

An Analysis of the Economic Growth of Moscow and the Regional Economy

Sponsored by the Greater Moscow Alliance

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* The results and findings of this study are those of the authors, Steven Peterson and Stephen Pool, and do not necessarily represent any other organization or individuals.

An Analysis of the Economic Growth of Moscow And the Regional Economy

Executive Summary

Overview: What is the economic health of Moscow and the regional economy? That is the fundamental purpose of this study. The study was commissioned by the Greater Moscow Alliance (GMA) and completed in September 2013. The principal investigator is Steven Peterson, a research economist and Clinical Assistant Professor of Economics at the University of Idaho; and Stephen Pool, Research Associate, Moscow Idaho.* This executive summary is amended from the October 8, 2018 release to reflect final report editing.

Key Conclusions

Moscow, Latah County, and the Regional Economy

- The City of Moscow and the University of Idaho (UI) are in a helicopter growth pattern over the last decade; effectively there has been no growth in 10 years.
- Latah County's total employment grew very slowly, a cumulative 1.9 percent from 2001 to 2010, ranking 36th out of 44th in the state. From 2009 to 2011, Latah County grew cumulatively -2.7 percent, ranking 39th in the state (Figure E.2).
- Whitman County and Pullman has become the growth engine of the Palouse, which is symbolized by its housing boom (Figure E.1).
- Moscow/Latah County's economic base identifies the key drivers of the economy. It consists of the UI (50% of the economy); all other basic industries including agriculture, wood products, high technology manufacturing and services (25% of the economy); and Moscow's role as the home and shopping center of the Palouse- remaining 25% of the economy.
- The only part of Moscow's economy that is growing modestly is the remaining 25 percent of the economy, from Moscow's role as the domicile (home) for residents who commute to their employment at Whitman County (Pullman) and Nez Perce County (Lewiston) (i.e. as a "bedroom community"). This includes Moscow's role as a shopping center for the Palouse region in attracting many customers from Whitman County.
- If it was not for the rapid growth of Schweitzer Engineering in Pullman which added over 1,000 employees this last decade, and the nearly 3,000 new students at Washington State University, Moscow would be in a recession.
- Moscow's population has shown some growth but it is derived from Pullman workers who live in Moscow. From 2010 to 2012 Moscow's population grew 2.7% and Latah County's population grew 2.4% Whitman County was ranked 2nd in Washington State in population growth (4.1 percent) from 2010-2012, while Pullman grew 5.1% (Figure E.3).
- Many residents of Moscow work in Pullman or Lewiston and out-commute. It is estimated that 2,376 people live in Latah County mostly Moscow residents who commute to Pullman to work. Alternatively 700 people live in Whitman County (Pullman) and commute to Latah County (Moscow) for a net outflow of workers between the counties of 1,676 workers. In 2011 Latah County gained \$130 million in income from these commuting patterns (net). Whitman County lost \$116 million (net).

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Figure E.1

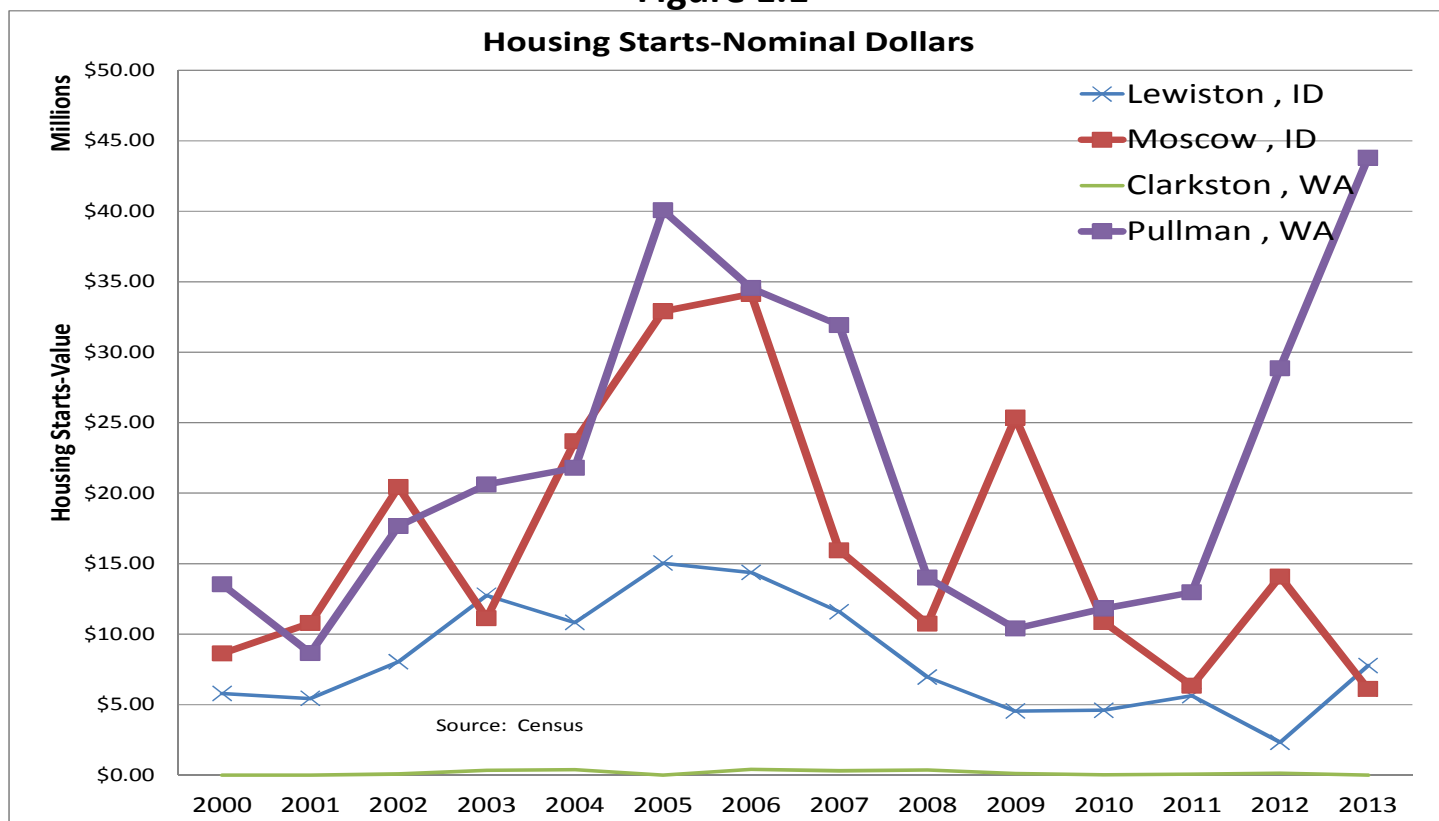


Figure E.2

Cumulative Percentage Change in Employment by Industry 2001-2011

Industry:	Washington State	Asotin	Whitman	Idaho State	Latah	Nez Perce
Farm employment	2%	-1%	-4%	-6%	11%	-11%
Forestry, fishing, and related activities	5%	-	-	-4%	-	21%
Mining	37%	-	-	64%	-	21%
Utilities	3%	-	-	56%	-	-
Construction	-11%	-23%	4%	-13%	-7%	-11%
Manufacturing	-14%	4%	191%	-18%	9%	-1%
Wholesale trade	2%	-33%	-26%	4%	35%	-
Retail trade	0%	33%	8%	5%	-18%	-13%
Transportation and warehousing	4%	-	-	12%	-	-29%
Information	6%	-47%	-15%	7%	-26%	15%
Finance and insurance	13%	42%	-4%	44%	19%	29%
Real estate and rental and leasing	32%	14%	39%	70%	46%	17%
Professional, scientific, and tech. services	24%	31%	5%	19%	10%	16%
Management of companies and enterprises	14%	-	286%	-22%	-22%	-33%
Administrative/waste management services	18%	-	18%	25%	20%	1%
Educational services	38%	23%	53%	65%	104%	12%
Health care and social assistance	25%	9%	25%	42%	28%	19%
Arts, entertainment, and recreation	23%	-20%	58%	31%	51%	-17%
Accommodation and food services	10%	13%	18%	11%	1%	8%
Other services	7%	-1%	4%	18%	-5%	-14%
Federal, civilian	12%	-22%	-3%	-2%	-9%	17%
Military	11%	-12%	-8%	0%	-9%	-1%
State and local	9%	12%	7%	8%	-6%	0%
Total	8.8%	10.7%	14.3%	11.8%	1.9%	-0.3%

Source: BEA

- Moscow heavily relies on outside income from its role as a bedroom community to Pullman. Moscow had a net injection of approximately \$231.2 million from all sources (commuting, retail trade, and services). Rural Latah County lost a net of \$34.9 million from all sources. In total, Latah County had a net injection of \$196.3 million for 2010.
- Pullman had a net leakage of approximately \$125.0 million from all sources. Rural Whitman County lost a net of \$76.3 million from all sources. In total, Whitman County had a net loss of \$201.3 million for 2010.
- Moscow historically has been the shopping center (retail trade hub) of the Palouse. Total retail sales for 2007 produced (the most recent Economic Census) in constant 2011 dollars were: 1) Lewiston \$738.3 million; 2) Moscow \$353.5 million; 3) Pullman \$203.7 million; and 4) Clarkston \$198.0 million.
- Moscow's retail trade industry is at risk for several reasons: 1) The virtual collapse of the new automobile market in the last 5 years losing 4 new dealerships and approximately \$100 million in lost retail sales, including James Toyota, Gilbert Ford, Ambassador Auto, and Nelson Chevrolet; 2) The opening of a new super Walmart in Pullman; and 3) The strong increase of retail development in Pullman.
- Surging growth: Whitman County's employment increased 14.3 percent cumulatively from 2001-2011, ranking 11 out of 39 counties in Washington. From 2010-2012 cumulatively, Whitman County was ranked 2nd in Washington State in population growth (4.1% while Pullman grew 5.1%).

University of Idaho, the Region's Largest Employer

- The UI is Idaho's Flagship university with the state's largest educational (80,000 alumni) and economic impacts (\$1 billion statewide) and the broadest and deepest range of programs in the state. However Boise State University (BSU) and the other state universities are catching up.
- The importance of student growth on the regional economy cannot be understated: Every student at UI creates \$57,400 in sales, \$31,000 in wage and salary earnings, and $\frac{3}{4}$ of a job in the community, assuming that in the long-run all university activities and expenditures are dependent on student enrollments (including the multiplier effects).
- The UI's dominance in its role of higher education in Idaho is at risk. BSU (and ISU) has reached par with the UI in many major functional areas. The UI still leads in research; doctoral programs and students; outreach and engagement; and some specialized programs such as WAMI (medical education) and Law.
- BSU had nearly 82% more students in 2012 than the UI by headcount and 54% more students measured by FTEs.
- Statewide, the University of Idaho-UI student population grew cumulatively 1% from 2002 to 2012, Boise State University 28%, Lewis-Clark State College-LCSC 27%, Idaho State University-ISU 4%. Since 1982 the average annual student growth rate for the UI was about 1%, BSU 2.4%, ISU 2.3%, and LCSC 2.1%.
- The UI now ranks 3rd in student headcounts (12,493) behind BSU (22,678), ISU (13,860), but above LCSC (3,775) and the UI is in second place in terms of full-time equivalents (FTEs) behind BSU (Figure E.4).
- Employing the historical (1982-2012) 1% UI student growth rate into a future forecast, the UI would reach former UI President Nellis target of 16,000 student enrollments in the year 2037. If we employ the average annual growth rate over the last decade 0.06% it would take several centuries to achieve the 16,000 student goal.

Figure E.3

Quad-County Population Growth 1910 -2012

Year	Whitman	Asotin	Nez Perce	Latah	Total
1900	25,360	3,366	13,748	13,451	55,925
1910	33,280	5,831	24,860	18,818	82,789
1920	31,323	6,539	15,253	18,092	71,207
1930	28,014	8,136	17,591	17,798	71,539
1940	27,221	8,365	18,873	18,804	73,263
1950	32,469	10,878	22,658	20,971	86,976
1960	31,263	12,909	27,066	21,170	92,408
1970	37,900	13,799	30,376	24,891	106,966
1980	40,103	16,823	33,220	28,749	118,895
1990	38,775	17,605	33,754	30,617	120,751
2000	40,740	20,551	37,410	34,935	133,636
2010	44,776	21,623	39,265	37,244	142,908
2012	46,606	21,888	39,531	38,184	146,209

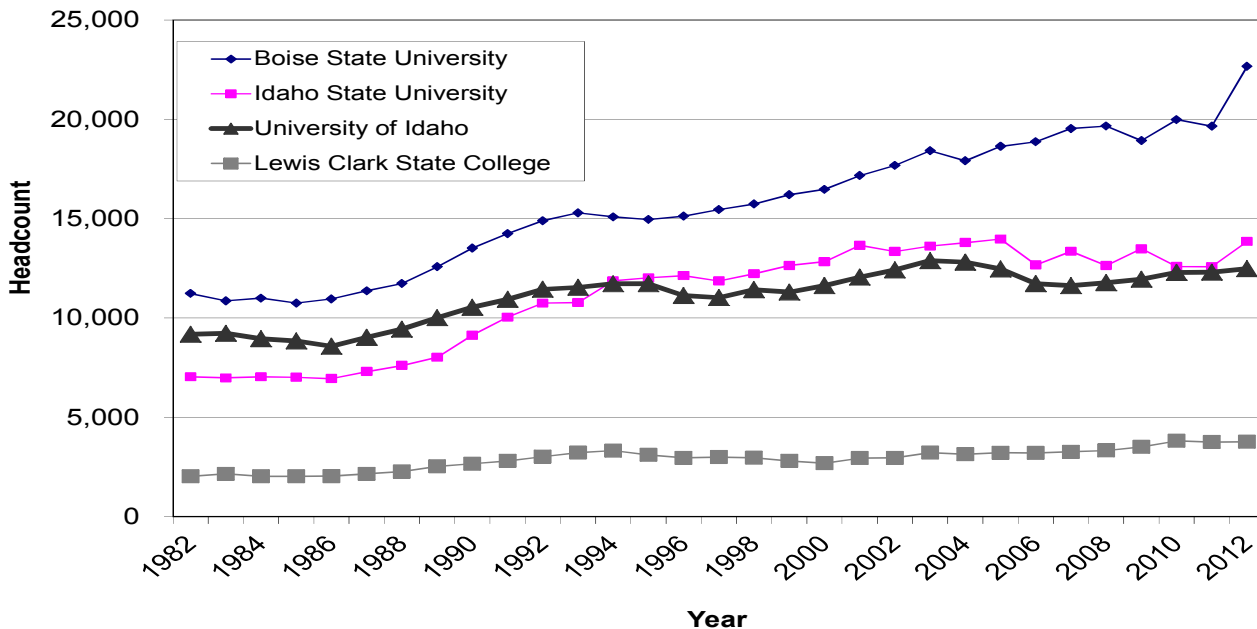
Cumulative Growth Rate

1900-2010	76.6%	542.4%	185.6%	176.9%	155.5%
1980-2010	11.7%	28.5%	18.2%	29.5%	20.2%
2000-2010	9.9%	5.2%	5.0%	6.6%	6.9%
2010-2012	4.1%	1.2%	0.7%	2.5%	2.3%

Source: U.S. Census

Figure E.4

Student Enrollments at Idaho Universities (Headcount 1982-2012)



Source: Idaho State Board of Education

- BSU now leads the UI in terms of the FY2014 basic state appropriation (\$77.3 million versus \$76.7 million).
- BSU is virtually tied with the UI in terms of the total appropriation which includes student fees (\$154.2 million versus \$157.0 million); and with the total operating budget which includes funding from all sources (UI \$450 million [FY13] to BSU \$443 million [FY-14]).
- BSU produced more Bachelor's degrees (2,588) than the UI (1,761) in 2011, and more Master's degrees (652 BSU to 636 UI).
- The UI produced more substantially more Doctoral degrees in 2011 (61 research/103 professional practice degrees) to BSU (11 research degrees).
- The UI had \$97.2 million in research expenditures in FY2012 and \$96.2 million in FY2011, approximately 68% of the total for all Idaho higher education research expenditures. From 2004 to 2011 UI research expenditures grew 1.7% cumulatively while research expenditures at BSU grew 165.2% (although beginning from a much lower base), and stood at \$24.2 million in 2011. ISU research expenditures grew 45.5% and stood at \$21.5 million (FY2011). Research expenditures from sponsored programs (alone) at the UI was \$65.5 million in FY2012, up from \$62.3 million in FY2005.

