

# LATAH COUNTY REGION ECONOMIC VITALITY REPORT



PARTNERSHIP  
for  
ECONOMIC  
PROSPERITY

## ACKNOWLEDGEMENTS-

We would like to express our sincere appreciation to the following entities and people.

**The City of Moscow** – Bill Belknap, Tyler Palmer

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**PEP Board of Directors** – Dan Ewart, Paul Kimmell, Gary Riedner, Kathie LaFortune, and Jenny Ford

On behalf of the Partnership for Economic Prosperity Board of Directors, we respectfully submit this report on February 26, 2020.

Gina Taruscio, Executive Director and Alisha Merriman, Research Analyst

## KEY CONCLUSIONS

### Idaho and the Statewide Economy

- According to the Bureau of Labor Statistics, Idaho's unemployment rate dropped to 2.9 percent at the end of 2019, and yet, Idaho has one of the fastest growing economies in the nation.
- In response to a statewide call for improved communications infrastructure, Idaho's Governor Little has formed a Broadband Task Force, headed by Idaho Department of Commerce Director, Tom Kealey. The task force released recommendations in late 2019, and included steps towards improving broadband throughout the state. While funding is still in question, a state broadband office has been established, and mapping available resources is one of the top priorities.
- With the final regulations regarding Opportunity Zones estimated to be released in March of this year, investors are beginning to firm up plans to take advantage of the 29 available zones throughout Idaho, including 2 in Latah county. Moscow is the single community in Idaho with 2 federally-designated opportunity zones.
- Answering demand for skilled trades, Idaho has established the Workforce Training Network (WTN) made up of workforce training centers at each of Idaho's six technical colleges. These centers offer streamlines skills training for applicants, and potential talent pipelines for Idaho businesses.

### Latah County and the Regional Economy:

- According to a Palouse Regional Housing Assessment study released in October of 2019, the Latah county ID and Whitman county WA region needs approximately 270 new single-family housing units annually – for the next decade - to meet with demand.
- The Palouse Regional Housing Leadership team, comprised of multiple community members from the cross-border region, will explore solutions to the regional housing dilemma.
- The Moscow Urban Renewal Agency, with its proposed Southeast Moscow Industrial Park, is planning development pending a catalytic project. Originally designed to be 600 acres overall, approximately 60 percent of the proposed development sits in one of Moscow's Opportunity zones.
- Idaho Transportation Department has planned the final piece of expansion of US 95 in Latah county for early 2021, and construction will run adjacent to the proposed Industrial Park project. Coordination of the projects is essential to avoid unintended consequences and delays.

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### **An Economic Analysis of Latah County and the Surrounding Region**

The Partnership for Economic Prosperity (PEP), the economic development organization for Latah County, Idaho, is pleased to present the fourth in a series of Latah County Region Economic Vitality Reports. PEP continues to produce these reports in an effort to provide a snapshot of local economic conditions and multi-year trends for workforce and labor, industry sector activity, retail sales, residential housing, income, and regional economic concerns. The report highlights the strengths of our beautiful Latah County as well as some areas of seemingly negative data. As always, PEP sees these bits of negative data as areas in which Latah county can improve and grow. As we have stated in previous reports, PEP believes that the power is in identifying these current threats to Latah County vitality so as to inform and empower future economic development strategies. As is our regular practice, PEP utilizes the most recent data available from the US Census, the Bureau of Labor Statistics and Economic Modeling Specialists, Inc. while striving to keep this document relevant and in step with our vibrant Latah County. While in a complete form herein, this will remain a dynamic document and we encourage you to look for updates on the PEP website at [www.pepedo.org](http://www.pepedo.org).

PEP has expanded this report for the 2020 edition, including discussions about occupancy rates as they relate to housing in the region in Section 1.4, an expanded discussion of economic development within the small cities in Latah County in section 5, and a discussion of economic development activities at a state level in Section 6. We believe that Latah county is gaining momentum, it's happening in our own back yards. It is an exciting time to be in northern Idaho. PEP is happy to bring this information forward, and we look forward to hearing your thoughts about these additions to our report.

For the purpose of this report, the economic context for the County of Latah will include Genesee, Deary, Juliaetta, Kendrick, Bovill, Troy, Potlatch, Onaway, and Moscow. Aggregated data, wherever available, will be included for the unincorporated cities of Avon, Cedar Creek, Farmington, Harvard, Helmer, Howell, Joel, Princeton and Viola.

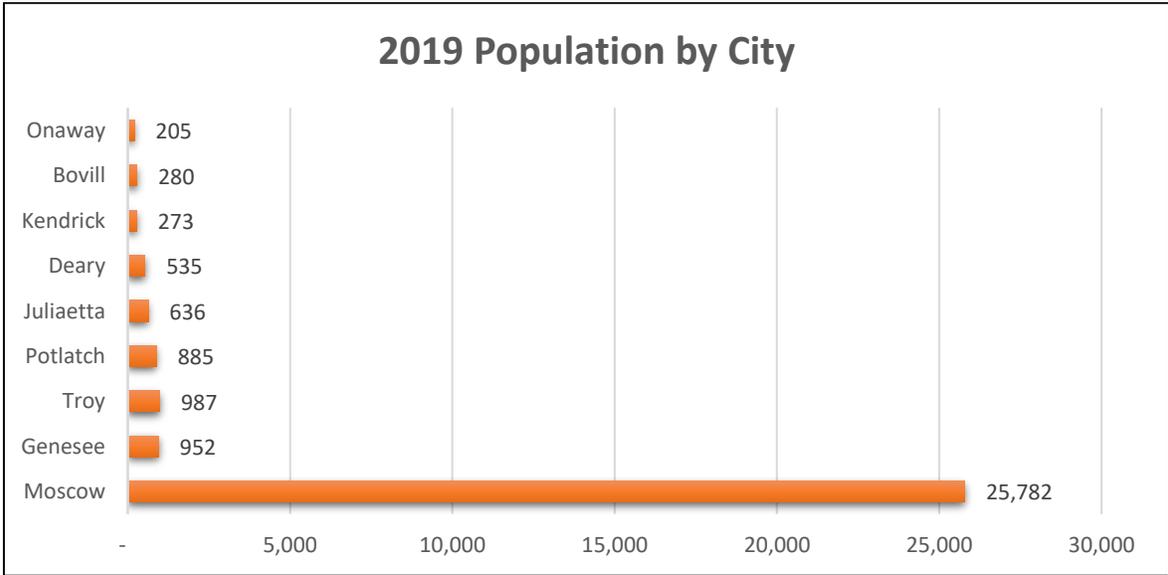


**1. LATAH COUNTY DEMOGRAPHICS**

**1.1 Population**

Economic Modeling Specialists, Inc. (EMSI), an economic consulting firm located in Moscow, states that in 2019 the Latah County population was 40,424. Population is expected to increase by 1,304, for a 3.2% growth between 2019 and 2024. Growth in Latah County has occurred largely in Moscow, but Deary, Troy, and Genesee’s populations grew at 5% or greater. See Figure 1.1a for 2019 population by city.

