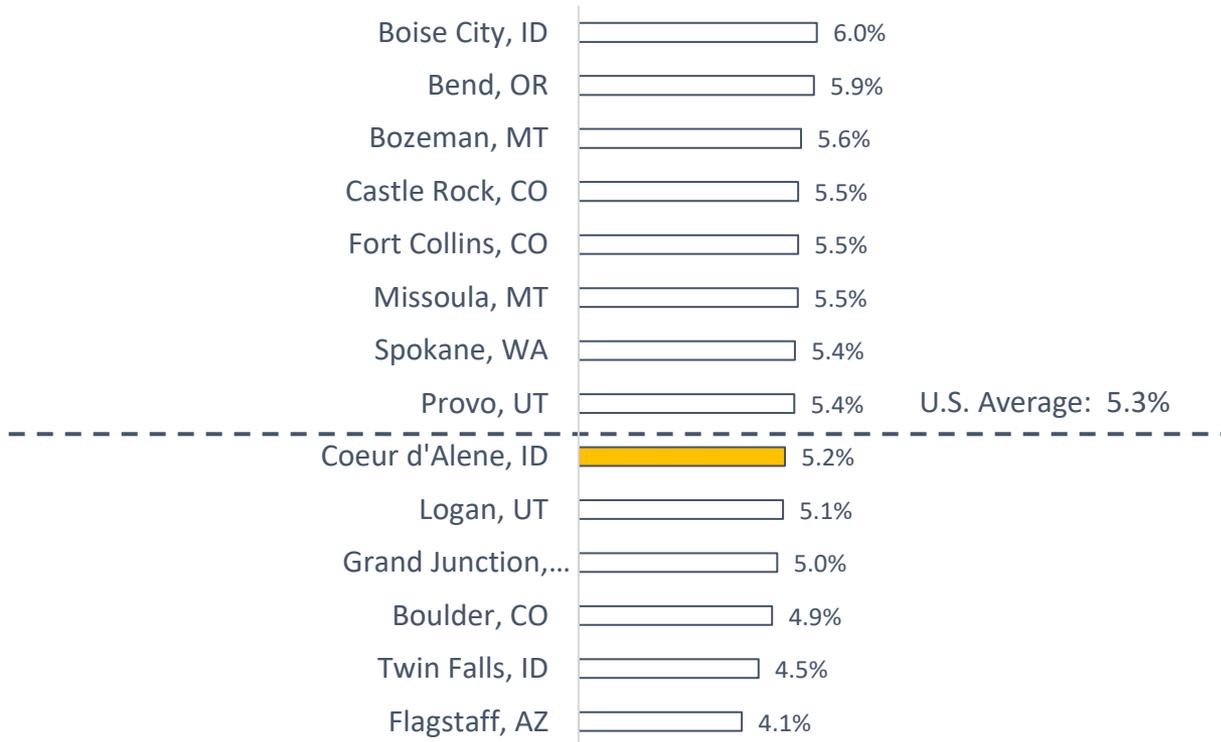
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Educational Services
(% of Businesses), 2016**

| City | % |
|------|-----|
| Boulder, CO | 2.3% |
| Castle Rock, CO | 2.2% |
| Provo, UT | 2.1% |
| Missoula, MT | 1.7% |
| Fort Collins, CO | 1.6% |
| Boise City, ID | 1.3% |
| Coeur d'Alene, ID | 1.3% |
| Bozeman, MT | 1.3% |
| Spokane, WA | 1.2% |
| Bend, OR | 1.2% |
| Logan, UT | 1.1% |
| Flagstaff, AZ | 1.0% |
| Grand Junction,… | 0.9% |
| Twin Falls, ID | 0.5% |

U.S. Average: 1.3%
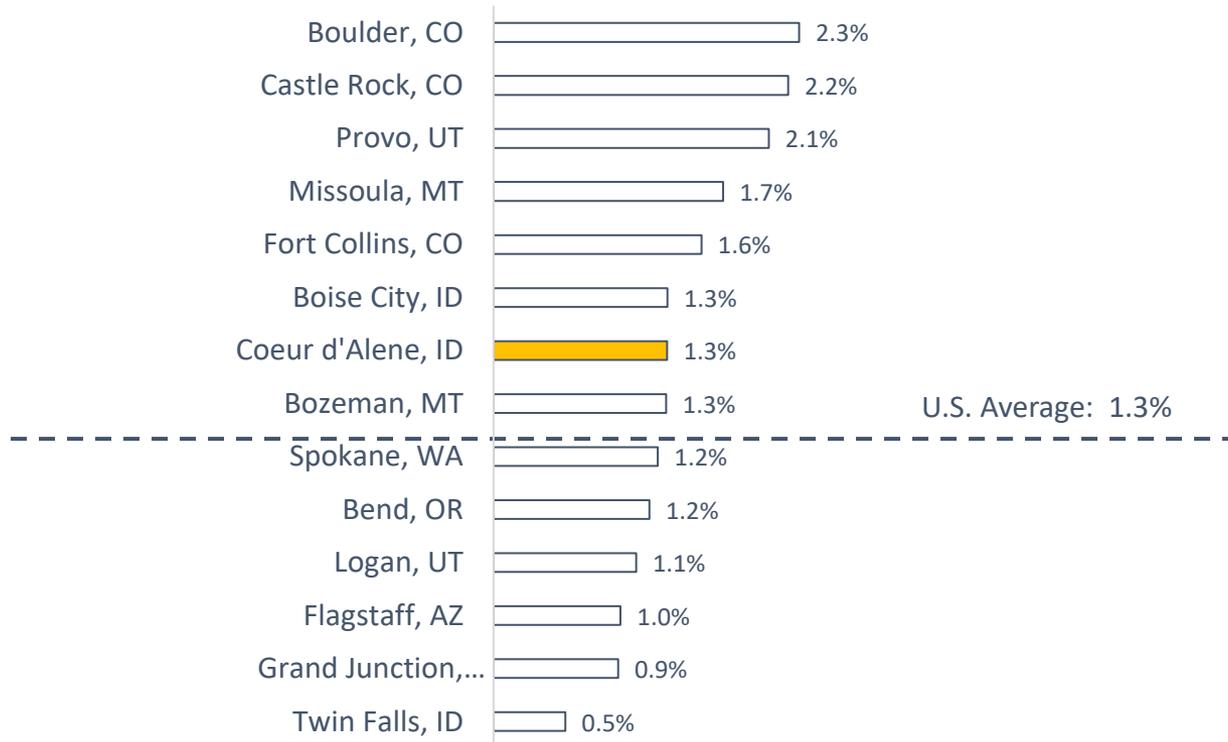
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Health and Social Assistance
(% of Businesses), 2016**

| City | Percentage |
|---|---|
| Fort Collins, CO | 14.5% |
| Spokane, WA | 12.4% |
| Missoula, MT | 11.7% |
| Boulder, CO | 11.6% |
| Logan, UT | 11.3% |
| Boise City, ID | 11.3% |
| Coeur d'Alene, ID | 10.8% |
| Fort Collins, CO | 10.6% |
| Flagstaff, AZ | 10.6% |
| Provo, UT | 10.6% |
| Bend, OR | 9.9% |
| Castle Rock, CO | 9.9% |
| Grand Junction,… | 9.8% |
| Bozeman, MT | 7.8% |

U.S. Average: 11.5%
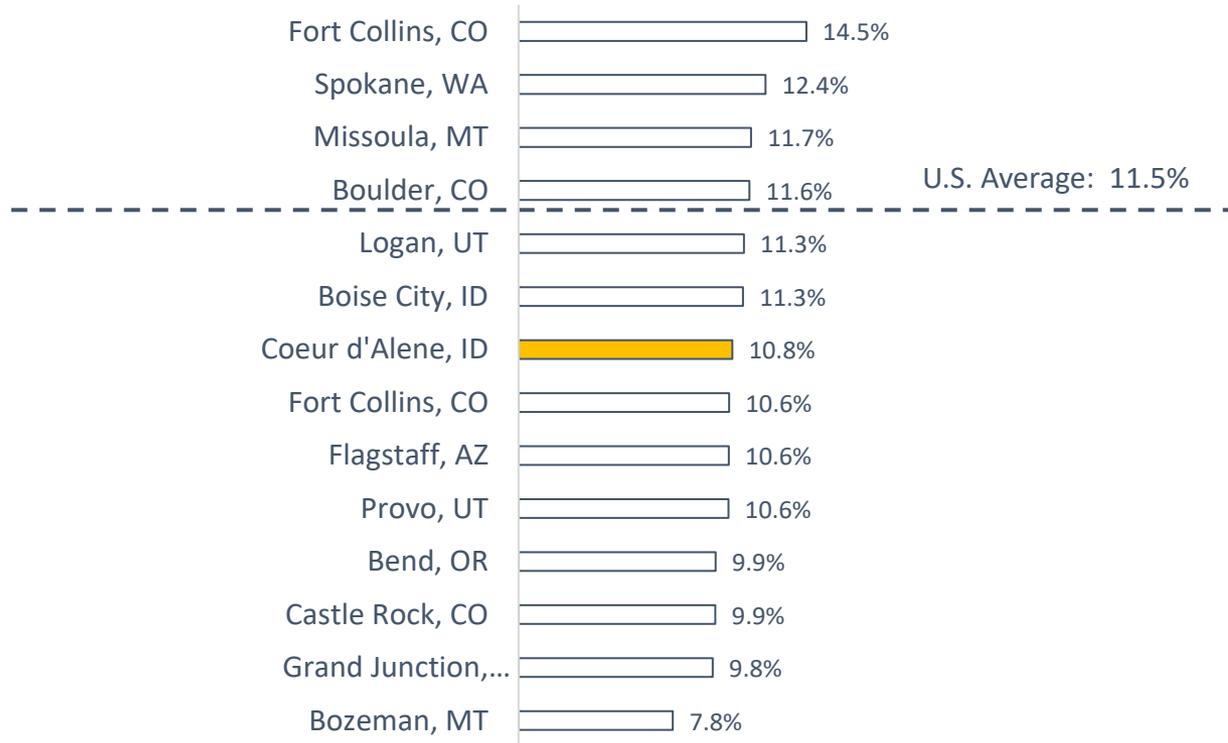
Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Arts, Entertainment, and Recreation
(% of Businesses), 2016**

| City | % |
|------|---|
| Bozeman, MT | 2.8% |
| Flagstaff, AZ | 2.6% |
| Missoula, MT | 2.6% |
| Boulder, CO | 2.2% |
| Logan, UT | 2.0% |
| Coeur d'Alene, ID | 2.0% |
| Fort Collins, CO | 1.9% |
| Bend, OR | 1.8% |
| Provo, UT | 1.6% |
| Twin Falls, ID | 1.6% |
| Grand Junction,… | 1.5% |
| Castle Rock, CO | 1.5% |
| Boise City, ID | 1.5% |
| Spokane, WA | 1.4% |
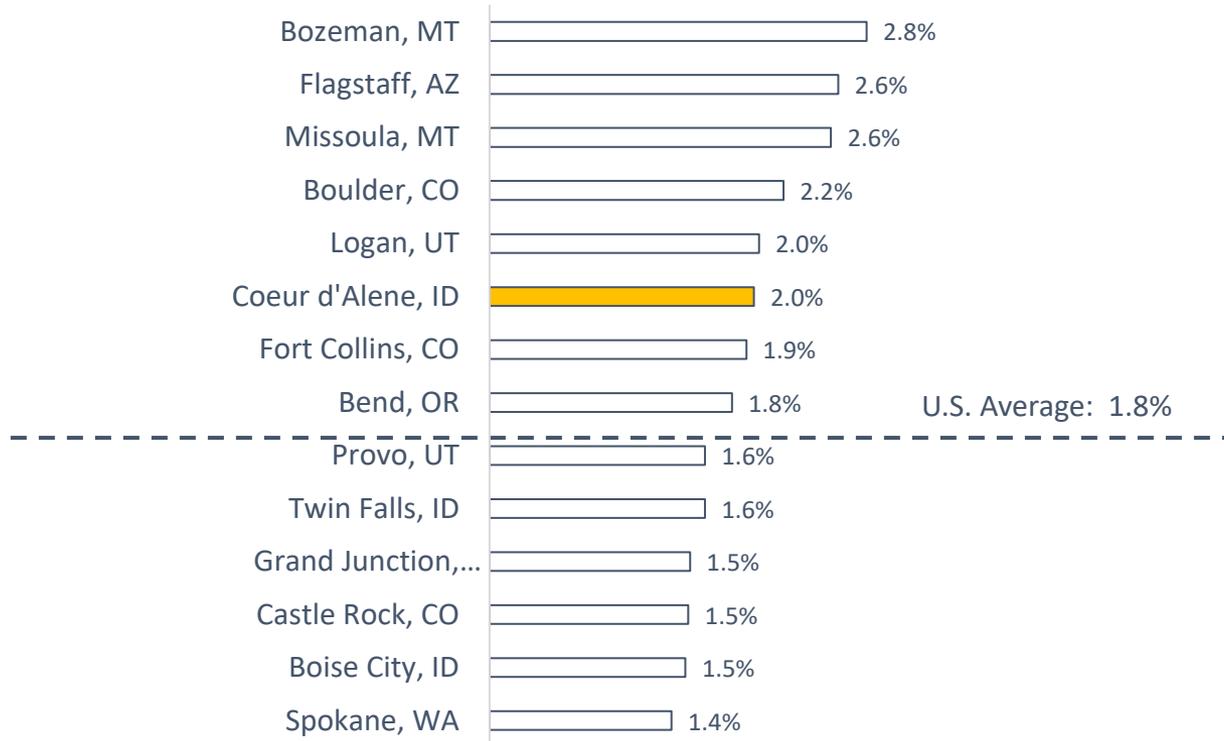
U.S. Average: 1.8%

Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Accommodation and Food Services
(% of Businesses), 2016**



| City | % |
|------|-----|
| Flagstaff, AZ | 16.1% |
| Fort Collins, CO | 8.6% |
| Spokane, WA | 8.4% |
| Bend, OR | 8.4% |
| Coeur d'Alene, ID | 8.4% |
| Missoula, MT | 8.3% |
| Bozeman, MT | 8.2% |
| Boise City, ID | 7.6% |
| Twin Falls, ID | 7.3% |
| Grand Junction,… | 7.2% |
| Boulder, CO | 7.1% |
| Provo, UT | 6.1% |
| Castle Rock, CO | 6.1% |
| Logan, UT | 5.3% |
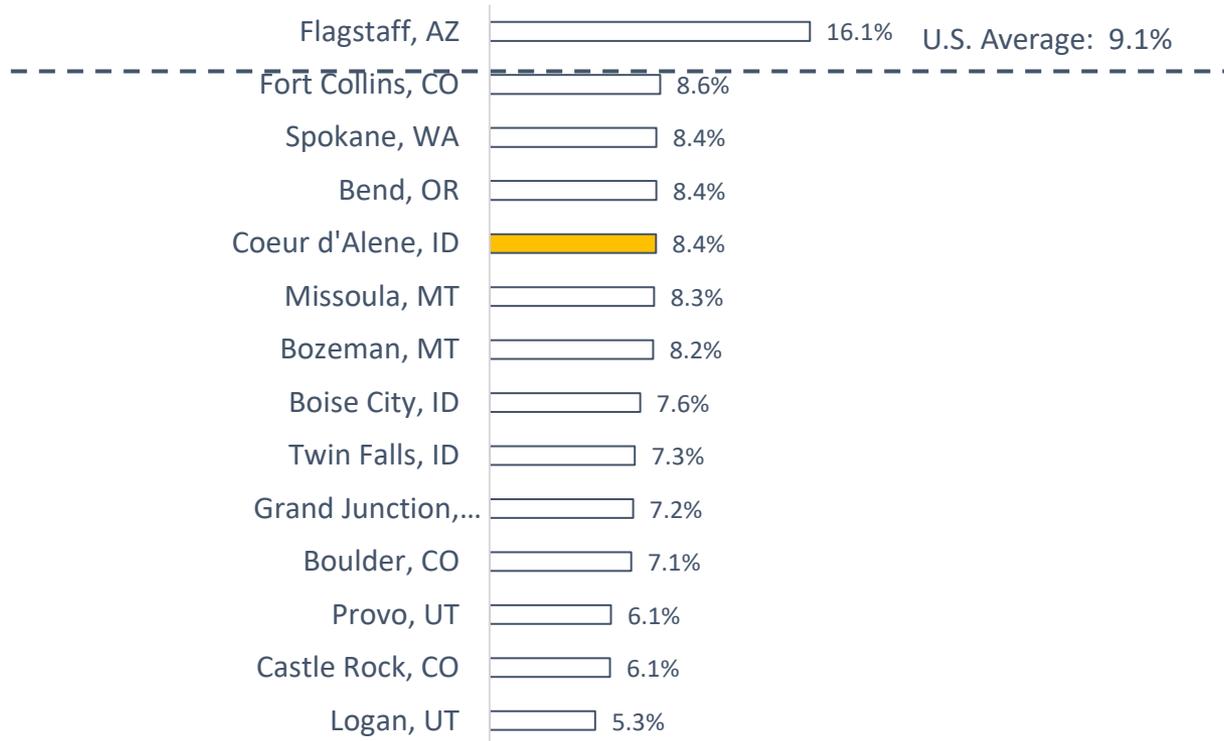
U.S. Average: 9.1%

Source: U.S. County Business Patterns 2016

# BUSINESS ESTABLISHMENTS

**Other Services
(% of Businesses), 2016**

U.S. Average: 9.7%

| City | % |
|------|-----|
| Grand Junction,… | 9.5% |
| Spokane, WA | 9.3% |
| Flagstaff, AZ | 9.0% |
| Missoula, MT | 8.5% |
| Fort Collins, CO | 8.4% |
| Twin Falls, ID | 8.2% |
| Castle Rock, CO | 8.0% |
| Boulder, CO | 7.7% |
| Boise City, ID | 7.7% |
| Coeur d'Alene, ID | 7.3% |
| Bend, OR | 7.2% |
| Bozeman, MT | 7.0% |
| Logan, UT | 6.5% |
| Provo, UT | 5.6% |

Source: U.S. County Business Patterns 2016

58
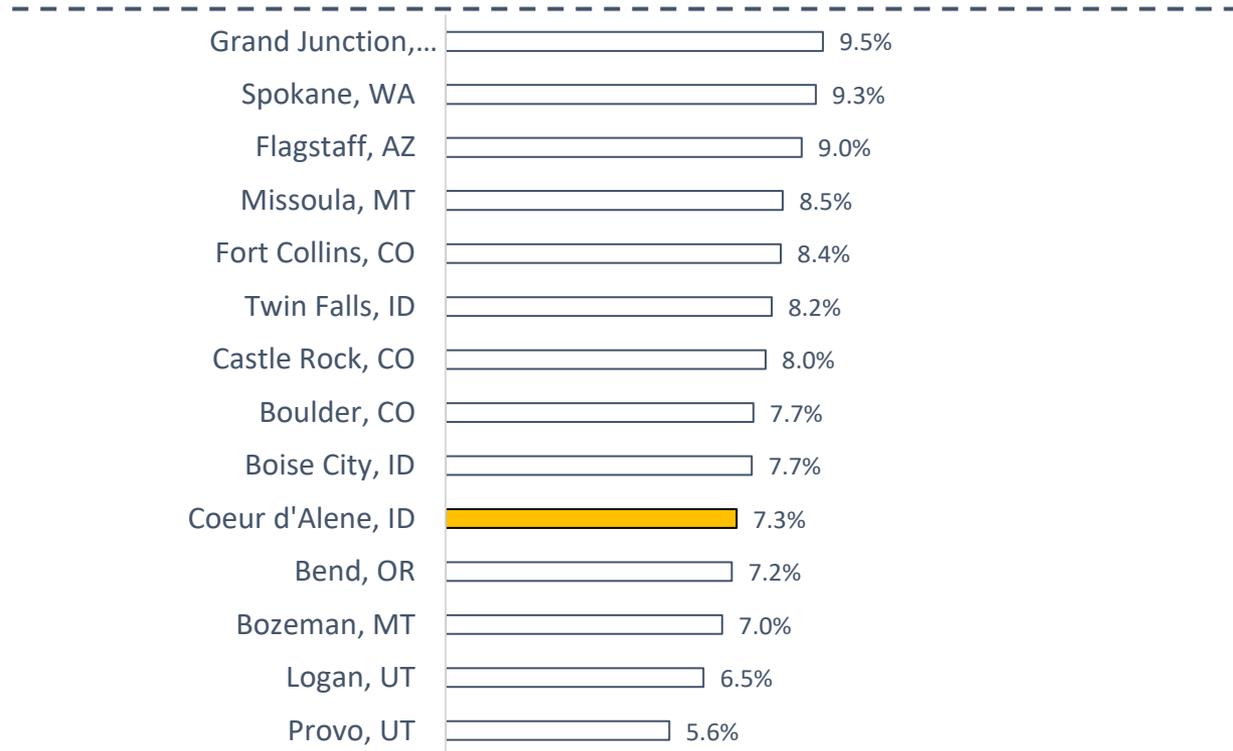
# RESIDENTS BY OCCUPATIONS

# TAKEAWAYS

- **Service Sector**
  Five in ten Coeur d'Alene workers (47.9%) have skills associated with the service sector – a share that ranks second among the benchmark cities and above the U.S. average (41.5%). Coeur d'Alene's service sector has increased 6% since 2013, two times the national average.

- **Working Sector**
  Approximately 4,500 Coeur d'Alene residents make up the city's working sector (20%) – skills associated production/ manufacturing, transportation, and maintenance. This is the fourth highest share among the benchmark cities. There's be a 1% decrease in the working sector since 2013.

- **Creative Sector**
  Coeur d'Alene's creative class (32.3%) – workers with skills in technology, arts/ culture, professional services, and education – ranks second to land among the benchmark cities and is well below the U.S. average (37.4%). That said Coeur d'Alene's creative class has grown more than 20% since 2013, ranking fourth and on par with Bend, Castle Rock, and Bozeman.

# OCCUPATIONS

## Residents by Occupational Sector, 2017



**Working Sector**
- Building and grounds cleaning and maintenance
- Construction and extraction
- Installation and repair
- Production
- Transportation and moving

**Creative Sector**
- Management
- Business and financial operations
- Computer and mathematical
- Architecture and engineering
- Life, physical and social science
- Education
- Legal
- Arts, design, entertainments and media
- Education and training

**Service Sector**
- Healthcare support
- Protective services
- Food preparation
- Personal care
- Sales
- Office and administrative support

Pie chart values:
- 19.9% (Working Sector)
- 32.2% (Creative Sector)
- 47.9% (Service Sector)

Legend: ■ Working Sector  ■ Creative Sector  ■ Service Sector

Source: U.S. Census American Community Survey 2017

61

# OCCUPATIONS

## Knowledge Sector, 2017

### Knowledge Sector
- Management
- Business and financial operations
- Computer and mathematical
- Architecture and engineering
- Life, physical and social science
- Education
- Legal
- Arts, design, entertainments and media
- Education and training

| City | Knowledge Sector |
|------|------|
| Boulder, CO | 56.8% |
| Castle Rock, CO | 48.3% |
| Fort Collins, CO | 45.7% |
| Boise City, ID | 44.0% |
| Bend, OR | 43.0% |
| Bozeman, MT | 42.1% |
| Provo, UT | 41.8% |
| Missoula, MT | 41.4% |
| Flagstaff, AZ | 38.1% |
| Grand Junction, CO | 36.2% |
| Spokane, WA | 35.2% |
| Logan, UT | 34.7% |
| Coeur d'Alene, ID | 32.3% |
| Twin Falls, ID | 27.3% |

U.S. Average: 37.4%

Source: U.S. Census American Community Survey 2017

62
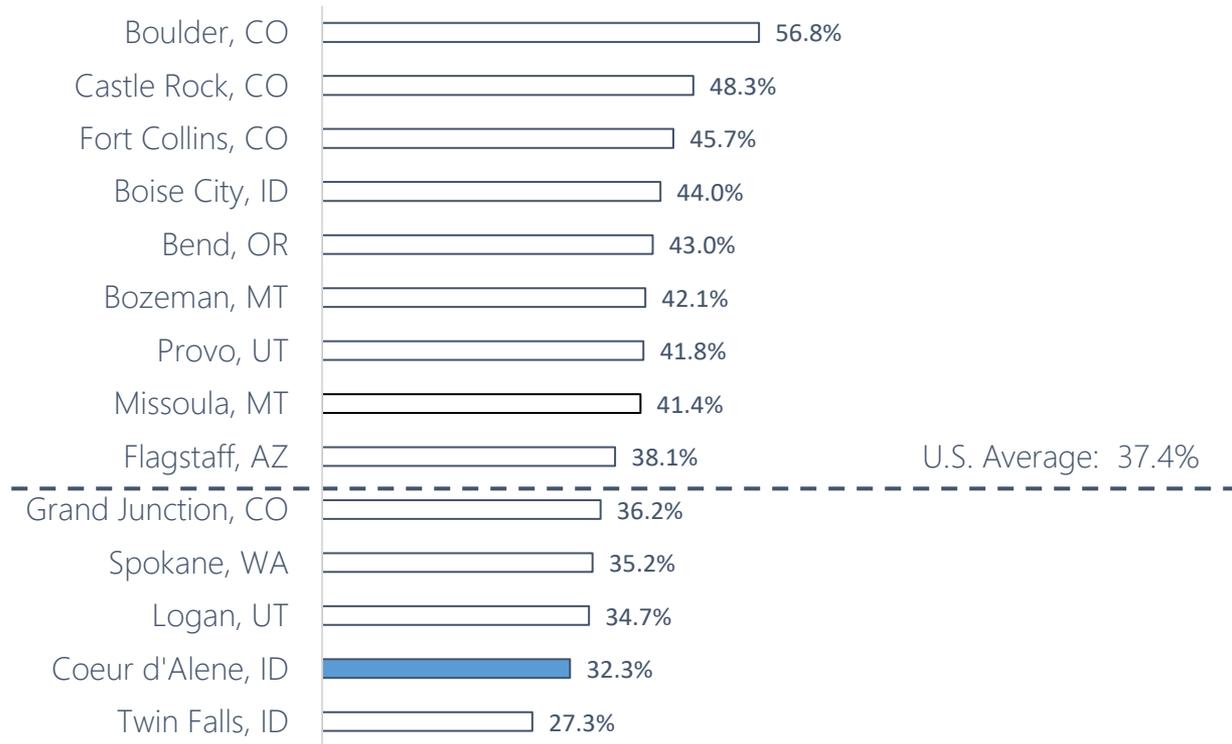
# OCCUPATIONS

**Service Sector, 2017**

Service Sector
- Healthcare support
- Protective services
- Food preparation
- Personal care
- Sales
- Office and administrative support

| City | Percentage |
|------|-----------|
| Flagstaff, AZ | 48.6% |
| Coeur d'Alene, ID | 47.9% |
| Spokane, WA | 45.6% |
| Twin Falls, ID | 45.3% |
| Provo, UT | 44.4% |
| Missoula, MT | 44.0% |
| Grand Junction, CO | 43.8% |
| Logan, UT | 42.4% |
| Bend, OR | 42.2% |
| Boise City, ID | 41.5% |
| Fort Collins, CO | 41.0% |
| Bozeman, MT | 40.5% |
| Castle Rock, CO | 39.4% |
| Boulder, CO | 35.9% |

U.S. Average: 41.5%
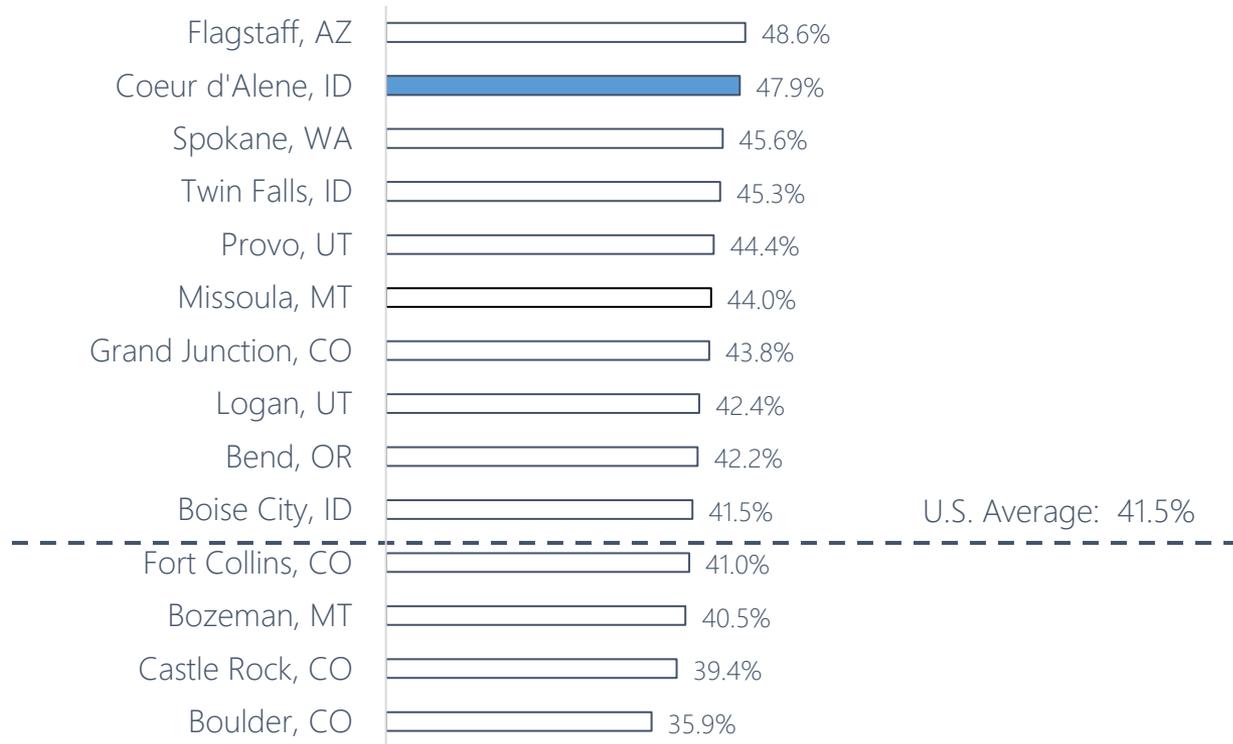
Source: U.S. Census American Community Survey 2017

# OCCUPATIONS

## Working Sector, 2017

Working Sector
- Building and grounds cleaning and maintenance
- Construction and extraction
- Installation and repair
- Production
- Transportation and moving

| City | Percentage |
|------|-----------|
| Twin Falls, ID | 27.4% |
| Logan, UT | 22.9% |
| Grand Junction, CO | 20.0% |
| Coeur d'Alene, ID | 19.9% |
| Spokane, WA | 19.2% |
| Bozeman, MT | 17.4% |
| Bend, OR | 14.8% |
| Missoula, MT | 14.6% |
| Boise City, ID | 14.5% |
| Provo, UT | 13.8% |
| Fort Collins, CO | 13.3% |
| Flagstaff, AZ | 13.2% |
| Castle Rock, CO | 12.3% |
| Boulder, CO | 7.2% |

U.S. Average: 21.5%
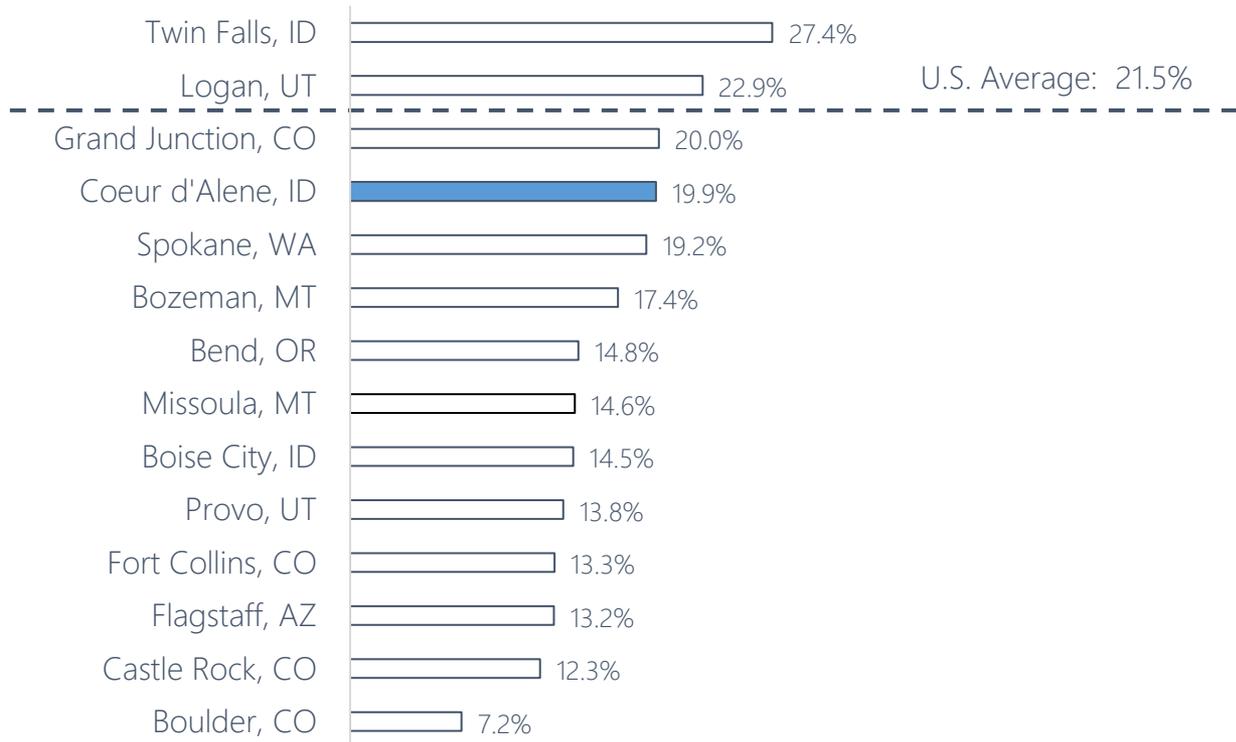
Source: U.S. Census American Community Survey 2017

# OCCUPATIONS

**Residents by Occupation, 2017**
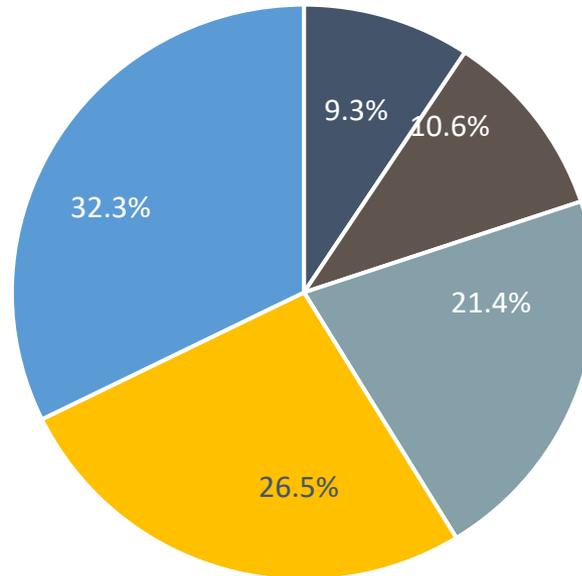


- ■ Natural Resources, Construction, and Maintenance
- ■ Production, Transportation, and Material Moving
- ■ Service
- ■ Sales and Office
- ■ Management, Business, Science, and Arts

Source: U.S. Census American Community Survey 2017

# OCCUPATIONS

**Management, Business, Science and Arts
(% of Residents), 2017**

| City | % |
|------|---|
| Boulder, CO | 56.8% |
| Castle Rock, CO | 48.3% |
| Fort Collins, CO | 45.7% |
| Boise City, ID | 44.0% |
| Bend, OR | 43.0% |
| Bozeman, MT | 42.1% |
| Provo, UT | 41.8% |
| Missoula, MT | 41.4% |
| Flagstaff, AZ | 38.1% |
| Grand Junction,… | 36.2% |
| Spokane, WA | 35.2% |
| Logan, UT | 34.7% |
| Coeur d'Alene, ID | 32.3% |
| Twin Falls, ID | 27.3% |