Idaho, the Perception of Moscow and Moving Forward in the Future

- Moscow and the University of Idaho seem to have a controversial public image with parts of the State of Idaho arising from several sources:
 - 1) southern Idaho media bias against both Moscow and the UI;
 - 2) challenges of running a state's largest residential campus;
 - 3) unintentional self-inflicted image problems by the UI and some bad luck; and
 - 4) a general lack of awareness by some civic leaders on how Moscow is perceived around the state.
- Moscow is a deeply divided community with a conflicted vision on future growth. That conflict makes it difficult for the community to move forward.
- Both the City of Moscow and the University of Idaho would benefit from a focus on economic growth from the ground up. If Moscow and UI do not take the "future into their own hands" their futures may be decided by external factors.

Table of Contents

1.1 Overview	10
1.2 Geography.....	10
1.3 Economic Background and Population	12
1.4 Regional Employment and Industry	12
1.5 Whitman County Economic Stagnation	16
1.6 Retail Trade Patterns.....	16
1.7 Economic Boom in Whitman County	16
1.8 Washington State University Expansion	16
1.9 Whitman County Summary.....	18
1.10 Overview of Moscow/Latah County Economy.....	18
1.11 The Economic Base of Latah County	18
1.12 University of Idaho	20
1.13 Flagship University	20
1.14 Slow UI Growth: 2003 to 2013 Decade	20
1.15 Growing Challenges in Graduate Programs	20
1.16 Economic Importance of Student Growth	22
1.17 Lagging Revenue Growth	22
1.18 Slowing Growth in Research	22
1.19 Summary Conclusion of the University of Idaho.....	26
1.20 Agriculture, Wood Products/Other Industries.....	26
1.21 Moscow: Home and Shopping Center of the Palouse.....	26
1.22 Leakages and Injections	26
1.23 Retail Sales Comparisons	30
1.24 Summary Moscow: Home and Shopping Center of the Palouse	32
1.25 Current Retail Trade Related Trends.....	32
1.26 Moscow’s Perception to Idaho.....	32
1.27 Divided Community.....	35
1.28 Summary Conclusion.....	36

Table of Figures

Figure E.1 Housing Starts – Nominal Dollars	3
Figure E.2 Cumulative Percentage Change in Employment by Industry 2001-2011	3
Figure E.3 Quad-County Population Growth 1910-2012	5
Figure E.4 Student Enrollments at Idaho Universities 1982-2012	5
Figure 1.1 The Quad City – Tri-Port Economic Area	9
Figure 1.2 Economic Regions of Idaho	9
Figure 1.3 Regional Trade Hierarchy	11
Figure 1.4 Quad-County Population Estimates 2012.....	11
Figure 1.5 Quad-County Population Growth 1910-2012	13
Figure 1.6 Selected County and State Population Growth 1910-2012.....	13
Figure 1.7 Idaho City Population Change 1990-2012	14
Figure 1.8 Washington City Population change 1990-2012	14
Figure 1.9 Change 2000 to 2010 in County Populations	15
Figure 1.10 Cumulative Percentage of Employment by Industry 2001-2011.....	17
Figure 1.11 Total Percentage of Employment by Industry 2001-2010.....	17
Figure 1.12 2007 Retail Sales Per Capita and Per Household.....	19
Figure 1.13 Student Enrollments at Idaho Universities 1982-2012.....	21
Figure 1.14 Student Headcount – Annual Percentage Change 1982-2012	23
Figure 1.15 2010-2011 Students on the Palouse as a Percent of Population	24
Figure 1.16 Total Appropriation and Funding for Higher Education in Idaho	24
Figure 1.17 State General Appropriation for Higher Education in Idaho	25
Figure 1.18 Percent Change in Direct Employment (A).....	27
Figure 1.19 Percent Change in Direct Employment (B)	28
Figure 1.20 Commuting Patterns in the Quad County Region 2010.....	29
Figure 1.21 Residence Adjustment 1969-2011.....	31
Figure 1.22 Grand Total Leakages and Injections	31
Figure 1.23 Housing Starts – Nominal Dollars	33
Figure 1.24 Housing Starts - Units	33

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the Economic
Growth of
Moscow
and the Regional
Economy

Figure 1.1

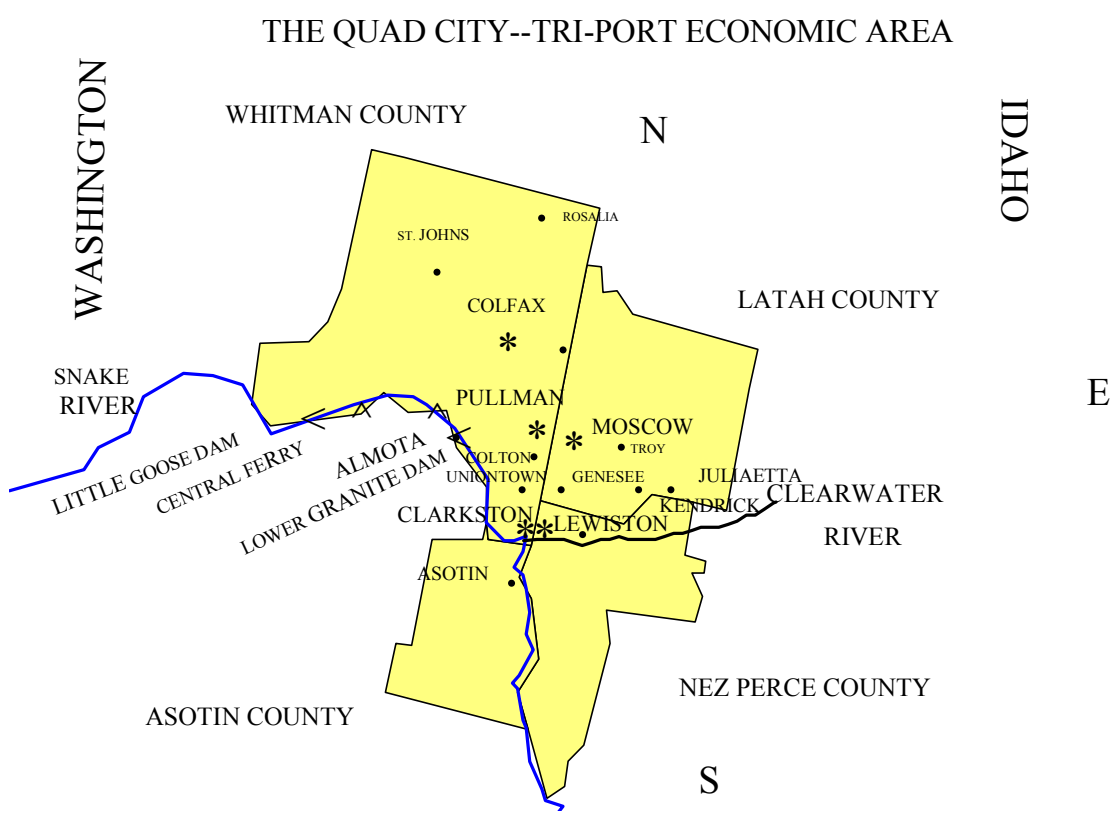
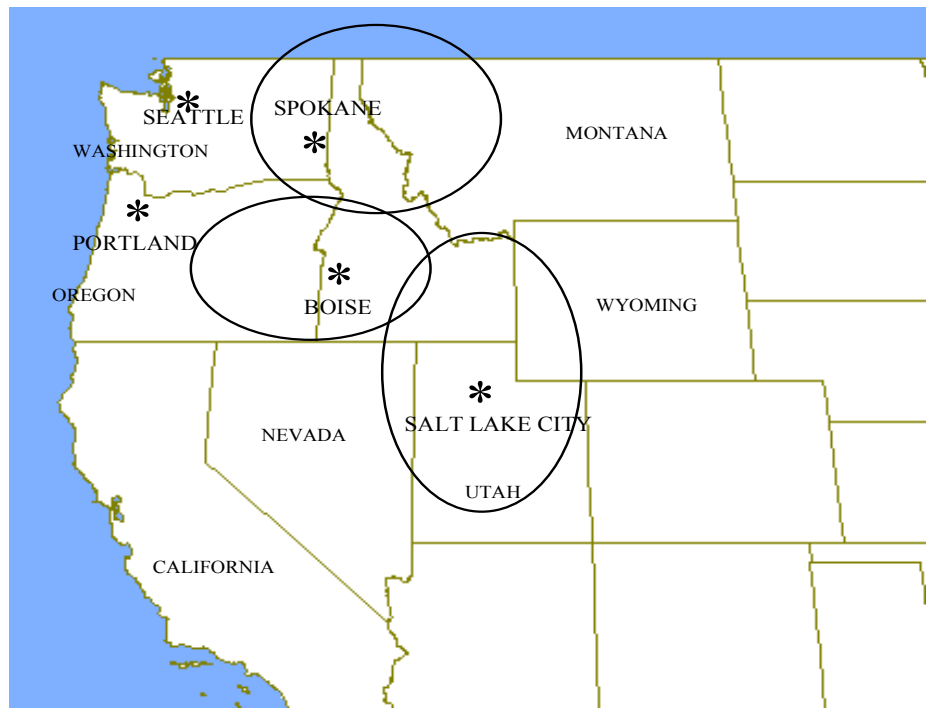


Figure 1.2



Overview of the Project

Overview: What is the economic health of Moscow and the regional economy? That is the fundamental purpose of this study. The study was commissioned by the Greater Moscow Alliance (GMA) and completed in September 2013. The principal investigator is Steven Peterson, a research economist and Clinical Assistant Professor of Economics at the University of Idaho; and Stephen Pool, Research Associate, Moscow Idaho.*

Geography: Moscow is part of the Quad County economy which includes the counties of Asotin and Whitman, situated in the state of Washington, and Latah and Nez Perce, situated in the state of Idaho (Figure 1.1). The four counties are located in north Idaho and eastern Washington along the Idaho-Washington border. The major cities situated in each county are Pullman, Washington (Whitman County), Moscow, Idaho (Latah County), Lewiston, Idaho (Nez Perce County), and Clarkston, Washington (Asotin County). In terms of political boundaries, Idaho is a single state. In terms of economic boundaries, Idaho is three distinct states. The Bureau of Economic Analysis divides the state of Idaho into three integrated economic regions: 1) The Boise region, which includes eastern Oregon, southwest Idaho, and central Idaho. 2) The Spokane region, which includes eastern Washington, northern Idaho, the southern western region of Canada, and part of western Montana. 3) Salt Lake City region, which includes most of Utah, northwestern Nevada, and southeast Idaho. Political jurisdictions rarely coincide with the integrated economic regions focused on these market centers. Moscow falls within the Spokane-Coeur d'Alene economic central place or region (Figure 1.2).

Trade flows (wholesale and retail trade patterns) observed for the region have both east-west and north-south elements (Figure 1.3). The dominant geographical location in the trade hierarchy is Spokane, Washington, which is the regional economic hub encompassing eastern Washington, northern Idaho, western Montana, and southwestern Canada. Spokane provides the widest range of goods and services for local businesses and households, and the most competition within each of the markets for goods and services. At the next level in the system of trade centers forming the trade hierarchy, is the local trade "hub" of Lewiston, Idaho. The number of goods and services, and the degree of competition in markets, is measurably

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Figure 1.3

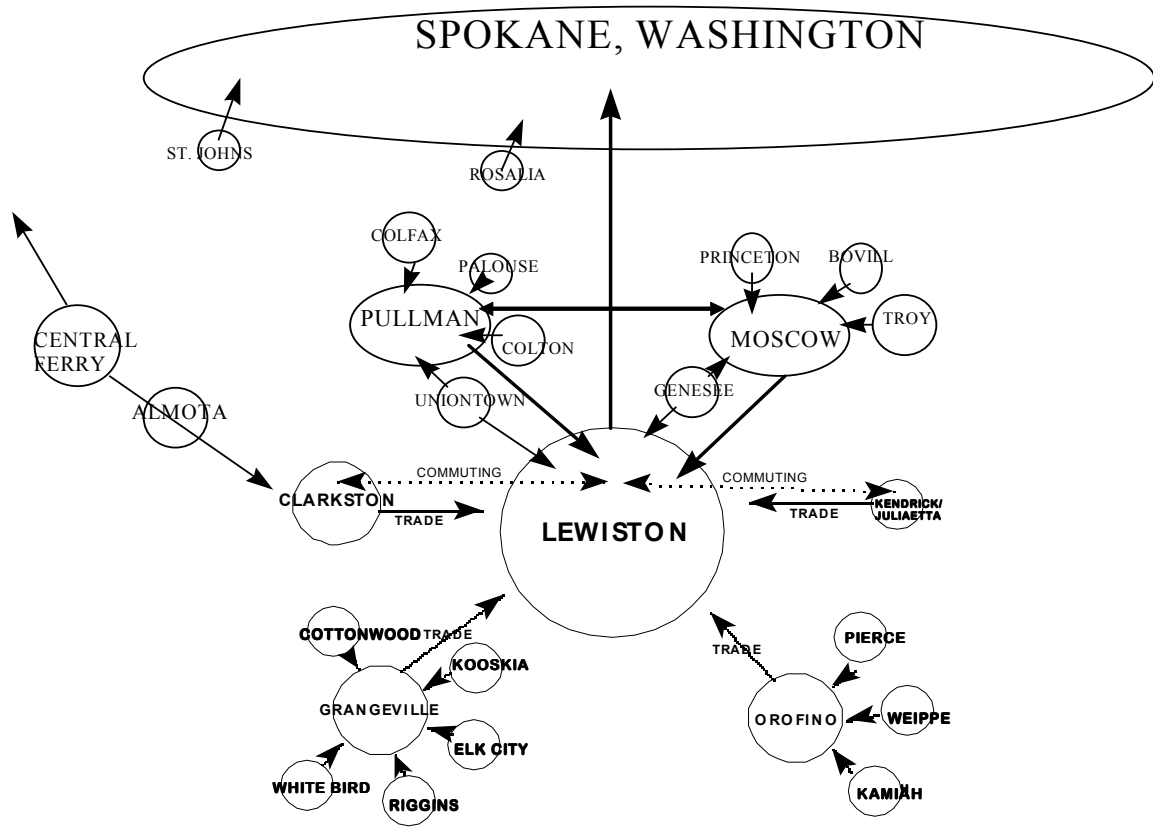
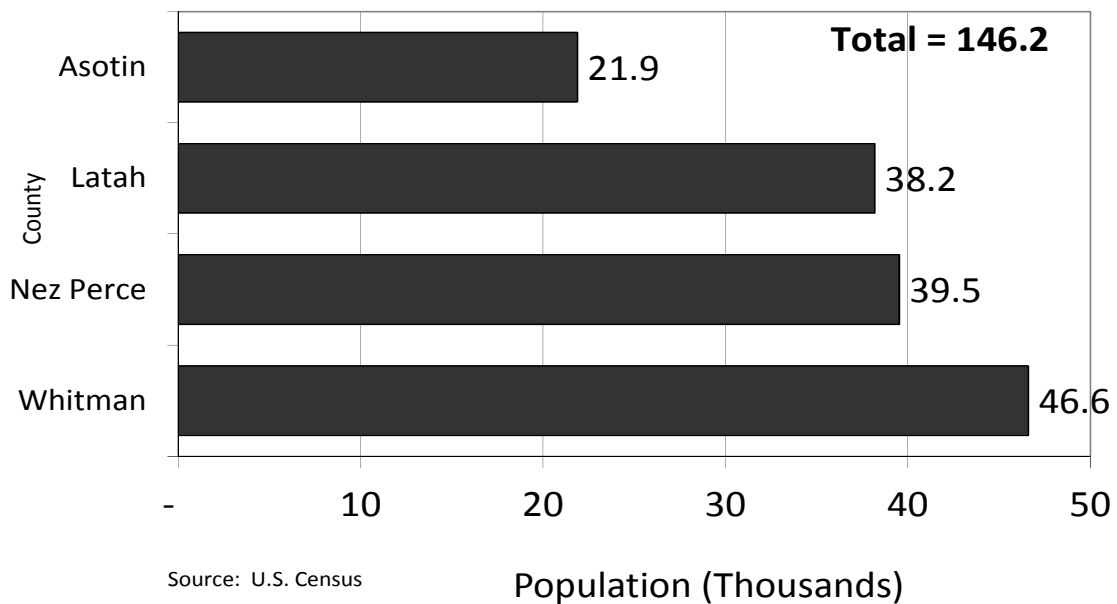