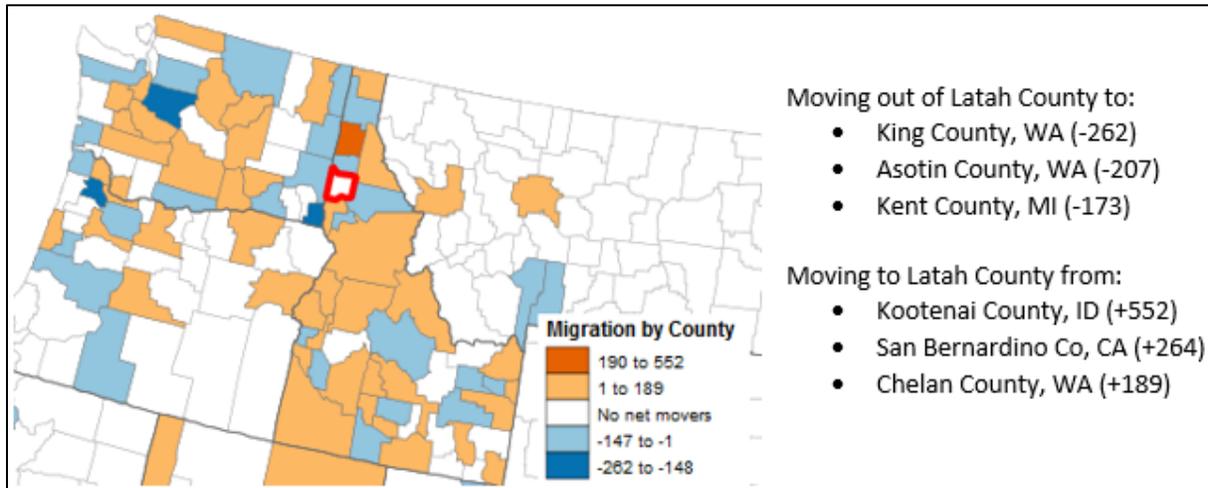
Figure 1.1a 2019 Population by City



For Latah County, most of the population increase is in the 70-74 and 75-79 age brackets with a 6% increase in each bracket. The 15-19 age bracket is close behind with a 5% increase, most likely due to the influx of

18 -19-year old's as students attending University of Idaho. The age bracket with the biggest decline is 55-59 at -3%. Another bracket with a significant decrease is 20-24, and can be attributed directly to students graduating from University of Idaho. **Figure 1.1b Latah County Migration Pattern** shows the migration to and from Latah County. The biggest influx of residents to Latah County is from Kootenai County, Idaho. Surprisingly, the biggest migration from Latah County is to Washington State's King County instead of the neighboring Whitman County, Kootenai County or Ada County. In fact, out of the top three locations for Latah County residents to relocate to, none of them are in Idaho.

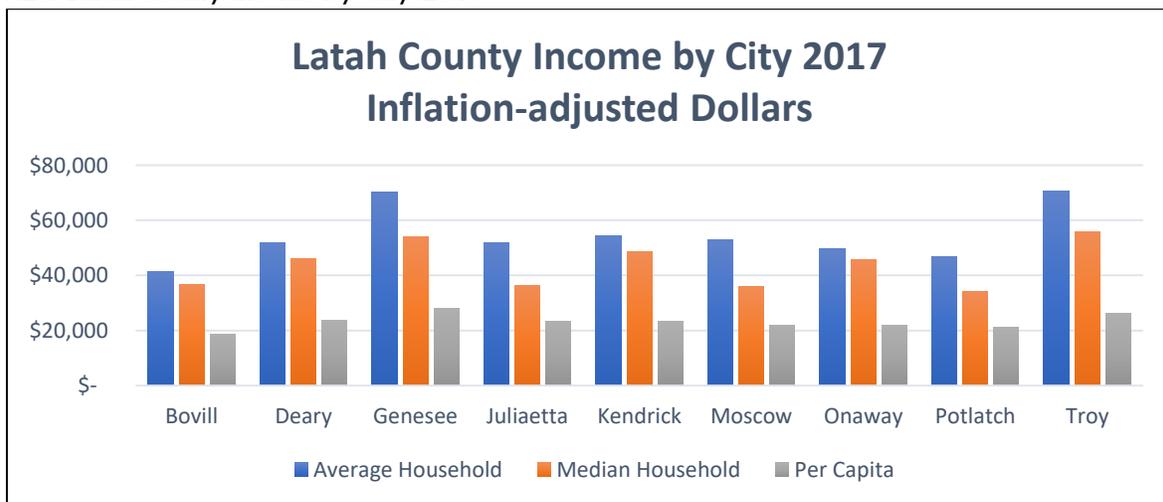
Figure 1.1b Latah County Migration Pattern



### 1.2 Income

Currently, the US Census Community Profile data estimates the average earnings per worker in Latah County, which includes wages, salaries, additional benefits, and proprietor income to be \$43,310 annually. That income is \$14.3K below the national average of \$57.7K. Though comparison of these two figures suggests that the cost of living is lower in Latah County, it is necessary to account for the presence of students which lowers the overall regional income earnings. **See Table 1.2a Latah County Income by City 2017**