U.S. Average: 37.4%
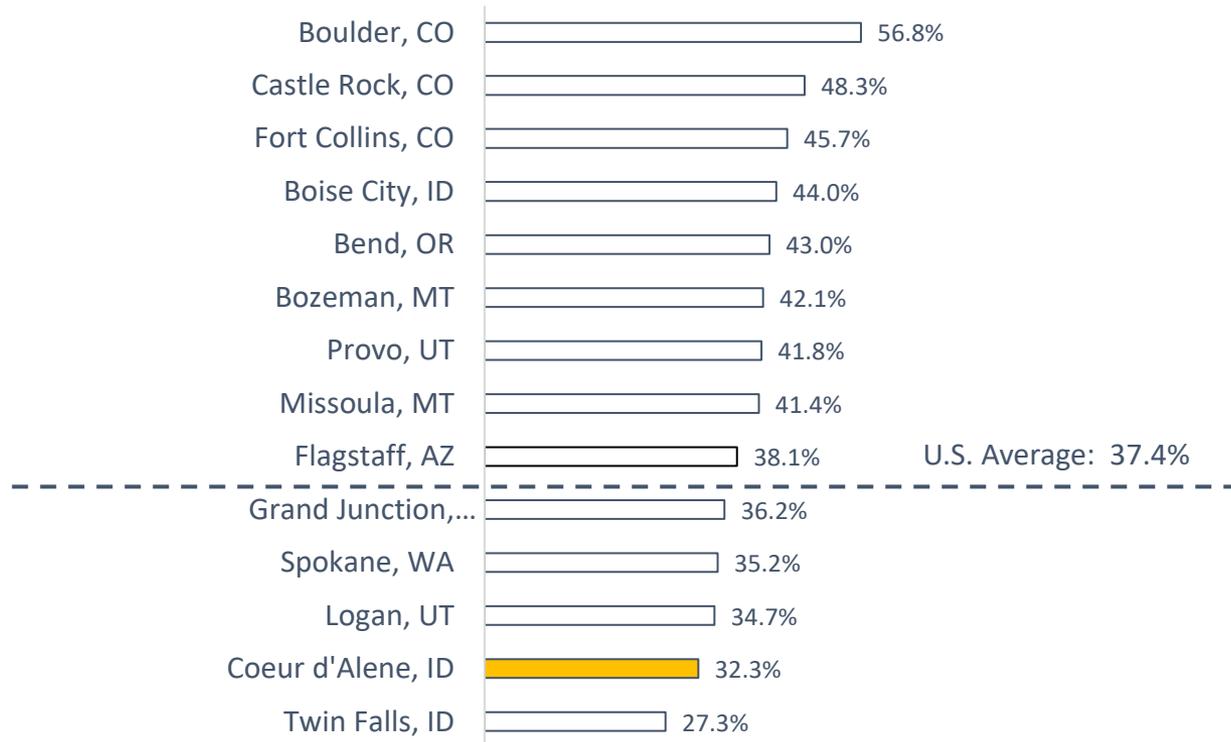
Source: U.S. Census American Community Survey 2017

# OCCUPATIONS

**Service
(% of Residents), 2017**

| City | % |
|------|---|
| Flagstaff, AZ | 23.7% |
| Missoula, MT | 21.7% |
| Coeur d'Alene, ID | 21.4% |
| Spokane, WA | 20.8% |
| Twin Falls, ID | 19.9% |
| Bozeman, MT | 19.0% |
| Bend, OR | 19.0% |
| Grand Junction,… | 18.7% |
| Fort Collins, CO | 18.4% |
| Provo, UT | 18.0% |
| Logan, UT | 17.6% |
| Boise City, ID | 17.0% |
| Boulder, CO | 16.6% |
| Castle Rock, CO | 14.1% |

U.S. Average: 18.0%
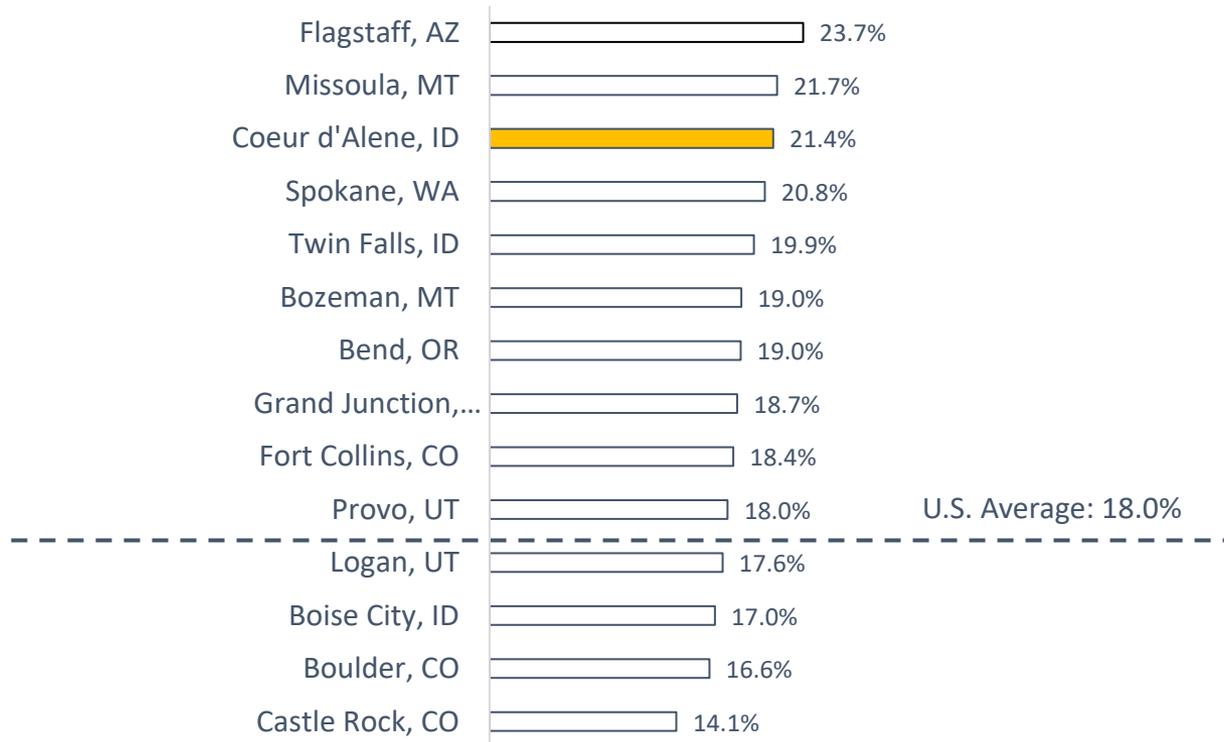
Source: U.S. Census American Community Survey 2017

# OCCUPATIONS

## Sales and Office
## (% of Residents), 2017

| City | % |
|------|---|
| Coeur d'Alene, ID | 26.5% |
| Provo, UT | 26.4% |
| Twin Falls, ID | 25.3% |
| Castle Rock, CO | 25.3% |
| Grand Junction,... | 25.1% |
| Flagstaff, AZ | 25.0% |
| Logan, UT | 24.8% |
| Spokane, WA | 24.8% |
| Boise City, ID | 24.5% |
| Bend, OR | 23.2% |
| Fort Collins, CO | 22.6% |
| Missoula, MT | 22.3% |
| Bozeman, MT | 21.6% |
| Boulder, CO | 19.4% |

U.S. Average: 23.5%
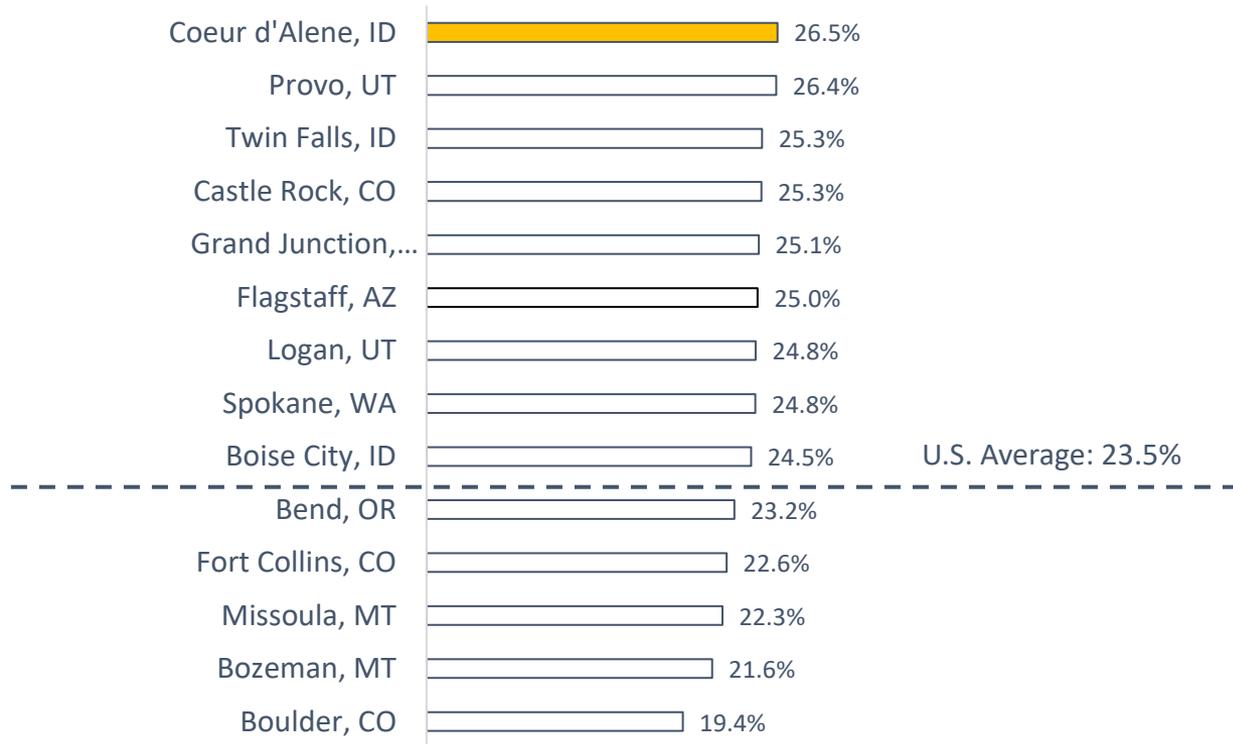
Source: U.S. Census American Community Survey 2017

# OCCUPATIONS

**Natural Resources, Construction and Maintenance (% of Residents), 2017**

| City | Percent |
|------|---------|
| Twin Falls, ID | 10.9% |
| Grand Junction,… | 9.7% |
| Bozeman, MT | 9.7% |
| Coeur d'Alene, ID | 9.3% |
| Logan, UT | 7.3% |
| Bend, OR | 7.2% |
| Spokane, WA | 7.1% |
| Missoula, MT | 6.9% |
| Boise City, ID | 6.3% |
| Fort Collins, CO | 6.1% |
| Castle Rock, CO | 6.0% |
| Provo, UT | 5.7% |
| Flagstaff, AZ | 5.7% |
| Boulder, CO | 2.8% |

U.S. Average: 8.9%
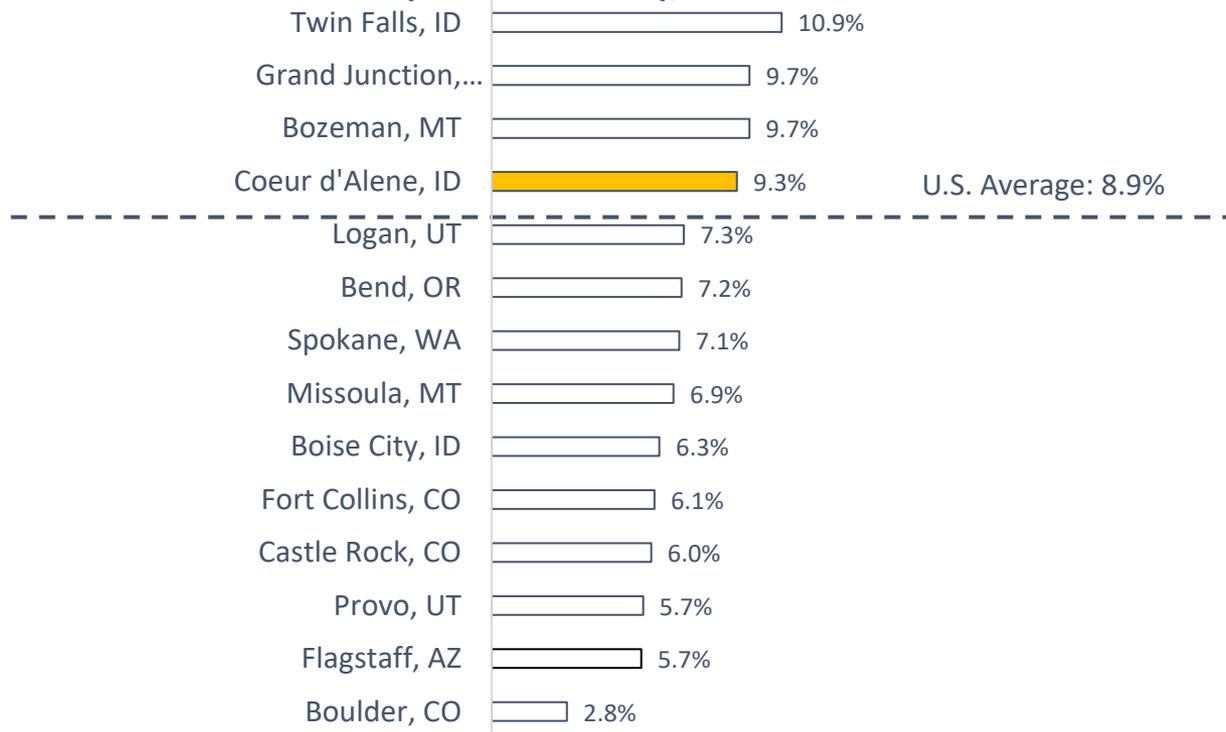
Source: U.S. Census American Community Survey 2017

# OCCUPATIONS

**Production, Transportation and Moving
(% of Residents), 2017**

| City | % |
|------|---|
| Twin Falls, ID | 16.5% |
| Logan, UT | 15.6% |
| Spokane, WA | 12.2% |
| Coeur d'Alene, ID | 10.6% |
| Grand Junction,… | 10.3% |
| Boise City, ID | 8.2% |
| Provo, UT | 8.1% |
| Missoula, MT | 7.7% |
| Bozeman, MT | 7.7% |
| Bend, OR | 7.7% |
| Flagstaff, AZ | 7.6% |
| Fort Collins, CO | 7.1% |
| Castle Rock, CO | 6.3% |
| Boulder, CO | 4.4% |

U.S. Average: 11.3%

Source: U.S. Census American Community Survey 2017

70
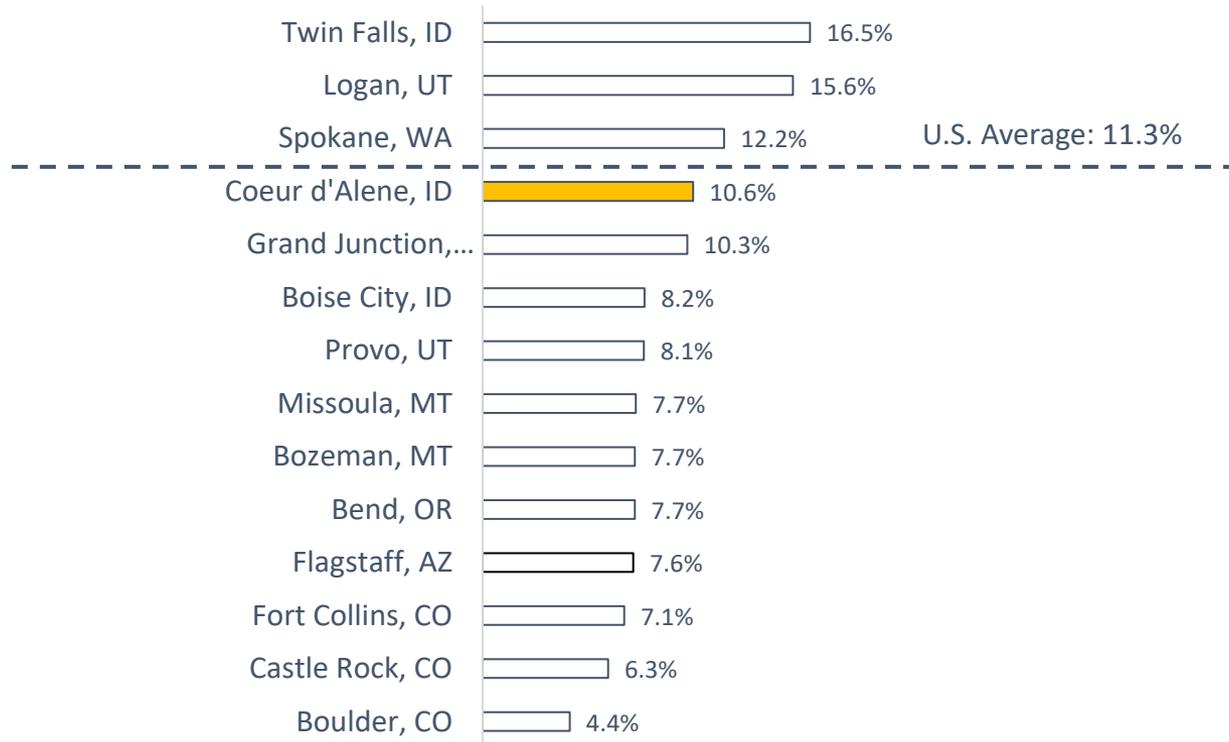
# RESIDENTS BY INDUSTRY

# TAKEAWAYS

- **Med and Eds.**
  Coeur d'Alene's health and educational sector employs 20% of the city's residents – an estimated 4,250 workers and a 5% increase from 2013.

- **Retail, Accommodation, Recreation and Hospitality.**
  Nearly one-third of all Coeur d'Alene's residents (approximately 6,400) are employed in the retail, accommodation, recreation, and hospitality sectors. This share ranks second among the benchmark communities.

- **Construction.**
  Nearly 9% of Coeur d'Alene's residents (1,900) are employed in the construction sector; this is second among the benchmark communities. Since 2013, the share construction sector has decreased 20%.

- **Manufacturing.**
  Manufacturing accounts for 7.5% of the employment among Coeur d'Alene residents (1,700) – a employment base that is up 32% since 2013 (nearly 8 times the growth of the U.S. average).

- **Professional Services.**
  Eleven percent of Coeur d'Alene's residents (2,500) are employed in the professional services sector; this is on par with Grand Junction, Bozeman, and Missoula.

# INDUSTRY

## Residents by Industry, 2017
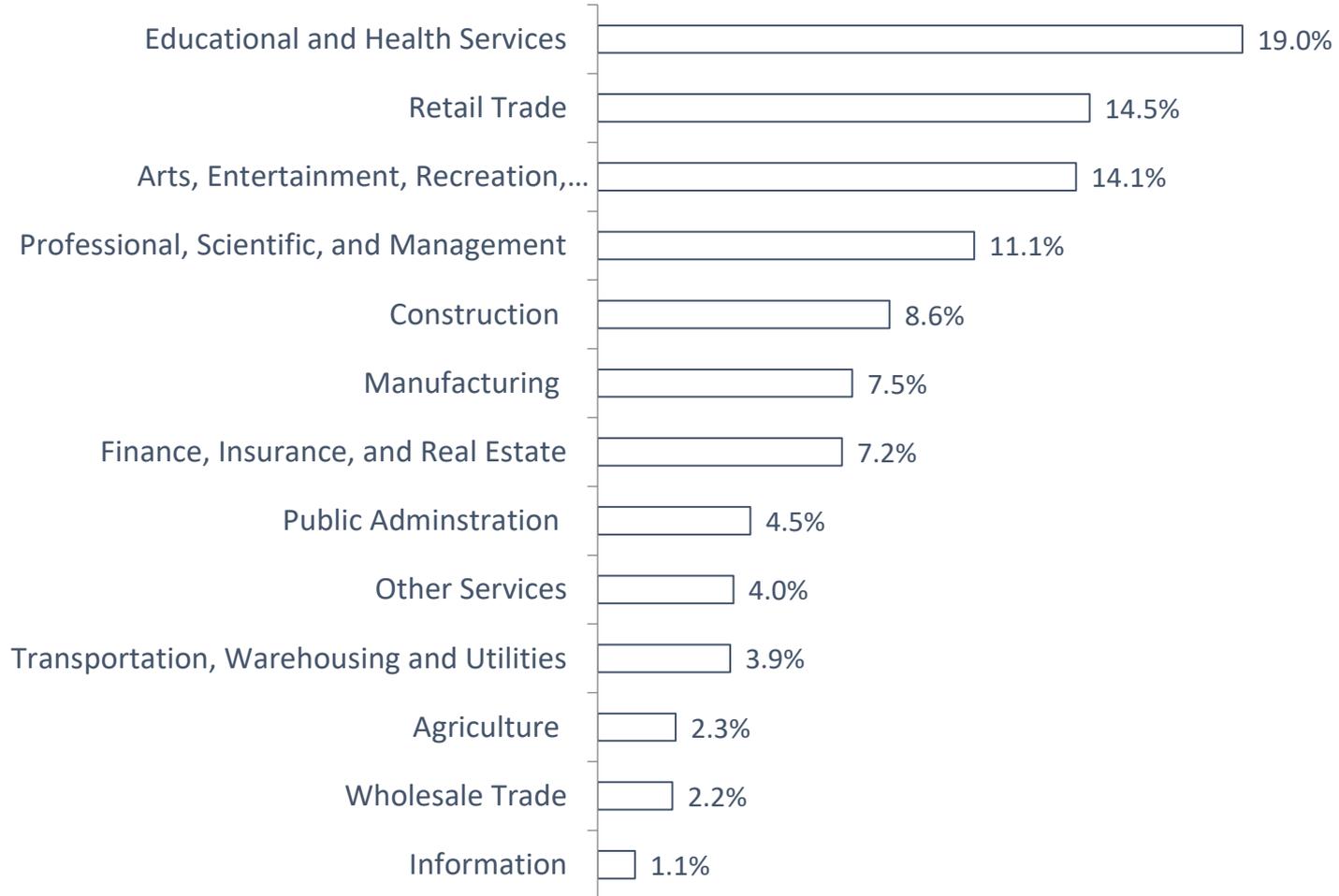


| Industry | Percentage |
|---|---|
| Educational and Health Services | 19.0% |
| Retail Trade | 14.5% |
| Arts, Entertainment, Recreation,… | 14.1% |
| Professional, Scientific, and Management | 11.1% |
| Construction | 8.6% |
| Manufacturing | 7.5% |
| Finance, Insurance, and Real Estate | 7.2% |
| Public Adminstration | 4.5% |
| Other Services | 4.0% |
| Transportation, Warehousing and Utilities | 3.9% |
| Agriculture | 2.3% |
| Wholesale Trade | 2.2% |
| Information | 1.1% |
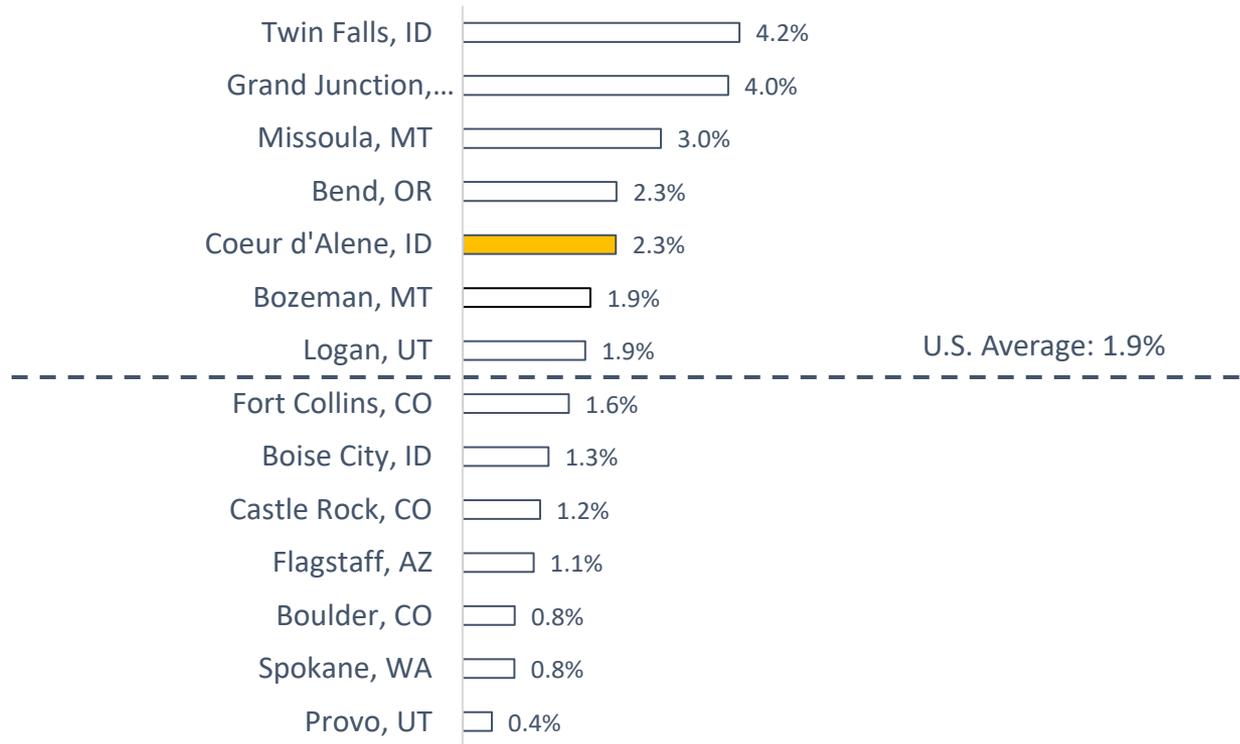
Source: U.S. Census American Community Survey 2017

# INDUSTRY

## Construction
## (% of Residents), 2017

| City | % |
|------|-----|
| Bozeman, MT | 8.7% |
| Coeur d'Alene, ID | 8.6% |
| Grand Junction,… | 7.5% |
| Bend, OR | 7.3% |
| Castle Rock, CO | 6.7% |
| Missoula, MT | 5.9% |
| Boise City, ID | 5.2% |
| Fort Collins, CO | 5.1% |
| Spokane, WA | 4.7% |
| Provo, UT | 4.4% |
| Twin Falls, ID | 4.3% |
| Flagstaff, AZ | 3.8% |
| Logan, UT | 3.6% |
| Boulder, CO | 2.6% |

U.S. Average: 6.4%
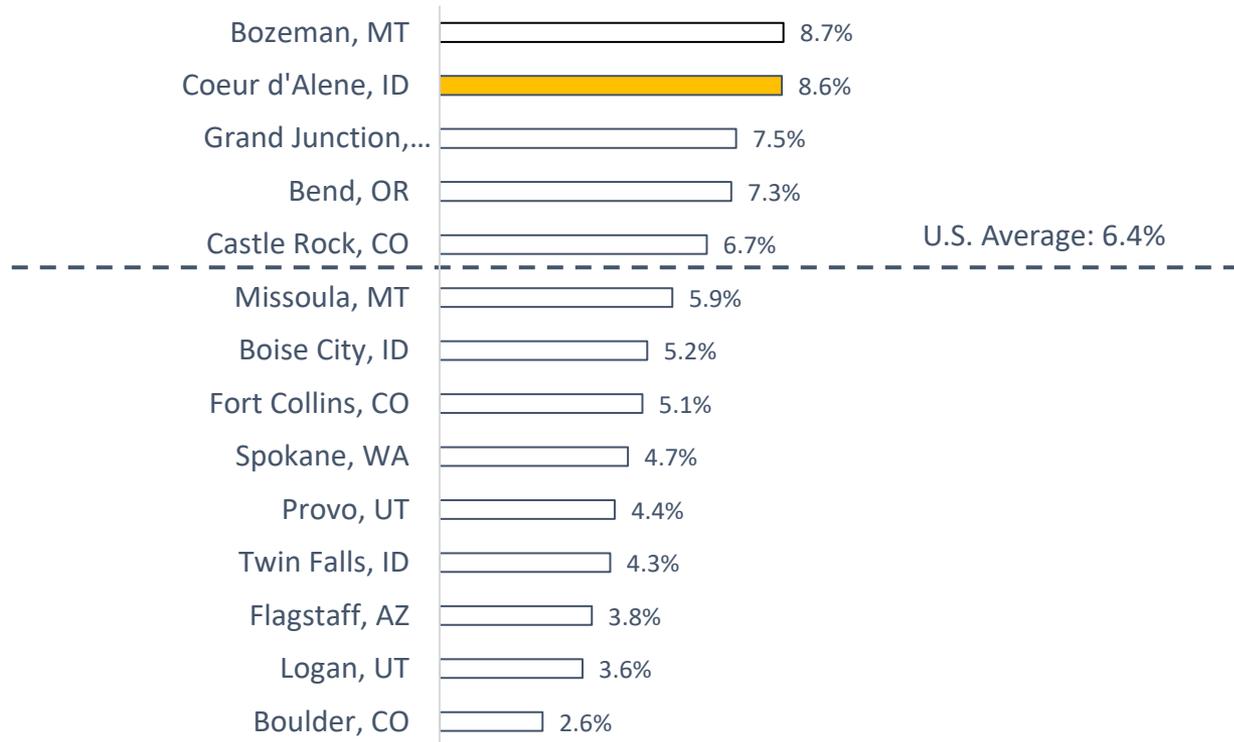
Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Manufacturing
(% of Residents), 2017**

| City | Percentage |
|------|-----------|
| Logan, UT | 15.4% |
| Twin Falls, ID | 11.2% |
| Boise City, ID | 8.9% |
| Fort Collins, CO | 8.8% |
| Flagstaff, AZ | 7.7% |
| Coeur d'Alene, ID | 7.5% |
| Spokane, WA | 7.4% |
| Bend, OR | 7.3% |
| Bozeman, MT | 7.2% |
| Boulder, CO | 6.6% |
| Provo, UT | 6.5% |
| Castle Rock, CO | 4.9% |
| Grand Junction,... | 3.6% |
| Missoula, MT | 3.2% |

U.S. Average: 10.3%

Source: U.S. Census American Community Survey 2017

76
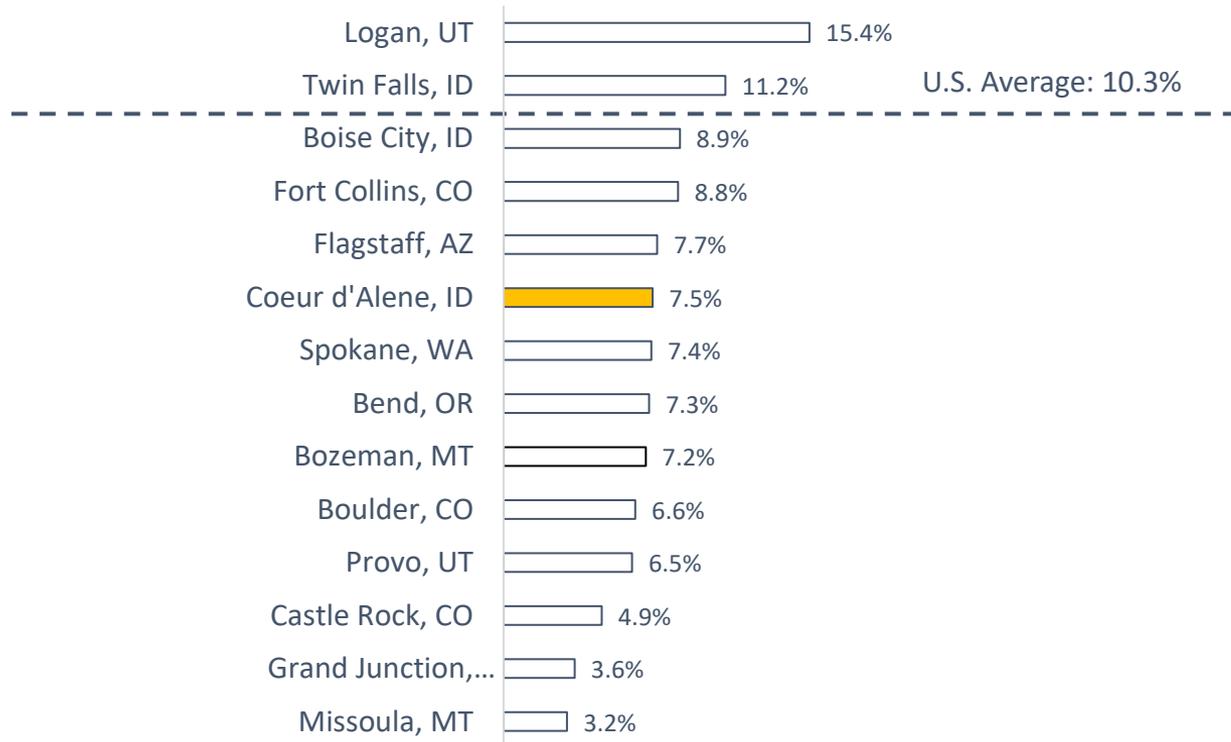
# INDUSTRY

**Wholesale Trade**
**(% of Residents), 2017**



| City | % |
|------|---|
| Twin Falls, ID | 3.6% |
| Spokane, WA | 3.3% |
| Castle Rock, CO | 3.2% |
| Grand Junction,… | 2.7% |
| Boise City, ID | 2.5% |
| Provo, UT | 2.5% |
| Missoula, MT | 2.4% |
| Coeur d'Alene, ID | 2.2% |
| Bend, OR | 2.0% |
| Fort Collins, CO | 1.7% |
| Boulder, CO | 1.6% |
| Bozeman, MT | 1.5% |
| Logan, UT | 1.0% |
| Flagstaff, AZ | 0.6% |
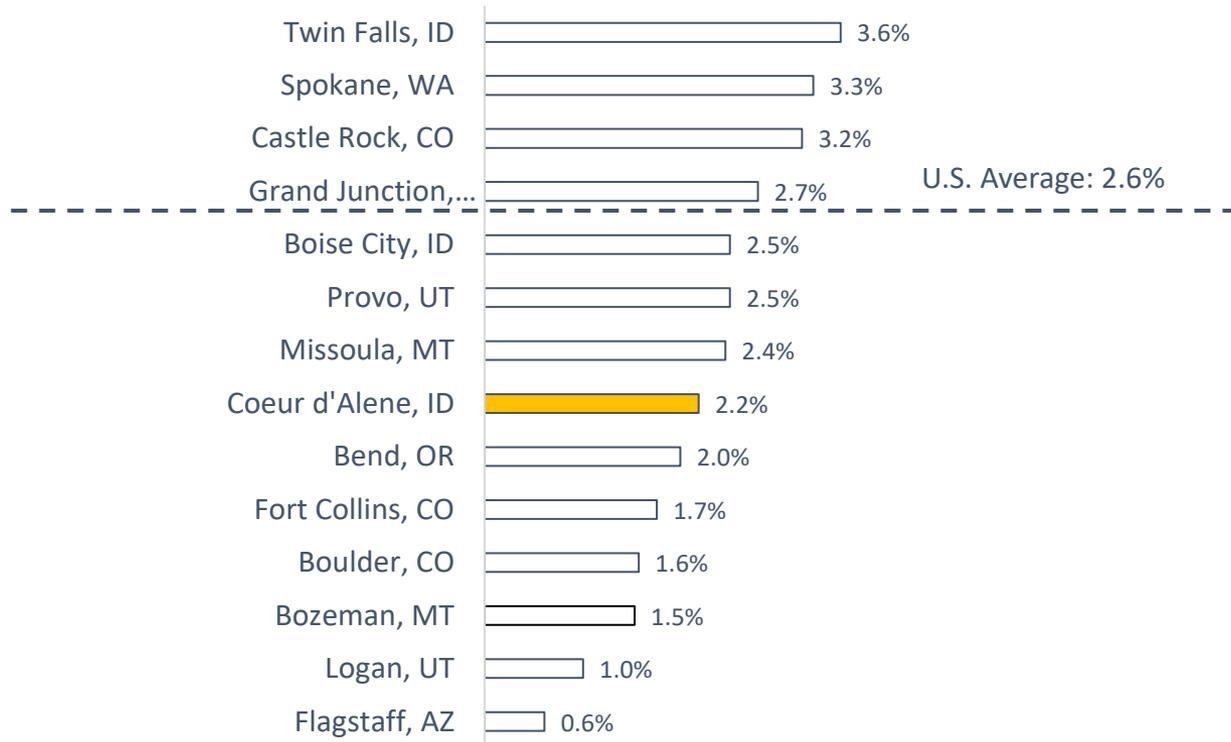
U.S. Average: 2.6%

Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Retail Trade
(% of Residents), 2017**



| City | % |
|------|------|
| Twin Falls, ID | 16.5% |
| Coeur d'Alene, ID | 14.5% |
| Bozeman, MT | 13.5% |
| Logan, UT | 13.2% |
| Bend, OR | 13.2% |
| Grand Junction,… | 12.9% |
| Spokane, WA | 12.4% |
| Castle Rock, CO | 12.2% |
| Flagstaff, AZ | 12.1% |
| Missoula, MT | 11.8% |
| Boise City, ID | 11.7% |
| Provo, UT | 11.6% |
| Fort Collins, CO | 10.6% |
| Boulder, CO | 9.0% |
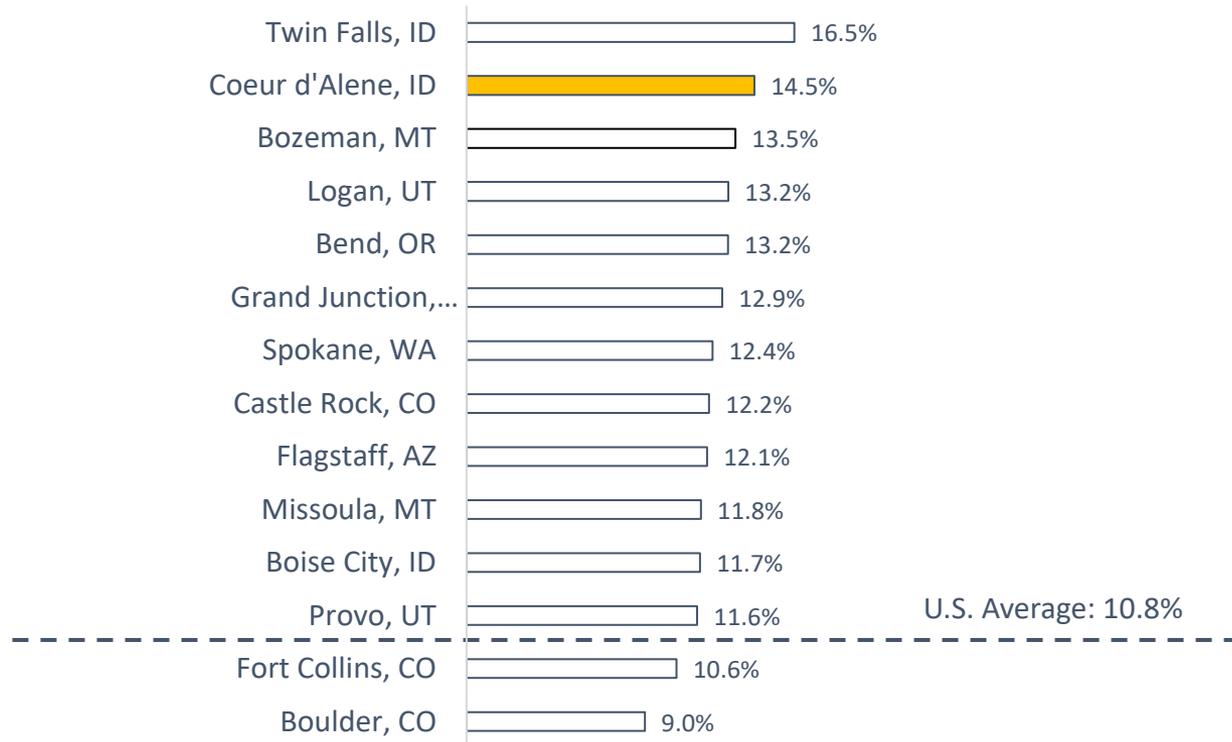
U.S. Average: 10.8%

Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Transportation, Warehousing, and Utilities
(% of Residents), 2017**

U.S. Average: 5.1%

| City | % |
|------|---|
| Spokane, WA | 4.4% |
| Grand Junction,… | 4.3% |
| Twin Falls, ID | 4.2% |
| Coeur d'Alene, ID | 3.9% |
| Missoula, MT | 3.8% |
| Castle Rock, CO | 3.7% |
| Boise City, ID | 3.6% |
| Flagstaff, AZ | 3.4% |
| Logan, UT | 2.4% |
| Fort Collins, CO | 2.4% |
| Bend, OR | 2.2% |
| Provo, UT | 2.0% |
| Bozeman, MT | 1.8% |
| Boulder, CO | 1.5% |
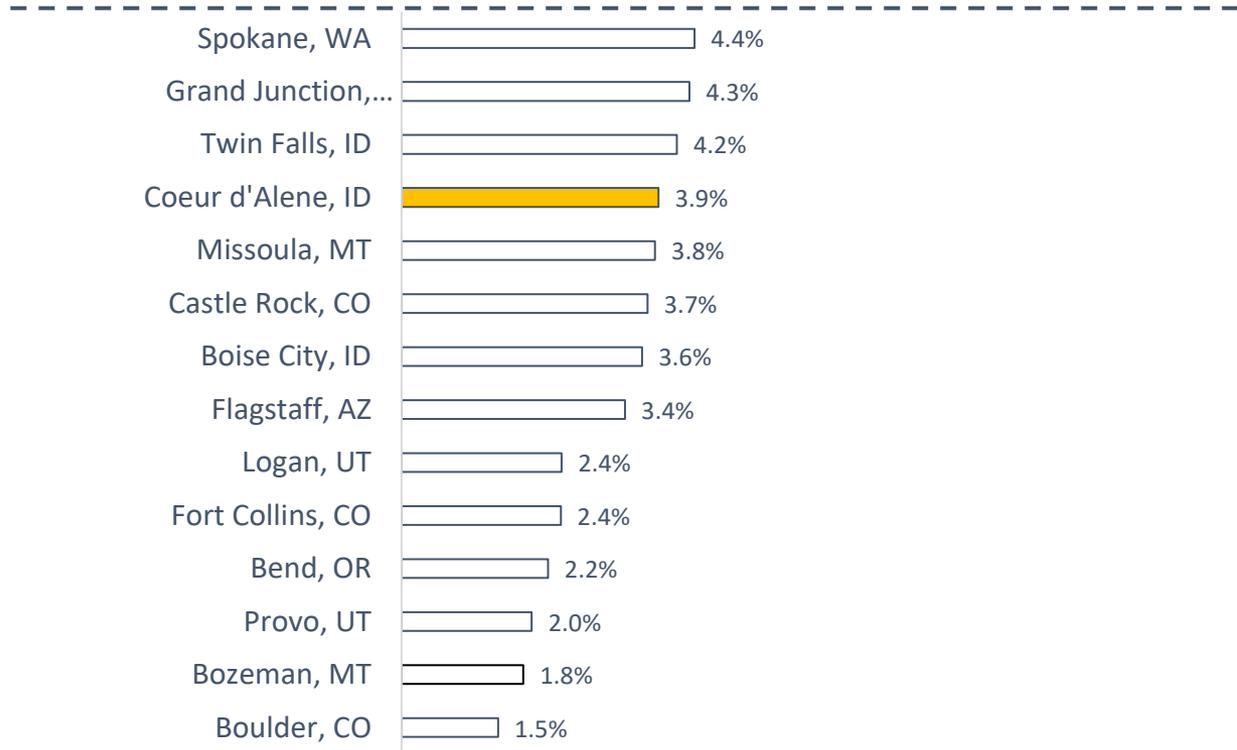
Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Information
(% of Residents), 2017**



| City | Percentage |
|------|-----------|
| Castle Rock, CO | 5.5% |
| Boulder, CO | 3.5% |
| Bend, OR | 3.3% |
| Missoula, MT | 3.2% |
| Provo, UT | 2.9% |
| Boise City, ID | 2.5% |
| Twin Falls, ID | 2.3% |
| Grand Junction,… | 2.3% |
| Logan, UT | 2.0% |
| Spokane, WA | 1.9% |
| Fort Collins, CO | 1.8% |
| Flagstaff, AZ | 1.4% |
| Bozeman, MT | 1.2% |
| Coeur d'Alene, ID | 1.1% |

U.S. Average: 2.1%
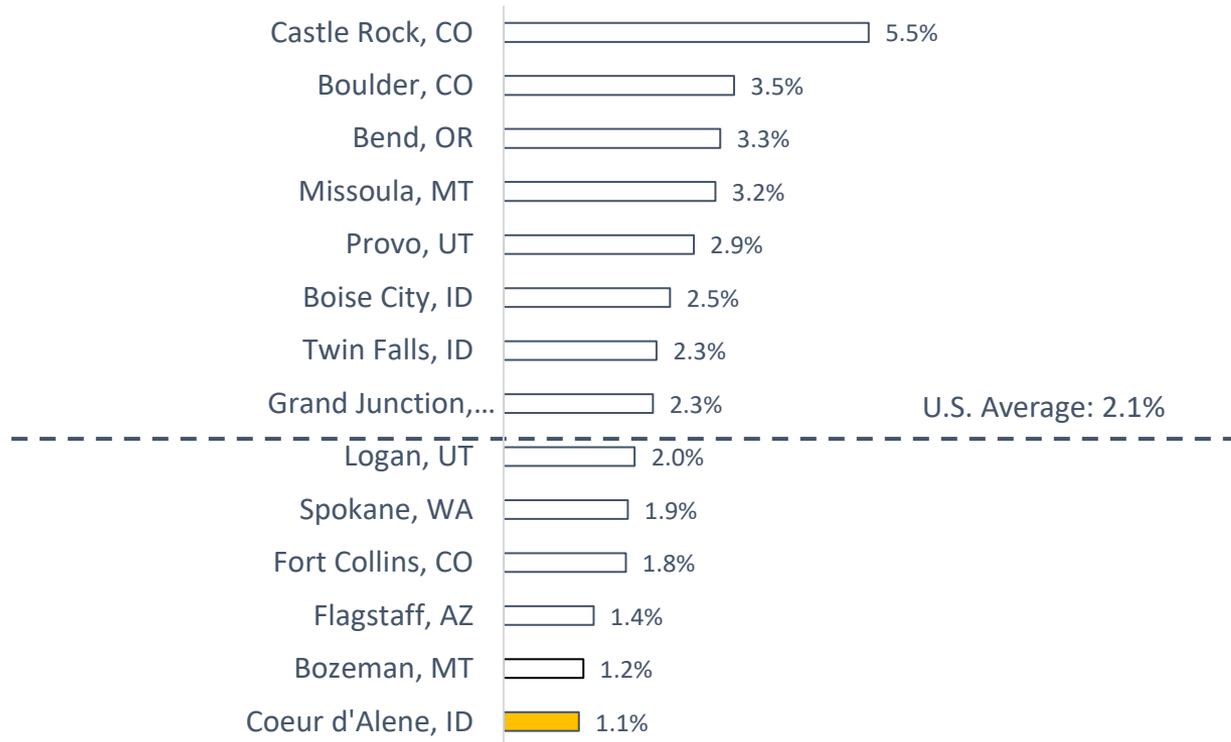
Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Finance, Insurance, and Real Estate
(% of Residents), 2017**

| City | % |
|------|---|
| Castle Rock, CO | 10.1% |
| Coeur d'Alene, ID | 7.2% |
| Spokane, WA | 6.5% |
| Boise City, ID | 6.4% |
| Bend, OR | 6.4% |
| Missoula, MT | 6.1% |
| Fort Collins, CO | 5.8% |
| Grand Junction,… | 5.3% |
| Bozeman, MT | 4.9% |
| Provo, UT | 4.5% |
| Boulder, CO | 4.2% |
| Twin Falls, ID | 3.8% |
| Flagstaff, AZ | 3.6% |
| Logan, UT | 3.6% |

U.S. Average: 6.6%
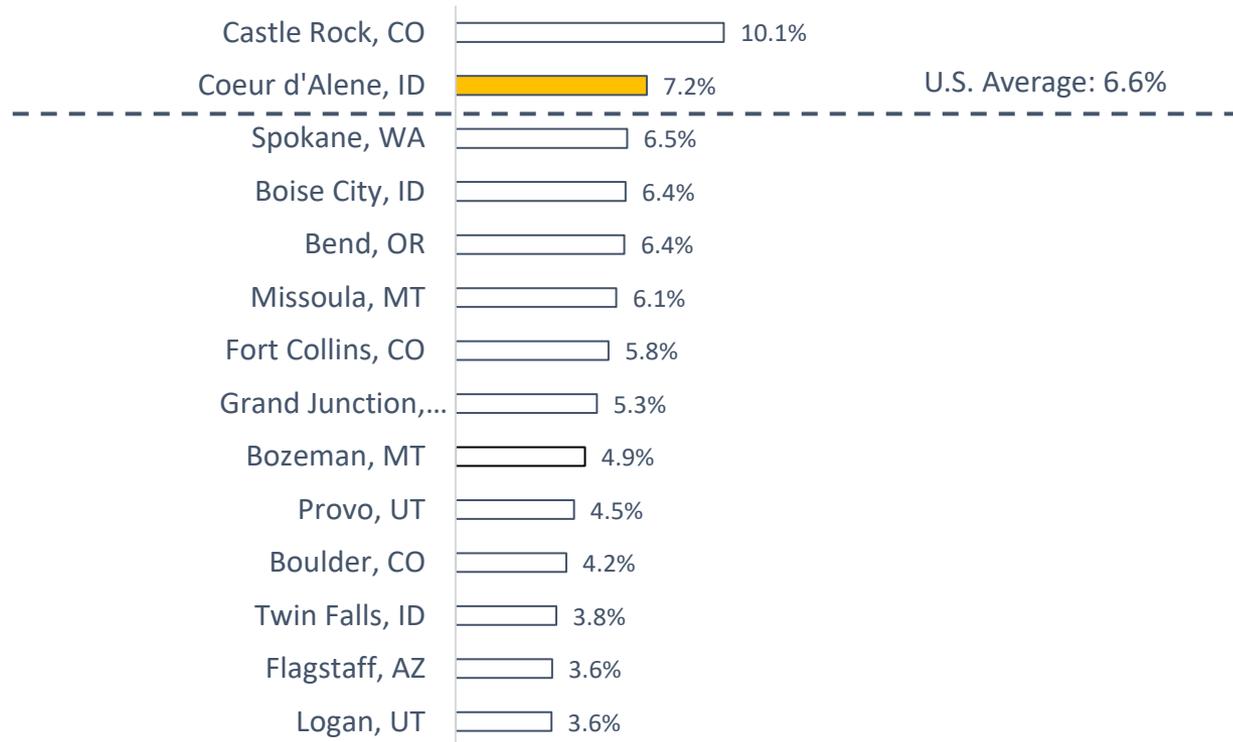
Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Professional, Scientific, and Management
(% of Residents), 2017**

| City | % |
|------|---|
| Boulder, CO | 20.9% |
| Provo, UT | 14.6% |
| Castle Rock, CO | 14.4% |
| Boise City, ID | 13.5% |
| Fort Collins, CO | 13.0% |
| Bend, OR | 12.8% |
| Logan, UT | 12.2% |
| Grand Junction,... | 11.8% |
| Bozeman, MT | 11.1% |
| Coeur d'Alene, ID | 11.1% |
| Missoula, MT | 11.1% |
| Spokane, WA | 9.5% |
| Twin Falls, ID | 8.9% |
| Flagstaff, AZ | 7.5% |

U.S. Average: 11.3%
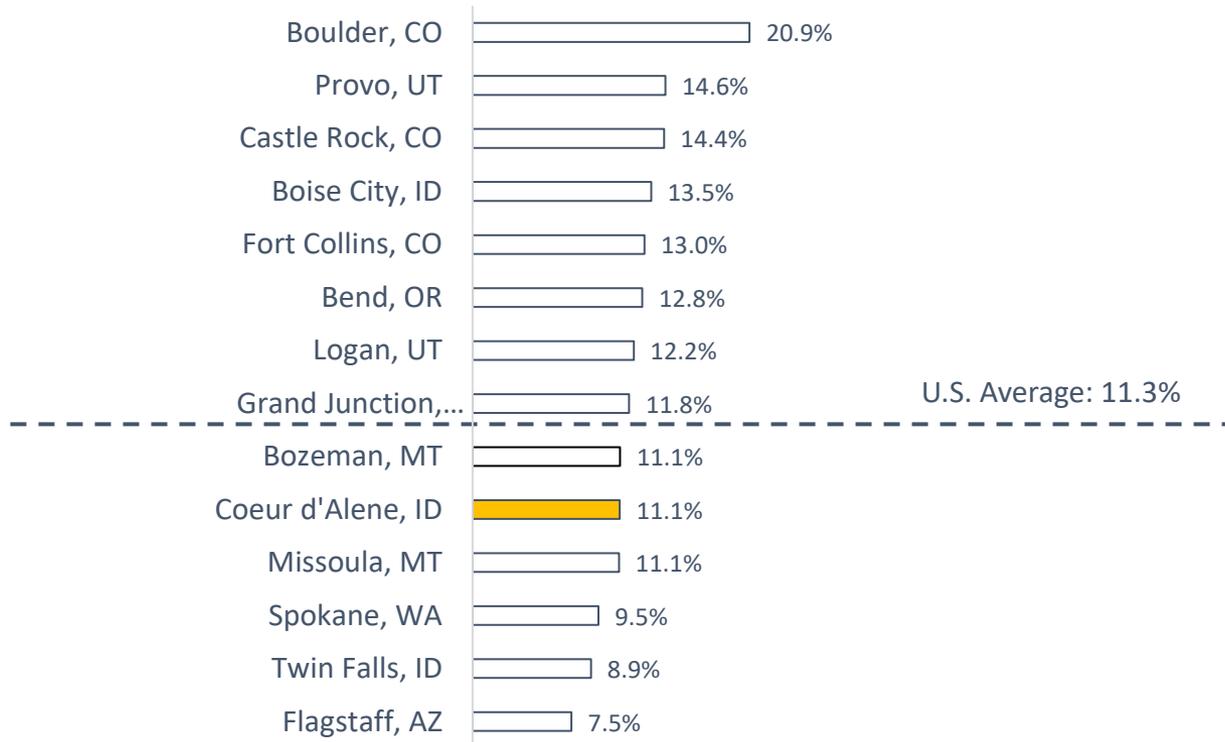
Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Arts, Entertainment, Recreation, Accommodation, and Food Service
(% of Residents), 2017**



| City | % |
|------|---|
| Flagstaff, AZ | 20.0% |
| Boulder, CO | 14.6% |
| Bozeman, MT | 14.1% |
| Coeur d'Alene, ID | 14.1% |
| Missoula, MT | 13.8% |
| Fort Collins, CO | 12.9% |
| Bend, OR | 12.7% |
| Spokane, WA | 12.0% |
| Logan, UT | 11.4% |
| Twin Falls, ID | 10.7% |
| Boise City, ID | 10.4% |
| Provo, UT | 10.0% |
| Grand Junction,… | 9.2% |
| Castle Rock, CO | 8.6% |

U.S. Average: 9.7%
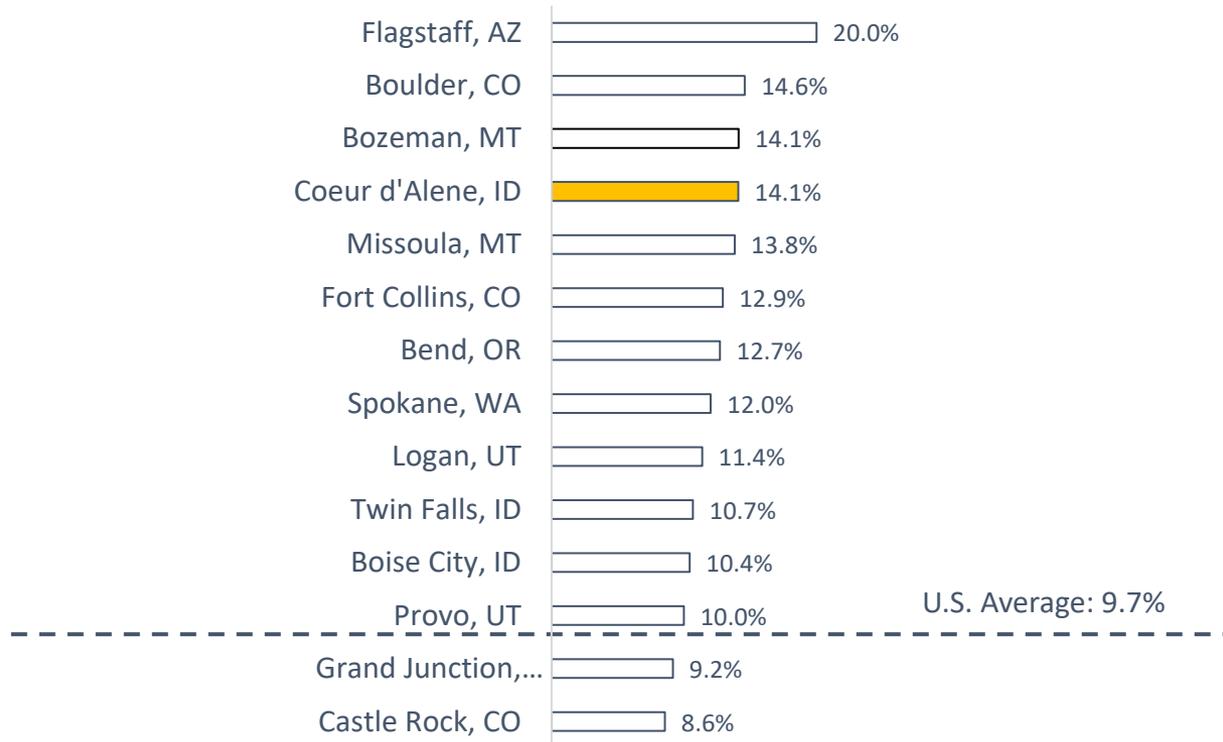
Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Educational and Health Services
(% of Residents), 2017**

| City | % |
|------|---|
| Provo, UT | 34.0% |
| Flagstaff, AZ | 30.1% |
| Missoula, MT | 28.3% |
| Logan, UT | 27.8% |
| Fort Collins, CO | 27.7% |
| Bozeman, MT | 27.6% |
| Boulder, CO | 27.3% |
| Spokane, WA | 27.1% |
| Grand Junction,… | 26.7% |
| Boise City, ID | 23.9% |
| Bend, OR | 22.4% |
| Twin Falls, ID | 21.9% |
| Coeur d'Alene, ID | 19.0% |
| Castle Rock, CO | 18.8% |
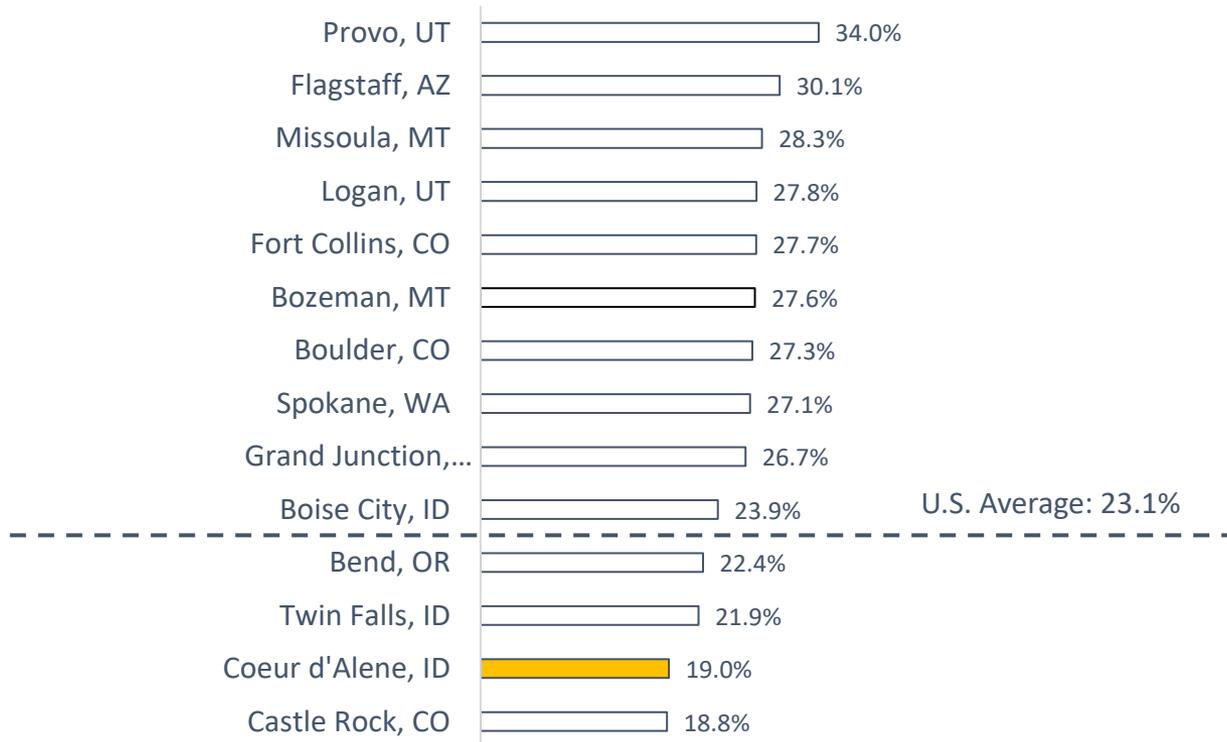
U.S. Average: 23.1%

Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Other Services
(% of Residents), 2017**



| City | % |
|------|---|
| Grand Junction,… | 5.5% |
| Spokane, WA | 5.2% |
| Provo, UT | 5.1% |
| Fort Collins, CO | 5.0% |
| Bend, OR | 4.8% |
| Castle Rock, CO | 4.6% |
| Twin Falls, ID | 4.5% |
| Boulder, CO | 4.4% |
| Boise City, ID | 4.2% |
| Missoula, MT | 4.2% |
| Logan, UT | 4.1% |
| Coeur d'Alene, ID | 4.0% |
| Bozeman, MT | 3.8% |
| Flagstaff, AZ | 3.4% |
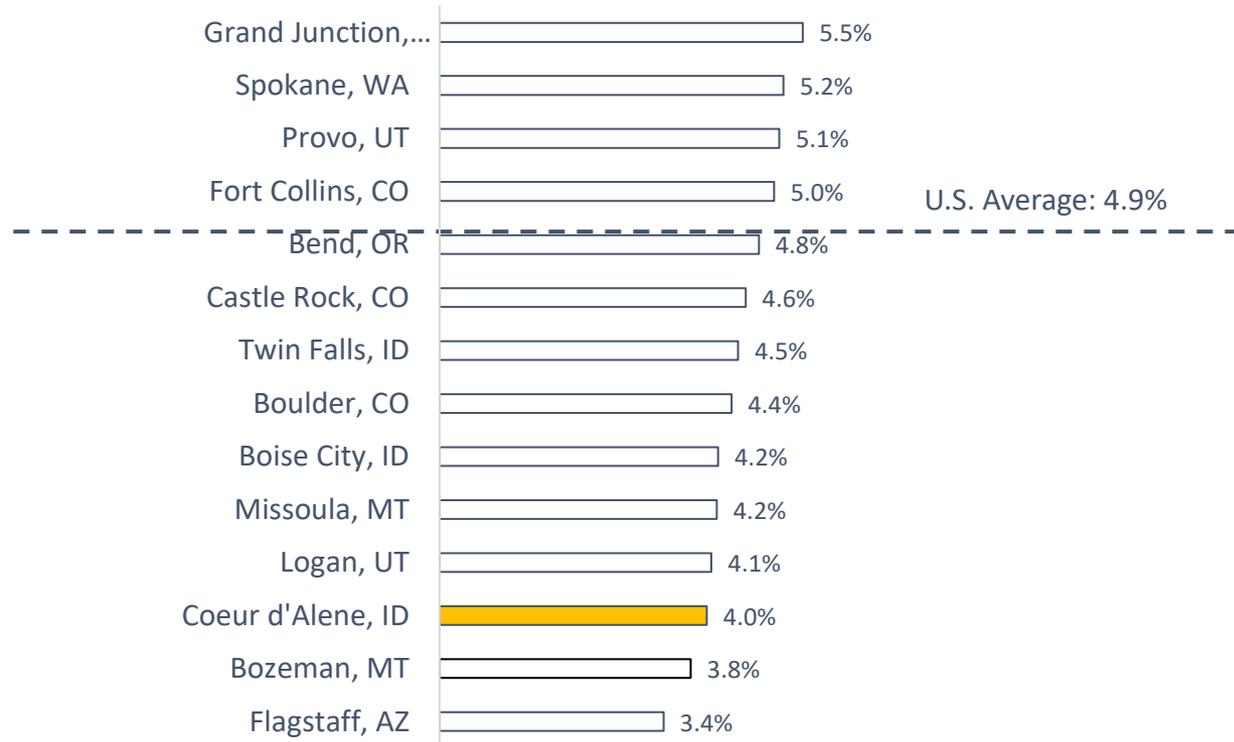
U.S. Average: 4.9%

Source: U.S. Census American Community Survey 2017

# INDUSTRY

**Public Administration**
**(% of Residents), 2017**

U.S. Average: 11.3%

| City | % |
|------|---|
| Castle Rock, CO | 6.0% |
| Boise City, ID | 5.8% |
| Flagstaff, AZ | 5.3% |
| Spokane, WA | 4.7% |
| Coeur d'Alene, ID | 4.5% |
| Grand Junction,… | 4.3% |
| Twin Falls, ID | 4.0% |
| Fort Collins, CO | 3.5% |
| Bend, OR | 3.3% |
| Missoula, MT | 3.3% |
| Boulder, CO | 3.1% |
| Bozeman, MT | 2.6% |
| Provo, UT | 1.6% |
| Logan, UT | 1.6% |

Source: U.S. Census American Community Survey 2017

86
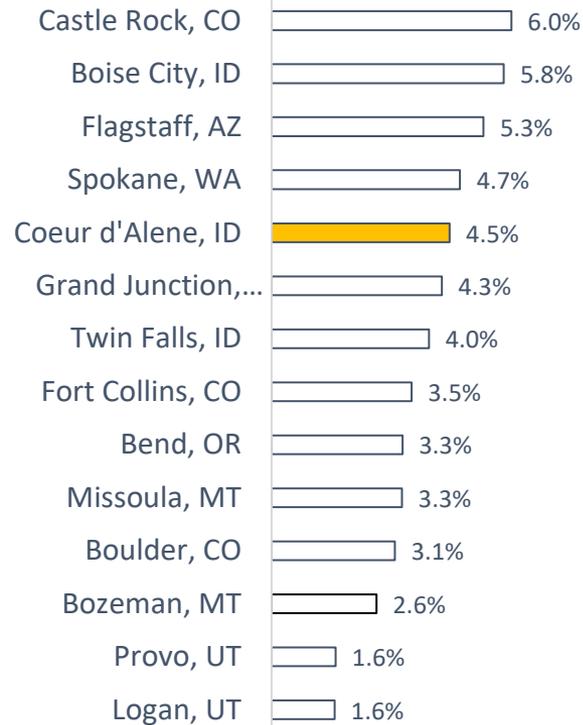
# COMMUTING

# TAKEAWAYS

- **Driving to Work.**
  8 in 10 Coeur d'Alene residents drive to work.

- **Short Commute Time.**
  Coeur d'Alene commute time is 17.9 minutes – 9 minutes shorter than the U.S. average.