Figure 1.4

**2012 County Population Estimates
- Quad County (Thousands)**



smaller for Lewiston than for Spokane. At the third level of the trade center hierarchy the towns of Moscow, Pullman, Grangeville, and Orofino appear as local trade hubs. For example, Grangeville serves as the hub for the towns of Whitebird, Riggins, Elk City, Kooskia, and Cottonwood, providing a smaller range of opportunities for residents' market expenditures.

Economic Background and Population: The character of the economy is in a state of change. Historically, the Quad County economy has been based heavily on both natural resource industries (primarily wood products manufacturing and agriculture) and university employment (University of Idaho-UI, Washington State University-WSU, and Lewis-Clark State College-LCSC) which are stable, mature, and in a possible state of decline. Thus, for decades the Quad County region has been a slow-growing region in fast-growing states, both in terms of population and employment. The population of the region grew about 6.9 percent cumulatively in the period 2000-2010. In contrast over the last decade Idaho grew 20.6 percent, Washington (13.8 percent), Ada County-Boise (29.5 percent), and Kootenai County-Coeur d'Alene (26.4 percent). Whitman County stood at 46,606 people in 2012, Nez Perce County (39,531), Latah County (38,184), and Asotin County (21,888) for a regional total of 146,209 (Figures 1.4, 1.5, and 1.6). Going forward in the post-recession coming decade, the trends going forward are looking more robust locally. From 2010-2012 cumulatively, Latah County grew 2.4 percent ranking a tie for 3rd place in Idaho behind Ada County (4.0 percent), Kootenai County (2.5 percent), and tied with Canyon County (2.4 percent). Whitman County was ranked 2nd in Washington State in population growth (4.1 percent), while Asotin County ranked 21st at 0.88 percent. The City of Moscow grew 2.7 percent cumulatively from 2010 to 2012 ranking 17th in Idaho, Lewiston grew 0.4 percent, ranking 85th place. Pullman grew 5.1 percent and ranked 14th in the State of Washington while Clarkston grew 0.5 percent, ranking 193rd place (Figures 1.7, 1.8, and 1.9).¹

Regional Employment and Industry: Latah County's total employment grew a cumulative 1.9 percent from 2001 to 2010, ranking 36th out of 44th in the state. Nez Perce County grew a cumulative -0.3 percent over the same time period. From 2009 to 2011, Latah county grew a cumulative -2.7 percent, ranking 39th in the state while Nez Perce County ranked 25th at -0.46 percent. Whitman County grew a cumulative 14.3 percent from 2001-2011, ranking 11 out of 39 counties in Washington. Asotin County grew 10.7 percent, ranking 16th in the state. From 2009-2011, Whitman County grew a cumulative 2.1 percent, ranking 9th in the state and Asotin County grew 2.2 percent (Figures 1.10 and 1.11).²

Figure 1.5
Quad-County Population Growth 1910 -2012

Year	Whitman	Asotin	Nez Perce	Latah	Total
1900	25,360	3,366	13,748	13,451	55,925
1910	33,280	5,831	24,860	18,818	82,789
1920	31,323	6,539	15,253	18,092	71,207
1930	28,014	8,136	17,591	17,798	71,539
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1950	32,469	10,878	22,658	20,971	86,976
1960	31,263	12,909	27,066	21,170	92,408
1970	37,900	13,799	30,376	24,891	106,966
1980	40,103	16,823	33,220	28,749	118,895
1990	38,775	17,605	33,754	30,617	120,751
2000	40,740	20,551	37,410	34,935	133,636
2010	44,776	21,623	39,265	37,244	142,908
2012	46,606	21,888	39,531	38,184	146,209

Cumulative Growth Rate

1900-2010	76.6%	542.4%	185.6%	176.9%	155.5%
1980-2010	11.7%	28.5%	18.2%	29.5%	20.2%
2000-2010	9.9%	5.2%	5.0%	6.6%	6.9%
2010-2012	4.1%	1.2%	0.7%	2.5%	2.3%

Source: U.S. Census

Figure 1.6
Selected County and State Population Growth 1910 -2012

Year	United States	Washington St.	King	Spokane	Idaho St	Ada	Kootenai
1900	76,212,168	518,103	110,053	57,542	161,772	11,559	10,216
1910	92,228,496	1,141,990	284,638	139,404	325,594	29,088	22,747
1920	106,021,537	1,356,621	1,356,621	141,289	431,866	35,213	17,878
1930	123,202,624	1,563,396	1,563,396	150,477	445,032	37,925	19,469
1940	132,164,569	1,736,191	1,736,191	164,652	524,873	50,401	22,283
1950	151,325,798	2,378,963	2,378,963	221,561	588,637	70,649	24,947
1960	179,323,175	2,853,214	935,014	278,333	667,191	93,460	29,556
1970	203,211,926	3,409,169	1,156,633	287,487	712,567	112,230	35,332
1980	226,545,805	4,132,156	1,269,749	341,835	943,935	173,036	59,770
1990	248,709,873	4,866,692	1,507,319	361,364	1,006,749	205,775	69,795
2000	282,192,162	5,911,043	1,738,916	418,673	1,299,610	302,992	109,528
2010	308,745,538	6,724,540	1,931,249	471,221	1,567,582	392,365	138,494
2012	313,914,040	6,897,012	2,007,440	475,735	1,595,728	409,061	142,357

Growth Rate

1900-2010	305.1%	1197.9%	1654.8%	718.9%	869.0%	3294.5%	1255.7%
1980-2010	36.3%	62.7%	52.1%	37.9%	66.1%	126.8%	131.7%
2000-2010	9.4%	13.8%	11.1%	12.6%	20.6%	29.5%	26.4%
2010-2012	1.7%	2.6%	3.9%	1.0%	1.8%	4.3%	2.8%

Source: U.S. Census

Figure 1.7**Idaho City Population Change 1990-2012**

	1960	1970	1980	1990	2000	2012	% (00-12)
<u>Latah County</u>							
Bovill	357	350	289	256	305	259	-15.1%
Deary	349	411	539	529	552	512	-7.2%
Genesee	535	619	791	725	946	965	2.0%
Juliaetta	368	423	522	488	609	582	-4.4%
Kendrick	443	426	395	325	369	303	-17.9%
Moscow	11,183	14,146	16,513	18,519	21,291	24,499	15.1%
Onaway	191	166	254	203	230	189	-17.8%
Potlatch	880	871	819	790	791	812	2.7%
Troy	555	541	820	699	798	888	11.3%
<u>Nez Perce County</u>							
Culdesac	209	211	261	280	378	379	0.3%
Lapwai	500	400	1,043	932	1,134	1,140	0.5%
Lewiston	12,691	26,068	27,986	28,082	30,904	32,051	3.7%
Peck	186	238	209	160	186	199	7.0%

Source: U.S. Census/Idaho State

Figure 1.8**Washington City Population Change 1990-2012**

	1990	2000	2012	% (00-12)
<u>Whitman County</u>				
Albion	632	616	583	-5.4%
Colfax	2,762	2,844	2,846	0.1%
Colton	325	386	432	11.9%
Endicott	320	621	292	-53.0%
Farmington	126	153	149	-2.6%
Garfield	544	641	606	-5.5%
La Crosse	336	380	318	-16.3%
Lamont	91	106	71	-33.0%
Malden	189	215	204	-5.1%
Oakesdale	347	420	431	2.6%
Palouse	931	1,011	1,021	1.0%
Pullman	23,462	24,675	31,359	27.1%
Rosalia	552	648	557	-14.0%
St. Johns	499	548	546	-0.4%
Tekoa	750	826	791	-4.2%
Uniontown	277	345	298	-13.6%
<u>Asotin County</u>				
Asotin	981	1,095	1,271	16.1%
Clarkston	6,753	7,337	7,283	-0.7%

Source: U.S. Census

Figure 1.9

Change 2000 to 2010 in Washington State County Population

Rank	County	Population	Change	Percent
1	Franklin County	79,215	29,650	59.82
2	Benton County	176,472	33,341	23.29
3	Clark County	427,014	79,806	22.99
4	Mason County	60,762	11,131	22.43
5	Kittitas County	41,039	7,502	22.37
6	Thurston County	253,005	44,718	21.47
7	Whatcom County	201,614	33,918	20.23
8	Grant County	89,701	14,783	19.73
9	Douglas County	38,587	5,913	18.10
10	Snohomish County	715,358	106,173	17.43
11	Adams County	18,818	2,360	14.34
12	Jefferson County	29,912	3,498	13.24
13	Skagit County	117,096	13,676	13.22
14	Pierce County	795,371	91,378	12.98
15	Spokane County	472,078	53,275	12.72
16	Skamania County	11,097	1,202	12.15
17	San Juan County	15,759	1,639	11.61
18	King County	1,937,157	198,148	11.39
19	Clallam County	71,513	7,244	11.27
20	Pend Oreille County	12,970	1,298	11.12
21	Cowlitz County	102,469	9,485	10.20
22	Lewis County	75,492	6,896	10.05
23	Whitman County	44,810	4,056	9.95
24	Yakima County	244,428	21,813	9.80
25	Island County	78,676	6,790	9.45
26	Chelan County	72,754	6,106	9.16
27	Grays Harbor County	72,870	5,795	8.64
28	Stevens County	43,504	3,294	8.19
29	Kitsap County	251,738	19,018	8.17
30	Walla Walla County	58,923	3,745	6.79
31	Klickitat County	20,400	1,196	6.23
32	Asotin County	21,703	1,157	5.63
33	Okanogan County	41,256	1,690	4.27
34	Lincoln County	10,565	422	4.16
35	Ferry County	7,556	280	3.85
36	Wahkiakum County	3,978	143	3.73
37	Columbia County	4,114	45	1.11
38	Pacific County	20,902	(37)	-0.18
39	Garfield County	2,274	(109)	-4.57
	Washington State	6,742,950	832,438	14.08

Source: U.S. Census

Change 2000 to 2010 in Idaho State County Population

Rank	County	Population	Change	Percent
1	Teton County	10,165	4,067	66.69
2	Canyon County	189,410	56,328	42.33
3	Madison County	37,602	10,083	36.64
4	Jefferson County	26,215	7,022	36.59
5	Ada County	393,466	90,138	29.72
6	Lincoln County	5,214	1,163	28.71
7	Valley County	9,784	2,125	27.75
8	Kootenai County	138,913	29,426	26.88
9	Bonneville County	104,622	21,654	26.10
10	Jerome County	22,461	3,968	21.46
11	Twin Falls County	77,490	13,130	20.40
12	Camas County	1,108	140	14.46
13	Adams County	3,954	477	13.72
14	Franklin County	12,798	1,448	12.76
15	Fremont County	13,248	1,479	12.57
16	Blaine County	21,334	2,219	11.61
17	Boundary County	11,015	1,102	11.12
18	Bonner County	40,924	3,974	10.76
19	Payette County	22,635	2,011	9.75
20	Bannock County	83,020	7,292	9.63
21	Gem County	16,669	1,454	9.56
22	Bingham County	45,742	3,989	9.55
23	Gooding County	15,500	1,304	9.19
24	Cassia County	23,091	1,698	7.94
25	Owyhee County	11,491	801	7.49
26	Latah County	37,314	2,436	6.98
27	Idaho County	16,291	821	5.31
28	Nez Perce County	39,316	1,918	5.13
29	Power County	7,867	383	5.12
30	Boise County	7,017	315	4.70
31	Oneida County	4,294	159	3.85
32	Lemhi County	7,957	233	3.02
33	Washington County	10,217	247	2.48
34	Lewis County	3,823	83	2.22
35	Benewah County	9,287	101	1.10
36	Custer County	4,370	34	0.78
37	Butte County	2,899	5	0.17
38	Minidoka County	20,082	(21)	-0.10
39	Clearwater County	8,748	(182)	-2.04
40	Caribou County	6,982	(299)	-4.11
41	Clark County	980	(44)	-4.30
42	Elmore County	27,080	(1,530)	-5.35
43	Bear Lake County	5,975	(449)	-6.99
44	Shoshone County	12,732	(1,030)	-7.48
	Idaho State	77,490	13,130	20.40

Whitman County Economic Stagnation: Whitman County historically was the slowest growing of the four counties. The population of Whitman County peaked in 1974 at 41,952 and did not surpass that level until 2004 (42,158). Enrollment declines coupled at the WSU Pullman campus in the early 1980s, slowed economic growth. The WSU student Pullman Campus population peaked at 19,303 students in 1981 and did not reach that level again until 2010 (19,433). Antigrowth land-use policies enacted in Whitman County and Pullman in the 1970s, further limited Whitman County's economic growth. The retail trade "shed" shifted from Pullman to Moscow in the 1970s. The Palouse Empire Mall³ (constructed in Moscow 1976-1980) was originally slated to be built in Pullman (where Schweitzer Engineering is located today) but was turned down by the City of Pullman.⁴ At the same time, the Moscow Mall (now the East Side Mall) was completed.⁵ Moscow and Latah County was perceived as both more friendly to retail trade growth and amenable to greater single family housing construction. Moscow emerged as the "shopping center" and "residential home" of the Palouse by the 1980s and commuting patterns clearly reflect this trend (Figure 1.20).