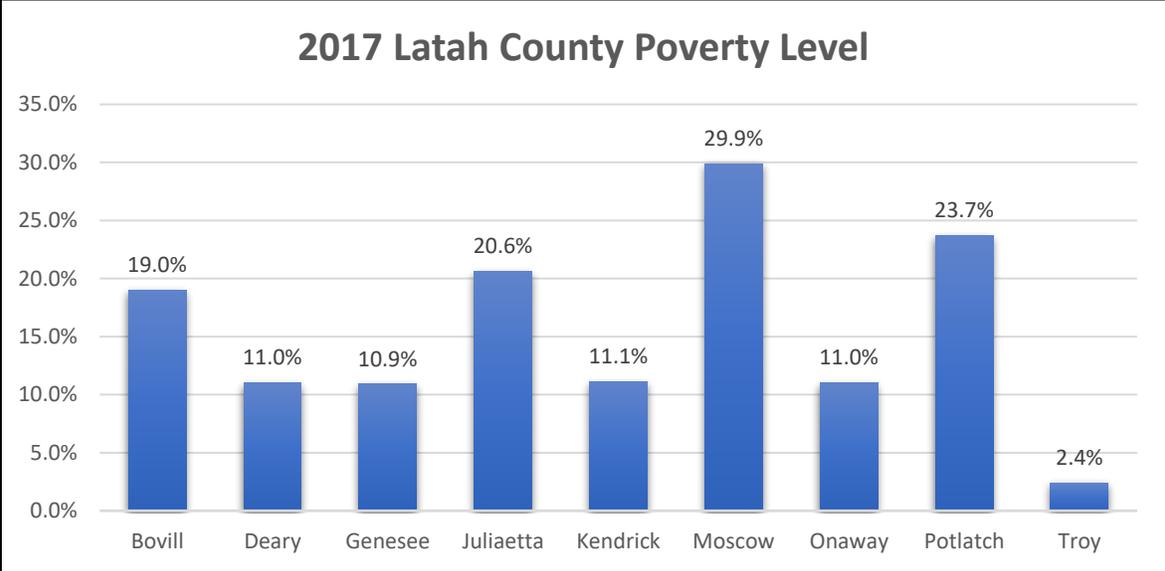
Table 1.2a Latah County Income by City 2017



Within the region, 43.8% of the population within the County registers as non-earnings individuals. As discussed earlier, this cohort includes students as well as retirement age individuals. In table 1.3 above, the effect of these individuals can be clearly seen in the average household earnings.

The U.S. Bureau of Labor Statistics states that Latah County's average weekly wage is \$695. This is below the Idaho average weekly wage of \$828 and well below the U.S. weekly average of \$1,184. **See Table 1.2b for 2017 Latah County Poverty Level.**

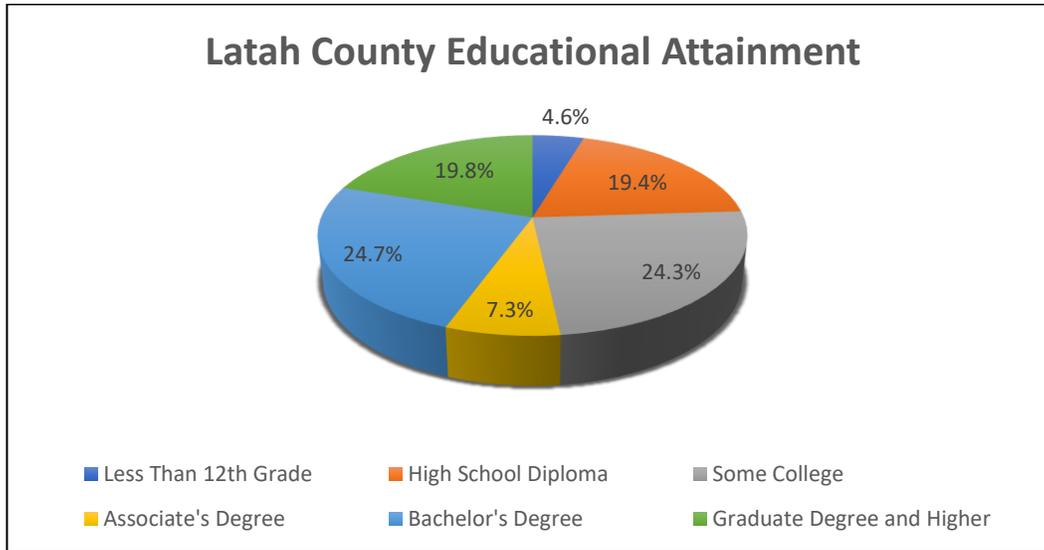
Table 1.2b 2017 Latah County Poverty Level



**1.3 Education**

Six school districts reside within Latah County; Moscow School District; Whitepine Joint School District; Troy School District; Kendrick Joint School District, Genesee Joint School District, and Potlatch School District. Combined, there are 18 public schools serving 3,954 students, two charter schools serving 352 students, and three private schools within the County. Latah County school districts have a consistent reputation of providing outstanding education to their communities, preparing students for college or entry into the regional workforce. Expenditures on education, training, and health are recognized as investments in human capital because once attained, knowledge, skills, and health cannot be separated from the individual. Of individuals residing within Latah County, 51.8% have obtained an Associate's degree or higher. **See Table 1.3 Latah County Educational Attainment.**

Table 1.3 Latah County Educational Attainment



**1.4 Housing**

According to the US Census, Latah County has 16,626 housing units, comprised of 53.3% occupied by the owner of the household. The remaining balance, 46.7% of households occupied by a renter, can be directly attributed to the large student population in Moscow but also by the income levels of the surrounding communities. With the median household income being approximately \$14K below the national average, it is easy to see how housing has become one of the largest concerns in Latah County. **Table 1.4a Latah County Housing Sales by City, 2019 YTD as of October** shows the relatively robust market for single family housing seemingly in spite of the housing cost burden.