# COMMUTING

**Means of Commuting (% of Workforce), 2017**

- 0.4%
- 2.8%
- 3.0%
- 3.4%
- 8.0%
- 81.2%

■ Public Transit　　　■ Other Means　　　■ Walked to Work

■ Worked at Home　　■ Carpooled　　　　■ Car/ Drove Alone
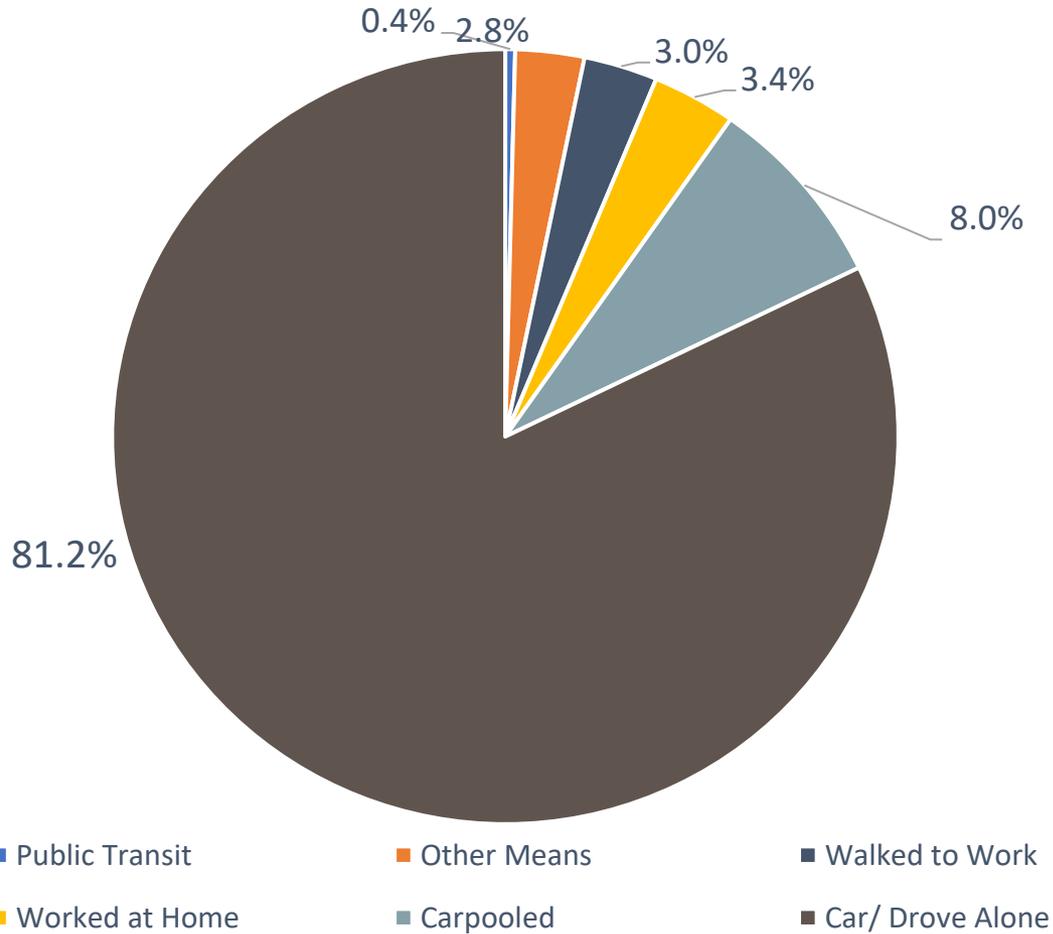
Source: U.S. Census American Community Survey 2017

# COMMUTING

**Car/ Drove Alone**
**(% of Workforce), 2017**

| City | % |
|------|---|
| Twin Falls, ID | 81.7% |
| Coeur d'Alene, ID | 81.2% |
| Boise City, ID | 79.6% |
| Castle Rock, CO | 79.0% |
| Spokane, WA | 75.4% |
| Grand Junction,… | 74.7% |
| Bend, OR | 72.6% |
| Fort Collins, CO | 71.0% |
| Bozeman, MT | 69.8% |
| Logan, UT | 69.5% |
| Missoula, MT | 69.4% |
| Flagstaff, AZ | 66.9% |
| Provo, UT | 61.2% |
| Boulder, CO | 49.5% |

U.S. Average: 76.4%
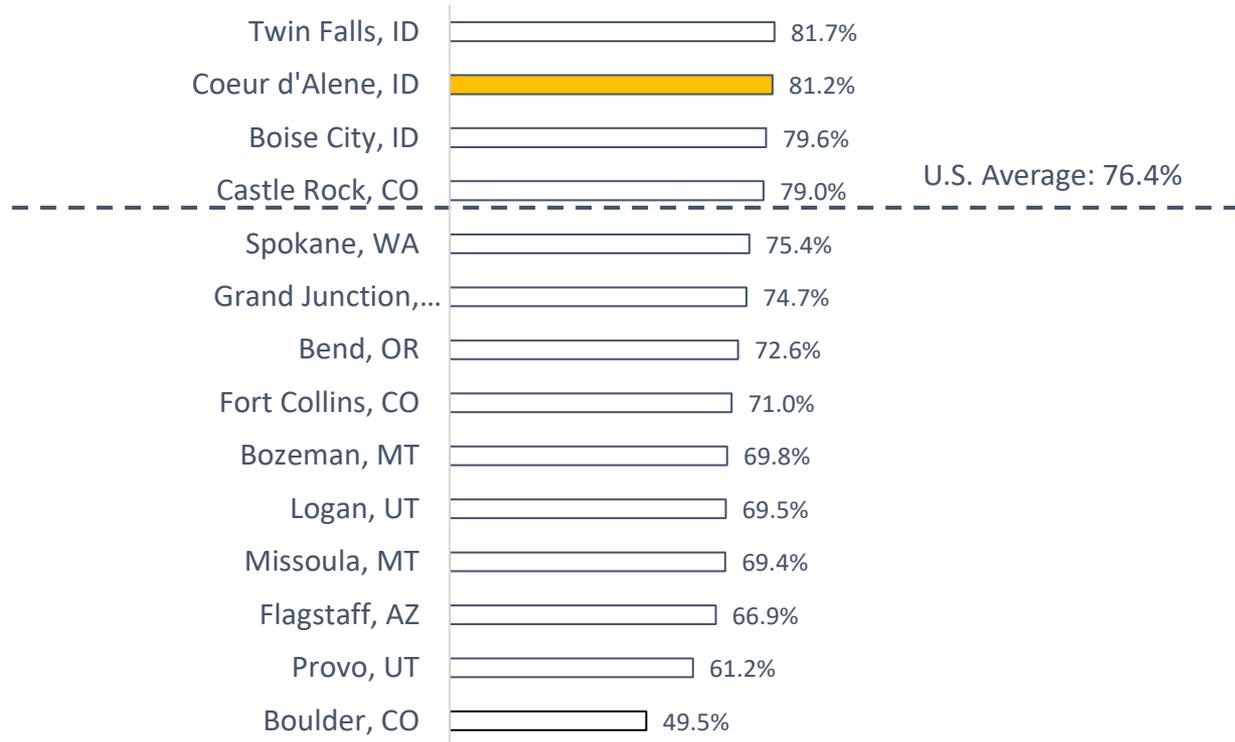
Source: U.S. Census American Community Survey 2017

# COMMUTING

## Carpooled
## (% of Workforce), 2017

| City | Carpooled % |
|------|-------------|
| Provo, UT | 12.5% |
| Logan, UT | 11.6% |
| Twin Falls, ID | 9.8% |
| Flagstaff, AZ | 9.6% |
| Spokane, WA | 9.3% |
| Grand Junction,… | 9.0% |
| Coeur d'Alene, ID | 8.0% |
| Bozeman, MT | 8.0% |
| Fort Collins, CO | 7.8% |
| Castle Rock, CO | 7.7% |
| Bend, OR | 7.4% |
| Boise City, ID | 7.3% |
| Missoula, MT | 6.4% |
| Boulder, CO | 5.4% |

U.S. Average: 9.2%
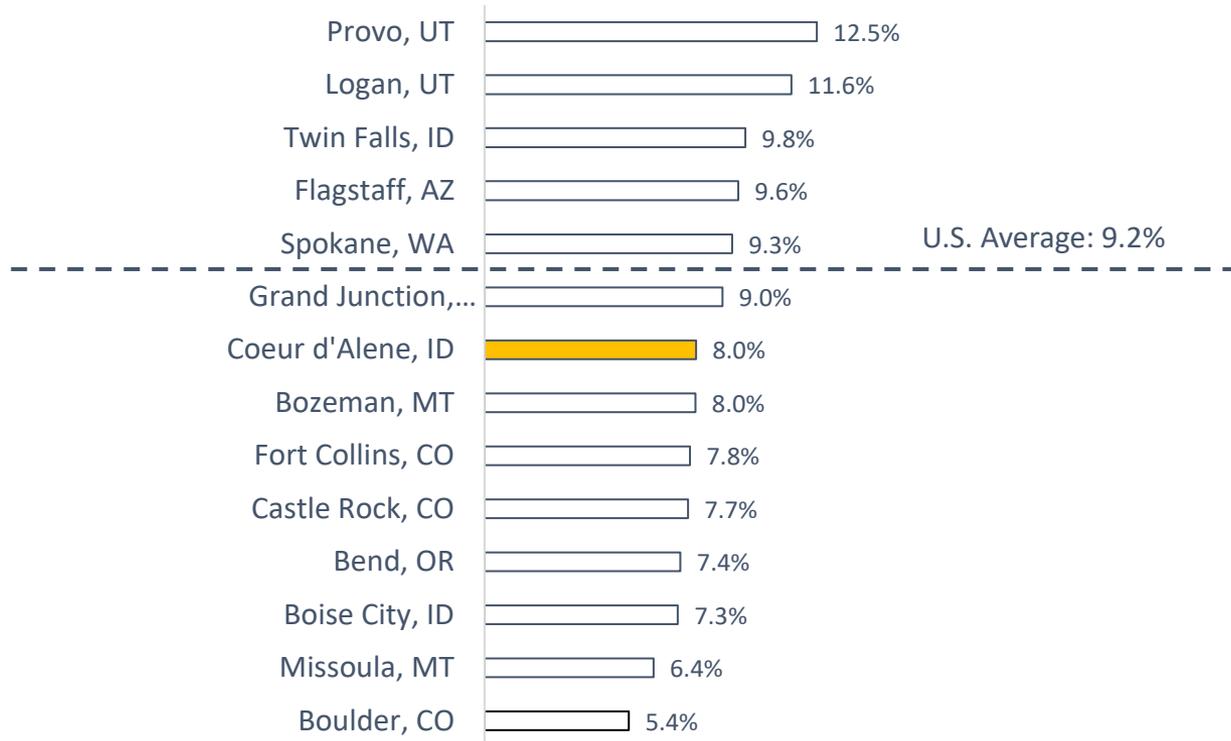
Source: U.S. Census American Community Survey 2017

# COMMUTING

## Public Transit
## (% of Workforce), 2017

| City | % |
|---|---|
| Boulder, CO | 7.7% |
| Spokane, WA | 3.9% |
| Logan, UT | 3.3% |
| Provo, UT | 2.9% |
| Missoula, MT | 2.7% |
| Flagstaff, AZ | 2.1% |
| Fort Collins, CO | 1.9% |
| Boise City, ID | 0.7% |
| Bozeman, MT | 0.6% |
| Castle Rock, CO | 0.6% |
| Bend, OR | 0.4% |
| Coeur d'Alene, ID | 0.4% |
| Grand Junction,… | 0.4% |
| Twin Falls, ID | 0.3% |

U.S. Average: 5.1%
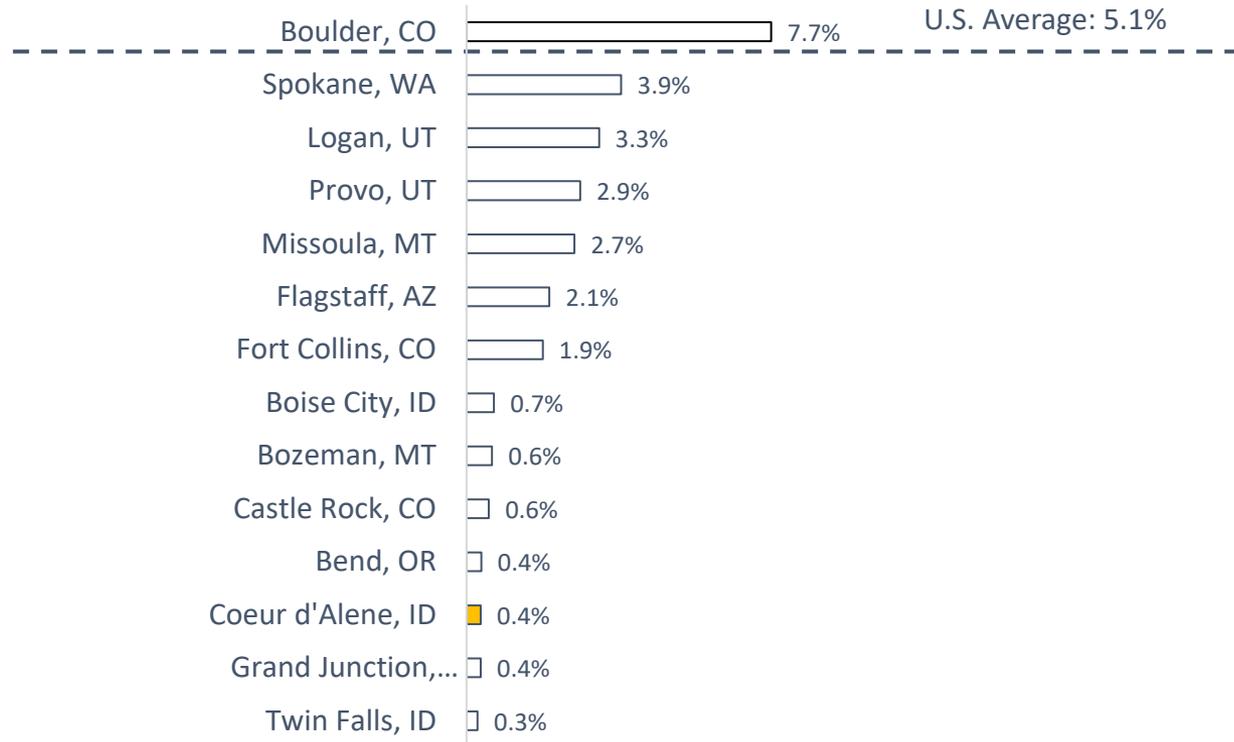
Source: U.S. Census American Community Survey 2017

# COMMUTING

## Walked to Work
## (% of Workforce), 2017

| City | Percentage |
|------|------------|
| Provo, UT | 12.2% |
| Boulder, CO | 11.0% |
| Flagstaff, AZ | 10.2% |
| Bozeman, MT | 9.2% |
| Missoula, MT | 7.2% |
| Logan, UT | 6.4% |
| Grand Junction,… | 5.0% |
| Bend, OR | 3.5% |
| Fort Collins, CO | 3.5% |
| Spokane, WA | 3.4% |
| Coeur d'Alene, ID | 3.0% |
| Twin Falls, ID | 2.0% |
| Boise City, ID | 2.0% |
| Castle Rock, CO | 0.7% |

U.S. Average: 2.7%
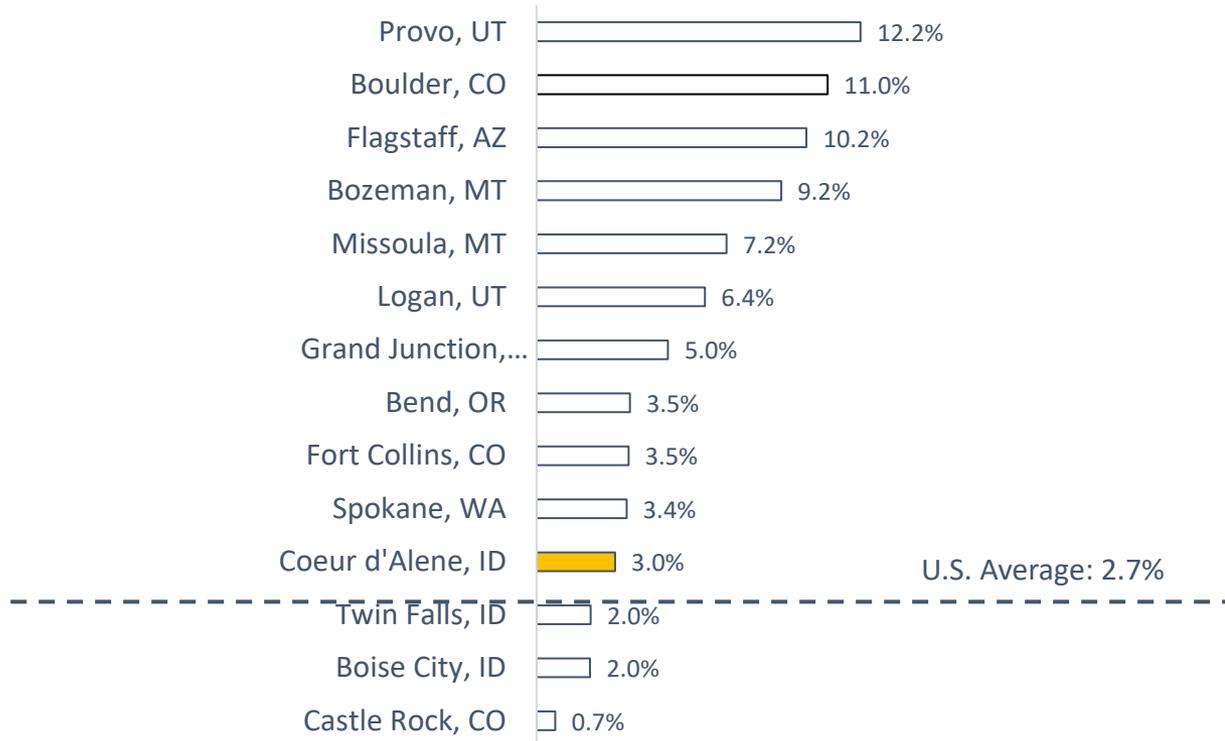
Source: U.S. Census American Community Survey 2017

# COMMUTING

**Other Means
(% of Workforce), 2017**

| City | Percentage |
|------|-----------|
| Boulder, CO | 11.2% |
| Fort Collins, CO | 7.3% |
| Missoula, MT | 7.2% |
| Bozeman, MT | 5.4% |
| Flagstaff, AZ | 5.2% |
| Provo, UT | 4.1% |
| Logan, UT | 3.9% |
| Bend, OR | 3.7% |
| Boise City, ID | 3.7% |
| Grand Junction,… | 3.5% |
| Coeur d'Alene, ID | 2.8% |
| Castle Rock, CO | 2.3% |
| Spokane, WA | 1.9% |
| Twin Falls, ID | 1.7% |

U.S. Average: 1.8%
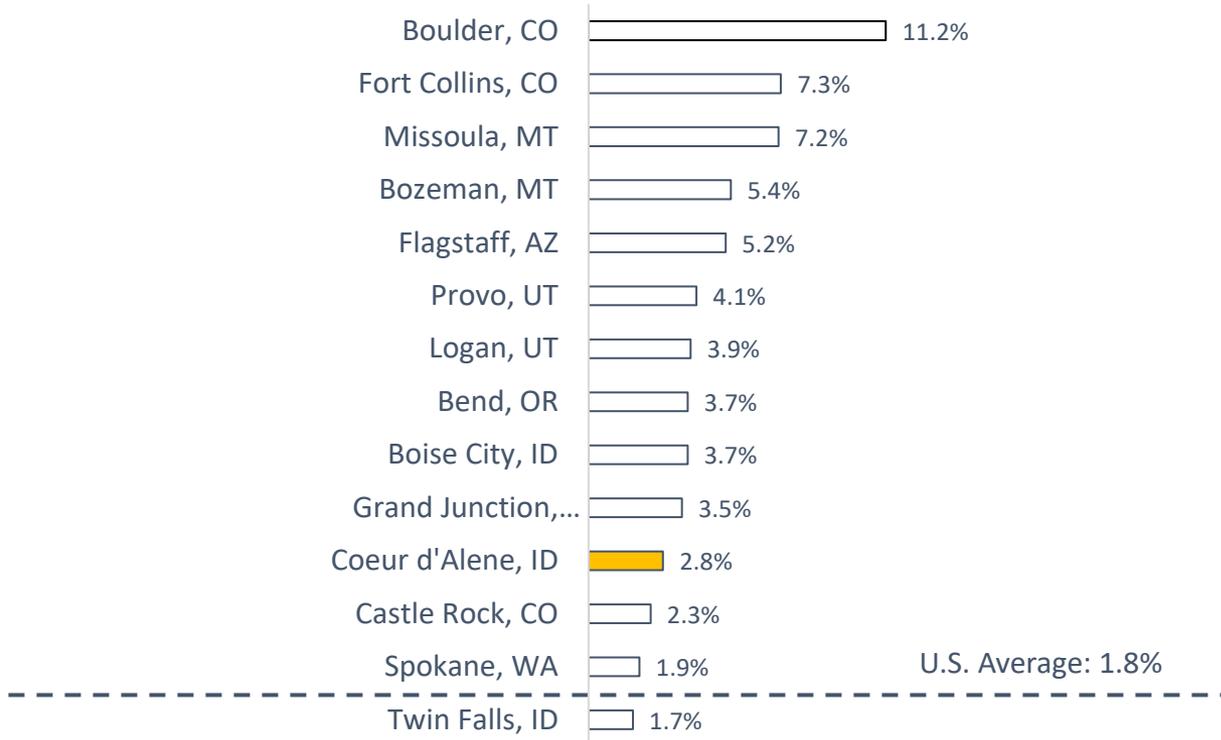
Source: U.S. Census American Community Survey 2017

# COMMUTING

**Worked from Home**
**(% of Workforce), 2017**

| City | % |
|------|-----|
| Boulder, CO | 12.5% |
| Bend, OR | 10.2% |
| Castle Rock, CO | 9.2% |
| Fort Collins, CO | 6.7% |
| Grand Junction,… | 5.8% |
| Bozeman, MT | 5.4% |
| Boise City, ID | 5.4% |
| Provo, UT | 4.7% |
| Spokane, WA | 4.6% |
| Missoula, MT | 4.6% |
| Logan, UT | 4.1% |
| Flagstaff, AZ | 3.7% |
| Coeur d'Alene, ID | 3.4% |
| Twin Falls, ID | 2.7% |

U.S. Average: 4.7%

Source: U.S. Census American Community Survey 2017

95
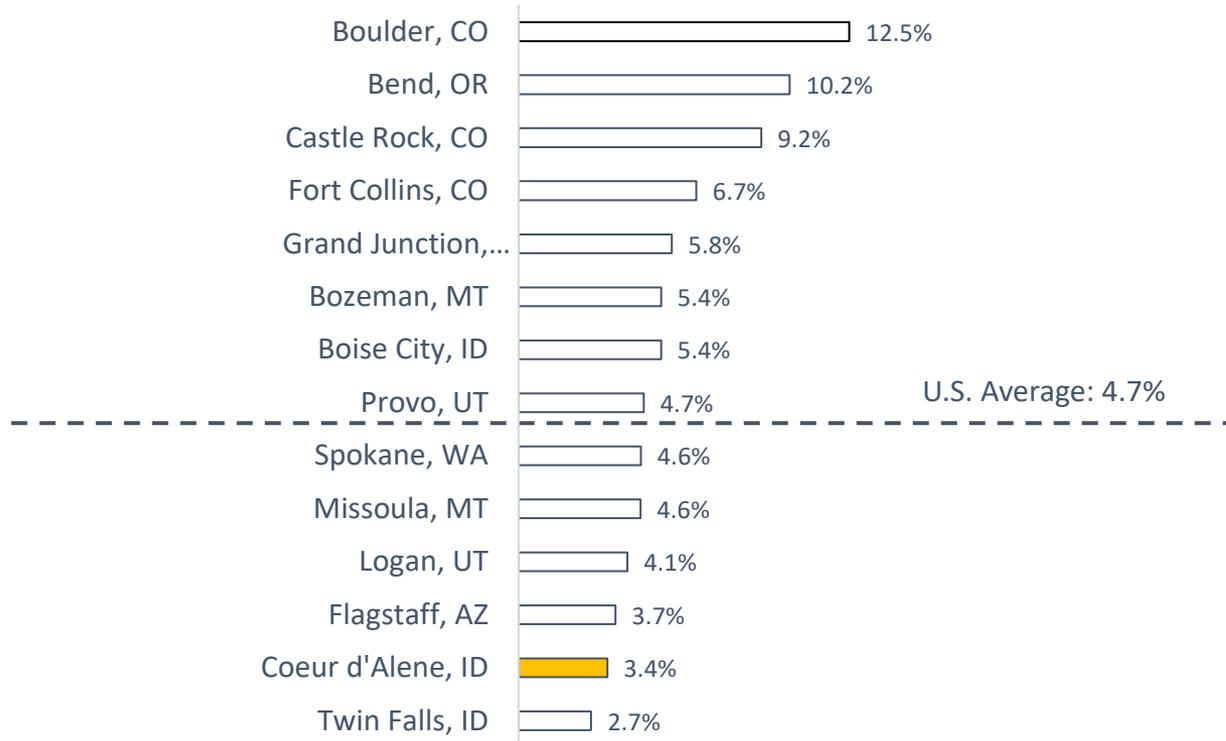
# COMMUTING

**Average Commute Time
(In Minutes), 2017**

| City | Minutes |
|---|---|
| Castle Rock, CO | 29.1 |
| Spokane, WA | 20.1 |
| Fort Collins, CO | 19.6 |
| Boulder, CO | 19.1 |
| Boise City, ID | 18.4 |
| Coeur d'Alene, ID | 17.9 |
| Provo, UT | 17.8 |
| Grand Junction,... | 16.3 |
| Twin Falls, ID | 16.2 |
| Missoula, MT | 15.8 |
| Flagstaff, AZ | 15.7 |
| Bend, OR | 15.3 |
| Bozeman, MT | 14.6 |
| Logan, UT | 14.4 |

U.S. Average: 26.4

Source: U.S. Census American Community Survey 2017

96
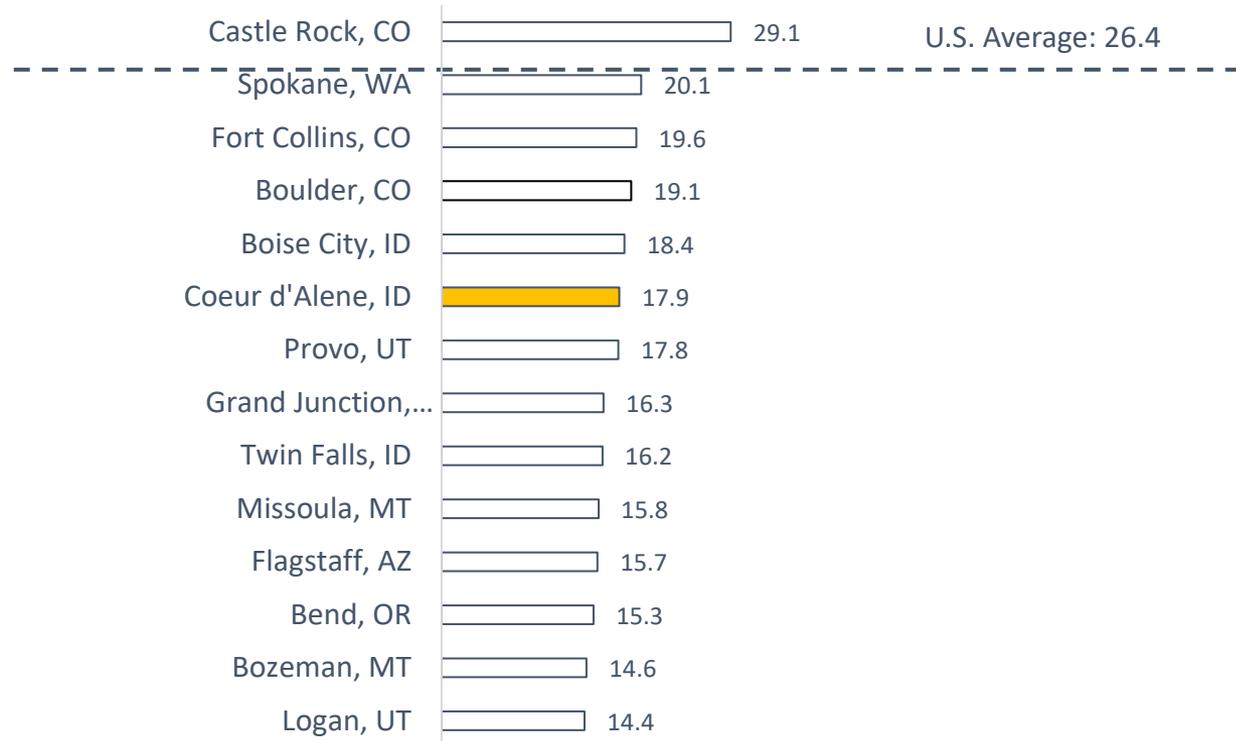
# ATTACHMENT B: Industry Cluster Analysis

# COEUR D'ALENE INDUSTRY ANALYSIS

DECEMBER 2019

# TRADED vs. LOCAL SECTOR INDUSTRIES

**TRADED SECTOR**

Traded-sector industries are the engines of regional economies. They are the focus of economic development efforts because:

- They serve markets in other regions or nations and bring new money into an economy
- They typically have higher wages
- These companies often generate innovation and spin-offs
- Example industries: aircraft manufacturing, management consulting, iron ore mining

**LOCAL SECTOR**

Sell products and services primarily for the local market and are generally located in every region. They are important because:

- They provide important services communities need
- They make a community distinct with unique local offerings.
- Example industries: drug stores, physician offices, elementary schools, radio networks

| Traded Sector | Local Sector |
|---|---|

# INDUSTRY ANALYSIS

- An industry cluster is a regional concentration of related traded-sector industries that arise out of the various types of linkages or externalities that span across industries in a particular location. They are the building blocks of modern economies, and they profile the economy of a location.

- Industry clusters are defined by groupings of similar businesses that are categorized by North American Industry Classification System (NAICS) codes.

- Industry clusters are measured by a Location Quotient (LQ), which  is a way of quantifying how "concentrated" an industry is in a region compared to a larger geographic area such as the state or nation. The following information compares the CdA and Spokane areas with the nation.

- The following information is derived from the U.S. Cluster Mapping site, which provides over 50 million open data records on industry clusters and regional business environments in the U.S. to promote economic growth and national competitiveness.  It is led by Harvard Business School's Institute for Strategy and Competitiveness in partnership with the U.S. Department of Commerce and U.S. Economic Development Administration.

4

# TAKE AWAYS

- Minimal overlap with Spokane and Coeur d'Alene metropolitan area industry clusters.
- Only similar cluster is Upstream Metals, however Spokane is declining whereas Coeur d'Alene is increasing the job base.
- Coeur d'Alene Cluster Overview:
  - Wood products is a strong cluster, but declining employment.
  - Metals are strong clusters and growing employment.
  - Strong overlap between Information Technology and Lighting through electrical and electronic components.
  - Marketing is emerging suggesting that creative industries and remote workers want to locate in Coeur d'Alene over Spokane.
- Aerospace cluster is dependent on six county Spokane Economic Area (Kootenai, Bonner, ID; Spokane, Whitman, Stevens, Pend Oreille, WA).
- Aircraft sector employment is growing but significantly smaller than other regions in the United States.
- Hospitality is a cluster because it brings new money into the economy. However it does not have the other attributes of traded-sector industries.

# COEUR D'ALENE

# CdA Top Industries

| Industry | Employment | Industry LQ | Establishments |
|---|---|---|---|
| *Wood Products* | 680 | 6.21 | 24 |
| *Lighting* | 395 | 4.57 | 5 |
| *Upstream Metals* | 515 | 4.49 | 7 |
| *Downstream Metals* | 480 | 3.81 | 10 |
| *Hospitality* | 2,486 | 2.58 | 44 |
| *Information Technology* | 635 | 1.86 | 6 |
| *Marketing* | 460 | 1.14 | 35 |

*Source: US Cluster Mapping, Information based on Kootenai County*

# HOSPITALITY

**Example Businesses and NAICS**

- Casino Hotels (721120)
- Bed-and-Breakfast Inns (721191)
- RV (Recreational Vehicle) Parks and Campgrounds (721211)
- Hotels (except Casino Hotels) and Motels (721110)
- Amusement and Theme Parks (713110)
- Recreational and Vacation Camps (except Campgrounds) (721214)

| 2016 | Employment | Industry LQ | Establishments |
|------|------------|-------------|----------------|
| Hospitality | 2,486 | 2.58 | 44 |



Hospitality

Categories (top to bottom): Coeur d'Alene, ID Totals (Subcluster); Tourism Related Services; Gambling Facilities; Cultural and Educational Entertainment; Other Tourism Attractions; Amusement Parks and Arcades; Spectator Sports; Accommodations and Related Services

Legend: ■ 2016 Employment  ■ 1998 Employment
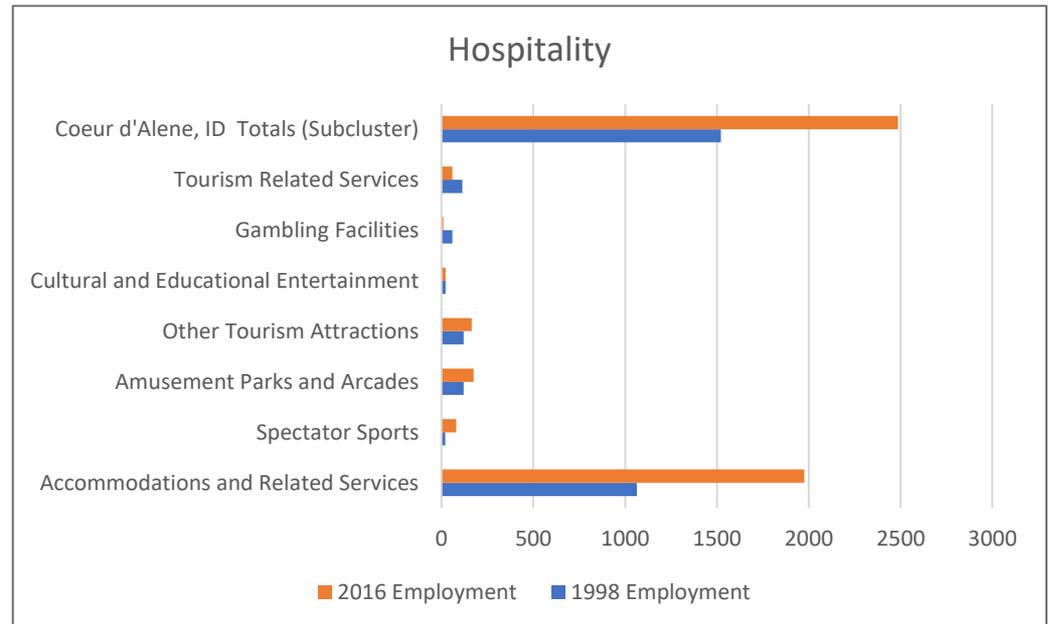
# WOOD PRODUCTS

**Example Businesses and NAICS**

- Wood Window and Door Manufacturing (321911)
- All Other Miscellaneous Wood Product Manufacturing (321999)
- Softwood Veneer and Plywood Manufacturing (321212)
- Reconstituted Wood Product Manufacturing (321219)
- Truss Manufacturing (321214)
- Wood Container and Pallet Manufacturing (321920)
- Other Millwork (including Flooring) (321918)
- Cut Stock, Resawing Lumber, and Planing (321912)
- Sawmills (321113)
- Wood Preservation (321114)
- Prefabricated Wood Building Manufacturing (321992)

| 2016 | Employment | Industry LQ | Establishments |
|---|---|---|---|
| **Wood Products** | **680** | **6.21** | **24** |

### Wood Products



Bar chart comparing 2016 Employment (orange) and 1998 Employment (blue) across categories: Coeur d'Alene, ID Totals (Subcluster), Wood Processing, Wood Components and Products, Prefabricated Wood Building. Horizontal axis from 0 to 1000.

# UPSTREAM METALS

**Upstream vs. Downstream:**
Upstream refers to the material inputs needed for production, while downstream is the opposite end, where products get produced and distributed.