Retail Trade Patterns: By 2007 retail trade per capita in Moscow was over double that of Pullman. In constant 2011 dollars, per capita retail trade was \$7,158 in Whitman County, \$7,788 in Pullman, as contrasted with Latah County (\$11,231), Moscow (\$16,598), Nez Perce County (\$20,386) and Lewiston (\$23,921).⁶ Moscow and Lewiston respectively were the retail trade hubs of the region. However, that may be changing (Figure 1.12).

Economic Boom in Whitman County: Recently, Pullman and Whitman County has become more growth focus and community leaders have attempted to expand and attract several high technology firms (most notably Schweitzer Engineering), manufacturing firms, and retail trade businesses in an effort to diversify the economy.⁷ Schweitzer Engineering has grown by over 1,000 employees in Pullman within the last decade, nearing a total of 1,900 employees in Pullman alone.⁸ Schweitzer Engineering now surpasses Clearwater Paper (1,600 employees) in Lewiston as the region's largest private employer.⁹ In 2005 Pullman Memorial Hospital constructed a \$19 million new hospital and medical complex.¹⁰ In recent years, developers constructed several thousand apartments and attracted and built a new super Walmart to Pullman.¹¹

Washington State University Expansion: The total state appropriation and operating fees was about \$383.0 million in FY2013. Operating revenues grew 10% in constant dollars (real terms) from 2003 to

2013 cumulatively, and 40% in nominal terms, even with the steep budget cuts WSU experienced in the aftermath of the Great Recession. Total direct expenditures from all sources were approximately \$669.1 million in FY2012 of which approximately 85% was spent in Pullman (\$569 million). External grants and contracts alone were \$215 million. Total employees at the Pullman campus were 5,681.

WSU added 2,707 students to their Pullman campus from 2005 to 2012, for a 15% cumulative growth. We estimate that the average student spends about \$14,410 locally (not including tuition and WSU related payments) per year. Adjusting for the estimated number of students living in the dorms, the 15% increase in students since 2005 has added approximately \$32 million in new consumer spending annually in the Quad County region.¹²

Whitman County Summary: After decades of minimal economic growth, Whitman County has emerged to become the engine of growth of the Quad County region due to an increase in high technology manufacturing jobs, a substantial increase in WSU student enrollments, and the rebuilding and expanding of the retail trade and service industries.

Economic Base of Latah County and Moscow

Overview of Moscow/Latah County Economy: The Moscow/Latah County economy includes the University of Idaho, New St. Andrews (a small private university), agriculture and related services, wood products (in the towns of Princeton and Troy), Northwest River Supply (a world-wide manufacturer and distributor of river and rafting gear), EMSI (an economic data and consulting firm), Alturas Analytics, Anatek Labs, Populi, AHA Products Group, and other small high-technology firms. Other large employers include Gritman Medical Center, Moscow School District, City of Moscow, and Latah County.

The Economic Base of Latah County: An economic base assessment identifies the true economic sources or drivers of an economy. Previous work categorized the economic base of Latah County (including Moscow) into three aggregated drivers:

- Approximately 50 percent of economy is supported by University of Idaho from all sources of spending (including institutional, research, faculty, student, staff, retirees, and visitors).
- Approximately 25 percent is supported from all other “export based” industries including agriculture, wood products, manufacturing, high technology services, etc.

Figure 1.10**Cumulative Percentage Change in Employment by Industry 2001-2011**

Industry:	Washington State	Asotin	Whitman	Idaho State	Latah	Nez Perce
Farm employment	2%	-1%	-4%	-6%	11%	-11%
Forestry, fishing, and related activities	5%	-	-	-4%	-	21%
Mining	37%	-	-	64%	-	21%
Utilities	3%	-	-	56%	-	-
Construction	-11%	-23%	4%	-13%	-7%	-11%
Manufacturing	-14%	4%	191%	-18%	9%	-1%
Wholesale trade	2%	-33%	-26%	4%	35%	-
Retail trade	0%	33%	8%	5%	-18%	-13%
Transportation and warehousing	4%	-	-	12%	-	-29%
Information	6%	-47%	-15%	7%	-26%	15%
Finance and insurance	13%	42%	-4%	44%	19%	29%
Real estate and rental and leasing	32%	14%	39%	70%	46%	17%
Professional, scientific, and tech. services	24%	31%	5%	19%	10%	16%
Management of companies and enterprises	14%	-	286%	-22%	-22%	-33%
Administrative/waste management services	18%	-	18%	25%	20%	1%
Educational services	38%	23%	53%	65%	104%	12%
Health care and social assistance	25%	9%	25%	42%	28%	19%
Arts, entertainment, and recreation	23%	-20%	58%	31%	51%	-17%
Accommodation and food services	10%	13%	18%	11%	1%	8%
Other services	7%	-1%	4%	18%	-5%	-14%
Federal, civilian	12%	-22%	-3%	-2%	-9%	17%
Military	11%	-12%	-8%	0%	-9%	-1%
State and local	9%	12%	7%	8%	-6%	0%
Total	8.8%	10.7%	14.3%	11.8%	1.9%	-0.3%

Source: BEA

Figure 1.11**Total Percentage of Employment by Industry-- 2011**

Industry:	Washington State	Asotin	Whitman	Idaho State	Latah	Nez Perce
Farm employment	2%	3%	5%	4%	5%	2%
Forestry, fishing, and related activities	1%	-	-	1%	-	1%
Mining	0%	-	-	1%	-	1%
Utilities	0%	-	-	0%	0%	-
Construction	5%	6%	3%	6%	4%	4%
Manufacturing	7%	5%	9%	7%	2%	11%
Wholesale trade	4%	1%	3%	3%	2%	-
Retail trade	10%	15%	7%	11%	10%	11%
Transportation and warehousing	3%	-	-	3%	1%	4%
Information	3%	0%	1%	1%	1%	2%
Finance and insurance	4%	4%	2%	4%	2%	7%
Real estate and rental and leasing	5%	4%	3%	5%	3%	3%
Professional, scientific, and technical services	7%	5%	4%	6%	6%	3%
Management of companies and enterprises	1%	-	0%	1%	0%	1%
Administrative and waste management services	5%	-	1%	6%	2%	3%
Educational services	2%	1%	1%	2%	2%	1%
Health care and social assistance	10%	13%	7%	10%	9%	15%
Arts, entertainment, and recreation	2%	2%	1%	2%	2%	1%
Accommodation and food services	6%	8%	7%	6%	8%	7%
Other services, except public administration	5%	8%	4%	5%	4%	5%
Federal, civilian	2%	1%	1%	1%	1%	1%
Military	2%	1%	1%	1%	1%	1%
State and local	12%	13%	38%	12%	31%	15%
Total	100%	100%	100%	100%	100%	100%

Source: BEA

Figure 1.12
2007 Retail Sales Per Capita and Per Household
In Constant 2011 Dollars

Region	Retail Sales	% (*)	Population	Per Capita	% (**)	Households	Per Household
Whitman County	\$ 294,061,457	100%	41,082	\$ 7,158	109%	15,717	\$ 18,710
Pullman	\$ 203,692,917	144%	26,154	\$ 7,788	100%	9,597	\$ 21,225
Rural Whitman	\$ 90,368,540		14,928	\$ 6,054	129%	6,120	\$ 14,766
Nez Perce County	\$ 762,629,587	39%	37,410	\$ 20,386	38%	16,163	\$ 47,184
Lewiston	\$ 738,286,202	40%	30,863	\$ 23,921	33%	13,489	\$ 54,732
Rural Nez Perce	\$ 24,343,385		6,547	\$ 3,718		2,674	\$ 9,104
Latah County	\$ 392,362,562	75%	34,935	\$ 11,231	69%	14,635	\$ 26,810
Moscow	\$ 353,477,586	83%	21,297	\$ 16,598	47%	9,168	\$ 38,556
Rural Latah	\$ 38,884,975		13,638	\$ 2,851		5,467	\$ 7,113
Asotin County	\$ 226,581,492	130%	20,551	\$ 11,025	71%	8,977	\$ 25,240
Clarkston	\$ 197,985,419	149%	7,330	\$ 27,010	29%	3,274	\$ 60,472
Rural Asotin	\$ 28,596,074		13,221	\$ 2,163		5,703	\$ 5,014
Spokane County	\$ 6,741,223,000	4%	456,197	\$ 14,777	53%	184,590	\$ 36,520
Ada County	\$ 5,855,102,000	5%	372,462	\$ 15,720	50%	145,584	\$ 40,218
Coeur d'Alene	\$ 1,234,577,000	24%	42,002	\$ 29,393	26%	18891	\$ 65,353
Boise	\$ 3,893,058,000	8%	202,563	\$ 19,219	41%	86032	\$ 45,251
Idaho State	\$ 20,526,631,000	1%	1,499,279	\$ 13,691	57%	570283	\$ 35,994
Washington State	\$ 92,968,519,000	0%	6,465,126	\$ 14,380	54%	2577375	\$ 36,071

* Ratio of Whitman County's Total Retail Sales to Other Regions

** Ratio of Pullman's Per Capita Retail Trade Sector to Other Regions

Source: Economic Census

- The remaining 25 percent of the economy is from Moscow's role as the domicile for workers who commute to their employment at Whitman County (Pullman) and Nez Perce County (Lewiston) (hereinafter "bedroom community") which also includes Moscow's role as a shopping center for the Palouse region (attracting many customers from Whitman County) (collectively hereinafter called "home and shopping center of the Palouse").¹³

University of Idaho (50 Percent of the Latah County Economy)

University of Idaho: The University of Idaho (UI) is Latah County's largest employer. The total UI operating budget from all sources for FY2013 was approximately \$450 million. The general basic state appropriation (i.e. state funding) was \$76.7 million, and the total appropriation (including student fees) was \$157 million (FY2014). About 90% of the spending occurred on the Moscow campus. Total research dollars (FY2012) was \$97.2 million. The Moscow campus had 11,043 students in 2011 and 12,493 students statewide in 2012.¹⁴

Flagship University: The UI is the Flagship University in Idaho, founded over a century ago with 80,000 alumni. It is a land grant university whose mission touches nearly every county in Idaho. The total statewide economic impacts (including graduates that are employed in Idaho's economy) total nearly a \$1 billion per year.¹⁵ The UI has Idaho's law school, a cooperative medical school program (WAMI) with the University of Washington. The UI also has a strong agricultural program, engineering, natural resources, business, art and architecture and many other undergraduate programs. The university boasts world class graduate and research programs, producing 68% of Idaho's higher education research in 2011. In FY2011 the UI had 2,176 full-time faculty and staff, 265, part-time faculty and staff, and 699 graduate students for a total 3,140 (2,441 excluding graduate students).

Slow UI Growth: 2002 to 2012 Decade: There has been minimal to no growth (hereinafter "helicopter pattern") in student population over the last decade. While the UI has a strong and lasting legacy, growth has largely stalled over the last decade and Idaho's other universities are catching up. Statewide, Boise State University student population grew cumulatively 28% from 2002 to 2012, Lewis-Clark State College-LCSC (27%), Idaho State University-ISU (4%), and the University of Idaho-UI (1%). Since 1982 the average annual student growth rate for the UI was about 1%, BSU (2.4%), ISU (2.3%), and LCSC (2.1%). The UI now ranks 3rd in student headcounts (12,493) behind BSU (22,678), ISU (13,860), but above LCSC (3,775) (Figures 1.13(a) and 1.13(b), Figure 1.14).

Figure 1.13 (a)
Student Enrollments at Idaho Universities
(Headcount 1982-2012)

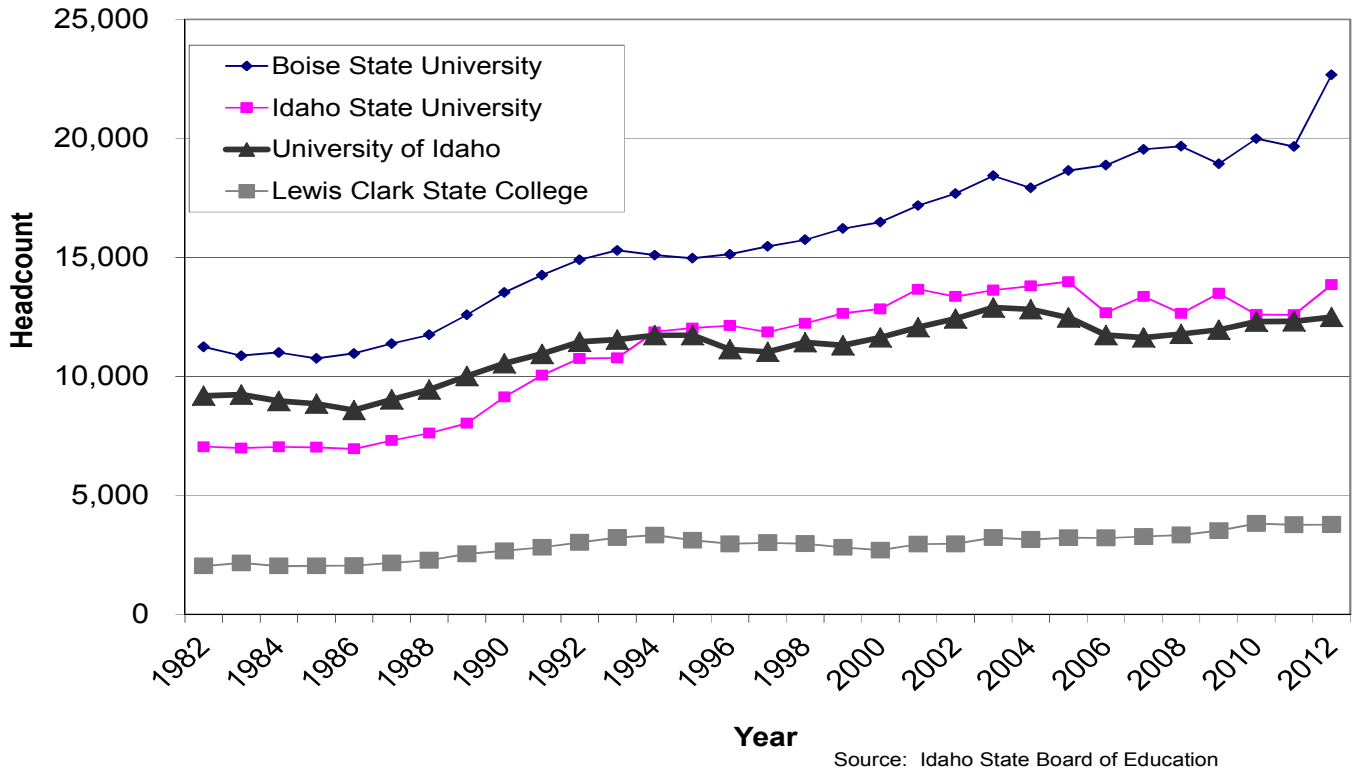
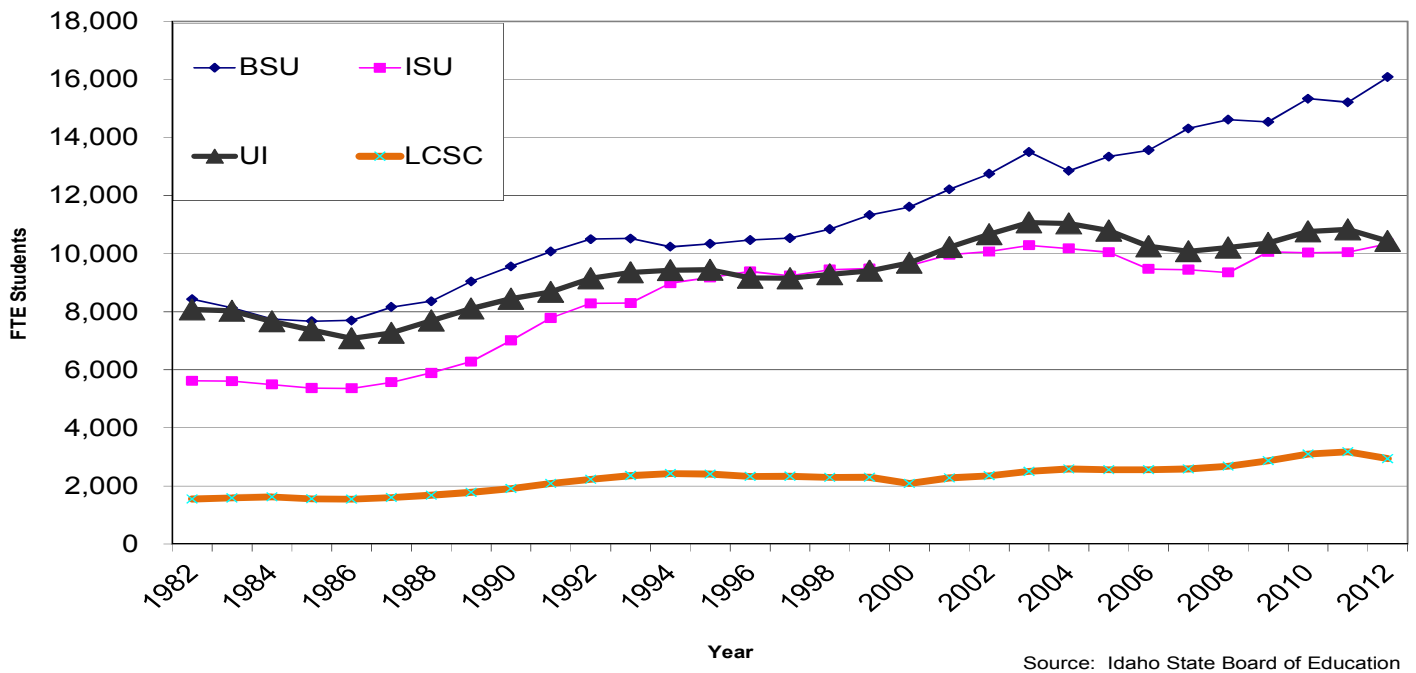