Table 1.4a Latah County Housing Sales by City, 2019 YTD as of October (information courtesy of Team Idaho Real Estate)

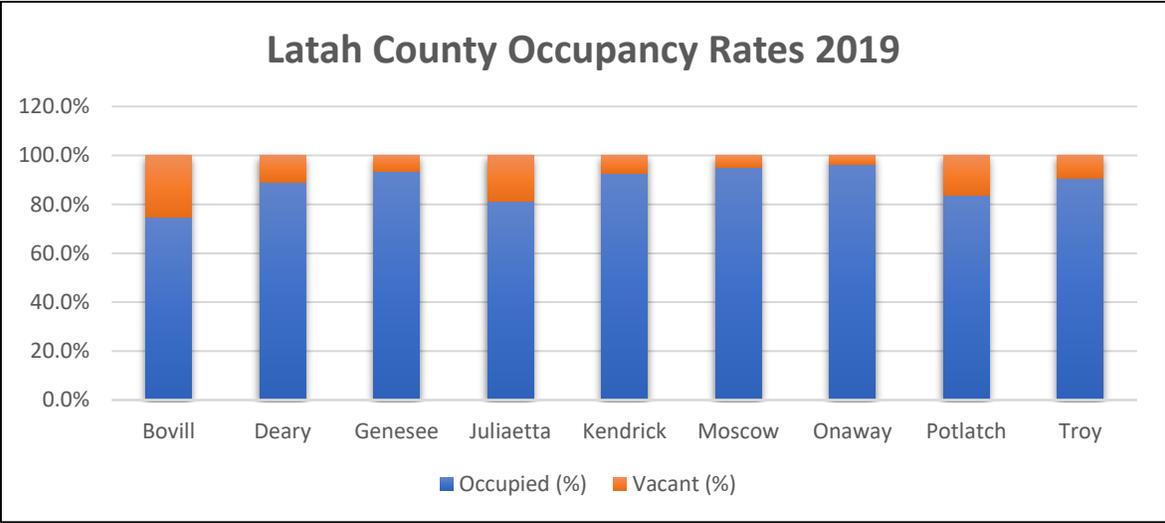
City	Number of Sales	Average Sales Price	Days on Market
Moscow	276	\$312,587	34
Viola	19	\$385,742	81
Troy	29	\$311,241	44
Deary	19	\$275,973	50
Genesee	23	\$260,565	74
Potlatch	18	\$235,444	99
Kendrick/Juliaetta	23	\$230,049	53
Bovill	3	\$107,000	62
Elk River	2	\$119,950	81

In 2019, PEP contracted Thomas P. Miller & Associates (TPMA) to conduct a housing study across the Palouse region – including both Latah and Whitman counties. The study found a large gap in single-family housing and a minor gap in multi-family housing. A large part of these gaps is due to nationally rising development costs resulting from increased material costs and labor shortages. These costs have an amplified effect in a remote area like the Palouse. To fulfill the housing shortage the region will need approximately 270 new single-family units each year through 2027. (See also Palouse Regional Housing Needs Assessment at [www.pepedo.org](http://www.pepedo.org))

It is impossible to speculate precisely what residents would choose if presented with multi-family units and more attainably priced single-family housing. A large part of this conversation traces to the behavior of millennials, who are the largest component of the overall American workforce and the predominant population group in the Palouse Region. PEP believes that many Latah county residents would prefer the advantages of single-family housing, if it were available. This conclusion is bolstered by research by multiple organizations that indicate millennials display the same preferences as older generations, but are inhibited by housing cost and their own debt obligations. Supporting this assumption, the same number of millennials and Generation Xer’s consider homeownership to be “the American dream,” and indicate house purchases in their future plans, according to the study done by TPMA.

In the surrounding cities, single family dwellings continue to be in demand, as shown in the table **1.4b Latah County Occupancy Rates 2019**.

Table 1.4b Latah County Occupancy Rates 2019



**2. LATAH COUNTY WORKFORCE CHARACTERISTICS**

Latah County’s workforce is broken down rather evenly by gender, with the majority of the workforce between 25 years and 55 years of age. The largest industries, shown in **Table 2.1 Latah County Largest Industries**, shows how important the University of Idaho and other government sectors are to Latah Counties economy. **Table 2.2 Latah County Largest Occupations** gives a glimpse into what kinds of positions the county offers. It is interesting to note that the top 4 occupations can be considered to be on the low end of the pay scale and command less educational attainment as well. While essential to the health of the county overall, growth in these industries do not necessarily add up to financial security for its residents.