**Example Businesses and NAICS**
- Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum) Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (331491)
- Spring Manufacturing (332613)
- Steel Wire Drawing (331222)
- Other Fabricated Wire Product Manufacturing (332618)

| 2016 | Employment | Industry LQ | Establishments |
|------|------------|-------------|----------------|
| Upstream Metals | 515 | 4.49 | 7 |
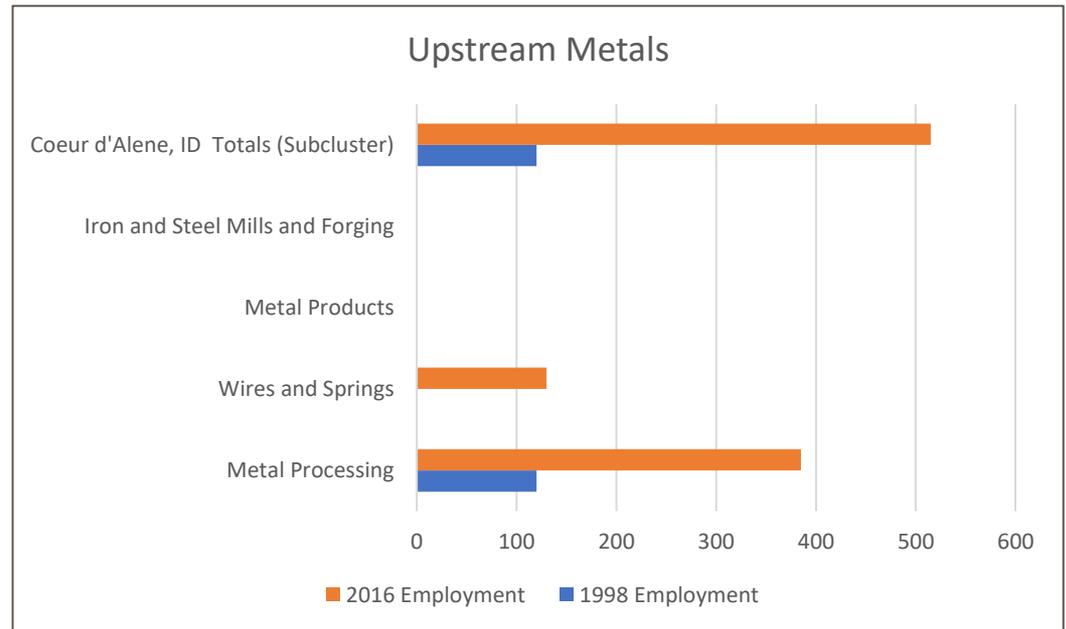


Upstream Metals

# DOWNSTREAM METALS

**Example Businesses and NAICS**

- All Other Miscellaneous Fabricated Metal Product Manufacturing (332999)
- Metal Kitchen Cookware, Utensil, Cutlery, and Flatware (except Precious) Manufacturing (332215)
- Saw Blade and Handtool Manufacturing (332216)
- Ornamental and Architectural Metal Work Manufacturing (332323)
- Small Arms Manufacturing (332994)
- Ammunition (except Small Arms) Manufacturing (332993)

| 2016 | Employment | Industry LQ | Establishments |
|------|-----------|-------------|----------------|
| Downstream Metals | 480 | 3.81 | 10 |



Downstream Metals chart showing 2016 Employment and 1998 Employment for Coeur d'Alene, ID Totals (Subcluster), Metal Containers, Ammunition, Fabricated Metal Structures, and Metal Products.
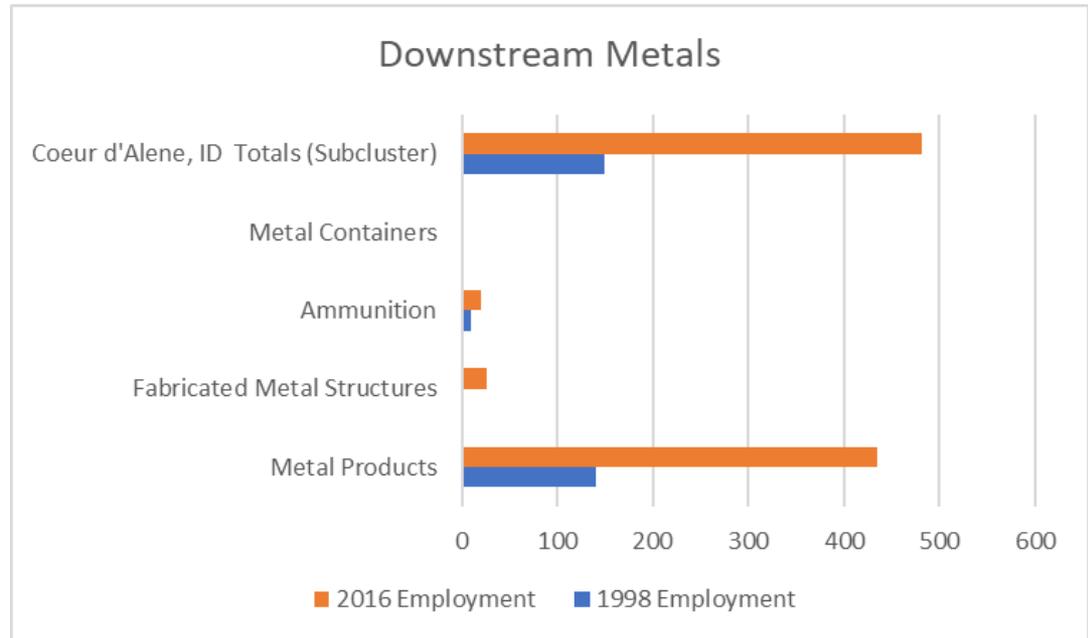
# INFORMATION TECHNOLOGY

## Example Businesses and NAICS

- Computer Terminal and Other Computer Peripheral Equipment Manufacturing (334118)
- Printed Circuit Assembly (Electronic Assembly) Manufacturing (334418)
- Analytical Laboratory Instrument Manufacturing (334516)
- Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (334515)
- Other Measuring and Controlling Device Manufacturing (334519)
- Audio and Video Equipment Manufacturing (334310)

| 2016 | Employment | Industry LQ | Establishments |
|---|---|---|---|
| Information Technology | 635 | 1.86 | 6 |



Information Technology

Categories (top to bottom): Coeur d'Alene, ID Totals (Subcluster), Electronic Components, Semiconductors, Software Publishers, Software Reproducing, Process and Laboratory Instruments, Medical Apparatus, Audio and Video Equipment, Computers and Peripherals

Legend: 2016 Employment, 1998 Employment
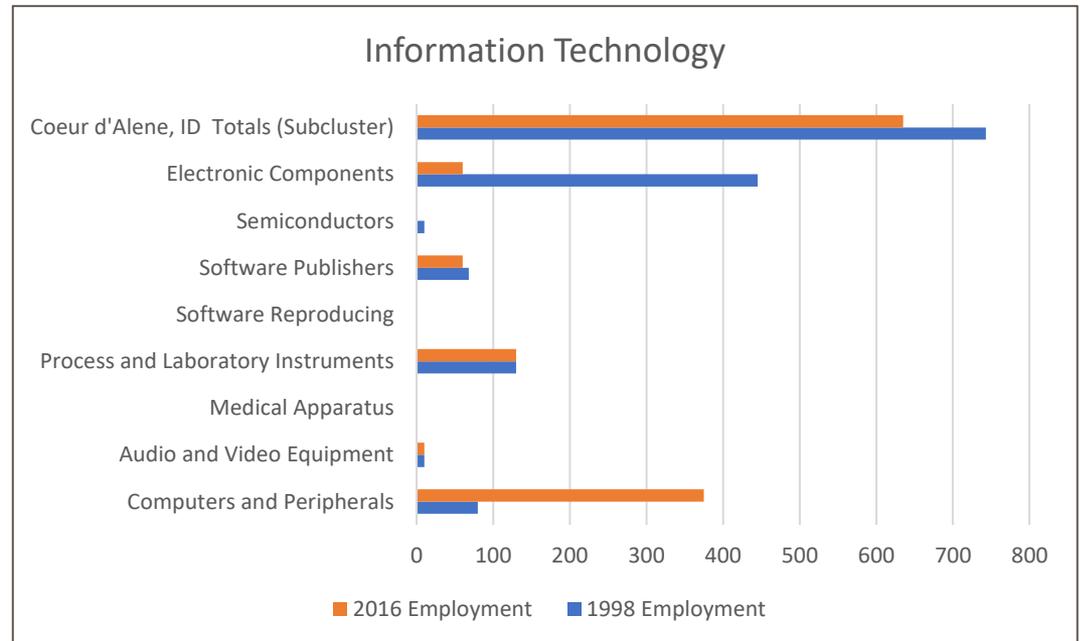
# LIGHTING

## Example Businesses and NAICS

- All Other Miscellaneous Electrical Equipment and Component Manufacturing (335999)
- Relay and Industrial Control Manufacturing (335314)
- Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing (335122)

| 2016 | Employment | Industry LQ | Establishments |
|------|-----------|-------------|----------------|
| Lighting | 395 | 4.57 | 5 |



Lighting

- Coeur d'Alene, ID Totals (Subcluster)
- Lighting Fixtures and Parts
- Storage Batteries
- Electrical Equipment
- Electrical Components

■ 2016 Employment  ■ 1998 Employment
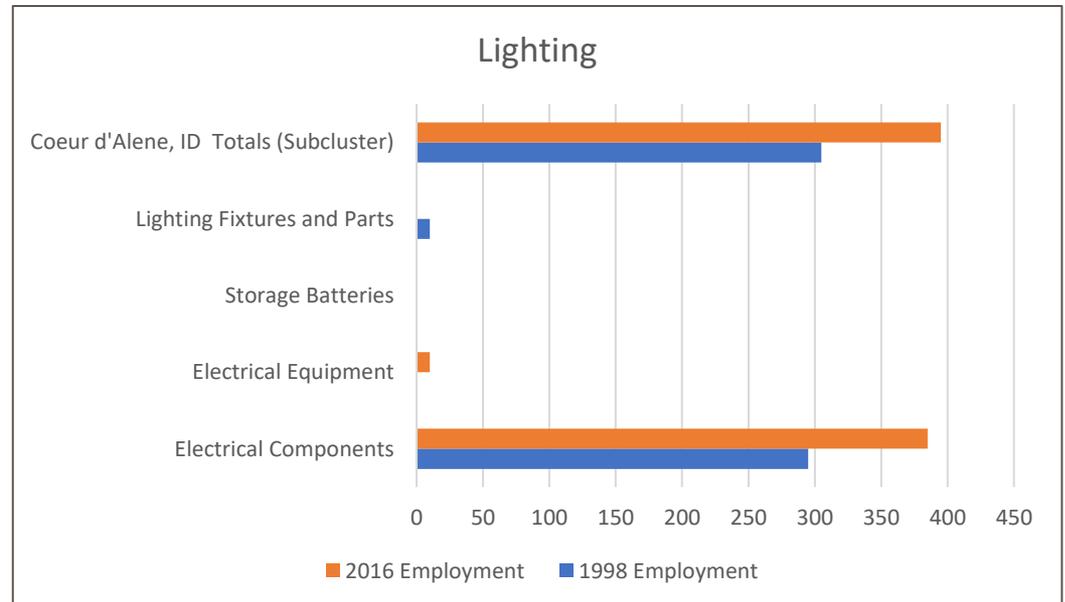
SPOKANE

# INDUSTRY ANALYSIS

Due to the CDA region proximity to Spokane, Washington, we reviewed the industry competitiveness of Spokane to determine if there are complimentary factors that should be considered.  In summary:

- The Spokane region does not have as many diverse industry opportunities as CDA.
- The one industry found in both regions is upstream metals. As the regions continue to focus on aerospace, this specific industry should be better understood to leverage supply chains and market opportunities.

# Spokane Top Industries

| | Employment | Industry LQ |
|---|---|---|
| **Upstream Metals** | 2,155 | 4.39 |
| **Biopharmaceuticals** | 760 | 2.40 |
| **Communication Equipment** | 841 | 1.51 |
| **Insurance** | 3,993 | 1.89 |
| **Education** | 5,731 | 1.42 |
| **Distribution and E-Commerce** | 8,792 | 1.19 |

# Upstream Metals Comparison



Upstream Metals CdA and Spokane
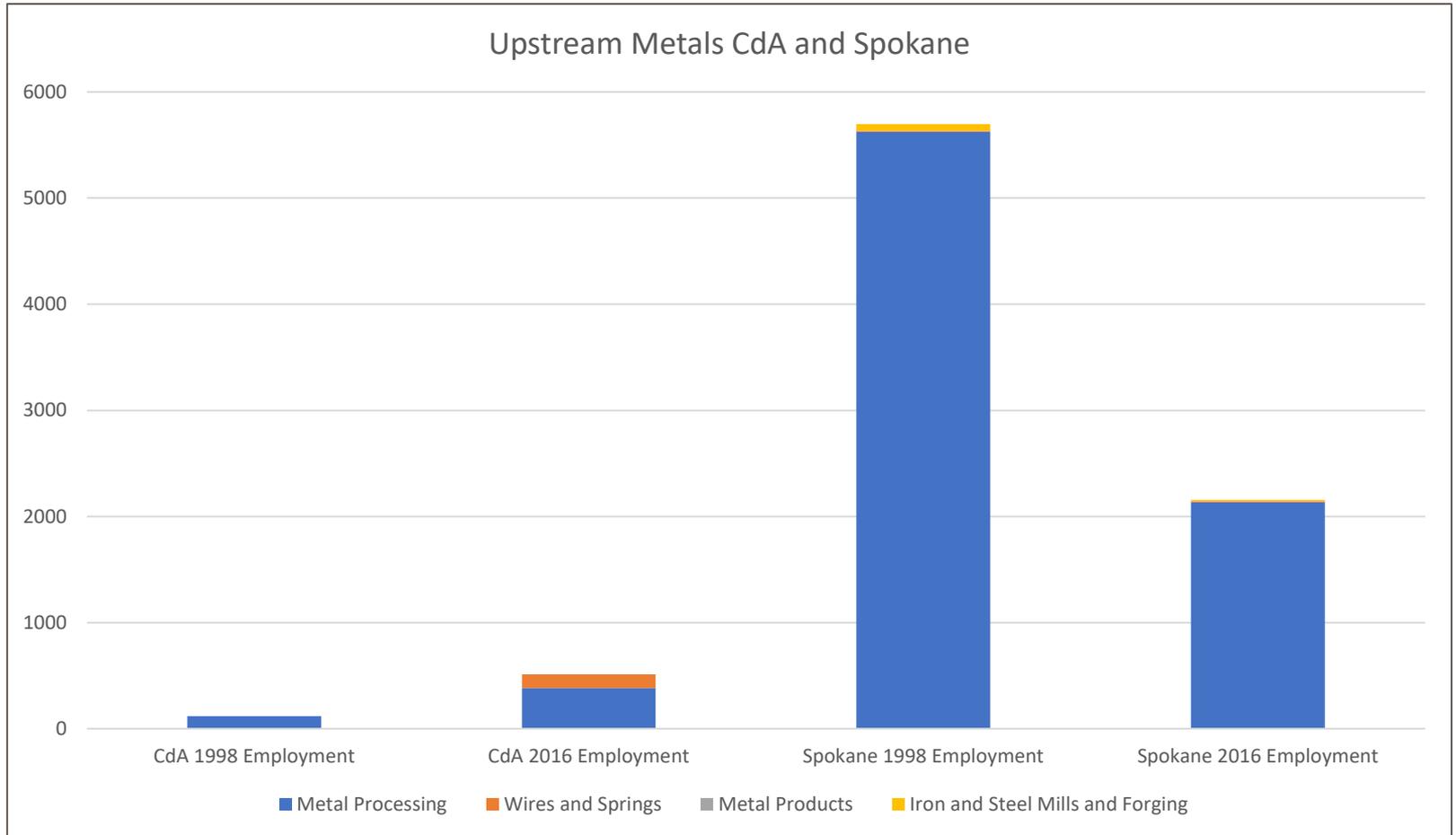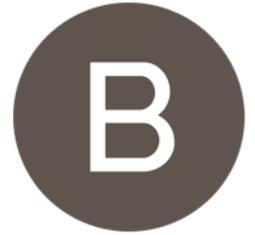
# AEROSPACE INDUSTRY

# Spokane Economic Area Aerospace



Aerospace Spokane Economic Area

(Bars by category, x-axis 0 to 1800)
- Spokane, WA Totals (Subcluster)
- Missiles and Space Vehicles
- Search and Navigation Equipment
- Aircraft

Legend: 2016 Employment / 1998 Employment
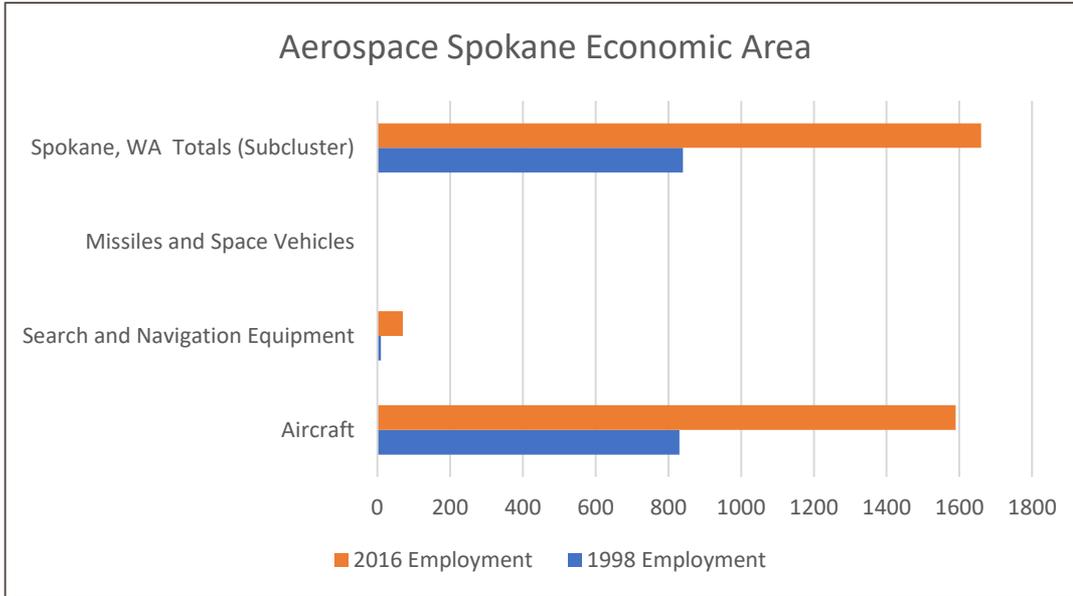
**Spokane Total Employment**: 1,660
**Spokane LQ**: 1.61
**Kootenai Employment Share**: 10% and within "other" parts includes such items as crop dusting apparatus, armament racks, inflight refueling equipment, and external fuel tanks.

| Aircraft sub-sector | Aircraft Manufacturing 336411 | | Aircraft Parts 336412 | | Other Parts 336413 | |
|---|---|---|---|---|---|---|
| County | Emp | Estab | Emp | Estab | Emp | Estab |
| Bonner | 375 | 1 | | | 173 | 3 |
| Kootenai | | | | | 152 | 3 |
| Spokane | 60 | 3 | | | 750 | 4 |
| Whitman | 10 | 1 | | | | |
| Stevens | 10 | 1 | | | | |
| Pend Oreille | | | | | | |

# 2016 Aerospace Employment
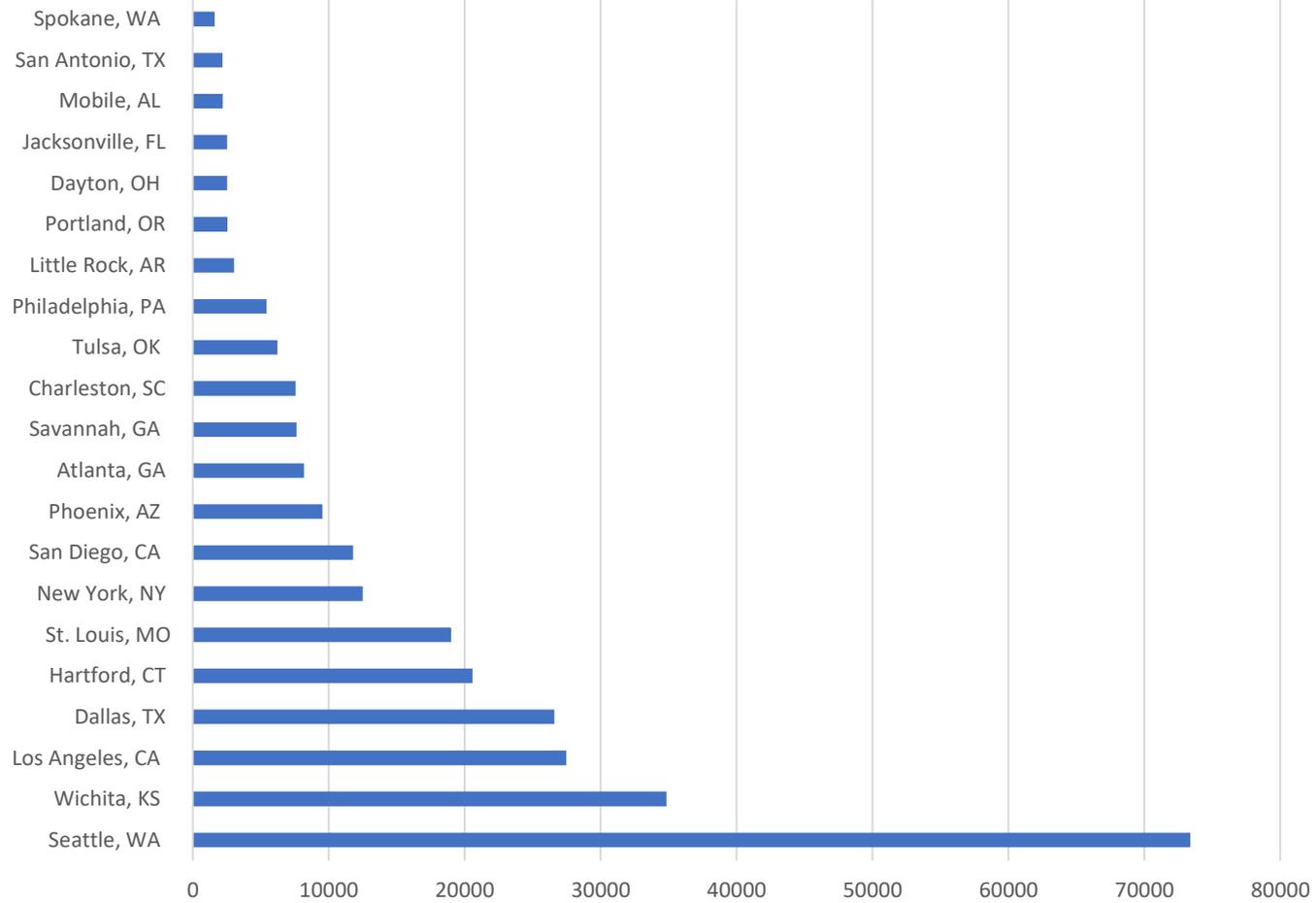
# ATTACHMENT C: Skills and Occupation Analysis

# COEUR D'ALENE TALENT ANALYSIS

## NOVEMBER 2019
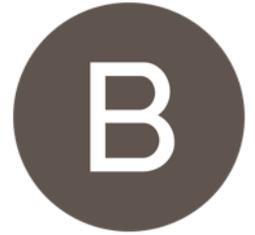
# COEUR D'ALENE MSA

# TAKEAWAYS

- **Service Sector.**
  Half of Coeur d'Alene MSA workers (35,000) have skills aligned with the service sector — 12% larger than the U.S. average.

- **Working Sector.**
  Coeur d'Alene's working sector (traditional blue-collar) is 7% larger than the U.S. average (for a community its size), employing nearly 18,000 residents and up approximately 16% since 2014.

- **Knowledge Sector.**
  Approximately 26% Coeur d'Alene workers are knowledge workers – 11 percent less than the U.S. average. In the past five years, however, the Knowledge Sector in the region has expanded the most — nearly 21%. The Knowledge Sector, especially those with skills in health, computers and business, are expected to increase the most by 2024.

- **Specializations.**
  Coeur d'Alene's occupational specializations (greater than the U.S. average) include:
    - Construction (1.48)
    - Healthcare Support (1.27)
    - Food Preparation (1.22)
    - Sales (1.12)
    - Office and Administration (1.12)
    - Health Practitioners (1.09)
    - Building and Grounds Keeping (1.04)
    - Installation and Repair (1.04)

# TAKEAWAYS
### (Continued)

- **Employment by 2024.**
  Looking to 2024, Coeur d'Alene regional employment base, including those who are self-employed, will top more than 77,400, an increase of 7.7% over 2019. This will represent approximately 5,550 new jobs.

- **Construction.**
  Coeur d'Alene's workforce with construction skills has increased (31%) the most of all occupational sectors from 2014 to 2019. This sector also represents the greatest skill specialization for the region — 48% larger than the U.S. average (for a community its size).

- **Science Expertise.**
  Coeur d'Alene's science occupational cluster is the most specialized knowledge sector for the county — 19% more concentrated than the U.S. average – and the second fastest growing sector. However, it employs less than 1,000 workers.

- **Healthcare Skills.**
  With approximately 4,300 workers, the region boasts a specialization for healthcare practitioners that is 9% greater than the U.S. average. Likewise, the Coeur d'Alene's healthcare support cluster is 27% larger than the U.S. average, employing 2,450 workers. Both skill clusters also represent two fast-growing sectors for the region.

# KOOTENAI COUNTY/ COEUR D'ALENE MSA

**Occupational Cluster: LQ, 2019**

| Occupation | LQ |
|---|---|
| Construction and Extraction | 1.48 |
| Healthcare Support | 1.27 |
| Food Preparation and Serving Related | 1.22 |
| Life, Physical, and Social Science | 1.19 |
| Sales and Related | 1.12 |
| Office and Administrative Support | 1.12 |
| Healthcare Practitioners and Technical | 1.09 |
| Building and Grounds Cleaning and… | 1.04 |
| Installation, Maintenance, and Repair | 1.04 |
| Community and Social Service | 1.00 |
| Personal Care and Service | 1.00 |
| Management | 0.98 |
| Production | 0.95 |
| Education, Training, and Library | 0.86 |
| Protective Service | 0.82 |
| Legal | 0.79 |
| Arts, Design, Entertainment, Sports,… | 0.79 |
| Architecture and Engineering | 0.75 |
| Business and Financial Operations | 0.68 |
| Farming, Fishing, and Forestry | 0.65 |
| Transportation and Material Moving | 0.64 |
| Computer and Mathematical | 0.48 |

U.S. Average = 1.0

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

5

# COEUR D'ALENE MSA

## Occupational Cluster: Employment, 2019

| Occupation | Employment |
|---|---|
| Office and Administrative Support | 11,419 |
| Sales and Related | 7,885 |
| Food Preparation and Serving... | 7,424 |
| Construction and Extraction | 4,985 |
| Healthcare Practitioners and... | 4,326 |
| Management | 4,117 |
| Production | 3,969 |
| Education, Training, and Library | 3,441 |
| Personal Care and Service | 3,361 |
| Transportation and Material Moving | 3,160 |
| Installation, Maintenance, and... | 2,891 |
| Building and Grounds Cleaning... | 2,748 |
| Business and Financial Operations | 2,539 |
| Healthcare Support | 2,449 |
| Protective Service | 1,363 |
| Community and Social Service | 1,278 |
| Arts, Design, Entertainment,... | 1,047 |
| Computer and Mathematical | 1,007 |
| Architecture and Engineering | 916 |
| Life, Physical, and Social Science | 708 |
| Legal | 473 |
| Farming, Fishing, and Forestry | 373 |

Total Employment: 71,878

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County and blue sharing indicates LQ over 1.00

6

# COEUR D'ALENE MSA

## Occupational Cluster: Share of Employment (%), 2019

| Occupational Cluster | Share |
|---|---|
| Office and Administrative Support | 15.8% |
| Sales and Related | 10.9% |
| Food Preparation and Serving… | 10.3% |
| Construction and Extraction | 6.9% |
| Healthcare Practitioners and… | 6.0% |
| Management | 5.7% |
| Production | 5.5% |
| Education, Training, and Library | 4.8% |
| Personal Care and Service | 4.7% |
| Transportation and Material Moving | 4.4% |
| Installation, Maintenance, and… | 4.0% |
| Building and Grounds Cleaning… | 3.8% |
| Business and Financial Operations | 3.5% |
| Healthcare Support | 3.4% |
| Protective Service | 1.9% |
| Community and Social Service | 1.8% |
| Arts, Design, Entertainment,… | 1.5% |
| Computer and Mathematical | 1.4% |
| Architecture and Engineering | 1.3% |
| Life, Physical, and Social Science | 1.0% |
| Legal | 0.7% |
| Farming, Fishing, and Forestry | 0.5% |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

**Occupational Cluster: 5-Year Employment Growth, 2014- 2019**

| Occupation | Growth |
|---|---|
| Construction and Extraction | 30.8% |
| Healthcare Practitioners and… | 23.8% |
| Food Preparation and Serving… | 22.5% |
| Life, Physical, and Social Science | 22.5% |
| Business and Financial Operations | 22.1% |
| Management | 21.9% |
| Computer and Mathematical | 21.4% |
| Installation, Maintenance, and… | 21.1% |
| Legal | 18.9% |
| Personal Care and Service | 18.7% |
| Arts, Design, Entertainment,… | 18.1% |
| Education, Training, and Library | 17.0% |
| Architecture and Engineering | 16.1% |
| Healthcare Support | 15.5% |
| Transportation and Material Moving | 14.7% |
| Farming, Fishing, and Forestry | 14.5% |
| Office and Administrative Support | 12.8% |
| Sales and Related | 8.5% |
| Community and Social Service | 8.3% |
| Building and Grounds Cleaning… | 8.0% |
| Protective Service | 5.4% |
| Production | 3.3% |

All Occupations: 16.0%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note:  Coeur d'Alene is defined as Kootenai County

8

# COEUR D'ALENE MSA

**Occupational Cluster: 5-Year Employment Growth (New Jobs), 2014-2019**

| Occupational Cluster | New Jobs |
|---|---|
| Food Preparation and Serving... | 1,362 |
| Office and Administrative Support | 1,298 |
| Construction and Extraction | 1,175 |
| Healthcare Practitioners and... | 830 |
| Management | 740 |
| Sales and Related | 620 |
| Personal Care and Service | 530 |
| Installation, Maintenance, and... | 504 |
| Education, Training, and Library | 500 |
| Business and Financial Operations | 460 |
| Transportation and Material Moving | 404 |
| Healthcare Support | 328 |
| Building and Grounds Cleaning... | 203 |
| Computer and Mathematical | 177 |
| Arts, Design, Entertainment,... | 161 |
| Life, Physical, and Social Science | 130 |
| Production | 128 |
| Architecture and Engineering | 127 |
| Community and Social Service | 98 |
| Legal | 75 |
| Protective Service | 69 |
| Farming, Fishing, and Forestry | 47 |

Total New Jobs: 9,996

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

9

# COEUR D'ALENE MSA

## Occupational Cluster: 5-Year Employment Projection, 2019-2024

| Occupational Cluster | Projection |
|---|---|
| Healthcare Support | 15.7% |
| Healthcare Practitioners and Technical | 13.1% |
| Computer and Mathematical | 12.2% |
| Business and Financial Operations | 10.9% |
| Education, Training, and Library | 9.0% |
| Food Preparation and Serving Related | 8.4% |
| Installation, Maintenance, and Repair | 8.2% |
| Management | 8.0% |
| Personal Care and Service | 8.0% |
| Life, Physical, and Social Science | 8.0% |
| Transportation and Material Moving | 7.9% |
| Architecture and Engineering | 7.8% |
| Construction and Extraction | 7.3% |
| Arts, Design, Entertainment, Sports, and Media | 7.1% |
| Building and Grounds Cleaning and Maintenance | 6.8% |
| Office and Administrative Support | 6.3% |
| Legal | 6.2% |
| Community and Social Service | 5.9% |
| Sales and Related | 5.9% |
| Production | 2.6% |
| Protective Service | 2.6% |
| Farming, Fishing, and Forestry | -2.0% |

All Occupations: 7.7%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

10

# COEUR D'ALENE MSA

**Occupational Cluster: 5-Year Employment Projection (New Jobs), 2019-2024**

| Occupational Cluster | New Jobs |
| --- | --- |
| Office and Administrative Support | 717 |
| Food Preparation and Serving Related | 624 |
| Healthcare Practitioners and Technical | 567 |
| Sales and Related | 463 |
| Healthcare Support | 384 |
| Construction and Extraction | 364 |
| Management | 331 |
| Education, Training, and Library | 308 |
| Business and Financial Operations | 277 |
| Personal Care and Service | 270 |
| Transportation and Material Moving | 250 |
| Installation, Maintenance, and Repair | 238 |
| Building and Grounds Cleaning and Maintenance | 187 |
| Computer and Mathematical | 122 |
| Production | 105 |
| Community and Social Service | 76 |
| Arts, Design, Entertainment, Sports, and Media | 75 |
| Architecture and Engineering | 71 |
| Life, Physical, and Social Science | 56 |
| Protective Service | 36 |
| Legal | 29 |
| Farming, Fishing, and Forestry | -7 |

Total New Jobs: 5,543

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

11

# COEUR D'ALENE MSA

## Occupational Cluster: Projected Employment, 2024

| Occupation | Employment |
|---|---|
| Office and Administrative Support | 12,135 |
| Sales and Related | 8,348 |
| Food Preparation and Serving... | 8,049 |
| Construction and Extraction | 5,349 |
| Healthcare Practitioners and... | 4,893 |
| Management | 4,447 |
| Production | 4,074 |
| Education, Training, and Library | 3,750 |
| Personal Care and Service | 3,631 |
| Transportation and Material Moving | 3,409 |
| Installation, Maintenance, and... | 3,129 |
| Building and Grounds Cleaning... | 2,935 |
| Healthcare Support | 2,832 |
| Business and Financial Operations | 2,816 |
| Protective Service | 1,399 |
| Community and Social Service | 1,354 |
| Computer and Mathematical | 1,129 |
| Arts, Design, Entertainment,... | 1,121 |
| Architecture and Engineering | 987 |
| Life, Physical, and Social Science | 764 |
| Legal | 503 |
| Farming, Fishing, and Forestry | 365 |

Total Employment: 77,421

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

## Occupational Cluster: Projected Share of Employment, 2024

| Occupational Cluster | Share |
|---|---|
| Office and Administrative Support | 15.6% |
| Sales and Related | 10.7% |
| Food Preparation and Serving... | 10.4% |
| Construction and Extraction | 6.9% |
| Healthcare Practitioners and... | 6.3% |
| Management | 5.7% |
| Production | 5.2% |
| Education, Training, and Library | 4.8% |
| Personal Care and Service | 4.7% |
| Transportation and Material Moving | 4.4% |
| Installation, Maintenance, and... | 4.0% |
| Building and Grounds Cleaning... | 3.8% |
| Healthcare Support | 3.6% |
| Business and Financial Operations | 3.6% |
| Protective Service | 1.8% |
| Community and Social Service | 1.7% |
| Computer and Mathematical | 1.4% |
| Arts, Design, Entertainment,... | 1.5% |
| Architecture and Engineering | 1.3% |
| Life, Physical, and Social Science | 1.0% |
| Legal | 0.6% |
| Farming, Fishing, and Forestry | 0.5% |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

**Occupational Cluster: Average Annual Salary, 2019**

| Occupational Cluster | Average Annual Salary |
|---|---|
| Legal | $89,005 |
| Healthcare Practitioners and… | $74,156 |
| Management | $64,971 |
| Architecture and Engineering | $64,461 |
| Computer and Mathematical | $61,217 |
| Business and Financial Operations | $55,628 |
| Life, Physical, and Social Science | $48,711 |
| Protective Service | $47,844 |
| Community and Social Service | $42,354 |
| Construction and Extraction | $40,386 |
| Installation, Maintenance, and… | $39,220 |
| Farming, Fishing, and Forestry | $35,790 |
| Arts, Design, Entertainment,… | $32,469 |
| Transportation and Material Moving | $32,432 |
| Office and Administrative Support | $32,320 |
| Healthcare Support | $31,681 |
| Education, Training, and Library | $31,293 |
| Production | $30,819 |
| Sales and Related | $27,616 |
| Building and Grounds Cleaning… | $25,392 |
| Personal Care and Service | $23,400 |
| Food Preparation and Serving… | $20,956 |

All Occupations: $37,689

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

14

# COEUR D'ALENE MSA

## Top 5 Occupational Clusters: LQ

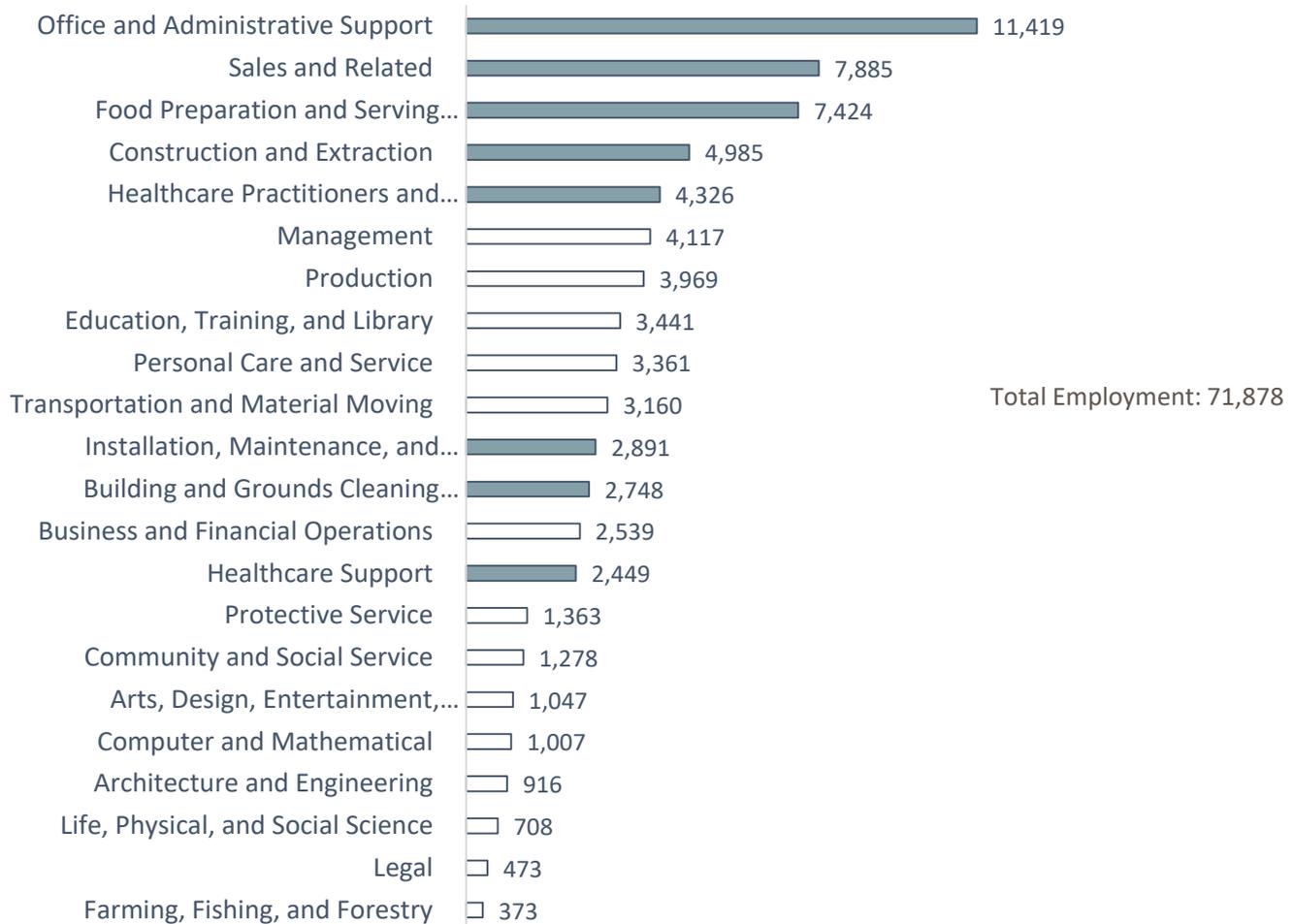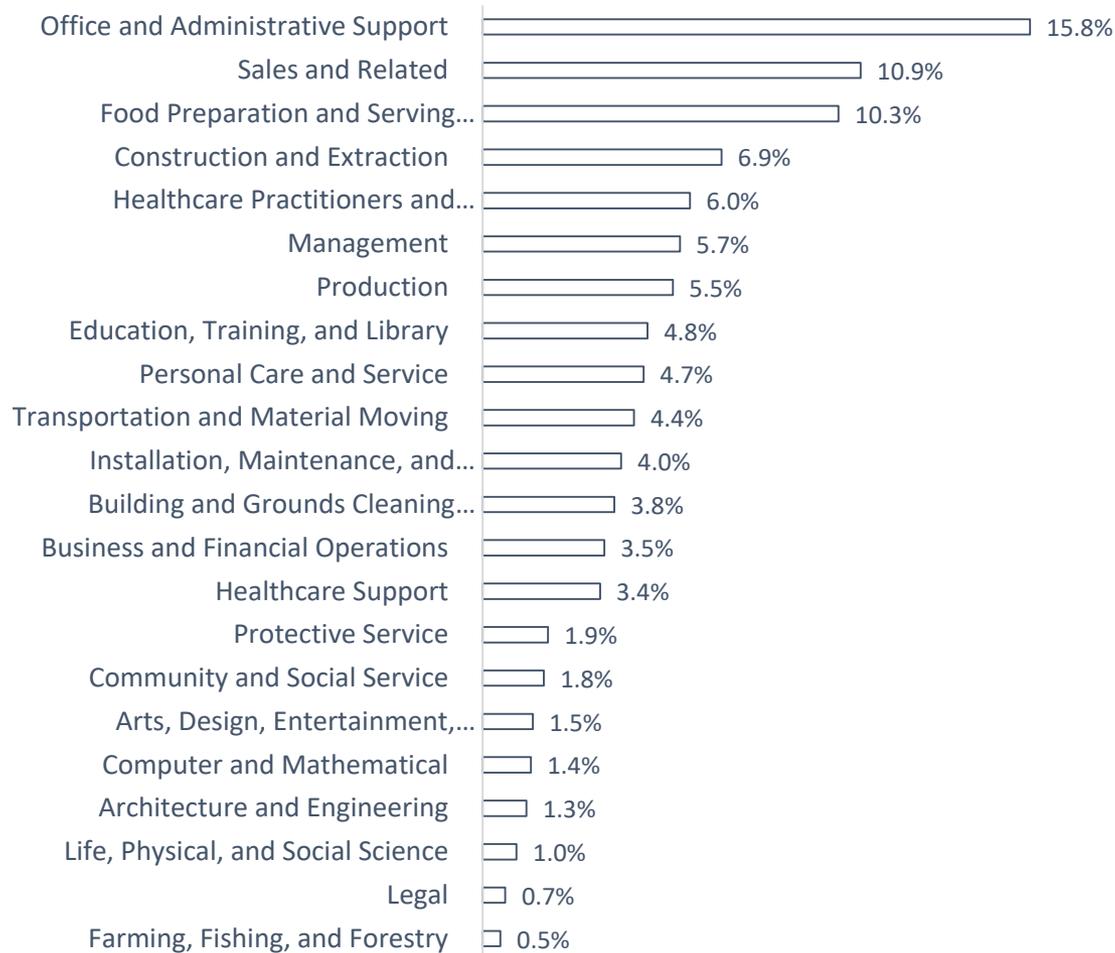| Rank | Cluster | LQ | Share of Employment (%) | 5-Year Growth, 2014-2019 | Average Annual Salary |
|------|---------|-----|-------------------------|--------------------------|-----------------------|
| 1 | Construction and Extraction | 1.48 | 6.9% | 30.8% | $40,386 |
| 2 | Healthcare Support | 1.27 | 3.4% | 15.5% | $31,681 |
| 3 | Food Preparation and Serving Related | 1.22 | 10.3% | 22.5% | $20,956 |
| 4 | Life, Physical, and Social Science | 1.19 | 1.0% | 22.5% | $48,711 |
| 5 | Sales and Related | 1.12 | 10.9% | 8.5% | $27,616 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note:  Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