Figure 1.13 (b)
FTE Student Enrollments at Idaho's Universities
(1982-2012)



Growing Challenges in Graduate Programs: The UI ranked second in the number of graduate students (raw numbers) of 1,473 (including Law and WAMI) in 2012; ISU (1,611) was first including pharmacy and dental, and BSU (1,352).

BSU produced more Bachelor's degrees and Master's degrees in 2011, but the UI led in Doctoral degrees. The UI awarded 1,761 Bachelor's degrees, 636 Master's degrees, 61 Doctoral degrees (research), and 103 Doctoral degrees (professional practice). BSU awarded 2,588 Bachelor's degrees, 652 Master's degrees, and 11 Doctoral degrees (research). ISU awarded 1,118 Bachelor's degrees, 465 Master's degrees, 42 Doctoral degrees (research), and 114 Doctoral degrees (professional practice). LCSC awarded 514 Bachelor's degrees.¹⁶

Employing the historical annual 1% UI student growth rate (1982-2012) into a future forecast, the UI would reach former President Nellis target of 16,000 students in the year 2037. If we employ the student annual growth rate over the last decade (0.06%) it would take several centuries to achieve that goal.

Economic Importance of Student Growth: The importance of student growth on the regional economy cannot be understated: Every student at UI creates \$57,400 in sales, \$31,000 in wage and salary earnings and 3/4 job in the community in the long-run (including the multiplier effects).¹⁷ Washington State University students constitute 43 percent of the Whitman County population, University of Idaho students constitute 29 percent of the Latah County population, and Lewis-Clark students constitute 10 percent of the Nez Perce County population. For the Quad County region (excluding Asotin County), students constitute 28 percent of the local population or 34,237 students out of the total of 122,324 in 2011 (Figure 1.15).

Lagging Revenue Growth: The UI has lagging revenue growth. The average annual growth rate (nominal dollars) from 1977-2012 of the general appropriation from the legislature was 5.0% (BSU), LCSC (5.3%), ISU (4.2%), and UI (3.8%). For the first time ever, BSU (\$77.3 million) exceeded the UI (\$76.7 million) in the basic appropriation from the legislature in FY2012; followed by ISU (\$64.5 million); and LCSC (\$13.5 million). In terms of total appropriation (which includes student fees) BSU (\$154.2 million) is virtually tied with the UI (\$157.0 million); followed by ISU (\$122.7 million) and LCSC (\$27.3 million). BSU's total operating budget from all sources for FY2014 is \$443.1 million¹⁸, nearly that of the UI's FY2013 budget of \$450 million (Figures 1.16 and 1.17).

Figure 1.14

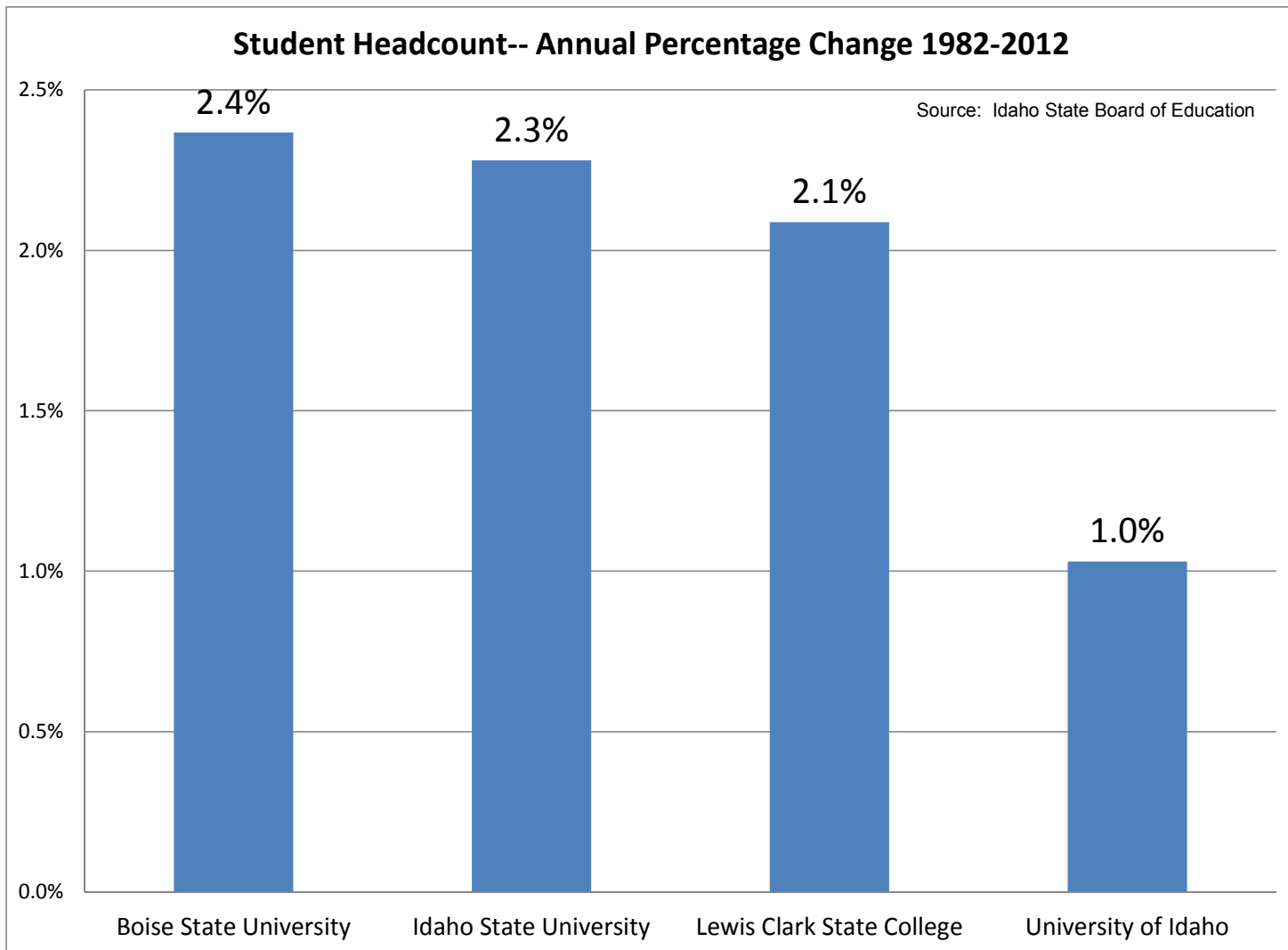


Figure 1.15
2010-2011 Students on the Palouse as a Percent of Population

University	County	Students	% Students	Population	% Population
Washington State University	Whitman	19,433	55%	45,077	43%
University of Idaho	Latah	11,043	35%	37,704	29%
Lewis-Clark State College	Nez Perce	3,761	10%	39,543	10%
Total		34,237	100%	122,324	28%

Notes: 2011 Estimated Population from U.S. Census; 2011 Headcount Students from WSU,UI, LCSC

Figure 1.16

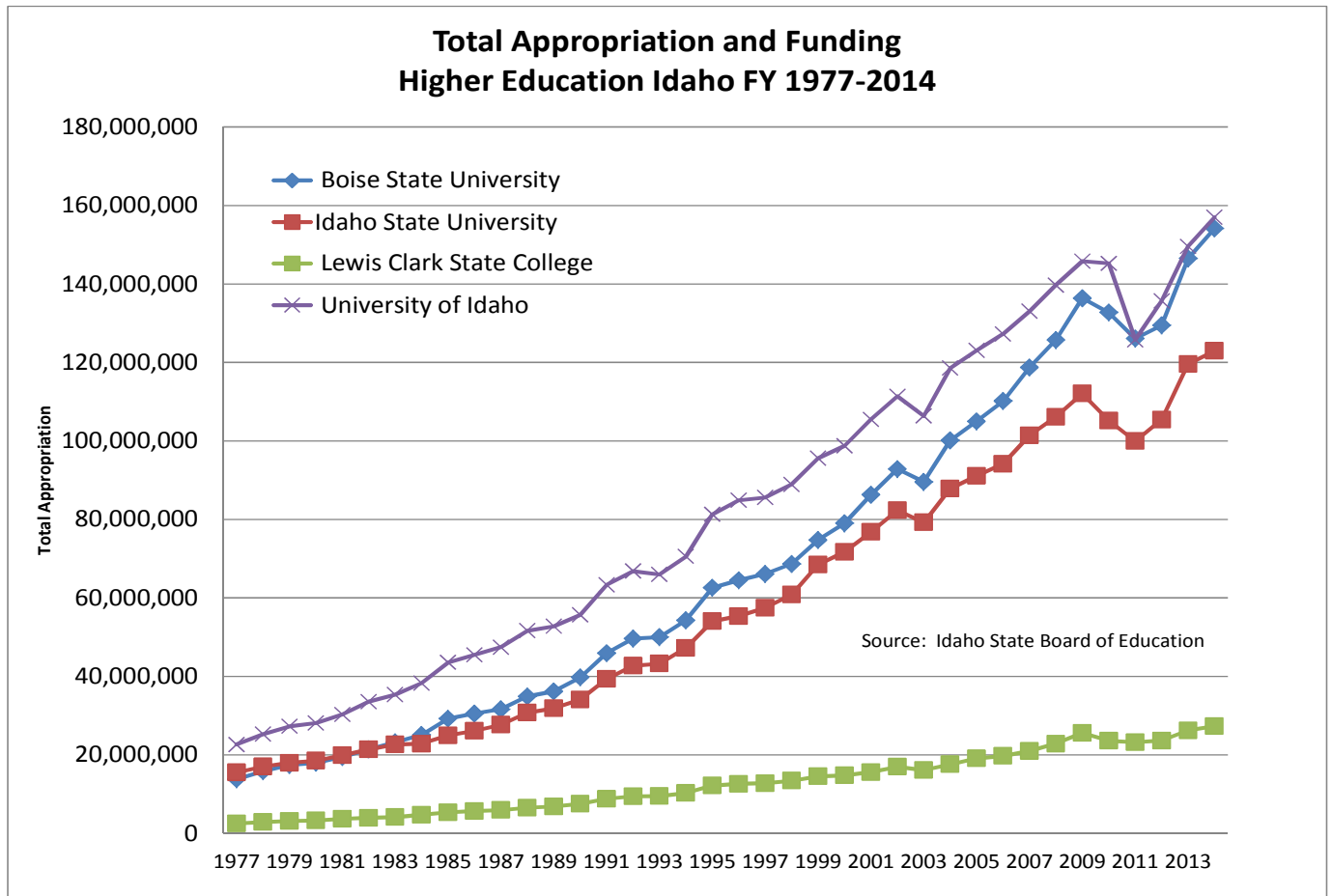
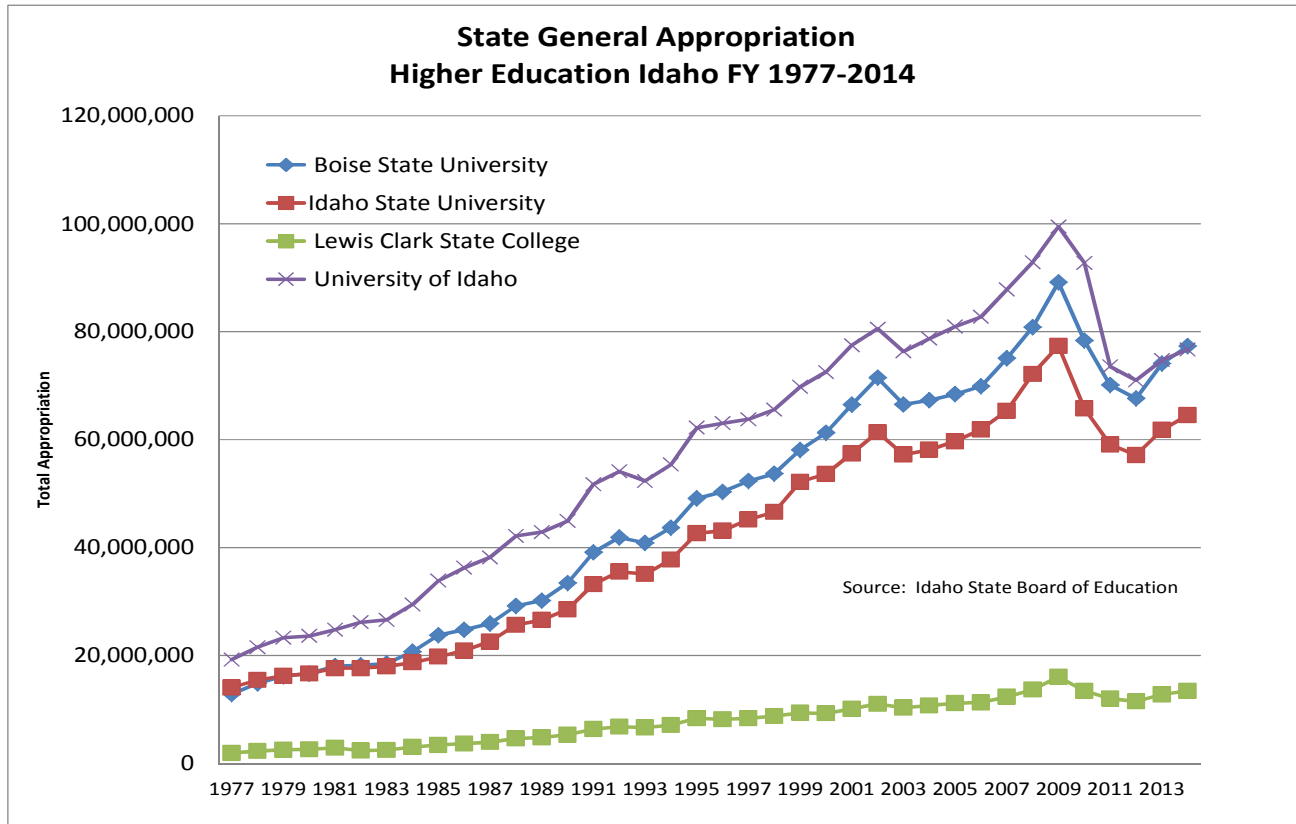


Figure 1.17



Slowing Growth in Research: The UI had \$97.2 million in total research expenditures FY2012 and \$96.2 million in FY2011, approximately 68% of the total research expenditures for all Idaho institutes of higher education. From 2004 to 2011 UI research expenditures grew 1.7% cumulatively while research expenditures at BSU grew 165.2% (although beginning from a much lower base), and stood at \$24.2 million in 2011. During the same timeframe ISU research expenditures grew 45.5% and stood at \$21.5 million FY2011.¹⁹ Research funding from sponsored programs (alone) at the UI was \$65.5 million of the \$97.2 million in total research FY2012, up from \$62.3 million in FY2005.²⁰

Summary Conclusion of the University of Idaho: The University of Idaho is Idaho's Flagship institution with the largest economic impact in the state. However, the other colleges and universities are catching up, particularly BSU. The UI has grown slowly in real terms over the last decade. It constitutes approximately 50% of the economic base of Latah County and Moscow.