Table 2.1 2019 Latah County Largest Industries

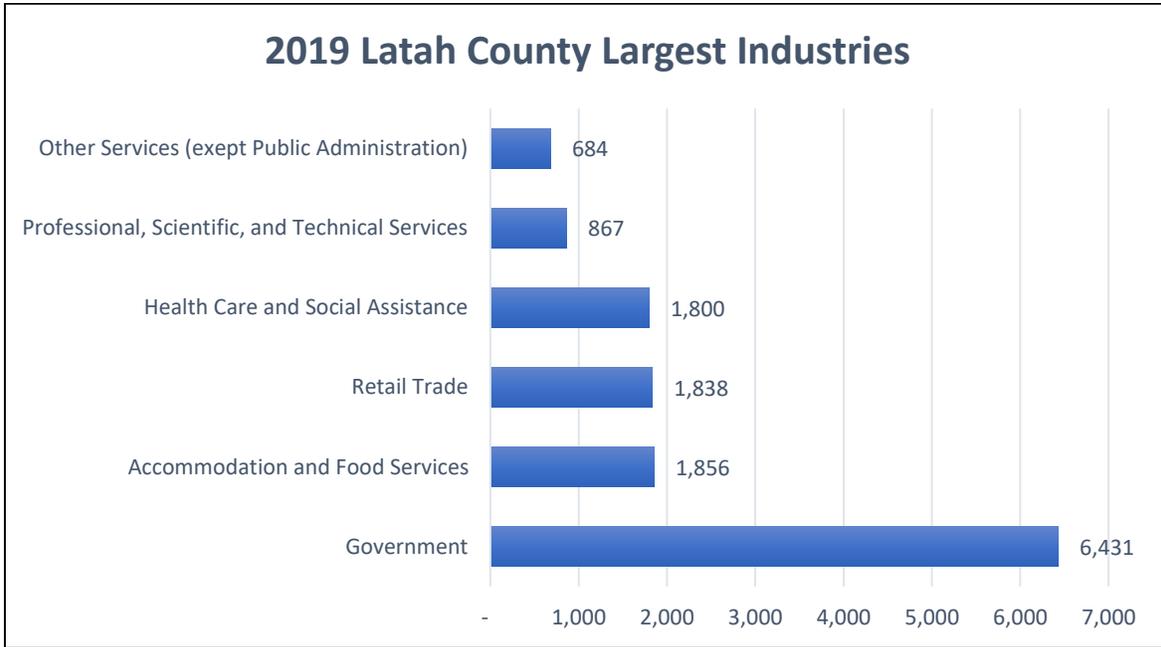
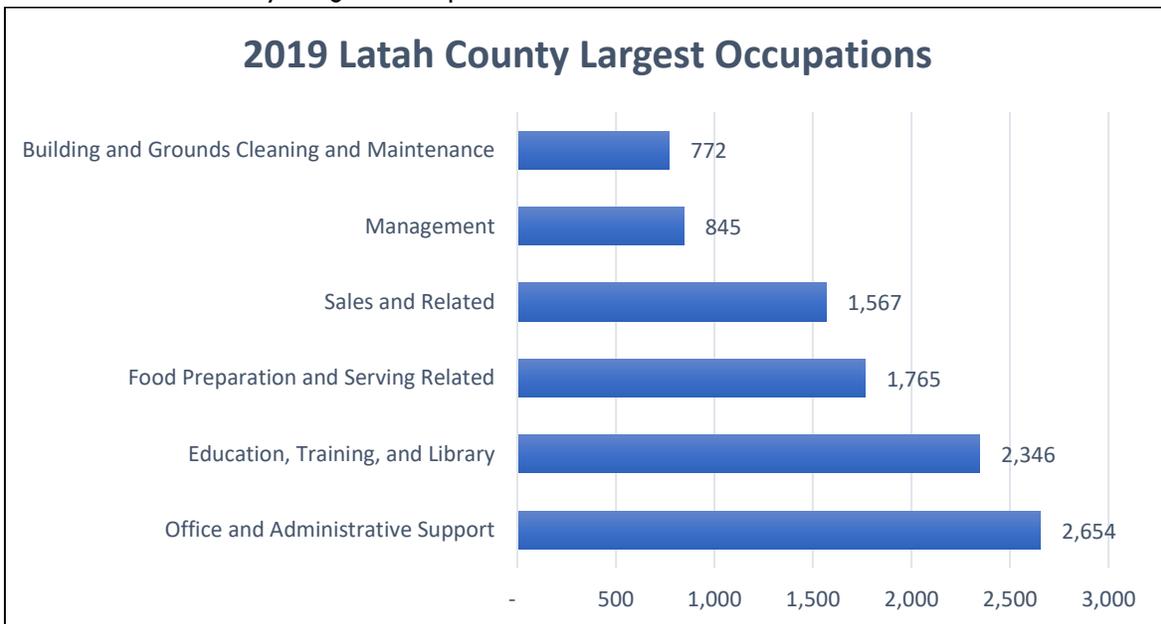
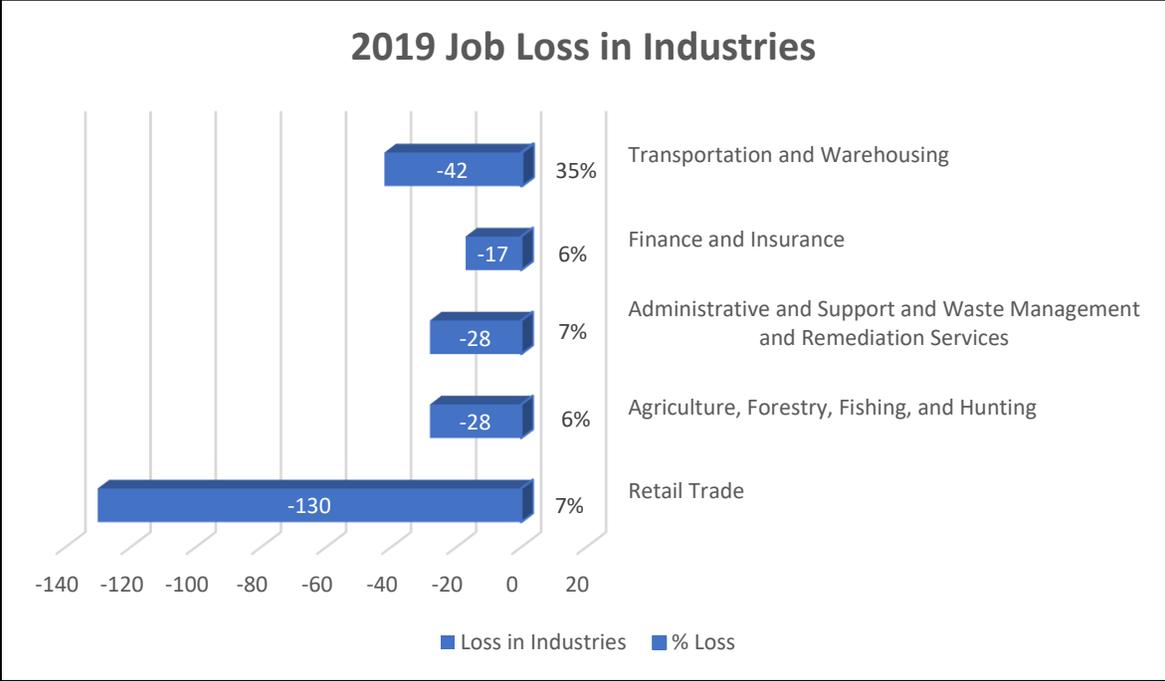


Table 2.2 2019 Latah County Largest Occupations



In 2019, five industries experienced job losses, including one of the largest industries in Latah County, Retail Trade. See **Table 2.3 2019 Job Loss in Industries**.

Table 2.3 2019 Job Loss in Industries



It is interesting to note that the Agriculture, Forestry, Fishing and Hunting industry has experienced the largest loss in the last year. Latah County’s slow departure from its roots in agriculture and forestry leaves a portion of its workforce unprepared for today’s computer-centric workplace. Simultaneously, those individuals entering the workforce are ill-equipped for positions as welders, plumbers and electricians, in spite of the high demand. Throughout the state of Idaho, there is a burgeoning movement to return to basic skills discussed above. Career and Technical education remain relevant just as computer-aided life becomes the norm.