## Top 5 Occupational Clusters: Total Employment

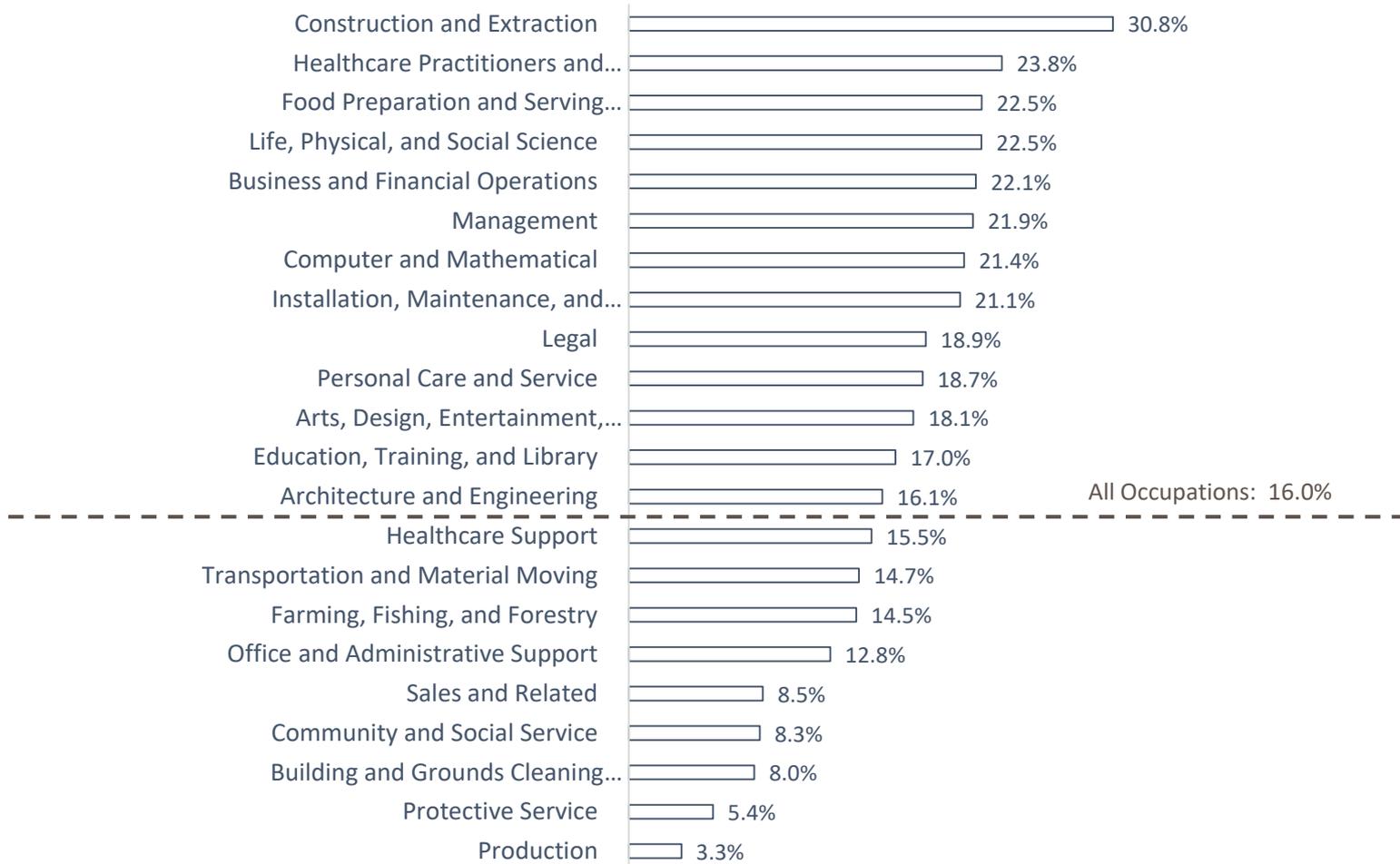| Rank | Cluster | Total Employment | Share of Employment (%) | LQ | Average Annual Salary |
|------|---------|------------------|-------------------------|-----|-----------------------|
| 1 | Office and Administrative Support | 11,419 | 15.8% | 1.07 | $32,320 |
| 2 | Sales and Related | 7,885 | 10.9% | 1.14 | $27,616 |
| 3 | Food Preparation and Serving Related | 7,424 | 10.3% | 1.19 | $20,956 |
| 4 | Construction and Extraction | 4,985 | 6.9% | 1.38 | $40,386 |
| 5 | Healthcare Practitioners and Technical | 4,326 | 6.0% | 1.04 | $74,156 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

**Top 5 Occupational Clusters: 5-Year Employment Growth, 2014-2019**

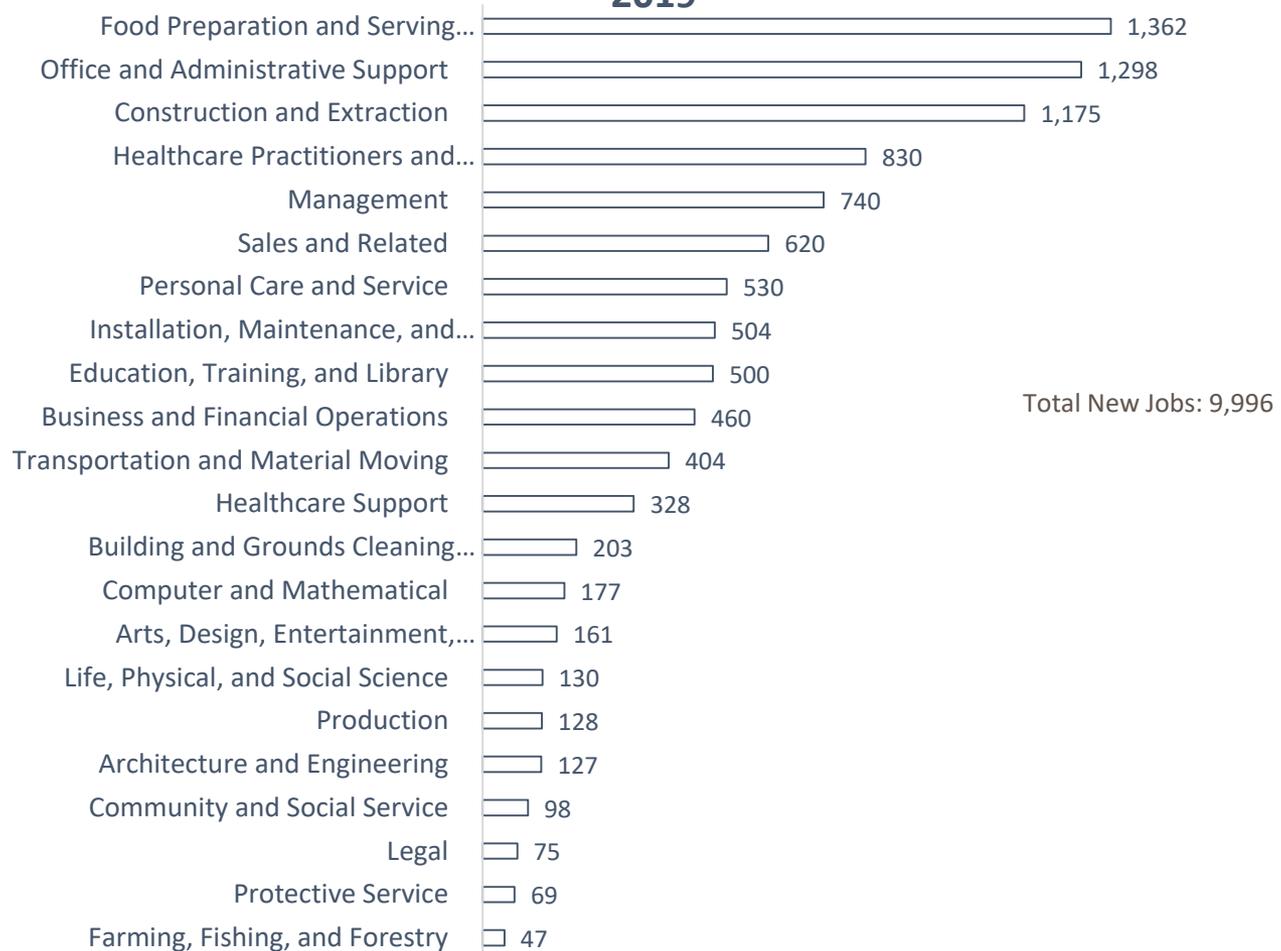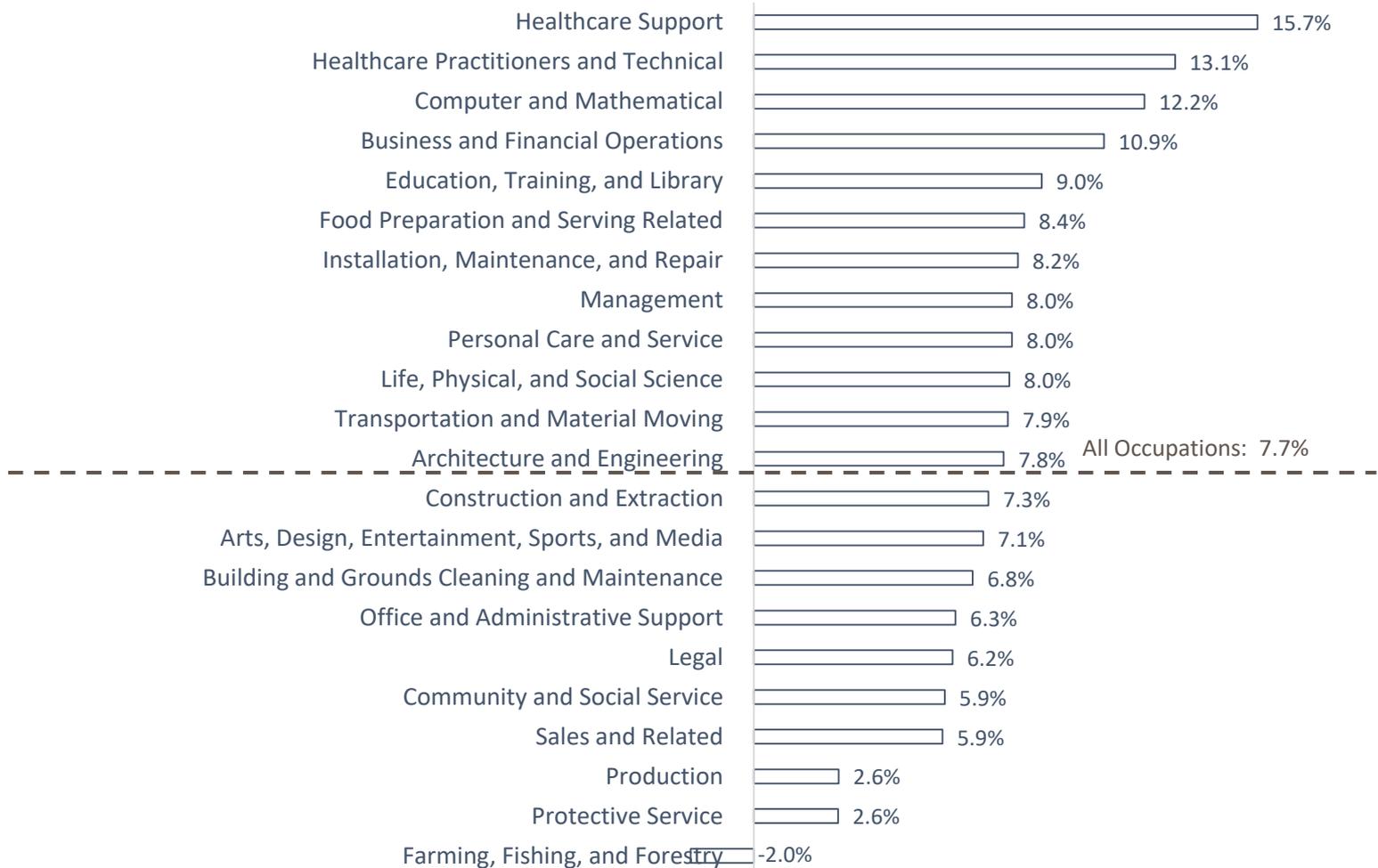| Rank | Cluster | 5-Year Growth | Share of Employment (%) | LQ | Average Annual Salary |
|------|---------|---------------|-------------------------|------|------------------------|
| 1 | Construction and Extraction | 30.8% | 6.9% | 1.48 | $40,386 |
| 2 | Healthcare Practitioners and Technical | 23.8% | 6.3% | 1.09 | $74,156 |
| 3 | Food Preparation and Serving Related | 22.5% | 10.4% | 1.22 | $20,956 |
| 4 | Life, Physical, and Social Science | 22.5% | 1.0% | 1.19 | $48,711 |
| 5 | Business and Financial Operations | 22.1% | 3.6% | 0.68 | $55,628 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

**Top 5 Occupational Clusters: 5-Year Employment Projection, 2014-2019**

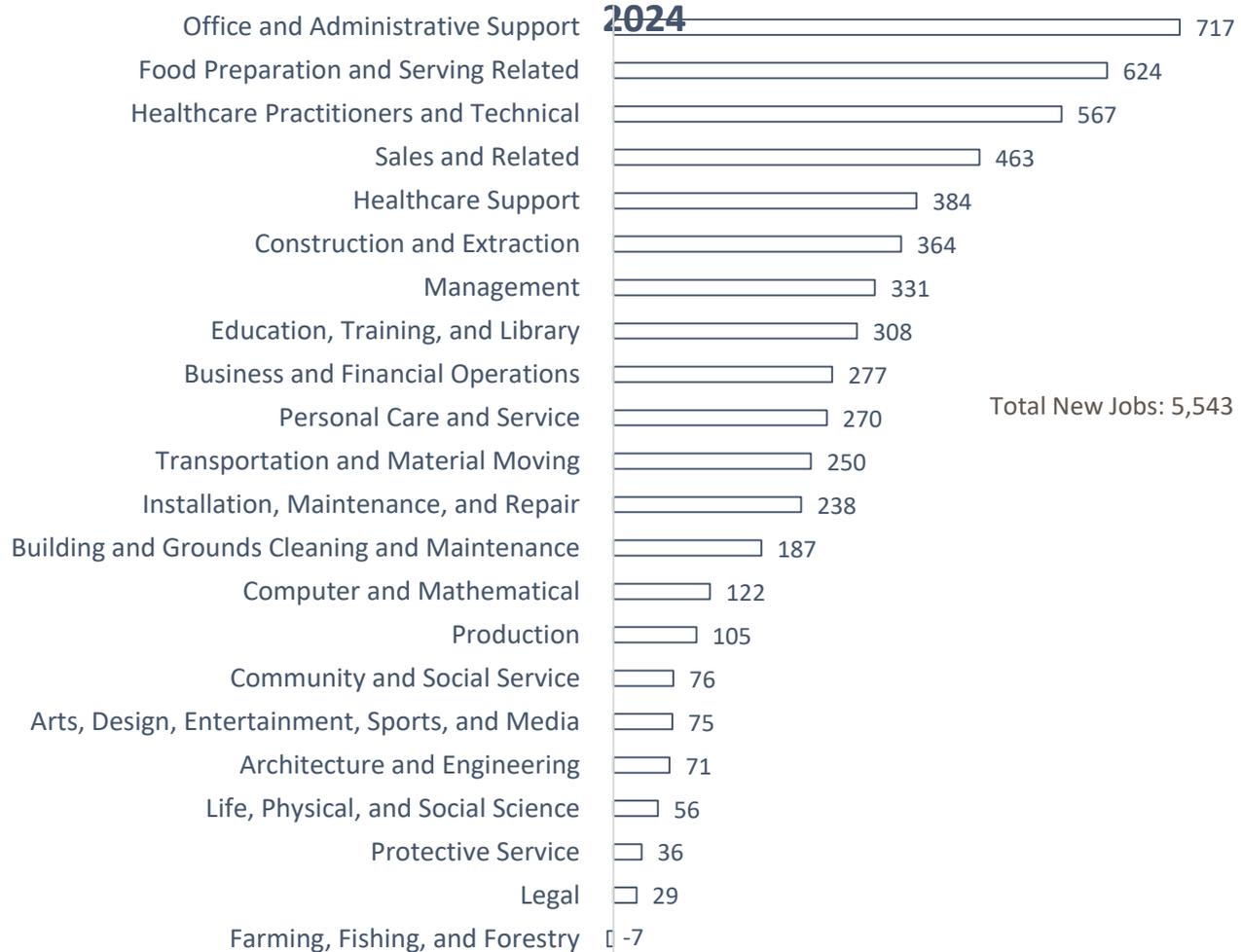| Rank | Cluster | 5-Year Projection, 2019-2024 | 2024 Employment | Share of 2024 Employment | LQ |
|---|---|---|---|---|---|
| 1 | Healthcare Support | 15.7% | 2,832 | 3.6% | 1.27 |
| 2 | Healthcare Practitioners and Technical | 13.1% | 4,893 | 6.3% | 1.09 |
| 3 | Computer and Mathematical | 12.2% | 1,129 | 1.5% | 0.48 |
| 4 | Business and Financial Operations | 10.9% | 2,816 | 3.6% | 0.68 |
| 5 | Education, Training, and Library | 9.0% | 3,750 | 4.8% | 0.86 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

**Top 5 Occupational Clusters: Average Annual Cluster**

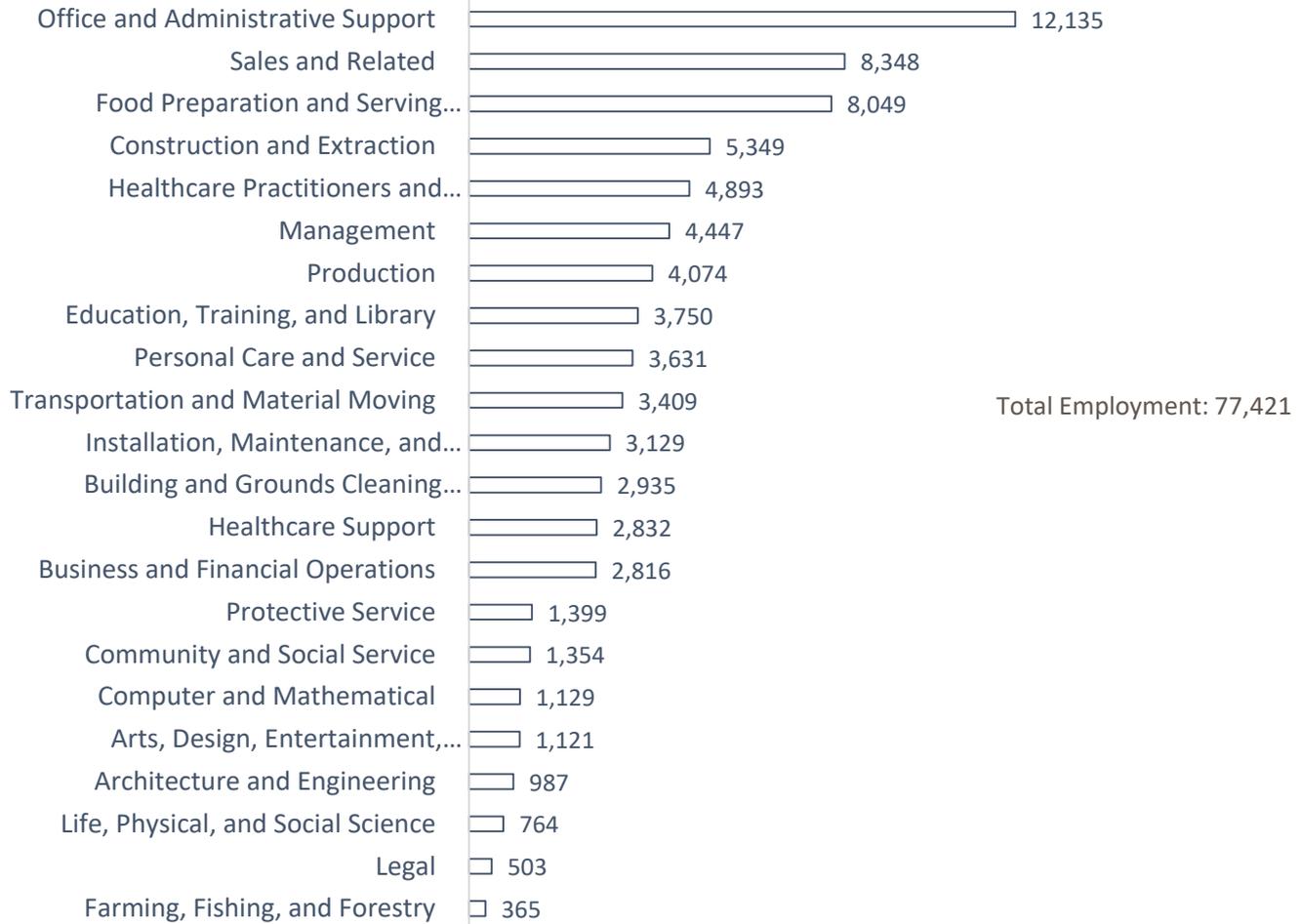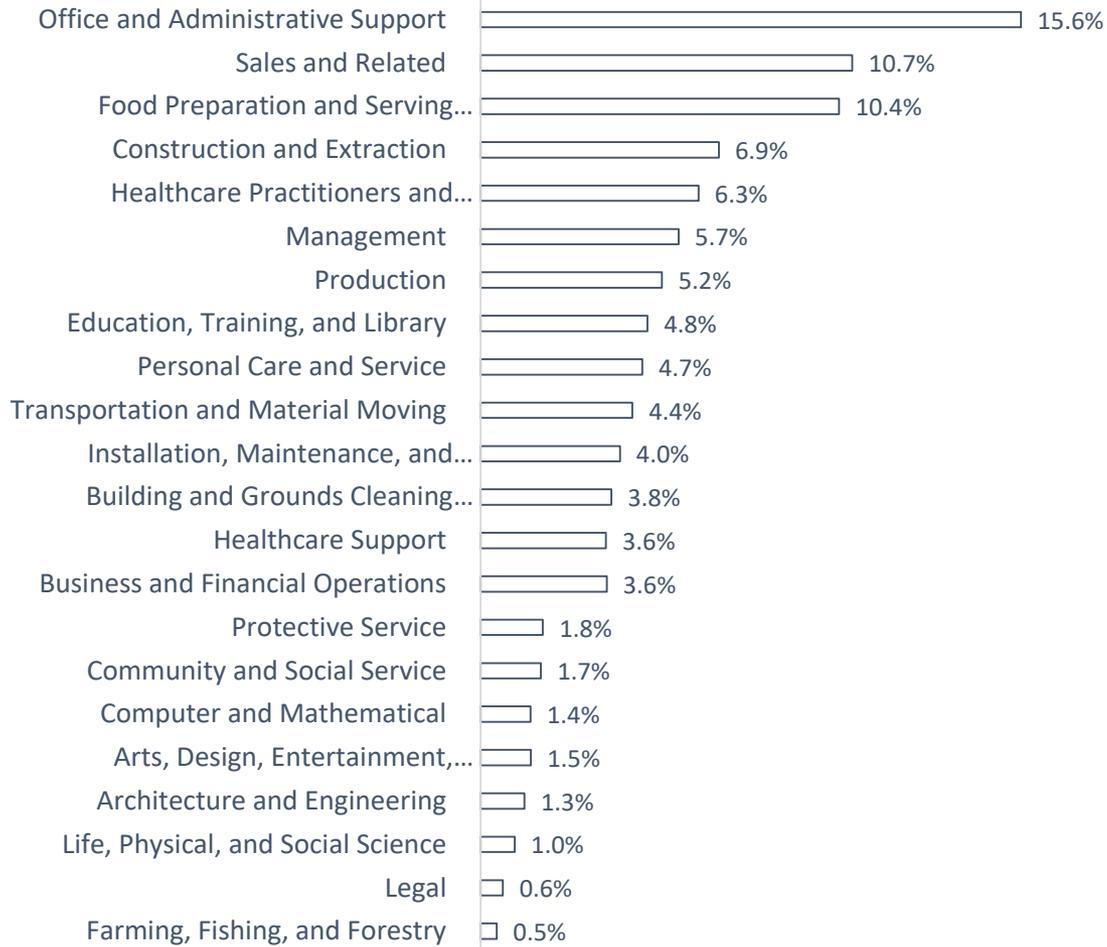| Rank | Cluster | Average Annual Salary | LQ | Share of Employment | 5-Year Growth, 2014-2019 |
|------|---------|----------------------|-----|---------------------|--------------------------|
| 1 | Legal | $89,005 | 0.79 | 0.7% | 18.9% |
| 2 | Healthcare Practitioners and Technical | $74,156 | 1.09 | 6.0% | 23.8% |
| 3 | Management | $64,971 | 0.98 | 5.7% | 21.9% |
| 4 | Architecture and Engineering | $64,461 | 0.75 | 1.3% | 16.1% |
| 5 | Computer and Mathematical | $61,217 | 0.48 | 1.4% | 21.4% |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note:  Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

## Sector

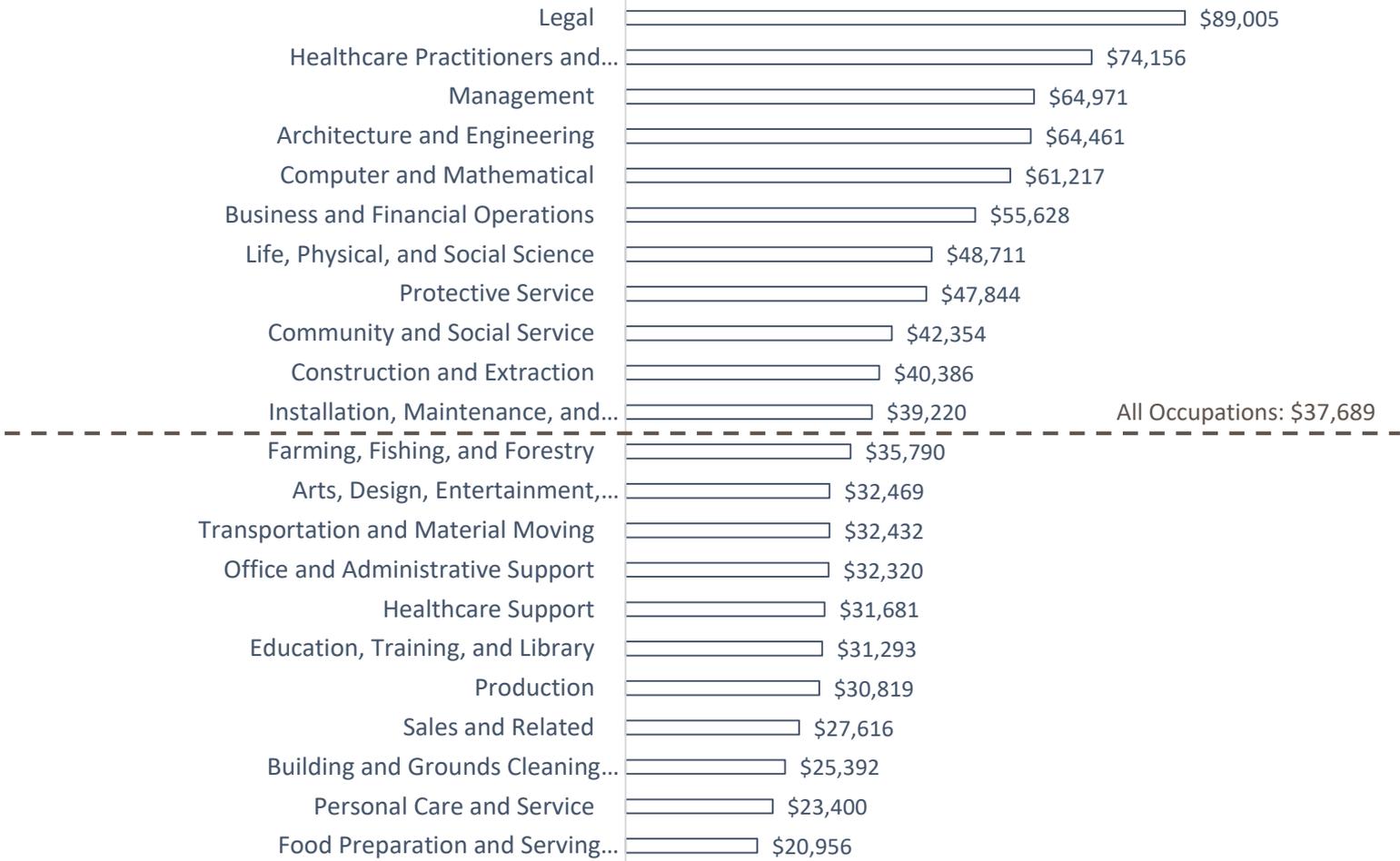| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---------|-----|-----------|------------------------|--------------------------|------------------------------|----------------------|
| Service Sector | 1.12 | 35,178 | 48.8% | 13.9% | 7.30% | $28,936 |
| Working Sector | 1.07 | 17,753 | 24.6% | 15.7% | 6.4% | $34,320 |
| Knowledge Sector | 0.89 | 18,574 | 25.7% | 20.8% | 9.8% | $57,526 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note:  Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

**Sector**

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

## Knowledge Sector

| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---|---|---|---|---|---|---|
| Life, Physical, and Social Science | 1.19 | 708 | 1.0% | 22.5% | 8.0% | $48,711 |
| Healthcare Practitioners and Technical | 1.09 | 4,326 | 6.0% | 23.8% | 13.1% | $74,156 |
| Management | 0.98 | 4,117 | 5.7% | 21.9% | 8.0% | $64,971 |
| Education, Training, and Library | 0.86 | 3,441 | 4.8% | 17.0% | 9.0% | $31,293 |
| Legal | 0.79 | 473 | 0.7% | 18.9% | 6.2% | $89,005 |
| Arts, Design, Entertainment, Sports, and Media | 0.79 | 1,047 | 1.5% | 18.1% | 7.1% | $32,469 |
| Architecture and Engineering | 0.75 | 916 | 1.3% | 16.1% | 7.8% | $64,461 |
| Business and Financial Operations | 0.68 | 2,539 | 3.5% | 22.1% | 10.9% | $55,628 |
| Computer and Mathematical | 0.48 | 1,007 | 1.4% | 21.4% | 12.2% | $61,217 |
| **Knowledge Sector** | **0.89** | **18,574** | **25.7%** | **20.80%** | **9.80%** | **$57,526** |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

Size of Bubble = Total Employment

# COEUR D'ALENE MSA

## Knowledge Sector
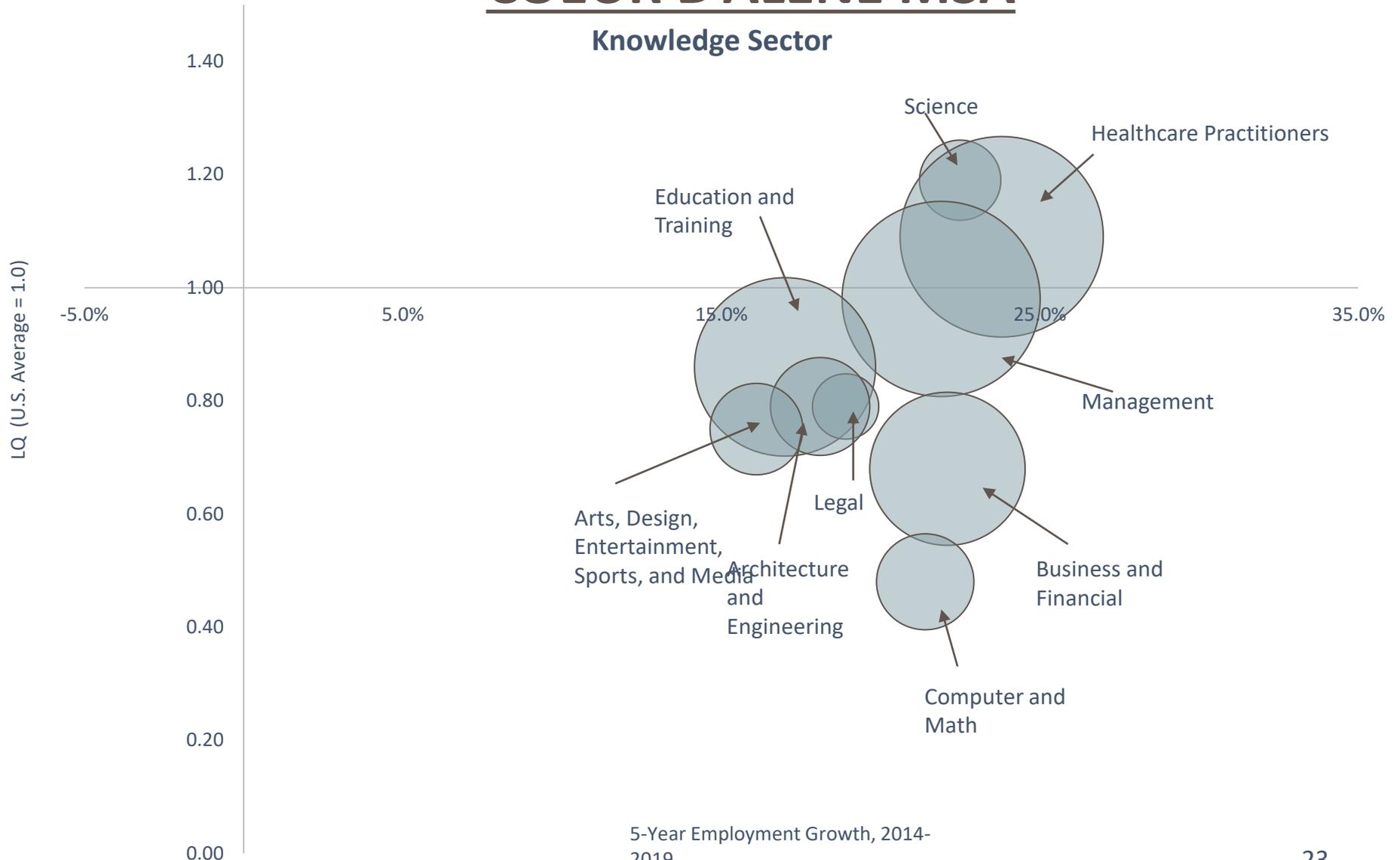


Science

Healthcare Practitioners

Education and Training

LQ (U.S. Average = 1.0)