Agriculture, Wood Products/Other Industries (25 Percent of the Economy)

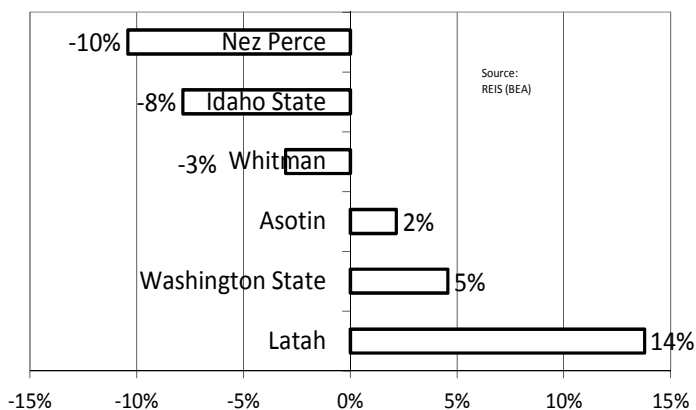
Most of the other export based industries (which are about 25% of Latah County's base) are either mature natural resource industries such as agriculture and wood products manufacturing; small niche basic manufacturing firms (i.e. Northwest River Supply); high technology firms and services; or other services. This sector is stable, with slow-modest growth. There are some bright spots such as EMSI which has added nearly 80 employees over the last decade and is currently relocating from Alturas Technology Park to the former Daily News downtown location.²¹ (Note: The historic percentage changes in employment by industry is presented for all major industries in Figures 1.18 and 1.19 for two aggregated time periods: 1969-2000 and 2001 to 2010).

Moscow: Home and Shopping Center of the Palouse (25 Percent of the Economy)

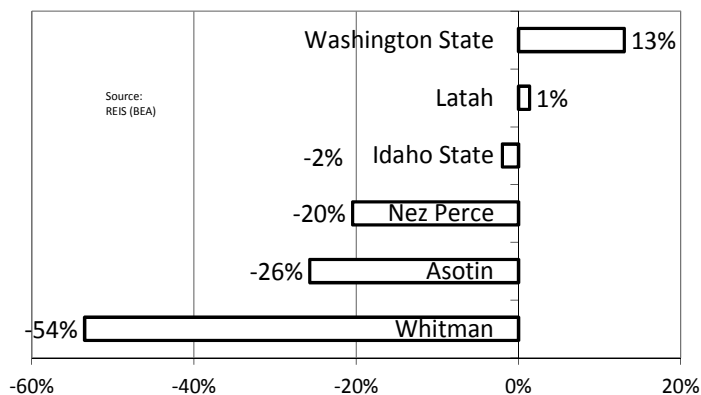
Moscow emerged in the 1970s as both the home and the shopping center of the Palouse. These combined effects constitute about 25% of the economic base of Latah County. It is estimated that 2,376 people live in Latah County (mostly Moscow) and commute to Pullman to work. Approximately 977 commute to Nez Perce County (Lewiston), and 519 commute to Kootenai County (Coeur d'Alene). Alternatively 700 people live in Whitman County (Pullman) and commute to Latah County (Moscow) for a net

Figure 1.18

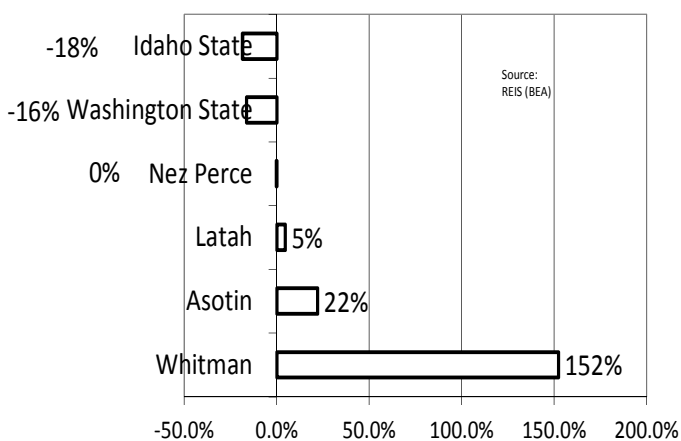
**Percent Change in Direct Farm employment
2001-2010**



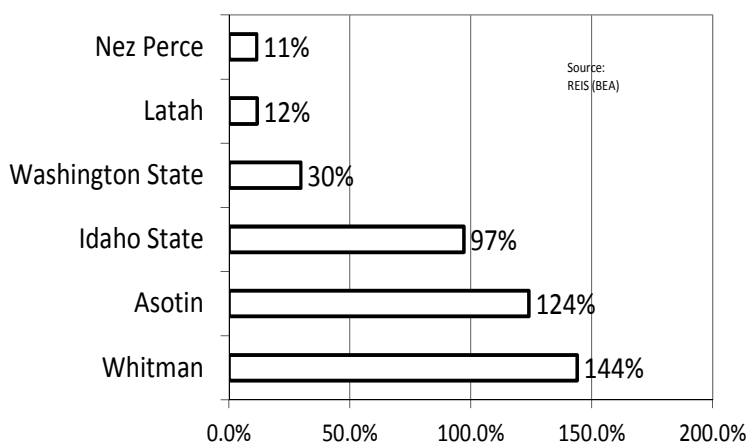
**Percent Change in Direct Farm employment
1969-2000**



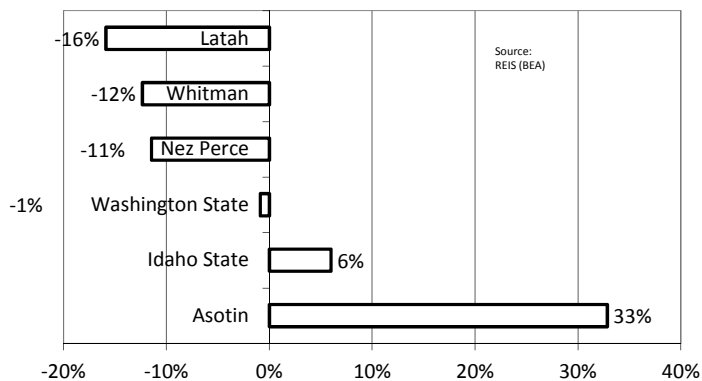
**Percent Change in Direct Manufacturing Employment
2001-2010**



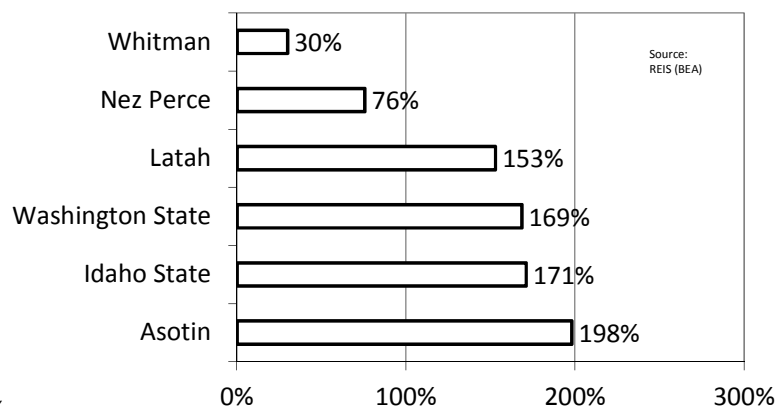
**Percent Change in Direct Manufacturing Employment
1969-2000**



**Percent Change in Direct Retail Trade Employment
2001-2010**



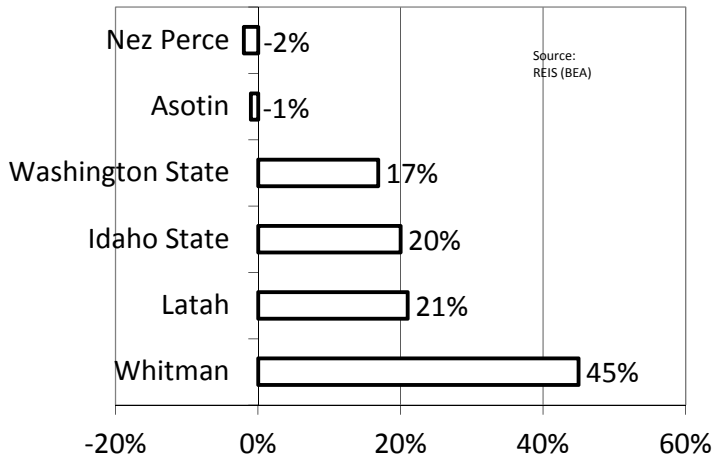
**Percent Change in Direct Retail Trade
Employment 1969-2000**



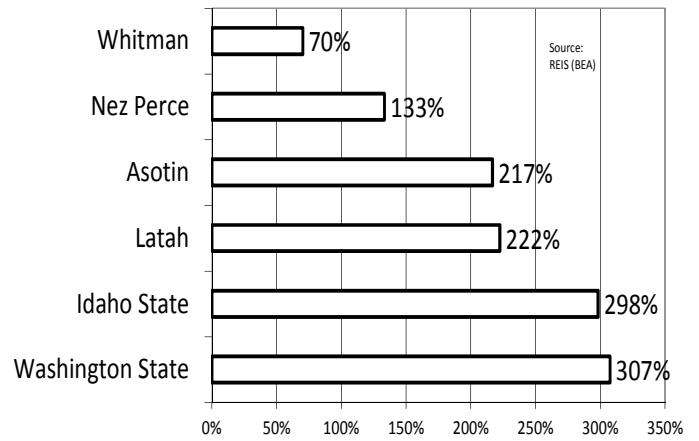
Source: BEA

Figure 1.19

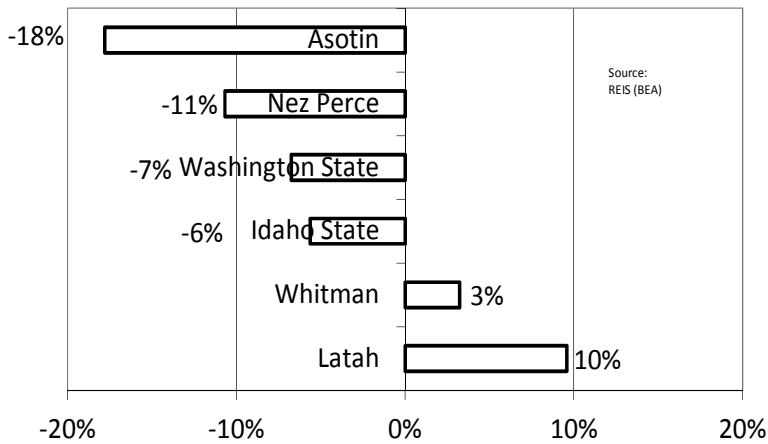
**Percent Change in Direct Service Employment
2001-2010**



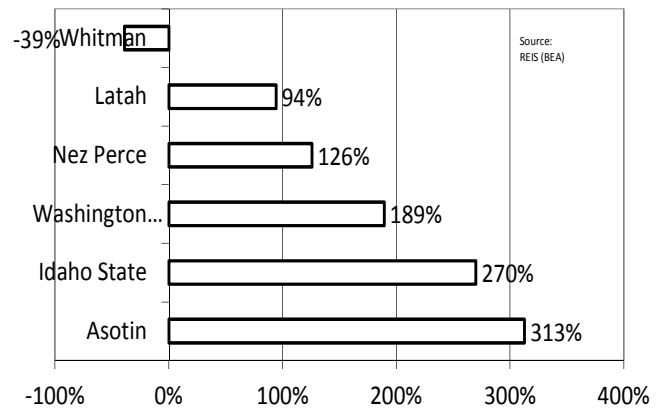
**Percent Change in Direct Service Employment
1969-2000**



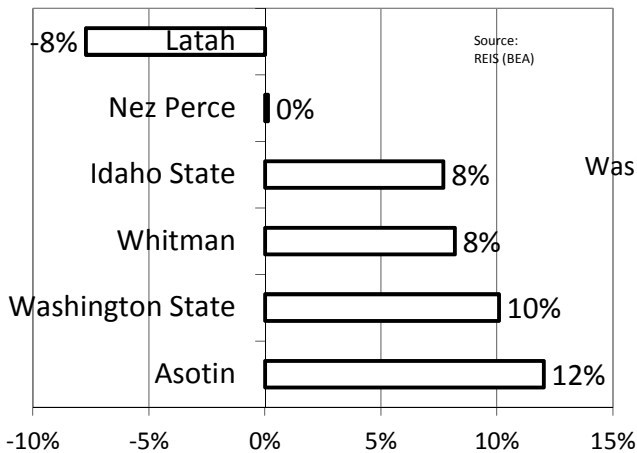
**Percent Change in Direct Construction Employment
2001-2010**



**Percent Change in Direct Construction Employment
1969-2000**



**Percent Change in Direct State and Local Employment
2001-2010**



**Percent Change in Direct State and Local Employment
1969-2000**

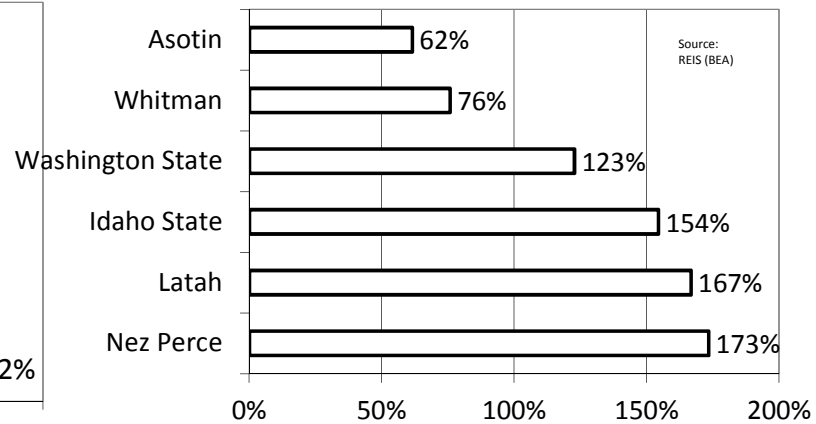


Figure 1.20**Commuting Patterns in the Quad County Region, 2010****Place of Residence
of Whitman County Workers**