**3. LATAH COUNTY INDUSTRY ANALYSIS**

Conducting a base analysis serves two primary purposes. First, it serves to identify major sources of income and employment in the local economy. Second, it allows areas to anticipate changes in their local economy. The second purpose is extremely important because it allows local entities to not only implement strategies to adapt to changing economic circumstances, but also to identify and encourage the development and diversification of their industrial base. Additionally, a cluster analysis aids in identifying a region's economic strengths and challenges so that regional economic development practitioners can identify realistic ways to shape their economic future.

**3.1 Education**

The University of Idaho is the state’s premier institution of higher learning, and is one of only 72 land-grant research universities in the United States. It is a leader in student-centered learning and excels at interdisciplinary research. The University boasts 94 undergraduate and 62 graduate majors, contributes to the state’s economy as a whole \$1.2 billion annually, employs a total of 2,651 full and part-time faculty and staff, and makes up approximately 15.6% of the total employment in Latah County. The University of Idaho will have research expenditures of \$111.6 million dollars in 2019.

Institutions of higher learning such as the University of Idaho are invaluable economic assets to the regions in which they reside. Not only is the University a source of knowledge spillover for the region, it is also the region’s creativity incubator.

### **3.2 Healthcare**

Gritman Medical Center is a private, nonprofit, community-led Critical Access Hospital and robust network of primary care clinics that has been a vital asset to the residents of the region for more than 120 years. In March 2019, Gritman achieved a 5-star rating from Hospital Compare for providing exceptional patient care. Gritman is continuously improving and expanding. In 2019, they added full-time pulmonology services as well as permanent oncology and neurology services (both through a regional hospital partnership) to keep patients close to home for their care instead of having to travel out of the area. Gritman performs a regular Community Health Needs Assessment to align services and staffing with the greatest health needs in the region. In 2018, Gritman had 57,039 patient registrations, performed 1,718 surgeries, delivered 298 babies, and treated 10,444 emergency patients. Gritman is the largest private employer in the county with over 600 dedicated employees.

### **3.3 Agriculture, Forestry, Fishing, and Hunting**

In the mid 1800's settlers realized the potential for the rich soil that was deposited in the Palouse region from millions of years of climate activity. Agriculture, Forestry, Fishing, and Hunting dominated Latah County's top industries, while today they are ranked #8. In 2017, Latah County had 1,041 farms, a 1% decrease from 2012. An average farm size holds 336 acres, down 15% and the total market value of products sold was \$77.9 million, an 11% decrease. Roughly 47.6% of Latah County's crops were wheat for grain, 22.9% were chickpeas, and 21% were forage (hay). The Bennett lumber mill in Princeton, and other small operations, employee about 580 people, down 100 employees from 10 years ago.

### **3.4 Retail**

The retail trade sector is the third largest industry in Latah County. EMSI estimates that total current employment within the sector is approximately 1,838 jobs, with average hourly earnings for individuals within this sector being \$29,000 annually. Retail constitutes 10.8% of the total employment within Latah County and, last year saw a 7% decrease with the loss of 130 jobs. Online shopping and increased offerings in the Palouse region are the main reasons for the decline. According to the City of Moscow, Moscow has lost several retail establishments in the past few years contributing to outside-of-the-county purchasing: Automobile sales, electronics and appliance stores, lawn, building materials and garden supply stores, gasoline stations, and general merchandise stores. These gaps in the retail sector creates opportunities for potential entrepreneurs.

### **3.5 Government**

The role of regional government is to provide services to individuals within their communities. Providing for public safety, recreation, and sanitation are just a few of the many services local governments provide. Latah County's government sector employment peaked in 2005 with 1,022 individuals employed. Since 2005, government within Latah County has experienced two major contractions in employment numbers, first in 2007 (17.8%) and again in 2012 (16.4%). Currently, the total number of individuals employed within the government sector is 602, a drop of 10 employees, or 2% from 2014-2020. The average annual income of individuals employed within Latah County's government sector is \$54,967.

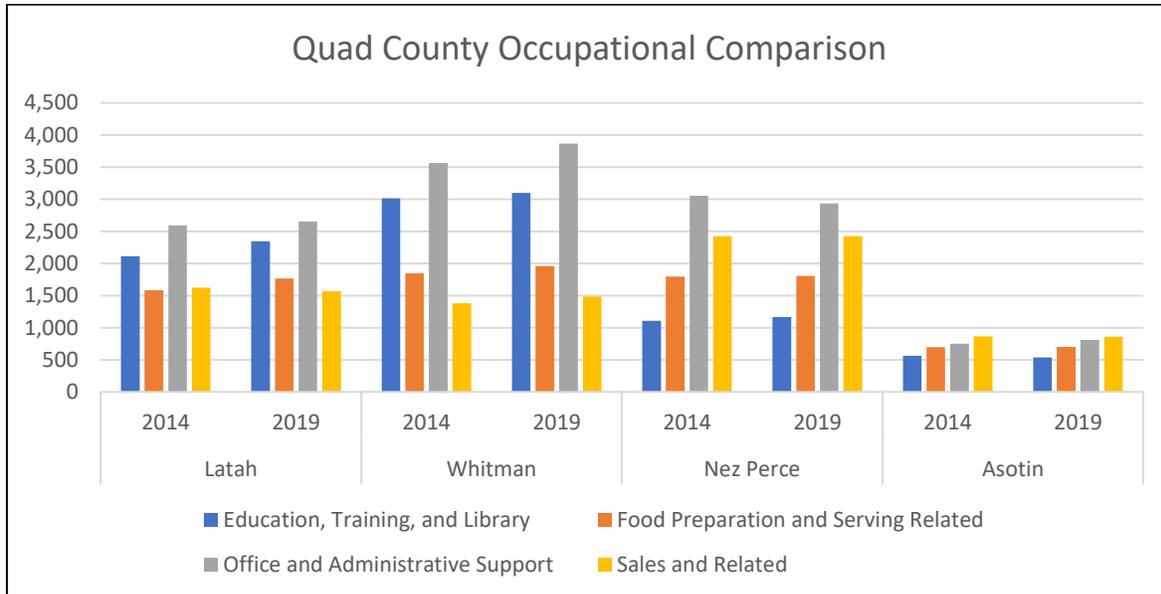
### **3.6 Food Service, Hotels and Motels**

The hospitality industry makes up the second largest industry workforce participation within Latah County, with 3082 individuals employed in various occupations within the industry. From 2014 to 2020, jobs in these industries have increased by approximately 17.5%, with 173 payrolled business locations throughout the county. According to the Idaho 2017 Regional Visitor Research, the primary reason people come to the North Central region is to visit friends. The main tourism activities include camping, visiting a landmark/historical site, and swimming.