1.40

1.20

1.00

0.80

0.60

0.40

0.20

0.00

-5.0%    5.0%    15.0%    25.0%    35.0%

Management

Legal

Arts, Design, Entertainment, Sports, and Media

Architecture and Engineering

Business and Financial

Computer and Math

5-Year Employment Growth, 2014-2019

23

# COEUR D'ALENE MSA

## Service Sector

| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---------|-----|------------|-------------------------|--------------------------|------------------------------|-----------------------|
| Healthcare Support | 1.27 | 2,449 | 3.4% | 15.5% | 15.7% | $31,681 |
| Food Preparation and Serving Related | 1.22 | 7,424 | 10.3% | 22.5% | 8.4% | $20,956 |
| Sales and Related | 1.12 | 7,885 | 10.9% | 8.5% | 5.9% | $27,616 |
| Office and Administrative Support | 1.12 | 11,419 | 15.8% | 12.8% | 6.3% | $32,320 |
| Community and Social Service | 1.00 | 1,278 | 1.8% | 8.3% | 5.9% | $42,354 |
| Personal Care and Service | 1.00 | 3,361 | 4.7% | 18.7% | 8.0% | $23,400 |
| Protective Service | 0.82 | 1,363 | 1.9% | 5.4% | 2.6% | $47,844 |
| **Service Sector** | **1.12** | **35,178** | **48.8%** | **13.9%** | **7.30%** | **$28,936** |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA
Service Sector

Size of Bubble = Total Employment
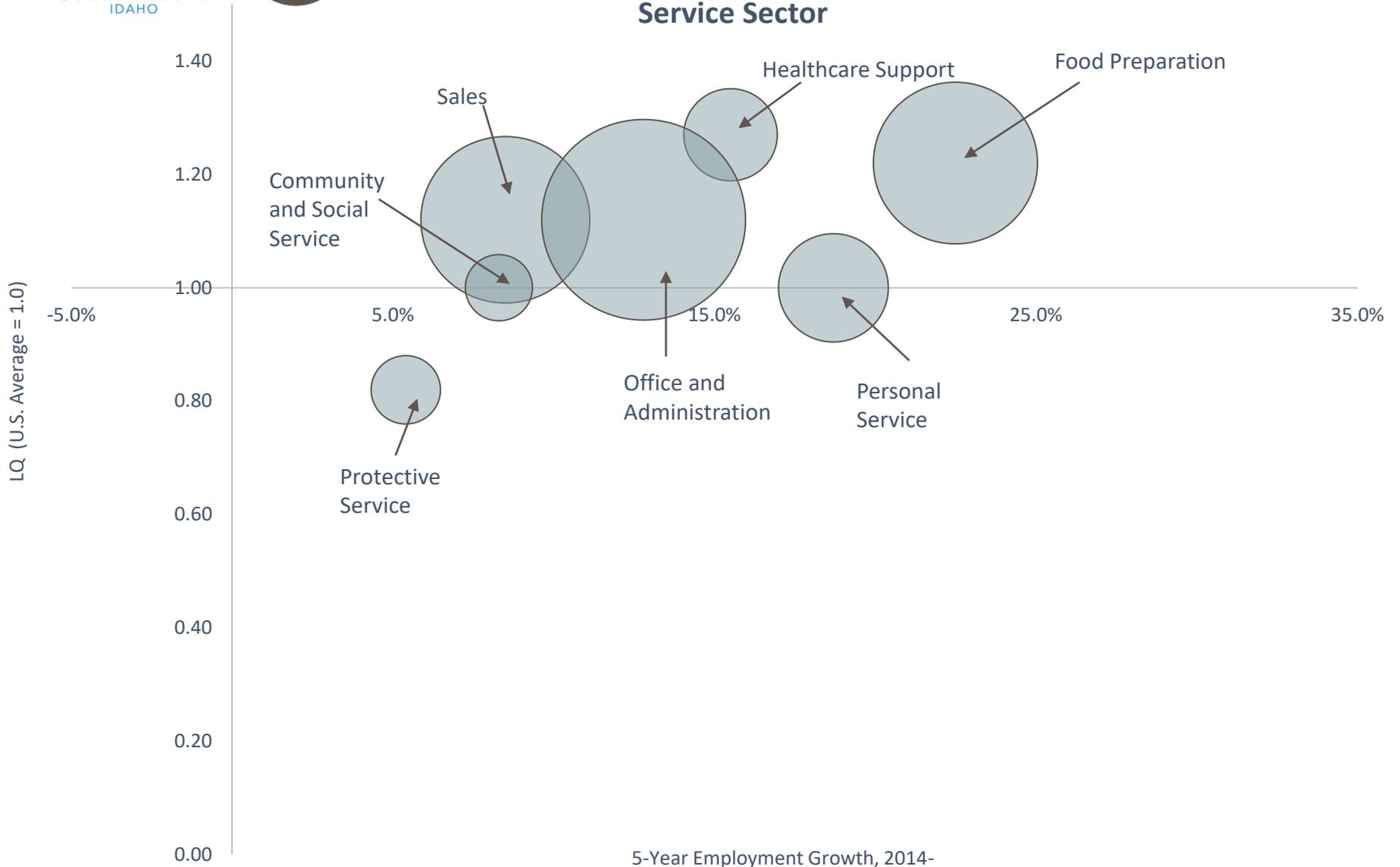
Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

# COEUR D'ALENE MSA

## Working Sector

| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---|---|---|---|---|---|---|
| Construction and Extraction | 1.48 | 4,985 | 6.9% | 30.8% | 7.3% | $40,386 |
| Building and Grounds Cleaning and Maintenance | 1.04 | 2,748 | 3.8% | 8.0% | 6.8% | $25,392 |
| Installation, Maintenance, and Repair | 1.04 | 2,891 | 4.0% | 21.1% | 8.2% | $39,220 |
| Production | 0.95 | 3,969 | 5.5% | 3.3% | 2.6% | $30,819 |
| Transportation and Material Moving | 0.64 | 3,160 | 4.4% | 14.7% | 7.9% | $32,432 |
| **Working Sector** | **1.07** | **17,753** | **24.6%** | **15.7%** | **6.4%** | **$34,320** |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note:  Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Working Sector

Size of Bubble = Total Employment

Construction

Building and Grounds Cleaning

Production

Installation and Repair

Transportation

LQ (U.S. Average = 1.0)

1.75
1.50
1.25
1.00
0.75
0.50
0.25
0.00

-5.0%    5.0%    15.0%    25.0%    35.0%

5-Year Employment Growth, 2014-2019

27
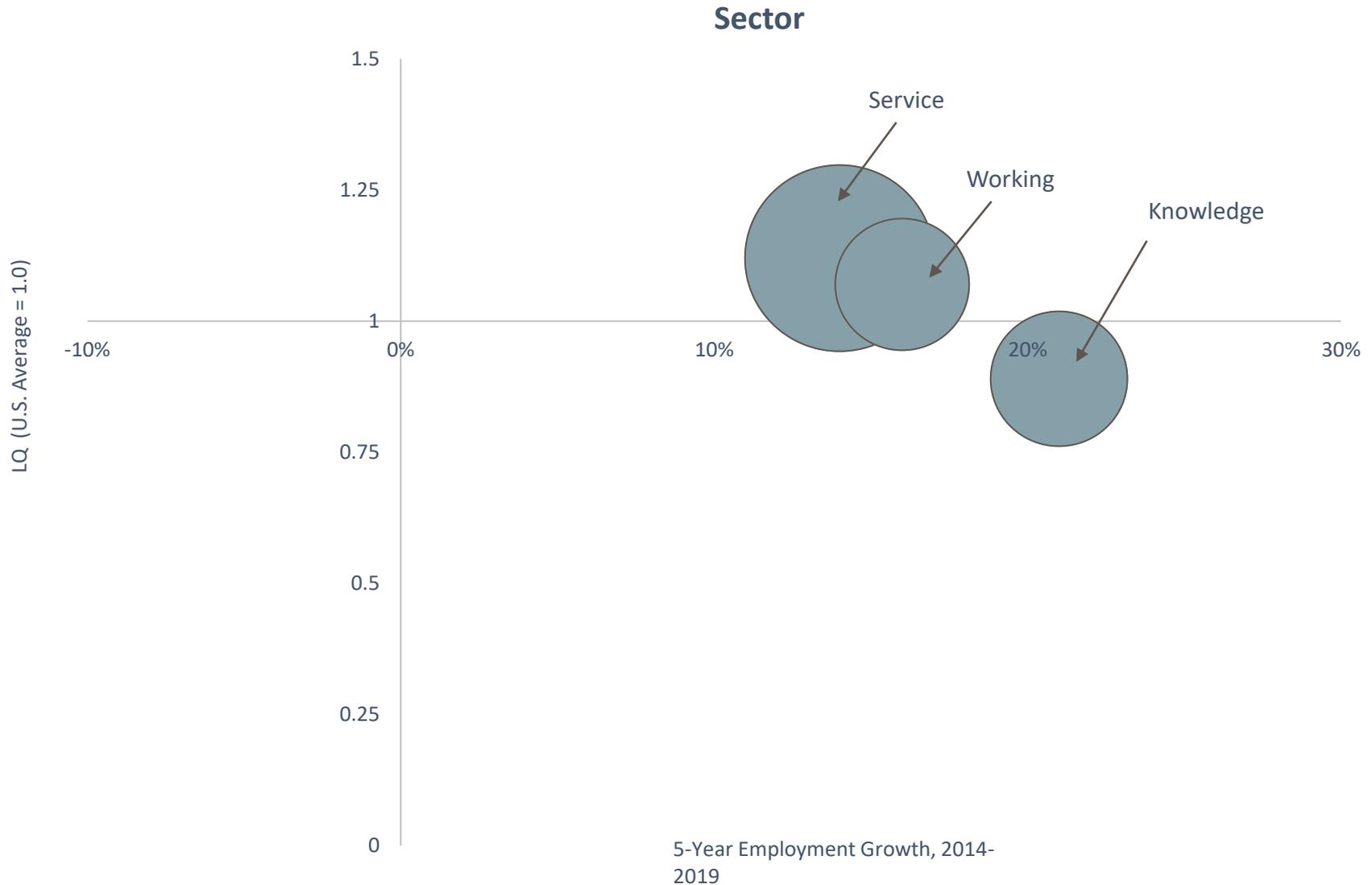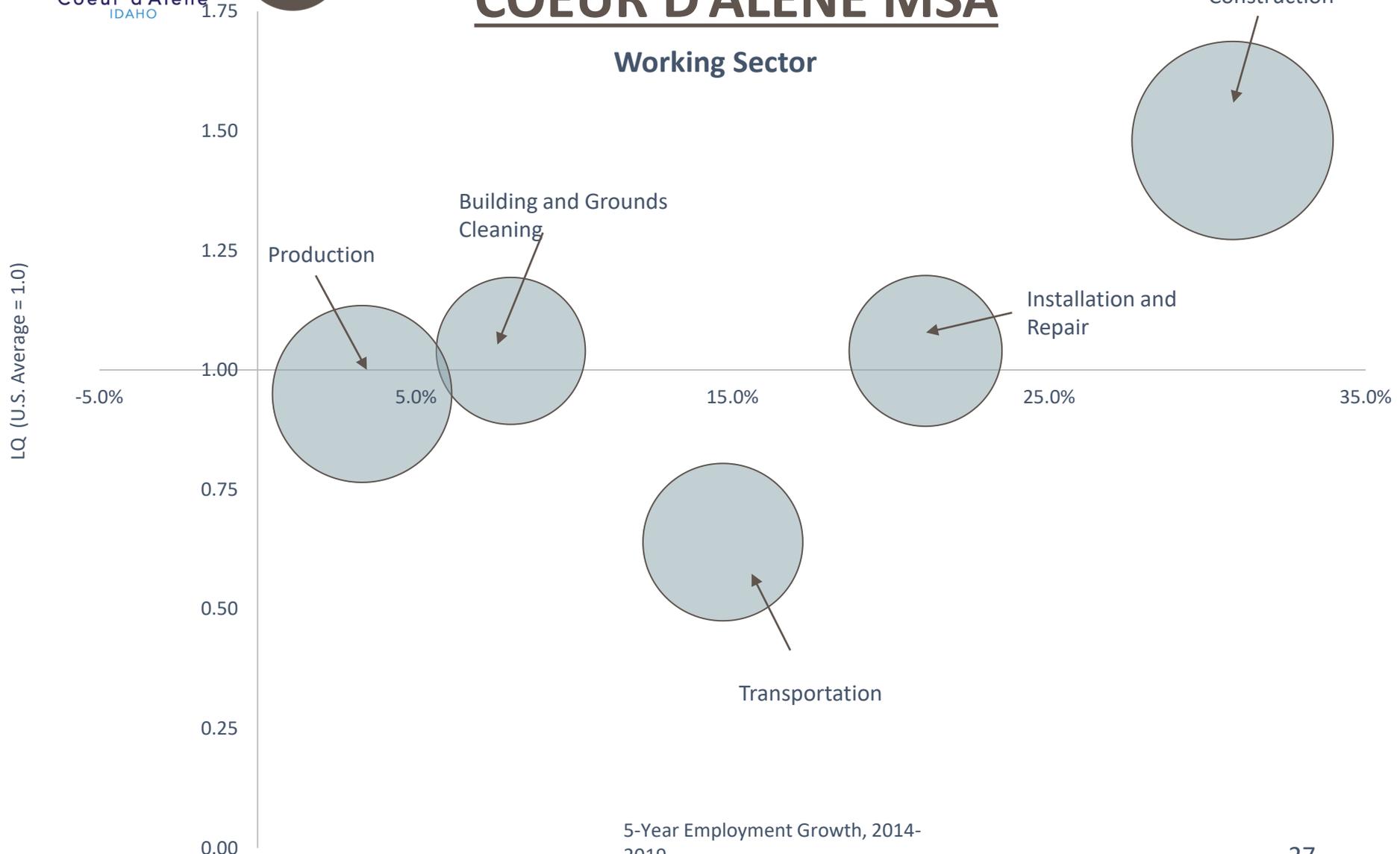
Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County
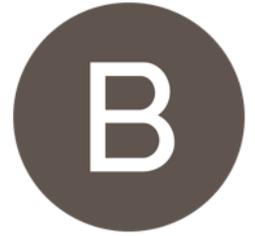
# Spokane MSA

# TAKEAWAYS

- **Service Sector.**
  Approximately 125,000 Spokane workers have skills associated with the service sector — a 7.5% increase over 2014. This represents a cluster that is 6% larger than the U.S. average.

- **Working Sector.**
  An estimated 67,000 Spokane workers have working sector (blue-collar) skills, including those in construction, transportation, and production, representing 25% of the workforce. Spokane's working sector was the fastest growing segment of the workforce (13.6%) from 2014 to 2019.

- **Knowledge Sector.**
  Spokane's knowledge sector is 6% smaller than the U.S. average, employing 77,000 residents. Looking out to 2024, the sector is expected to increase by 7% and represent the fastest growing skill sector in the region.

- **Specializations.**
  Spokane's occupational specializations include:
  - Community and Social Science (1.47)
  - Healthcare Support (1.13)
  - Agriculture and Forestry (1.13)
  - Personal Services (1.13)
  - Building and Grounds Maintenance (1.12)
  - Construction (1.11)
  - Healthcare Practitioners (1.07)
  - Installation (1.06)
  - Arts, Design, and Media (1.05)
  - Office and Administration (1.04)
  - Protective Services (1.04)
  - Sales (1.02)

# TAKEAWAYS
## (Continued)

- **Employment by 2024.**
  Looking to 2024, Spokane's employment base will top more than 288,200, an increase of 6.5% over 2019. This will represent approximately 17,669 new jobs. In the future.

- **Agriculture.**
  Spokane's farming and forestry sector represents one of the occupational clusters with the highest specialization for the region – 13% above the national average. It is also the fastest-growing cluster for the metro areas as well (97%). The sector employs approximately 2,000 workers.

- **Limited Knowledge Cluster Specializations.**
  Spokane has just two Knowledge Sector skill clusters (Arts, Design and Media; and Healthcare Practitioners) with a locational quotient above 1.0 (the U.S. average).

- **Healthcare-Related Skills.**
  More than 31,300 residents have skills aligned with healthcare and social services: healthcare practitioners, healthcare support, and community and social services. This represents 12% of regional employment, and each of these three sectors are more specialized than the U.S. average.

- **Construction.**
  Spokane's construction skill cluster has increased 25% from 2014 to 2019, representing the largest increase in new jobs (2,760).

# SPOKANE MSA

## Occupational Cluster: LQ, 2019

| Occupation | LQ |
|---|---|
| Community and Social Service | 1.47 |
| Healthcare Support | 1.13 |
| Farming, Fishing, and Forestry | 1.13 |
| Personal Care and Service | 1.13 |
| Building and Grounds Cleaning… | 1.12 |
| Construction and Extraction | 1.11 |
| Healthcare Practitioners and… | 1.07 |
| Installation, Maintenance, and… | 1.06 |
| Arts, Design, Entertainment,… | 1.05 |
| Office and Administrative Support | 1.04 |
| Protective Service | 1.04 |
| Sales and Related | 1.02 |
| Education, Training, and Library | 0.99 |
| Business and Financial Operations | 0.96 |
| Life, Physical, and Social Science | 0.96 |
| Food Preparation and Serving… | 0.94 |
| Transportation and Material Moving | 0.90 |
| Production | 0.88 |
| Management | 0.82 |
| Legal | 0.81 |
| Architecture and Engineering | 0.73 |
| Computer and Mathematical | 0.71 |

U.S. Average = 1.0

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

31

# SPOKANE MSA

## Occupational Cluster: Employment, 2019

| Occupation | Employment |
|---|---|
| Office and Administrative Support | 40,627 |
| Sales and Related | 27,104 |
| Food Preparation and Serving… | 21,944 |
| Transportation and Material Moving | 16,815 |
| Healthcare Practitioners and… | 16,248 |
| Education, Training, and Library | 15,213 |
| Personal Care and Service | 14,112 |
| Business and Financial Operations | 13,982 |
| Production | 13,839 |
| Construction and Extraction | 13,783 |
| Management | 12,804 |
| Installation, Maintenance, and… | 11,239 |
| Building and Grounds Cleaning… | 11,026 |
| Healthcare Support | 8,463 |
| Community and Social Service | 6,622 |
| Protective Service | 6,177 |
| Computer and Mathematical | 5,863 |
| Arts, Design, Entertainment,… | 5,360 |
| Architecture and Engineering | 3,430 |
| Life, Physical, and Social Science | 2,177 |
| Farming, Fishing, and Forestry | 1,916 |
| Legal | 1,819 |

Total Employment: 270,564

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Blue shading indicates LQ over 1.00

# SPOKANE MSA

## Occupational Cluster: Share of Employment (%), 2019

| Occupational Cluster | Share |
|---|---|
| Office and Administrative Support | 15.0% |
| Sales and Related | 10.0% |
| Food Preparation and Serving… | 8.1% |
| Transportation and Material Moving | 6.2% |
| Healthcare Practitioners and… | 6.0% |
| Education, Training, and Library | 5.6% |
| Personal Care and Service | 5.2% |
| Business and Financial Operations | 5.2% |
| Production | 5.1% |
| Construction and Extraction | 5.1% |
| Management | 4.7% |
| Installation, Maintenance, and… | 4.2% |
| Building and Grounds Cleaning… | 4.1% |
| Healthcare Support | 3.1% |
| Community and Social Service | 2.4% |
| Protective Service | 2.3% |
| Computer and Mathematical | 2.2% |
| Arts, Design, Entertainment,… | 2.0% |
| Architecture and Engineering | 1.3% |
| Life, Physical, and Social Science | 0.8% |
| Farming, Fishing, and Forestry | 0.7% |
| Legal | 0.7% |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# SPOKANE MSA

## Occupational Cluster: 5-Year Employment Growth, 2014- 2019

| Occupational Cluster | Growth |
|---|---|
| Farming, Fishing, and Forestry | 97.0% |
| Construction and Extraction | 25.0% |
| Management | 17.1% |
| Healthcare Practitioners and… | 16.7% |
| Community and Social Service | 15.8% |
| Business and Financial Operations | 15.6% |
| Transportation and Material Moving | 15.5% |
| Personal Care and Service | 13.6% |
| Computer and Mathematical | 13.4% |
| Arts, Design, Entertainment,… | 12.8% |
| Installation, Maintenance, and… | 12.5% |
| Food Preparation and Serving… | 11.2% |
| Building and Grounds Cleaning… | 9.1% |
| Legal | 8.5% |
| Protective Service | 7.9% |
| Architecture and Engineering | 6.6% |
| Education, Training, and Library | 6.3% |
| Life, Physical, and Social Science | 6.1% |
| Production | 6.0% |
| Office and Administrative Support | 5.3% |
| Sales and Related | 4.8% |
| Healthcare Support | 1.6% |

All Occupations: 10.8%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

34

# SPOKANE MSA

**Occupational Cluster: 5-Year Employment Growth (New Jobs), 2014-2019**

| Occupational Cluster | New Jobs |
|---|---|
| Construction and Extraction | 2,761 |
| Healthcare Practitioners and… | 2,323 |
| Transportation and Material Moving | 2,260 |
| Food Preparation and Serving… | 2,202 |
| Office and Administrative Support | 2,054 |
| Business and Financial Operations | 1,887 |
| Management | 1,866 |
| Personal Care and Service | 1,685 |
| Installation, Maintenance, and… | 1,248 |
| Sales and Related | 1,237 |
| Farming, Fishing, and Forestry | 944 |
| Building and Grounds Cleaning… | 923 |
| Community and Social Service | 905 |
| Education, Training, and Library | 895 |
| Production | 783 |
| Computer and Mathematical | 692 |
| Arts, Design, Entertainment,… | 609 |
| Protective Service | 452 |
| Architecture and Engineering | 211 |
| Legal | 142 |
| Healthcare Support | 137 |
| Life, Physical, and Social Science | 126 |

Total New Jobs: 26,342

# SPOKANE MSA

## Occupational Cluster: 5-Year Employment Projection, 2019-2024

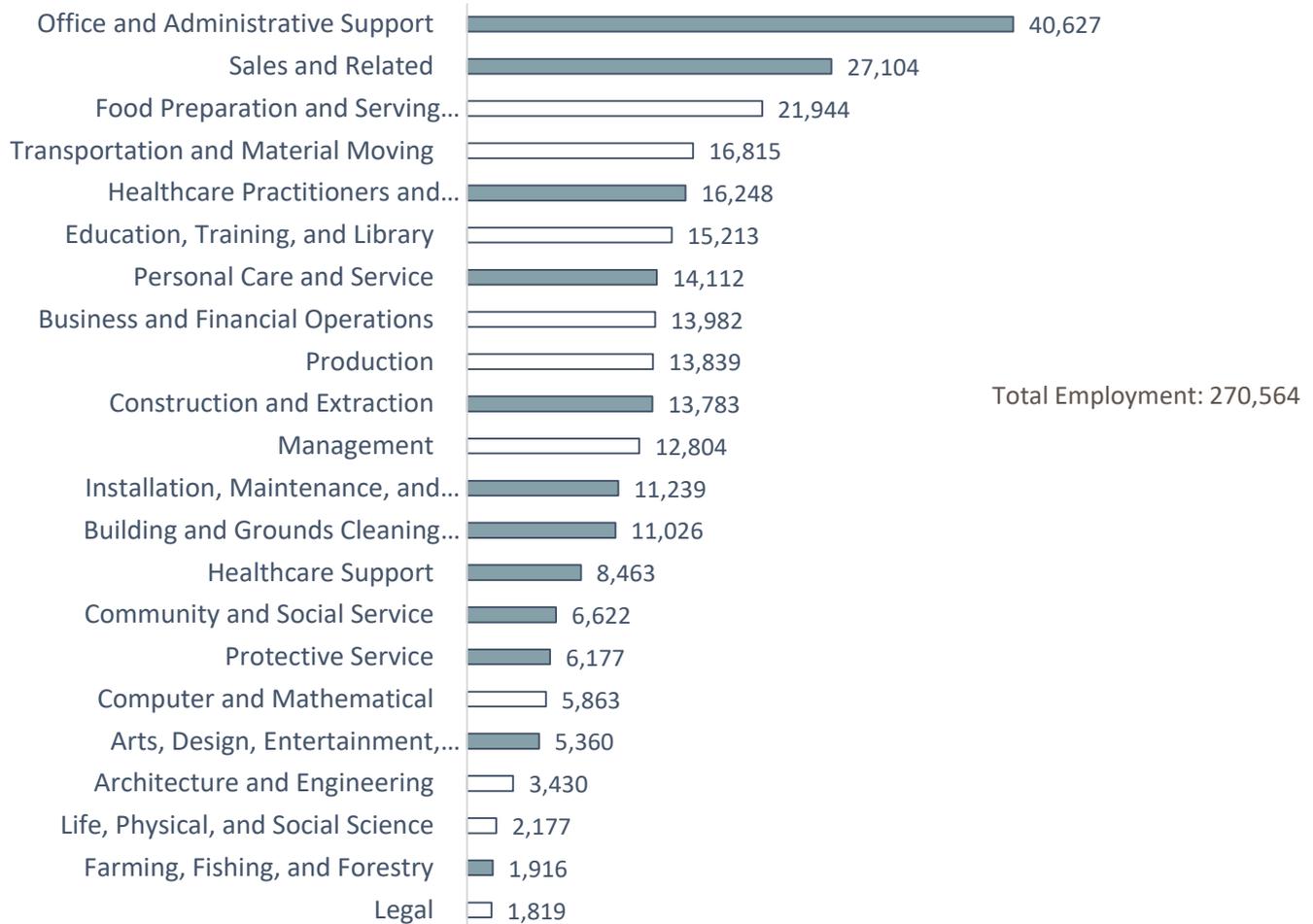| Occupational Cluster | Projection |
|---|---|
| Farming, Fishing, and Forestry | 24.1% |
| Healthcare Support | 11.6% |
| Community and Social Service | 11.6% |
| Healthcare Practitioners and… | 10.3% |
| Construction and Extraction | 8.9% |
| Personal Care and Service | 8.7% |
| Management | 8.4% |
| Protective Service | 7.4% |
| Building and Grounds Cleaning… | 7.2% |
| Installation, Maintenance, and… | 6.8% |
| Education, Training, and Library | 6.7% |
| Computer and Mathematical | 6.4% |
| Transportation and Material Moving | 6.3% |
| Business and Financial Operations | 6.2% |
| Life, Physical, and Social Science | 5.9% |
| Food Preparation and Serving… | 5.6% |
| Legal | 5.3% |
| Architecture and Engineering | 5.1% |
| Sales and Related | 4.4% |
| Office and Administrative Support | 4.0% |
| Arts, Design, Entertainment,… | 3.4% |
| Production | 2.1% |

All Occupations: 6.5%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

36

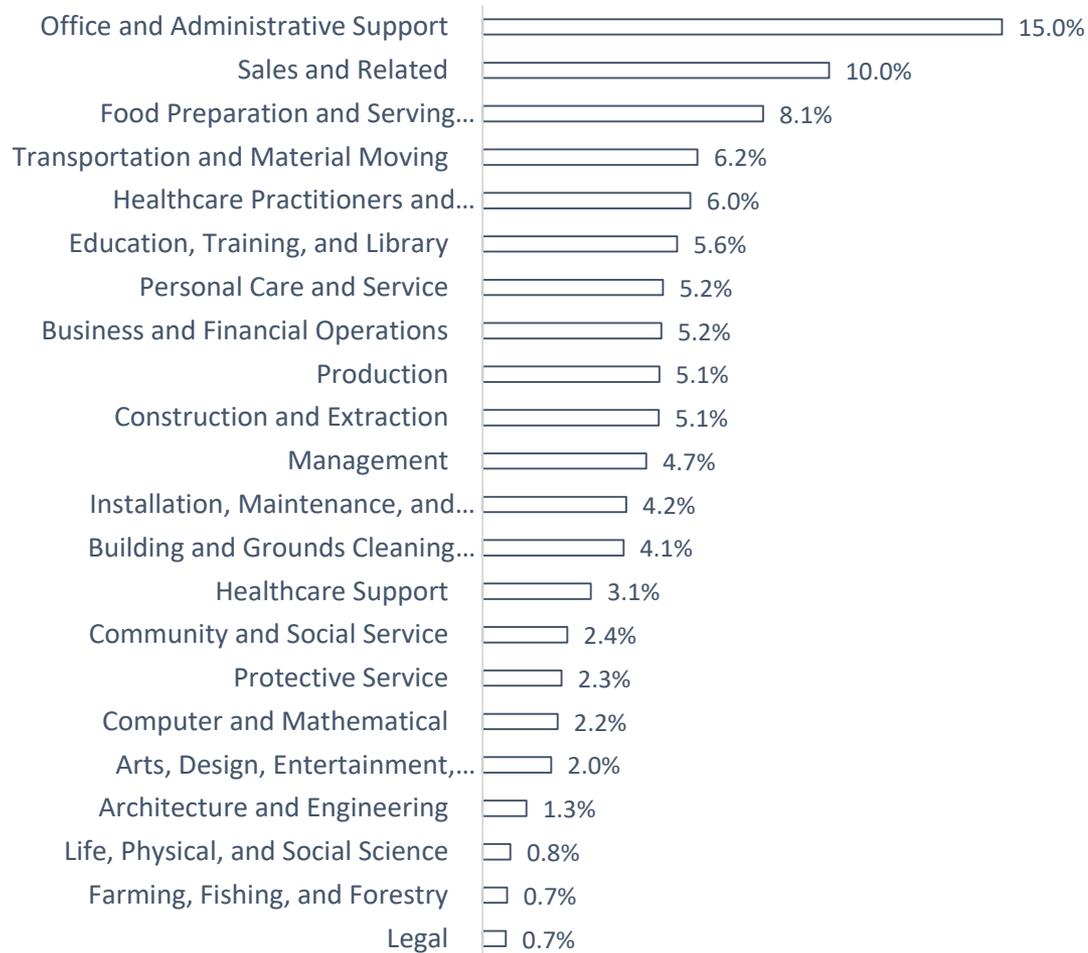# SPOKANE MSA

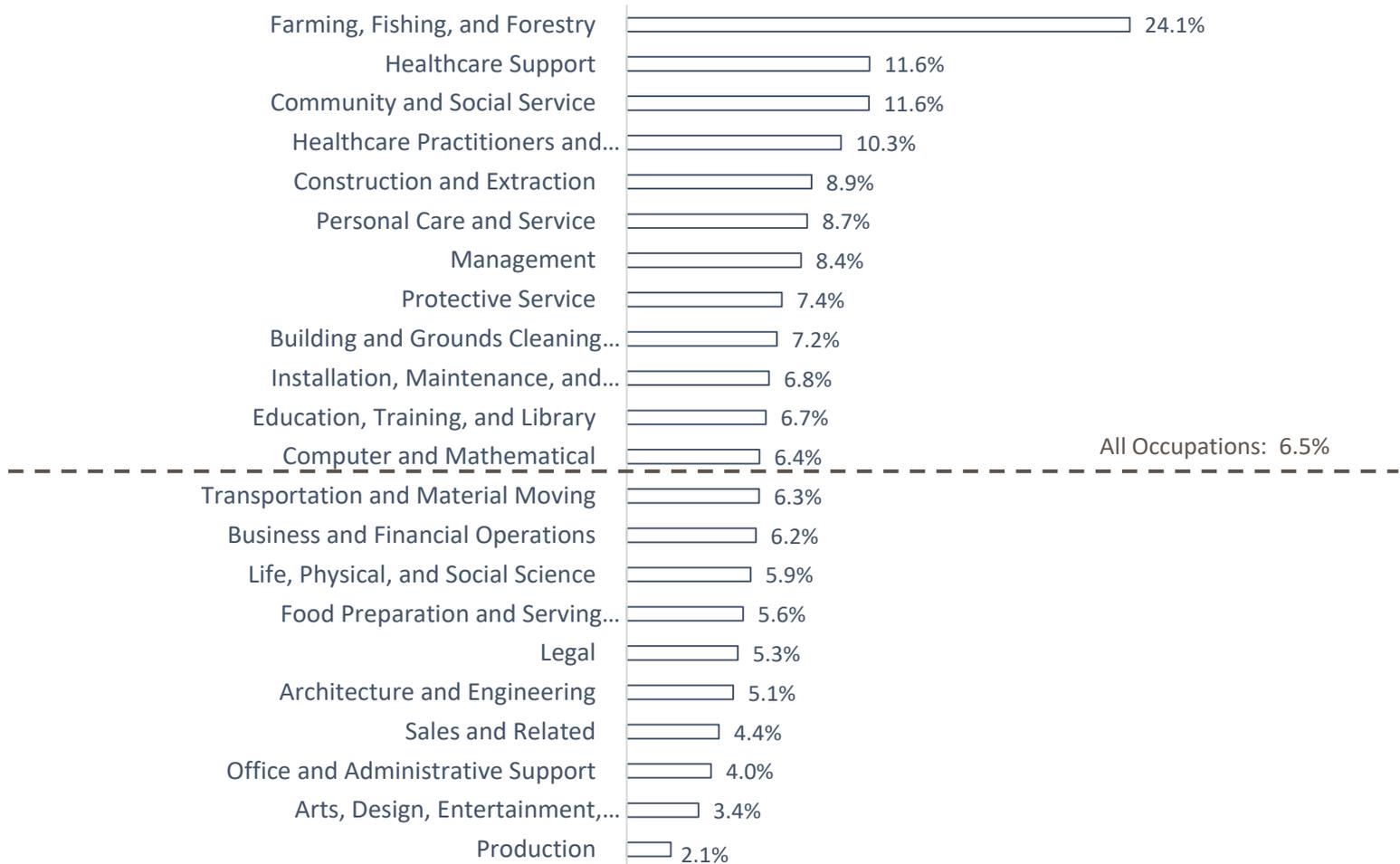## Occupational Cluster: 5-Year Employment Projection (New Jobs), 2019-2024

| Occupational Cluster | New Jobs |
|---|---|
| Healthcare Practitioners and… | 1,667 |
| Office and Administrative Support | 1,641 |
| Food Preparation and Serving… | 1,224 |
| Personal Care and Service | 1,221 |
| Construction and Extraction | 1,220 |
| Sales and Related | 1,197 |
| Management | 1,070 |
| Transportation and Material Moving | 1,066 |
| Education, Training, and Library | 1,013 |
| Healthcare Support | 984 |
| Business and Financial Operations | 865 |
| Building and Grounds Cleaning… | 794 |
| Community and Social Service | 769 |
| Installation, Maintenance, and… | 767 |
| Farming, Fishing, and Forestry | 462 |
| Protective Service | 459 |
| Computer and Mathematical | 372 |
| Production | 292 |
| Arts, Design, Entertainment,… | 184 |
| Architecture and Engineering | 175 |
| Life, Physical, and Social Science | 129 |
| Legal | 97 |

Total New Jobs: 17,669

# SPOKANE MSA

## Occupational Cluster: Projected Employment, 2024

| Occupational Cluster | Projected Employment |
|---|---|
| Office and Administrative Support | 42,268 |
| Sales and Related | 28,302 |
| Food Preparation and Serving… | 23,168 |
| Healthcare Practitioners and… | 17,915 |
| Transportation and Material Moving | 17,881 |
| Education, Training, and Library | 16,227 |
| Personal Care and Service | 15,333 |
| Construction and Extraction | 15,003 |
| Business and Financial Operations | 14,847 |
| Production | 14,131 |
| Management | 13,874 |
| Installation, Maintenance, and… | 12,005 |
| Building and Grounds Cleaning… | 11,819 |
| Healthcare Support | 9,447 |
| Community and Social Service | 7,391 |
| Protective Service | 6,637 |
| Computer and Mathematical | 6,236 |
| Arts, Design, Entertainment,… | 5,544 |
| Architecture and Engineering | 3,605 |
| Farming, Fishing, and Forestry | 2,378 |
| Life, Physical, and Social Science | 2,306 |
| Legal | 1,916 |