Place of Residence	Workers	%
Whitman Co. WA	9,377	59%
Latah Co. ID	2,376	15%
Spokane Co. WA	988	6%
Nez Perce Co. ID	378	2%
Asotin Co. WA	370	2%
Yakima Co. WA	266	2%
King Co. WA	218	1%
Other	1,888	12%
Total	15,861	100%

**Place of Work
of Latah County Residents**

Place of Work	Workers	%
Latah Co. ID	7,789	57%
Whitman Co. WA	2,376	18%
Nez Perce Co. ID	977	7%
Kootenai Co. ID	519	4%
Asotin Co. WA	65	0%
Ada Co. ID	428	3%
Spokane Co. WA	239	2%
Other	1,154	9%
Total	13,547	100%

**Place of Work
of Whitman County Residents**

Place of Work	Workers	%
Whitman Co. WA	9,377	69%
Spokane Co. WA	907	7%
Latah Co. ID	700	5%
Benton County. WA	426	3%
Nez Perce Co. ID	234	2%
King Co. WA	185	1%
Yakima Co. WA	183	1%
Other	1,555	11%
Total	13,567	100%

**Place of Residence
of Latah County Workers**

Place of Residence	Workers	%
Latah Co. ID	7,789	68%
Nez Perce Co. ID	710	6%
Whitman Co. WA	700	6%
Kootenai Co. ID	565	5%
Asotin Co. WA	223	2%
Ada Co. ID	154	1%
Bonner C. ID	135	1%
Other	1,138	10%
Total	11,414	100%

Source: U.S. Census, OnTheMap Application

outflow of workers between the counties of 1,676 workers (Figure 1.20)

Leakages and Injections: The residence adjustment measures the net income adjustments from the work-commuting patterns stated in the previous paragraph. In 2011 Latah County gained \$130 million in income from these commuting patterns (net). Whitman County lost \$116 million. Nez Perce County lost \$148 million and Asotin County gained \$134 million. In effect, Whitman County and Nez Perce County (the Quad County net economic drivers) *export jobs* to Latah County and Asotin County. Moscow and Clarkston are bedroom communities of Pullman, and Lewiston, respectively and import jobs from them (Figure 1.21).

In the 2006 Walmart study, a conservative (low end) estimate was made with regards to the overall net leakages and injections (including retail trade and services) for Latah County and Whitman County. These numbers have been adjusted for inflation (constant 2010 dollars). Moscow had a net injection of approximately \$231.2 million from all sources. Rural Latah County lost a net of \$34.9 million from all sources. In total, Latah County had a net injection of \$196.3 million for 2010.²²

Pullman had a net leakage of approximately \$125.0 million from all sources. Rural Whitman County lost a net of \$76.3 million from all sources. In total, Whitman County had a net loss of \$201.3 million for 2010 (Figure 1.22).

Retail Sales Comparisons: Total retail sales for 2007 (the most recent Economic Census) in constant 2011 dollars reflect historical regional trade patterns. Lewiston produced \$738.3 million in retail sales, Moscow (\$353.5 million), Pullman (\$203.7 million), and Clarkston (\$198.0 million). Pullman produced nearly the same level of retail sales as Clarkston, a town less than one third the size of Pullman (See Figure 1.12 noted earlier).²³

Retail trade employment has exhibited healthy growth in all four quad-cities from 1969-2000. It grew 198 percent in Asotin County, 171 percent in Idaho State, 169 percent in Washington State, 153 percent in Latah County, 76 percent in Nez Perce County, and 30 percent in Whitman County. From 2001 to 2010, retail trade grew 33 percent in Asotin County, 6 percent in Idaho State, -1 percent in Washington State, -16 percent in Latah County, -11 percent in Nez Perce County, and -12 percent in Whitman County, re-

Figure 1.21

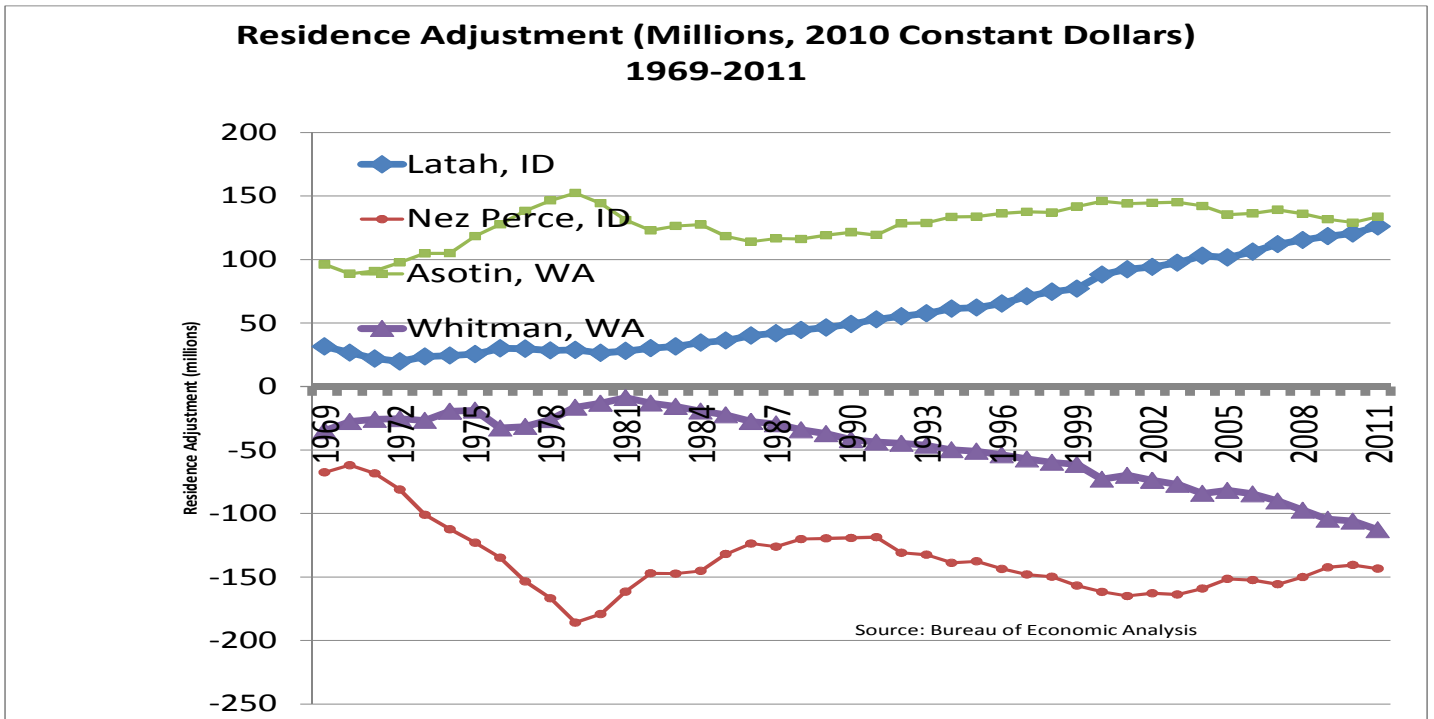


Figure 1.22

Grand Total Leakages and Injections

2004/2010 Data in 2010 Dollars

Region	Net Retail Trade	Net Services	sub-total
Moscow	\$ 158,364,926	\$ 6,499,203	\$ 164,864,129
Rural Latah County	\$ (90,039,795)	\$ 903,994	\$ (89,135,802)
Total Latah County	\$ 68,325,130	\$ 7,403,197	\$ 75,728,327
Pullman	\$ (31,462,780)	\$ (7,036,501)	\$ (38,499,281)
Rural Whitman County	\$ (46,482,978)	\$ (8,216,463)	\$ (54,699,441)
Total Whitman County	\$ (77,945,758)	\$ (15,252,965)	\$ (93,198,722)

Region	Residents (2010) Adjustment	Grand Total
Moscow	\$ 66,301,400	\$ 231,165,529
Rural Latah County	\$ 54,246,600	\$ (34,889,202)
Total Latah County	\$ 120,548,000	\$ 196,276,327
Pullman	\$ (86,484,000)	\$ (124,983,281)
Rural Whitman County	\$ (21,621,000)	\$ (76,320,441)
Total Whitman County	\$ (108,105,000)	\$ (201,303,722)

flecting the effects of the Great Recession. Retail trade employment constitutes 11% of the Latah County total direct employment, Asotin County (15.4 percent), State of Idaho (11.3 percent), Washington State (10.1 percent), Nez Perce County (11.5 percent), and Whitman County (6.2 percent) (See Figures 1.18 bottom frame).

Walmart has altered the retail trade structure of the regional economy. The Lewiston Walmart closed and the Clarkston super Walmart opened in September 2009. In October 2010 the Pullman super Walmart opened and the Moscow Walmart closed. The Moscow Walmart was remodeled and reopened in January 2012, and the square footage was increased from 94,000 to 121,000 and groceries were added.²⁴

Summary Moscow: Home and Shopping Center of the Palouse: From 2010 to 2012 Moscow's population grew 2.7% and Latah County's population grew 2.4 percent most of which was derived from Pullman workers who live in Moscow. Whitman County was ranked 2nd in Washington State in population growth (4.1 percent) from 2010-2012, while Pullman grew 5.1%. In contrast, Latah County's total employment grew a cumulative 1.9 percent from 2001 to 2011, ranking 36th out of 44th in the state and -0.2% from 2010 to 2012. Whitman County's employment grew a cumulative 14.3 percent from 2001-2011, ranking 11 out of 39 counties in Washington and 8.4 percent from 2010 to 2012.²⁵

Thus employment growth in Whitman County is driving the regional economy including the recent population growth in Moscow and Latah County. The only part of Latah County's economy that has been growing over the last decade is its role as the home and shopping center of the Palouse.

Current Retail Trade Related Trends

"There was not a suitable place for us [in Moscow]" James Hill of James Toyota.²⁶ Moscow has faced a virtual collapse of the automobile market in the last 5 years, losing 4 new car dealerships and approximately \$100 million in lost retail sales annually, including James Toyota, Gilbert Ford, Ambassador Auto, and Nelson Chevrolet.²⁷ Recently, there has been some new commercial construction and related businesses including the recent addition of the Fairfield Inn and Suites motel on the Pullman Road; and a new Autozone Store also on the Pullman Road.

Currently (2013) there is a construction boom in Whitman County and Pullman including 450 new apart-

Figure 1.23

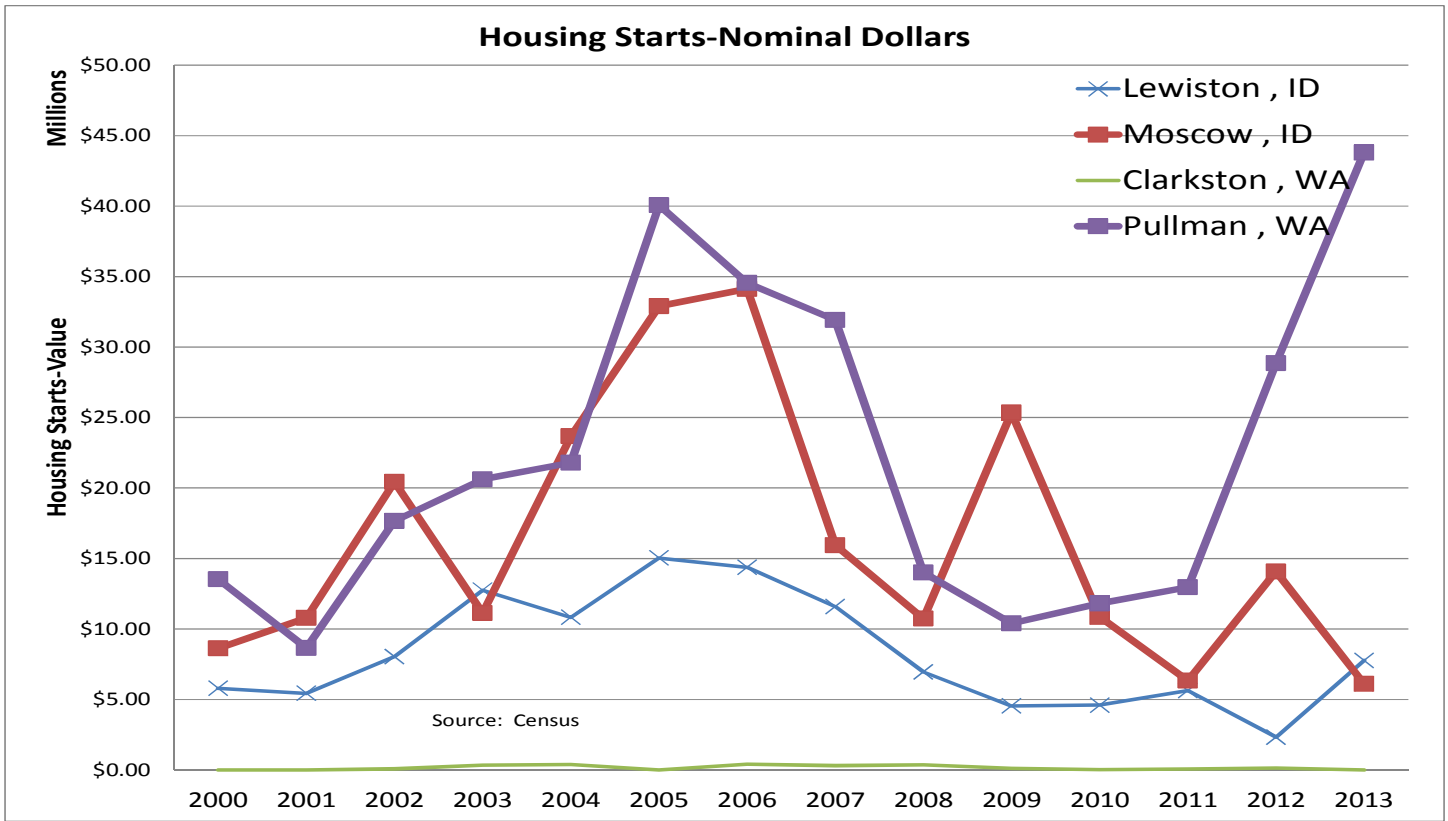
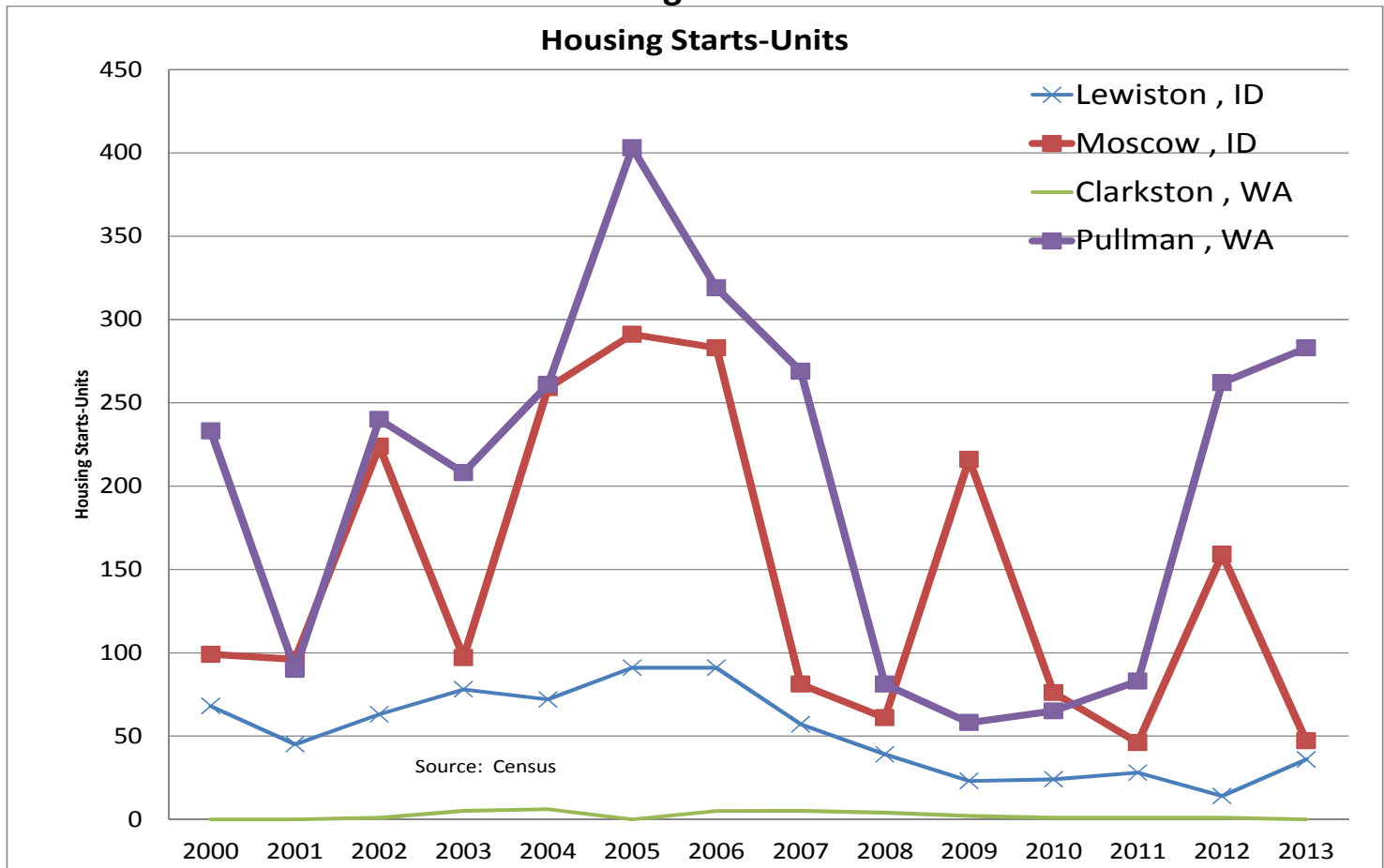