#### 4. LATAH COUNTY AS PART OF THE PALOUSE REGION

On the regional level a comparison of the quad-county area is warranted due to the overall proximity as well as the regionally-shared workforce. Nez Perce, Asotin, Latah and Whitman counties are shown below. See **Table 4.1 Quad County Occupational Comparison**

Table 4.1 Quad County Occupational Comparison



Top occupations in three out of the four counties varied little excepting Asotin County. Top performing occupations in each county were: Sales and Related up .68% from 2014 to 2019, Office and Administration up by 3.01%, and Food Preparation and Serving Related had the biggest increase of 5.26%.

More regional comparisons can be seen below in **Table 4.2 Regional Quad County Comparison**

Table 4.2 Regional Quad County Comparison

	Latah	Whitman	Nez Perce	Asotin
<b>Population 2018</b>	40,124	49,769	40,409	22,610
<b>Population 2019</b>	40,424	50,315	40,568	22,717
<b>Population Change %</b>	1%	1%	0%	0%
<b>COL Index</b>	98.5	111.0	99.5	117.6
<b>Unemployment Rate (July 2019)</b>	2.8%	5.6%	2.7%	4.8%
<b>Median Household Income</b>	\$41,574	\$43,310	\$51,804	\$47,486

#### 5. Economic Development by City

**Bovill** experienced political pressures in 2019, with the sitting mayor being recalled, and the majority of the city council resigning. The present governor-appointed and subsequently elected mayor brings a will to

change the current status and a can-do attitude. Bovill remains the location of choice for mining companies, potentially bringing much-needed employment opportunities in the very near future. Simultaneously, with its city government turmoil, Bovill faces the same housing challenges, essential infrastructure updates, and broadband and communication barriers as the rest of Latah county.

**Genesee** has brought a business-friendly attitude forth this year, and with the new Fire Station construction, new ballfield complex, and the recent sewer bond passage, are poised to grow their community. The citizens are supportive of the few businesses in the community, and pull together to solve problems.

**Juliaetta** continues to enjoy the prosperity of Colters Creek Winery and Tasting Room bringing much-needed tourism into the community. Both Juliaetta and its neighbor Kendrick are considered bedroom communities for Lewiston, and while beneficial, this can also mean a lack of retail businesses like hardware stores in these towns.

**Kendrick** is working to upgrade its infrastructure, and in 2021, will apply for a grant to overhaul its popular community pool. Kendrick houses a local brewery, and for a time, saw an uptick in business growth as a result of the tourism. 2019 saw the closure of a Bed and Breakfast, but the addition of a healthcare clinic. The local grocery store sees brisk traffic, and the community welcomes progress.

**Moscow** is the county seat of Latah county, and has had much progress in 2019: Economic Modeling Specialists, Inc announced expansion plans bringing 327 jobs over 5 years, the owners of Sangria Grille will relocate to downtown Moscow in the summer of 2020, Moscow continues to improve its infrastructure, purchase new fire engines, and recently passed a \$10M Police Station bond.

**Potlatch** is a progressive community in Latah county, proudly developing its RV park and new splash pad within it. The mayor and council are deeply business-friendly, and are quite successful at seeking and winning grants for infrastructure upgrades. Native Potlatchians come home to the community to raise their children and start their businesses.

**Troy** has great potential as it has long been considered – quite unfairly - a bedroom community to Moscow. The Troy community supports its local businesses. The main street houses three bars, city hall and multiple small businesses. They have seen the result of businesses locating in their community and welcome new ideas. Troy is uniquely positioned for development of housing as it is only a short commute from neighboring towns.

PEP will begin an effort in 2020 to assist the Latah county communities to develop action plans, or PEP Steps, toward solving citizen-identified issues. This community capital development process will help to build the necessary ‘people infrastructure’ for the cities, as well as positive momentum. A community that solves problems together cannot help but succeed.

## 6. IDAHO AS A STATE

Idaho grew by 2.05% in 2019 making it one of the fastest growing states in the nation. Low cost of living and a growing tech industry are two factors for Idaho’s rapid growth. **Table 6.1 Cost of Living Index** shows Idaho with the lowest cost of living in the western states.