Total Employment: 288,233

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

38

# SPOKANE MSA

## Occupational Cluster: Projected Share of Employment, 2024

| Occupational Cluster | Share |
|---|---|
| Office and Administrative Support | 14.7% |
| Sales and Related | 9.8% |
| Food Preparation and Serving… | 8.0% |
| Healthcare Practitioners and… | 6.2% |
| Transportation and Material Moving | 6.2% |
| Education, Training, and Library | 5.6% |
| Personal Care and Service | 5.3% |
| Construction and Extraction | 5.2% |
| Business and Financial Operations | 5.2% |
| Production | 4.9% |
| Management | 4.8% |
| Installation, Maintenance, and… | 4.2% |
| Building and Grounds Cleaning… | 4.1% |
| Healthcare Support | 3.3% |
| Community and Social Service | 2.6% |
| Protective Service | 2.3% |
| Computer and Mathematical | 2.2% |
| Arts, Design, Entertainment,… | 1.9% |
| Architecture and Engineering | 1.3% |
| Farming, Fishing, and Forestry | 0.8% |
| Life, Physical, and Social Science | 0.8% |
| Legal | 0.7% |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# SPOKANE MSA

## Occupational Cluster: Average Annual Salary, 2019

| Occupational Cluster | Average Annual Salary |
|---|---|
| Management | $90,994 |
| Architecture and Engineering | $70,860 |
| Healthcare Practitioners and… | $70,746 |
| Computer and Mathematical | $68,463 |
| Legal | $66,699 |
| Life, Physical, and Social Science | $63,667 |
| Business and Financial Operations | $61,401 |
| Education, Training, and Library | $49,362 |
| Construction and Extraction | $49,076 |
| Community and Social Service | $46,242 |
| Installation, Maintenance, and… | $45,172 |
| Protective Service | $44,056 |
| Arts, Design, Entertainment,… | $41,433 |
| Production | $37,271 |
| Office and Administrative Support | $36,597 |
| Transportation and Material Moving | $35,959 |
| Farming, Fishing, and Forestry | $34,016 |
| Healthcare Support | $33,219 |
| Sales and Related | $30,985 |
| Building and Grounds Cleaning… | $28,818 |
| Personal Care and Service | $28,215 |
| Food Preparation and Serving… | $25,648 |

All Occupations: $43,927

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

40

# SPOKANE MSA

## Top 5 Occupational Clusters: LQ

| Rank | Cluster | LQ | Share of Employment (%) | 5-Year Growth, 2014-2019 | Average Annual Salary |
|------|---------|-----|--------------------------|--------------------------|-----------------------|
| 1 | Community and Social Service | 1.47 | 2.4% | 15.8% | $46,242 |
| 2 | Healthcare Support | 1.13 | 3.1% | 1.6% | $33,219 |
| 3 | Farming, Fishing, and Forestry | 1.13 | 0.7% | 97.0% | $34,016 |
| 4 | Personal Care and Service | 1.13 | 5.2% | 13.6% | $28,215 |
| 5 | Building and Grounds Cleaning and Maintenance | 1.12 | 4.1% | 9.1% | $28,818 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# SPOKANE MSA

## Top 5 Occupational Clusters: Total Employment

| Rank | Cluster | Total Employment | Share of Employment (%) | LQ | Average Annual Salary |
|------|---------|------------------|-------------------------|-----|------------------------|
| 1 | Office and Administrative Support | 40,627 | 15.0% | 1.04 | $36,597 |
| 2 | Sales and Related | 27,104 | 10.0% | 1.02 | $30,985 |
| 3 | Food Preparation and Serving Related | 21,944 | 8.1% | 0.94 | $25,648 |
| 4 | Transportation and Material Moving | 16,815 | 6.2% | 0.90 | $35,959 |
| 5 | Healthcare Practitioners and Technical | 16,248 | 6.0% | 1.07 | $70,746 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# SPOKANE MSA

**Top 5 Occupational Clusters: 5-Year Employment Growth, 2014-2019**

| Rank | Cluster | 5-Year Growth | Share of Employment (%) | LQ | Average Annual Salary |
|------|---------|---------------|-------------------------|------|-----------------------|
| 1 | Farming, Fishing, and Forestry | 97.0% | 0.7% | 1.13 | $34,016 |
| 2 | Construction and Extraction | 25.0% | 5.1% | 1.11 | $49,076 |
| 3 | Management | 17.1% | 4.7% | 0.82 | $90,994 |
| 4 | Healthcare Practitioners and Technical | 16.7% | 6.0% | 1.07 | $70,746 |
| 5 | Community and Social Service | 15.8% | 2.4% | 1.47 | $46,242 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# SPOKANE MSA

**Top 5 Occupational Clusters: 5-Year Employment Projection, 2014-2019**

| Rank | Cluster | 5-Year Projection, 2019-2024 | 2024 Employment | Share of 2024 Employment | LQ |
|------|---------|------------------------------|-----------------|--------------------------|-----|
| 1 | Farming, Fishing, and Forestry | 24.1% | 2,378 | 0.8% | 1.13 |
| 2 | Healthcare Support | 11.6% | 9,447 | 3.3% | 1.13 |
| 3 | Community and Social Service | 11.6% | 7,391 | 2.6% | 1.47 |
| 4 | Healthcare Practitioners and Technical | 10.3% | 17,915 | 6.2% | 1.07 |
| 5 | Construction and Extraction | 8.9% | 15,003 | 5.2% | 1.11 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# SPOKANE MSA

## Top 5 Occupational Clusters: Average Annual Cluster

| Rank | Cluster | Average Annual Salary | LQ | Share of Employment | 5-Year Growth, 2014-2019 |
|------|---------|----------------------|-----|--------------------|--------------------------|
| 1 | Management | $90,994 | 0.82 | 4.8% | 17.1% |
| 2 | Architecture and Engineering | $70,860 | 0.73 | 1.3% | 6.6% |
| 3 | Healthcare Practitioners and Technical | $70,746 | 1.07 | 6.2% | 16.7% |
| 4 | Computer and Mathematical | $68,463 | 0.71 | 2.2% | 13.4% |
| 5 | Legal | $66,699 | 0.81 | 0.7% | 8.5% |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

# SPOKANE MSA

## Sector

| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---|---|---|---|---|---|---|
| Service Sector | 1.06 | 125,050 | 46.2% | 7.5% | 5.9% | $28,740 |
| Working Sector | 1.00 | 66,701 | 24.7% | 13.6% | 6.2% | $46,182 |
| Knowledge Sector | 0.94 | 76,897 | 28.6% | 12.8% | 7.2% | $65,960 |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Size of Bubble = Total Employment

# SPOKANE MSA

## Sector

LQ (U.S. Average = 1.0)

Service

Knowledge

Working

5-Year Employment Growth, 2014-2019
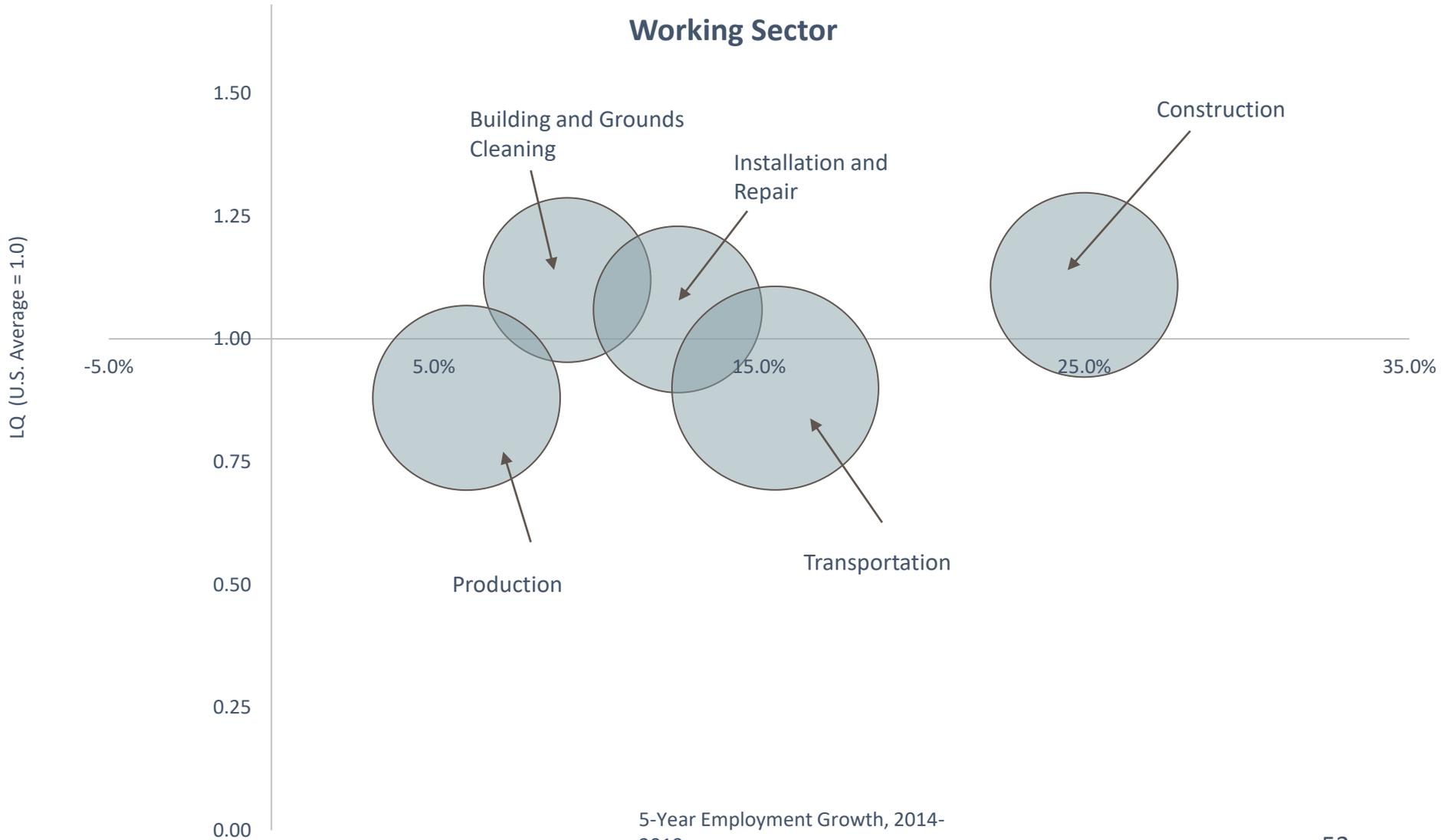
47
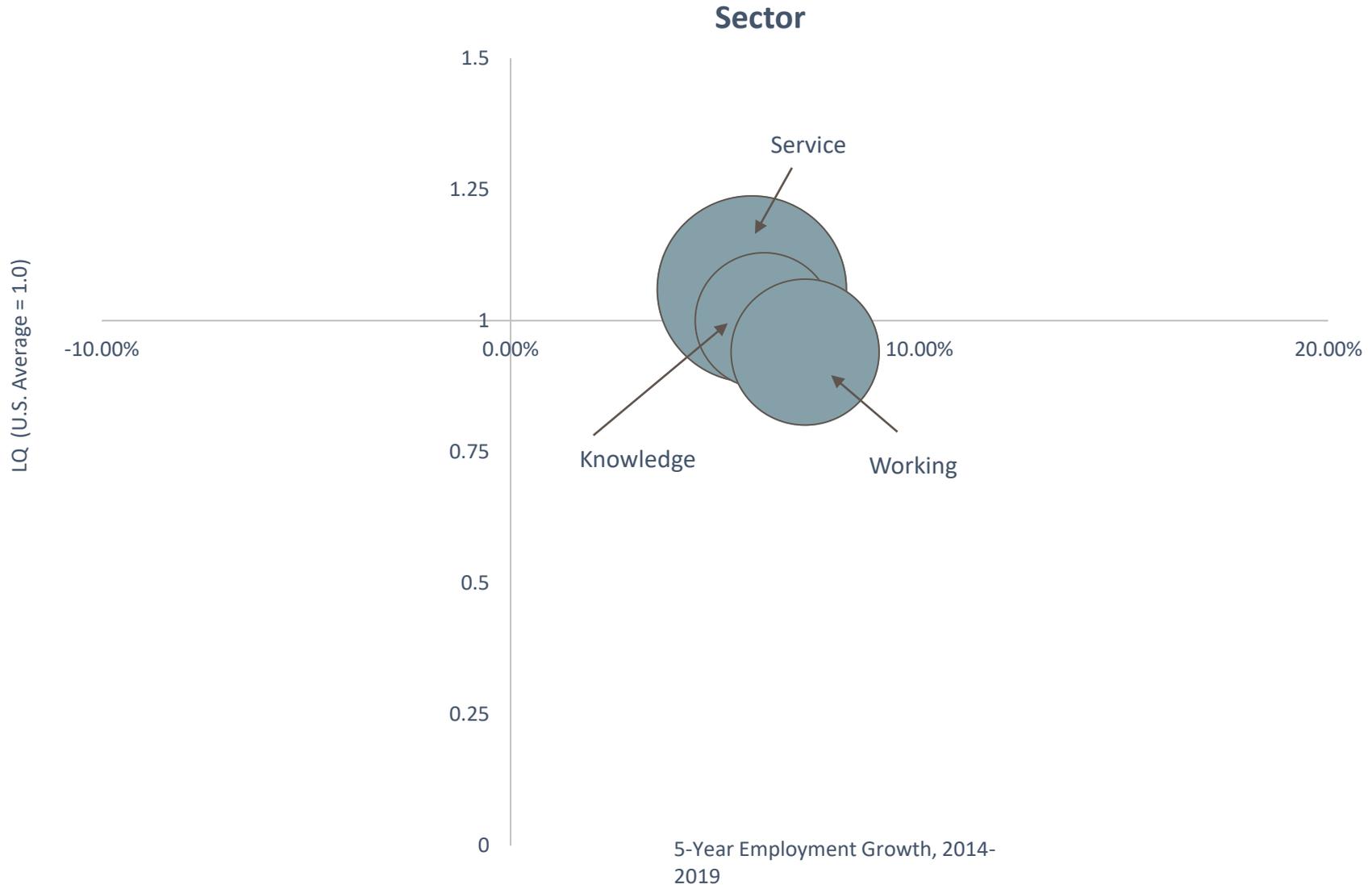
# SPOKANE MSA

## Knowledge Sector

| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---|---|---|---|---|---|---|
| Healthcare Practitioners and Technical | 1.07 | 16,248 | 6.2% | 16.7% | 10.3% | $70,746 |
| Arts, Design, Entertainment, Sports, and Media | 1.05 | 5,360 | 1.9% | 12.8% | 3.4% | $41,433 |
| Education, Training, and Library | 0.99 | 15,213 | 5.6% | 6.3% | 6.7% | $49,362 |
| Business and Financial Operations | 0.96 | 13,982 | 5.2% | 15.6% | 6.2% | $61,401 |
| Life, Physical, and Social Science | 0.96 | 2,177 | 0.8% | 6.1% | 5.9% | $63,667 |
| Management | 0.82 | 12,804 | 4.8% | 17.1% | 8.4% | $90,994 |
| Legal | 0.81 | 1,819 | 0.7% | 8.5% | 5.3% | $66,699 |
| Architecture and Engineering | 0.73 | 3,430 | 1.3% | 6.6% | 5.1% | $70,860 |
| Computer and Mathematical | 0.71 | 5,863 | 2.2% | 13.4% | 6.4% | $68,463 |
| **Knowledge Sector** | **0.94** | **76,897** | **28.6%** | **12.8%** | **7.2%** | **$65,960** |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Knowledge Sector

Size of Bubble = Total Employment

LQ (U.S. Average = 1.0)

5-Year Employment Growth, 2014-2019

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
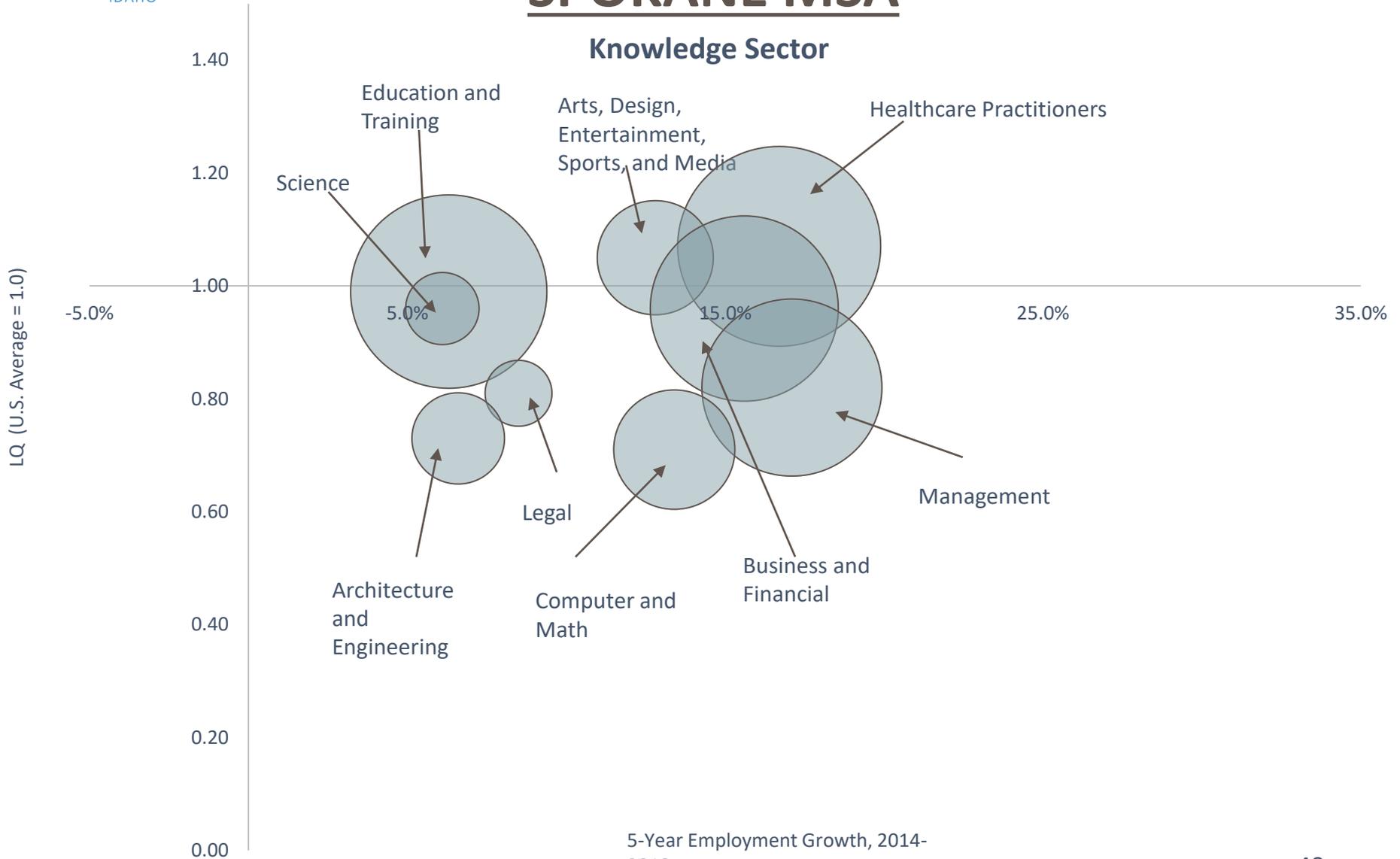
49

# SPOKANE MSA

## Service Sector

| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---|---|---|---|---|---|---|
| Community and Social Service | 1.47 | 6,622 | 2.4% | 15.8% | 11.6% | $46,242 |
| Protective Service | 1.04 | 6,177 | 2.3% | 7.9% | 7.4% | $44,056 |
| Office and Administrative Support | 1.04 | 40,627 | 15.0% | 5.3% | 4.0% | $36,597 |
| Healthcare Support | 1.13 | 8,463 | 3.1% | 1.6% | 11.6% | $33,219 |
| Sales and Related | 1.02 | 27,104 | 10.0% | 4.8% | 4.4% | $30,985 |
| Personal Care and Service | 1.13 | 14,112 | 5.2% | 13.6% | 8.7% | $28,215 |
| Food Preparation and Serving Related | 0.94 | 21,944 | 8.1% | 11.2% | 5.6% | $25,648 |
| **Service Sector** | **1.06** | **125,050** | **46.2%** | **7.5%** | **5.9%** | **$28,740** |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA
Service Sector

Size of Bubble = Total Employment

LQ (U.S. Average = 1.0)

5-Year Employment Growth, 2014-2019

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

51
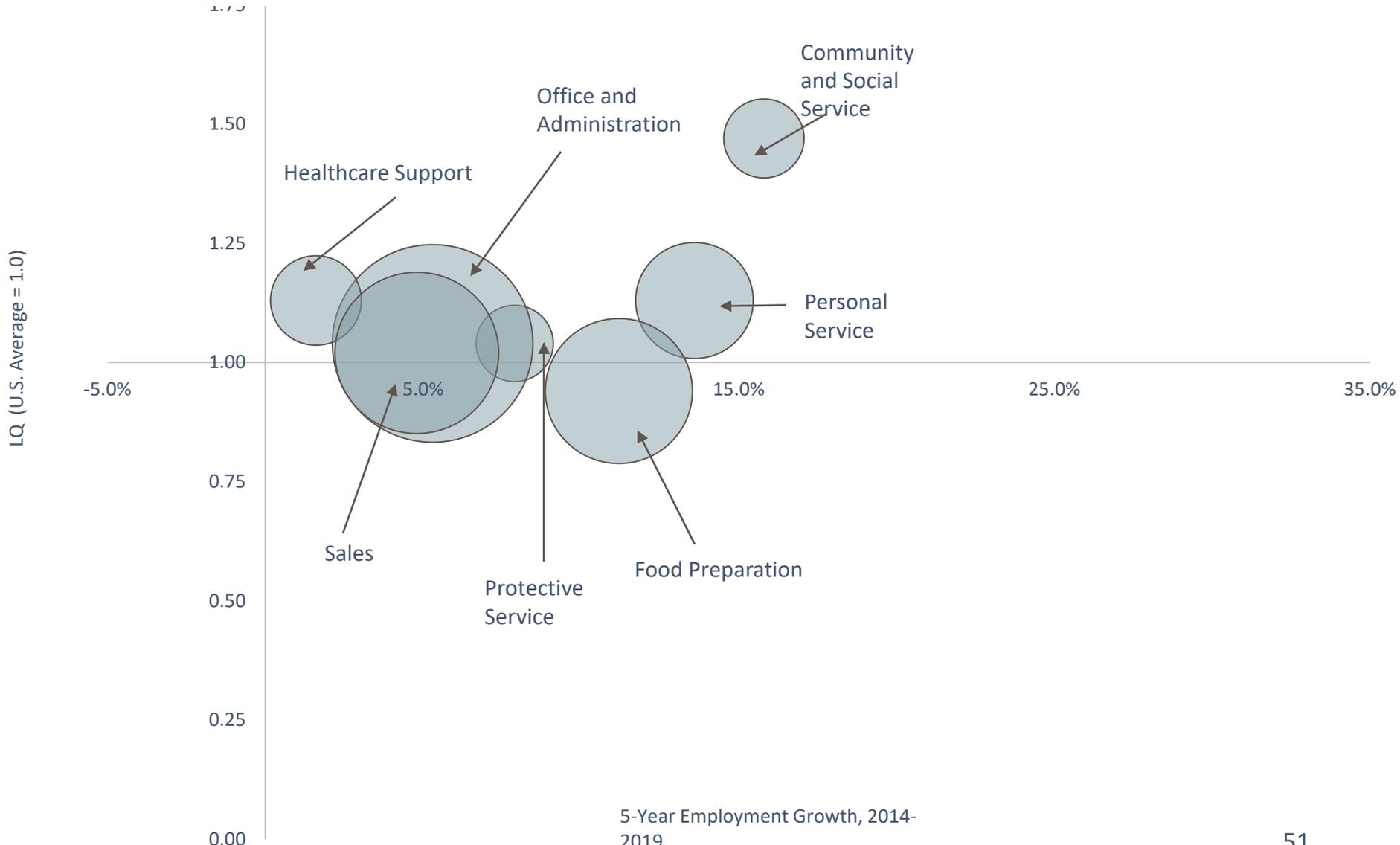
# SPOKANE MSA
## Working Sector

| Cluster | LQ | Employment | Share of Employment (%) | 5-Year Growth, 2014-2019 | 5-Year Projection, 2019-2024 | Average Annual Salary |
|---|---|---|---|---|---|---|
| Building and Grounds Cleaning and Maintenance | 1.12 | 11,026 | 4.1% | 9.1% | 7.2% | $28,818 |
| Construction and Extraction | 1.11 | 13,783 | 5.1% | 25.0% | 8.9% | $49,076 |
| Installation, Maintenance, and Repair | 1.06 | 11,239 | 4.2% | 12.5% | 6.8% | $45,172 |
| Transportation and Material Moving | 0.90 | 16,815 | 6.2% | 15.5% | 6.3% | $35,959 |
| Production | 0.88 | 13,839 | 5.1% | 6.0% | 2.1% | $37,271 |
| **Working Sector** | **1.00** | **66,701** | **24.7%** | **13.6%** | **6.2%** | **$46,182** |

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Size of Bubble = Total Employment

**Working Sector**

LQ (U.S. Average = 1.0)

Building and Grounds Cleaning

Installation and Repair

Construction

Production

Transportation

5-Year Employment Growth, 2014-2019

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

53

# ATTACHMENT D: Stakeholder Summary

# **B** Bridge Economic Development

## Memorandum

| | |
|---|---|
| **Date** | October 3, 2019 |
| **To** | Sean Holm, City of CdA |
| | Nicole Kahler, CDA 2030 |
| **From** | Alisa Pyszka, Bridge Economic Development |
| | Alex Dupey, MIG |
| **Subject** | Roundtable Meetings Summary |
| **Project** | Envision Coeur d'Alene |

## ROUNDTABLE SUMMARY

The following information is a summary of feedback from participants in the focused roundtable meetings and Citizen Advisory Committee (CAC) during September 25-26, 2019. All comments are anonymous and are intended to supplement the quantitative data analysis.

### City Staff

- Historically a timber community, but has become a destination community since the construction of the Resort in the 1980s. We would now like to go beyond tourism.
- CdA EDC originally just focused on new company recruitment. Has expanded that focus to include business retention and expansion (BRE).
    - TDS-will provide free fiber optics, but wanted some incentives back. Did not provide incentives it but they are still located here. Proves the desire for companies to locate here.
- North Idaho College is focused on economic gardening. Innovation Den is an important physical space for startups to gather.
- City's role in economic development has been site readiness, infrastructure and proactive culture of permitting. City staff will come together during a preliminary concept of a project for initial review with no fees.
    - With the East Sherman redevelopment plan city is applying strengths in matchmaking between properties/buildings and tenants.
    - Area could see more investment if a BID was in place similar to downtown.
- City now owns Atlas Mill (now a URD)
- Creating a new URD near the hospital
- Don't have an ec/dev department. Strong partnerships. City's role is to facilitate infrastructure/zoning.
- Sales tax dispersed on population and assessment. Communities don't spend energy vying for retail businesses.

- Area is being more strategic in how to target clusters
- CDA 2030-Advocacy. Soft skills. Pushing for living wage jobs, daycare
    - Neutral convener
    - Long-term perspective
    - Great health care here but we can't get into see the doctors

- Hard for retailers to make it year-round. City is extremely busy for approximately three summer months

Infrastructure

- Water
    - Working off of master plan
    - Able to service development
    - 500 acres on the west of the City-can supply it
    - Water is not an issue
- Streets
    - Deferred maintenance but we're catching up.
- Stormwater
    - Anything south of I-90 is going to the River or lake
    - North of I-90, treated in swales
- In process of installing some smart traffic signals
- Transit/bikes
    - Less than mediocre – loop system which is very inefficient
    - Multiple funding sources for transit and free
    - Adding bike lanes (miles per year)-seasonal
    - Not a big issue for new businesses, but does come up with affordable housing grants.

- Would like to focus on "Year around community"- foster a sense of community

- As this plan evolves, consider "who are you investing in?"


## Economic Development Partners

- NIC Small business Center: Education/coaching for small and medium-sized businesses.
- Exit/succession plans
- Work with service industries a lot, then light manufacturing. Technology sector is growing
    - Getting ready to open a rapid prototyping lab in the Headland Building
- Tech sector is growing. Working remotely from CdA or starting a business
    - Computer science degree just getting started at U of I
    - Strong focus on robotics and artificial intelligence. Masters and PhD students coming up
- Started a community makers space (k-12) in technology. Located on NIC Campus. Includes professional development for kids

- - o Rapid prototyping and maker space (Gizmo) are adjacent to one another.
    - o Community members are using the site (e.g. continuous composites)
      - ▪ XCraft and Computer Science program are in the basement of the Innovation Den.
- Heard that we really need data systems and data science
- AVISTA did a study looking at the Idaho side of the health care-focused on possibility of data science
- All classes have advisory committee members from local business community.
- Dual credit courses available (high school students earning college credit)
- Lots of non-credit related courses (nurse assistants, plumbing, electrical, welding etc.)
  - o Designed to respond to business needs.
  - o Use federally funded on-the-job training
- Workforce co-op for coding (Charles' group)
- Biggest challenge is lack of talent and opportunities to attract people.
- Innovation Den has done a good job connecting people, but only for small shops. Not bigger players.
- Technology industry is not collaborative here.  Very siloed due to competition for talent.
- Pitch event is largely a twice a month coffee and concept meeting at Innovation Den.
- WA-too expensive and regulated. Come to Idaho where land is cheaper
- EDC is a great board and has a diverse group of people.
- Milken named CdA the fifth most innovative small town
- Innovation Collective started by Nick Smoot, Cody Peterson, Rich Thrasher
- 5-10,000 sq ft space is needed. Smaller spaces are ok. Once companies start to grow they have a hard time finding space.
- Rural access to high speed internet is a problem
- Need to engage folks who come here periodically-get past the fear/irritation of part-time residents.
- There is a lack of awareness of good jobs here. Need to promote companies and opportunities to attract talent.
- NIC is seeing a declining enrollment in credit courses.  Hard for students to live here due to affordable housing issues.
- Sam Wolkenhauer, Northern Regional Economist is a good resource for additional information.


## CdA EDC

- CdA has limited industrial land.  Post Falls has about 600 acres of industrial land
- Bigger buildings are located out in the Prairie
- Continuous Composites-wants to stay, but needs the right space.
  - o Sales force mostly engineering
  - o Want to be in CdA because the talent is here
  - o CdA is great for hosting clients

- Chief Architect is located here with about 80 employees.
- Professional services/engineering/aerospace is a large focus
    - I-90 aerospace conference has been successful. Want to bring more companies here to localize the supply chain
- Companies don't have enough talent
- If they don't come here, they go to Washington or Oregon. If they don't come here it is because of limited talent pool.  Challenging with 2.7% unemployment rate.
- Washington and CA companies calling
- Starting to look at a talent attraction committee. Focus on
    - Veterans
    - High school students (Go On initiative)
    - Kootenai County Young Professionals – attract millennials.
- Would like to tap into retiring community – part time hours but with significant experience.
- Higher wages in Spokane have required some businesses like healthcare pay competitive wages in CdA
- There is a lack of branding in marketing ec/dev. Should be EDC. We have jobs-people need to know about them. Working on listing jobs in a consistent fashion.
- We partner with the City and CDA 2030 in a lot of ways. Once we have the action items, we'll engage with all of the cities on implementation.
- Need to promote locally-grown businesses through EDC and communities.  Rocky Mountain Construction is a good example: article about them in USA but very important to receive recognition locally.

## CAC

- Would like to see the industries that create the different sectors split out.
- Concerned that housing numbers are not most current.
- Would like to give feedback on data as there may be large employers skewing some of the data points.

## Downtown Partners and Developers

- Parking is the biggest issue for businesses. If you can't park in the front, locals will move on
- Competing with Amazon. Not against chain stores, just asking that people consider local first.
- "Commit to 1 percent" shopping local. Will provide video of the strengths and weaknesses of CdA. Mayors are concerned about growth and recession
- Focused outreach to increase confidence in the local economy. Need people to understand why they should participate in a recession.
- Need to get some housing downtown. Current housing costs downtown are not accessible to most people

- Land costs are cheaper elsewhere in the city than downtown which is why it's happening up north.
- Parking and ground floor retail requirements are killing projects.
- Midtown is a good example of the community opposition. People don't want "Section 8" housing. Don't' understand concept of affordable/workforce housing.
- If building downtown, would be 5-story wood frame to make it pencil.  Need to provide surface parking
- Affordability is becoming an issue. People living here are being priced out because of property tax increases
- Continuing to add parks is great but maintenance is becoming an issue-where do you focus your money? Who are the parks for?
- C-17, allows you to do anything
- State of Idaho is a becoming a retiree refuge. Some homes are going to local retirees looking to downsize.
- Younger families are coming Downtown businesses. Going to the park and then walking to the shops/restaurants.
- New parking structure has encouraged development.
- Downtown Association: events, marketing, parking management, clean and safe etc.
- Seeing more foot traffic on 4th and 3rd
- Hospital district URA is where new investment will go. New master plan will be available soon.
- Midtown has good potential.
- Low vacancy rate downtown. Average retail rental price downtown is $2.00/sq foot.  Sometimes property owners let retail rent laps in shoulder tourist seasons because there is such limited business.

## High-Tech Business Leaders

1. What makes Coeur d'Alene unique for business?
    a. *CDA is a beautiful place to live with a special culture focused on the community. Especially for the tech industry, the cost of living is low for a beautiful place to live. Because of the people we attract, our internal company reflects the broader culture of the city.*
2. What are barriers to growth?
    a. *We lack a degree of tech focus and infrastructure in the city. We have companies like ours, an autonomous yacht company (Qurrent), bread making robots, carbon fiber printing companies, drone companies, but most people do not even realize because we have no collective technology identify within Coeur d'Alene. To outsiders (especially talent in Spokane!), we lack professional opportunities, but they are here!*
3. Missed opportunities to consider?
    a. *CDA can become a mini Silicon Valley with the proper focus – we can attract world class talent because of the quality of life here and positively impact our local economy if we promote and invest in the tech community*
4. Where does your talent typically come from?

     a. *Local engineering schools, but much of it is just finding smart people and growing them internally no matter what their background is. It takes investment, but it's worth it and helps retain that talent.*

5. Is it difficult to recruit and/or retain?
     a. *Difficult to recruit (we lack quantity of engineers that are open to staying in CDA and are a culture fit), easy to retain – this is one of CDA's competitive advantages. Retention is easy because of quality of life, but finding the engineering talent that has an innovative attitude is difficult.*

6. How is the quality of infrastructure, transportation, site availability for industry growth?
     a. *We have a lot of great developments in the area focused on medical offices, banks and apartments, but we lack a tech hub. For example, we are looking for a beautiful new office space to bring customers and show off our city as well as our game-changing technology.*

Couple of thoughts:

- The newspaper which is a customer so I want to be respectful of this, but we just raised $36M in a equity round last month and our local newspaper (CDA PRESS) didn't even cover the story. Note the Spokane papers that were all over it and the Journal of Business in Spokane put us on the front page, what happened to the business section?
- Need more of CDA business community leadership group, not the Chamber which I love but group of successful business people that can drive efforts
- Old school, from an outsiders prospective there is a group of old time business people and they want nothing to do with outsiders unless it helps them. Just saying.

## STAKEHOLDERS

Hillary Andersson, City of CdA
Kyle Marize, City of CdA
Sean Holm, City of CdA
Chris Bosley, City of CdA
Troy Tymesen, City of CdA
Renata McLeod, City of CdA
Nicole Kahler, CDA 2030
Marie Nail, CDA 2030
Sue Shelby, North Idaho College (NIC)
Charles Buck, University of Idaho
Warren Mueller, NIC
Vicki Isaleson, NIC
Gynii Gillian, CdA EDC
Dennis Cunningham, Active West

Emily Boyd, Downtown Business Association
Niels Johansen, Heart of Businesses
Tony Berns, Ignite