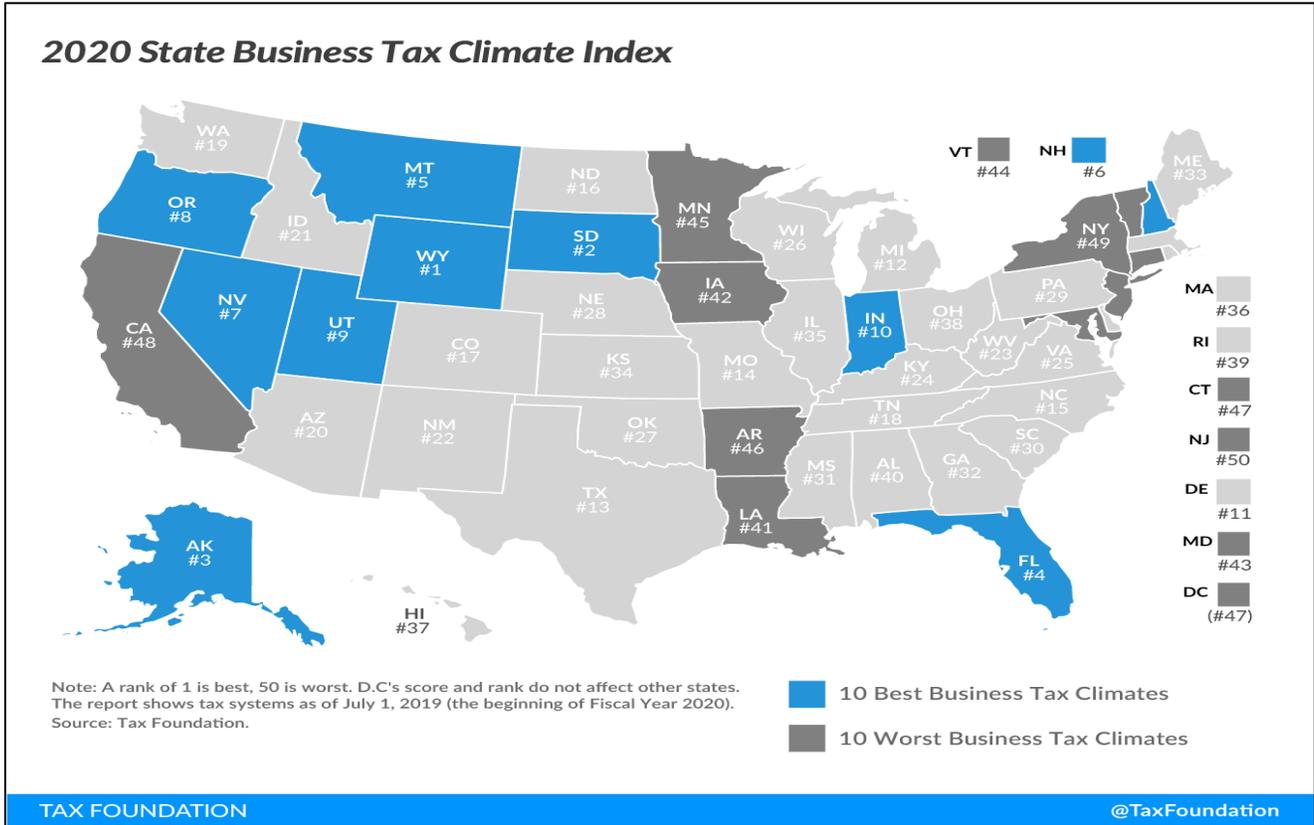
Table 6.1 Cost of Living Index

COST OF LIVING INDEX	
Source: C2ER, 2018	
Idaho	92.1
Arizona	123.6
California	139.0
Colorado	105.1
Montana	96.9
Nevada	103.9
New Mexico	96.8
Oregon	108.6
Utah	98.5
Washington	112.5

Average composite index based on national average of 100

On a state level, Idaho ranks in the top half of the nation for tax structure, however, it is not well positioned next to the neighboring states. According to the 2019 State Business Tax Climate Index developed by the Tax Foundation, Idaho ranks well below most of its neighbors and slightly below Washington. Most of the surrounding states, Nevada, Wyoming, Utah, Oregon and Montana ranked in the top ten states with the most favorable tax structure, and competing with neighboring states, for Idaho, becomes a problem. It's important to note that a business-friendly climate is paramount to business recruitment efforts, but also critical to retention and expansion of existing businesses. Local governments cognizant of issues such as taxation, regulatory compliance and economic incentives are building their foundations for future success. See Table 6.2 2020 National Tax Rankings

Table 6.2 2020 National Tax Rankings



Idaho is hoping to continue their growth pace with 29 new federally- designated Opportunity Zones. Opportunity Zones are economically depressed areas of the state with stagnant or decreased business development. The zones are created to encourage capital investment and stimulate economic development. The city of Moscow has two Opportunity Zones within its limits and is the only city in Idaho with this opportunity.

Idaho is also assisting and enabling economic development through expanding broadband connectivity throughout the state. Idaho Governor Brad Little's broadband task force concluded that expanding access to broadband services in rural areas of north central Idaho should be a top priority for state government. The report found that Idaho is likely missing out on millions in federal grants and loans due to its lack of an updated broadband plan. Some recommendations from the report include a five-county open access fiber network from Lewiston to Orofino and Grangeville, and a "dig once, hang once" policy to install trenches for

broadband infrastructure during road construction. The recommendations will be investigated for the 2020 budget.

The Idaho Department of Commerce has two main programs to support economic development, the first of which is the Tax Reimbursement Incentive program, allowing businesses to receive a tax credit of up to 30% on income, payroll and sales taxes for up to 15 years. Their popular Opportunity Fund program also assists Idaho communities through funding to improve or complete infrastructure projects necessary for site selection.

Idaho's low cost of living and beautiful landscape are drawing in a whole new population bringing with them endless business possibilities.

## 7. ADDITIONAL RESEARCH AREAS

1. Development of a **Palouse Regional Housing Leadership Team** to research and recommend solutions to the regional attainable housing shortage.
2. Further research is needed in areas of concern for the Latah county workforce such as **transportation, child care, and skills training**. PEP will work with its partners to develop innovative and cost-effective solutions.
3. A complete **Infrastructure Analysis** needs to be done for each city within Latah County, including broadband, telecommunications, water, sewer, natural gas line locations, and transportation of all kinds. Not only will existing businesses benefit from this discussion, but this kind of information is critical for any prospective businesses as well.
4. A continued strengthening and expansion of the **Relationship with the University of Idaho Technology Transfer office**. A collaborative strategic relationship can and will help address the gap between the initial research and the step into commercialization. Linkages between the research and the business world will be critical to the successful development of a business incubation program – either physical or virtual.
5. Continued **collaboration among the business, governments and institutions located within Latah County**. The formation of the Partnership for Economic Prosperity is a great example of the benefits of regional collaboration and cooperation. By recognizing the benefits of a regional approach to economic development, the partners are able to leverage the assets of the region, not just the individual partner.
6. **Collaboration and association with regional entities** such as the new City of Pullman Economic Development Manager, Clearwater Economic Development Association, Clearwater County Economic Development Agency, Valley Vision, IEDA, Inland Northwest Partners, Jobs Plus, Idaho Department of Commerce, Idaho Department of Labor, and other agencies as appropriate.

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