Figure 1.24



ments (8% of the total existing multi-family units in Pullman), Schweitzer Engineering Delivery Center No 2 (\$14 million), Marriot Resident Inn Hotel (\$11.1 million), and the Hilltop Inn addition (\$3.8 million). In total for 2013 there have been 37 commercial permits issued in Pullman issued at a total construction value of \$32 million, the second highest in Pullman history (Figures 1.23 and 1.24).²⁸

Growth Challenges

Moscow's Perception to Idaho: What follows in this section is based primarily on the principal author's opinion based upon his experience and prior economic evaluations.

How is Moscow perceived to the rest of Idaho? The answer is important as:

- 1) approximately 50% of Latah County's economy is derived directly or indirectly from Idaho taxpayer support;
- 2) perception affects long term University of Idaho funding; and
- 3) perception affects new businesses and industries interested in doing business in Moscow.

Moscow and the University of Idaho seem to have a controversial public image with parts of the State of Idaho arising from several sources:

- 1) southern Idaho media bias against both Moscow and the UI;
- 2) challenges of running a state's largest residential campus;
- 3) unintentional self-inflicted image problems by the UI and some bad luck; and
- 4) a general lack of awareness by some civic leaders on how Moscow is perceived around the state.

First, is there is a *perceived* southern Idaho media bias against Moscow and the UI? The Idaho Statesman (located in Boise) is perceived in northern Idaho to be "a wholly owned subsidiary of BSU," publishing only bad news on the UI and Moscow (usually on the front page) and only good news on BSU and Boise. The Statesman, located in Boise with a customer base of nearly 1/3rd of Idaho's population, coverage of the Moscow and UI is important for state wide perception and UI funding. The purpose of this section is not to prove such bias exists or not, but simply to present as an economic factor the ramifications of such a perceived bias. The principle suggests there could be an economic benefit for Moscow and the UI to dialogue with the Idaho Statesman regarding the existence of a such a news bias.

Second, there are the challenges of running a residential university with a large student population. The principal author's perception, based on living in Moscow for approximately 30 years, is there is an average of about one serious alcohol related accident or student alcohol-related death per year in Moscow. Young adults, ages 18-25 years, often engage in risky behavior and alcohol related accidents occur whether or not they are attending college. Unfortunately, there is intense media scrutiny when accidents occur associated with a student from a college residential campus as opposed to the non-college young adult or a commuter based non-residential college student in the 18-25 years-old population (the media rarely extensively reports alcohol related accidents involving non college young adults or commuter-based college (non-residential) students of the same age).²⁹ The Rejena Coghlan case illustrates the point. Rejena fell from the fire escape at her resident, the Alpha Phi sorority in 1993 and was paralyzed from the waist down. Earlier that evening, she obtained alcohol at a fraternity party. The case received mass media coverage for years, appearing on the front page of many regional newspapers repeatedly.³⁰

Third, UI administrators are sometimes not successful at navigating Idaho politics and media coverage efficiently or effectively. There is a recent case to illustrate the point. A closure of the UI Parma Research Station due to State of Idaho budget cuts in 2009 was planned. The UI was facing severe budget cuts from the 2007-2009 recession and it was evident early in the year from Idaho legislative action that one of the research stations was going to close. Rather than announce it in a timely fashion that would have directly linked the closure to the budget cuts by the legislature, associated UI administrators waited until June 17th of that year after the legislature was out-of-session to announce that decision. The result, the UI got blamed in the media rather than the recession or the Idaho Legislature (See: *Rebellion in Idaho: Research Station, Slated for Closure, Incites Grower Resistance*³¹). Fortunately, a partnership with Simplot averted the closure, but not without substantial bad publicity.³²

There has also been a string of high profile cases of just plain fate (or bad luck) instances including the Bustamante shooting (a professor who engaged in a murder-suicide)³³, and Wiederrick, a student who froze to death after a fraternity party.³⁴

Fourth, there is a political insensitivity or fundamental lack of awareness on how the Moscow community is perceived around the state. Note this is not about the merits of any specific issue, but how Moscow's community publically addresses, responds and discusses these issues, more so than the actual

issue resolution. Many important local issues, which attract state media attention due to the style of the community's response, involve individual and community values and may have considerable merit but they may not be perceived well elsewhere in the state (Idaho is a very conservative state and Moscow is perceived by many Idaho citizens outside Moscow as an bastion of liberals).

Two examples:

Megaloads (transporting large pipes through Moscow for tar-sands development): "They see us as saboteurs and eco-terrorists," Yost laughed, adding that a request for riot gear from the Moscow City Police Department was recently approved by the City Council. "It's good that we're a threat to them, though I can't imagine that we are. People just need to keep pushing back."³⁵

Anti-Discrimination Ordinance: Despite passing unanimously by the city council (by all conservative and liberal members), the newspaper headlines carried throughout the state: *Moscow council angers attendees.*³⁶ Even when the city council is in agreement they sometimes unintentionally manage to create state-wide controversy.

Divided Community: Based on the principal author's experience, Moscow, due to divergent lifestyles, is a deeply divided community with a conflicted vision on future community growth. That conflict makes it difficult for the community to economically move forward. It is probably best illustrated by the Thorncreek Road Project. The Idaho Transportation Department obtained some badly needed funds several decades ago to improve a portion of U.S. Highway 95, (the only north-south highway in Idaho) between Moscow and Lewiston. A lawsuit filed by the Moscow-based Paradise Ridge Defense Coalition blocked the last 6.5 miles of the highway into Moscow for over a decade, setting off a contentious if not rancorous community debate.³⁷ This stretch of highway is dangerous and in deep decay with several new fatalities over the last decade since the lawsuit. Thorncreek Road exemplifies the problem the Moscow community faces with each economic growth issue, lifestyle issues of should growth occur or should things stay the same, are a predominate discussion in the community.

Other local contentious issues:

- Moscow's Living Wage Ordinance (Repealed in 2010).³⁸
- Proposed Hawkins Shopping Center Development -i.e. proposed shopping center in Whitman County near the Idaho State line at the Appaloosa Horse Club.³⁹
- Rejection of the Thompson 77 acres shopping center- Super Walmart proposal in the eastside

of Moscow.⁴⁰

- Big Box Store (restrictions)/Ordinances -to restrict large chain stores from coming to Moscow.
- Proposed Dark Store (Box) Ordinance -to prevent large empty stores in Moscow.⁴¹

Summary Conclusion

The role of the University of Idaho is estimated to be about 50% of the local economy's base (from all sources—state funding, grants and contracts, student spending, retirees, university related visitors, etc.). The UI is not growing, and effectively has not grown in a decade, as indicated by a number of important indicators including student enrollments, research grants and contracts, and state funding. The foreseeable future does not indicate a change in this pattern given the state-wide challenges the UI faces--especially from Boise State University.

The University of Idaho and Moscow has an image problem in Boise and other parts of Idaho.

Approximately 25% of the economy originates from spillover economic activity (home and shopping center), largely from Whitman County, and a smaller fraction from Nez Perce County and other counties. This includes Moscow residents who work outside the county, primarily in Pullman. The *net* out-commuters from Moscow is over 1,600 workers. Spillover income also includes Pullman residents and students who shop in Moscow, visit eating and drinking establishments, and contract services. This portion of Moscow's base has been growing modestly. It is the principal author's opinion Moscow has been kept out of a substantial recession for the last several years by this spillover from Whitman county growth.

The remaining portion of the economic base (all other industries) represent about 25% of the economy. While some individual firms such as EMSI are growing, overall growth in this area has been small or modest.

Whitman County and Pullman has undergone robust economic growth over the last decade (as noted by a number of indicators) and is in a transformational stage of development. This rapid growth is driven by Schweitzer Engineering (1,000+ jobs) and WSU (3,000 students) growth; along with some modest growth

in other sectors. Pullman has improved its retail trade sector, services, and residential housing over the last decade. It is seeking to reduce its economic leakage to Moscow and elsewhere (which if successful would reduce income and jobs in Moscow).

Complacency: One of the biggest economic challenges the community faces is complacency, both in Moscow and at the University of Idaho. It is economically risky to take any portion of the local economic base for granted. One of the goals of this report was to move the economic discussion from complacency to urgency. Moscow, by its very divergent lifestyles, is a very politically divided community that complicates economic development efforts.

Both the City of Moscow and the University of Idaho would benefit from a focus on economic growth from the ground up. If Moscow and UI do not take the “future into their own hands” their futures may be decided by external factors.

Notes

- ¹ Bureau of the Census. Population Estimates
- ² Bureau of Economic Analysis
- ³ Palouse Empire Mall. Mall Hall of Fame.
- ⁴ Forbes, Tom. "Some Perspectives on Growth and Conflict Over Growth in Pullman and Whitman County."
- ⁵ "Moscow Mall moves closer to completion." Lewiston Morning Tribune.
- ⁶ 2007 Economic Census.
- ⁷ "Changed attitudes of Pullman residents spur economic growth," KLEW. <http://www.klewtv.com/news/local/spurs-growth-182393171.html?p.int=y>
- ⁸ "Schweitzer has big plans for Lewiston." Lewiston Morning Tribune.
- ⁹ "Manufacturing growth boosts economy," Moscow-Pullman Daily News.
- ¹⁰ Lydig Construction.
- ¹¹ "Walmart opens doors of Pullman supercenter," Klew TV.
- ¹² Institutional Research, Washington State University.
- ¹³ Peterson, Steven, J. Miller and H. Robison (2006), "Growth in Moscow: A Study of Modest Population Growth and Rising Economic Prosperity". See also: Peterson, Steven and Mike DiNoto (2003), "The Economic Impacts of the University of Idaho on the Latah County Economy."
- ¹⁴ Various sources: UI Budget office, Research Office, Archie George, Institutional Research, and the Idaho State Board of Education.
- ¹⁵ EMSI Economic Impact Study. University of Idaho.
- ¹⁶ Idaho Board of Education.
- ¹⁷ This is based on the assumption that all university funding ultimately is derived from student enrollments in the long run. They include the multiplier effects. These estimates were *adapted* from a 2003 study and updated to 2012 dollars. See "Area has growing stake in higher ed." Moscow-Pullman Daily News.
- ¹⁸ 2014 Revenue Projections, Boise State University.
- ¹⁹ National Science Foundation, http://www.nsf.gov/statistics/nsf13325/content.cfm?pub_id=4240&id=2. See table 34, line 283.
- ²⁰ Price, Lodi. Executive Assistant to the Vice President for Research and Economic Development. University of Idaho.
- ²¹ "EMSI moving out of Alturas." Daily News.
- ²² Peterson, Steven (2006), "Moscow at a Tipping Point: An Economic Analysis of the Retail Trade Sector, the Local, and the Effects of Locating a Super Wal-Mart in the Moscow, Idaho Regional Economy"
- ²³ 2007 Economic Census.
- ²⁴ "Much-anticipated Walmart Supercenter opens in Clarkston," Klew TV. "Walmart opens doors of Pullman supercenter," Klew TV. "Moscow Walmart opening soon," Klew TV.
- ²⁵ The 2001 to 2010 employment numbers were Bureau of Economic Analysis numbers representing total employment while the 2010 to 2012 numbers were covered employment from the Quarterly Census of Employment and Wages (QCEW). The reason for using QCEW numbers is they include 2012 whereas the BEA numbers only go to 2011. Generally BEA numbers are a more accurate measure of total employment because it includes self-employed individuals.
- ²⁶ "Crossing the Line: James Toyota relocates to Pullman-Moscow Highway." Moscow-Pullman Daily News.
- ²⁷ "Creditors seize vehicles from Gilbert Auto lot in Moscow." Moscow-Pullman Daily News. (See Also: "Moscow Subaru dealership to close doors." Moscow-Pullman Daily News).
- ²⁸ "Pullman Construction Boom." Moscow-Pullman Daily News.
- ²⁹ Or they get buried deep in the newspaper.
- ³⁰ "Coghlan case headed to the Idaho Supreme Court." Moscow-Pullman Daily News.
- ³¹ "Rebellion in Idaho: Research Station, Slated for Closure, Incites Grower Resistance." Fruit Growers News.
- ³² "University of Idaho in Parma hopes to extend Simplot deal." Idaho Press.
- ³³ "Professor-Student Romance Ends in Murder-Suicide." Fox News.
- ³⁴ "UI Student Freezes to Death After Fraternity Party." Spokesman-Review.
- ³⁵ "Megawoes On Megaloads." Boise Weekly.
- ³⁶ "Moscow council angers attendees." Moscow-Pullman Daily News.
- ³⁷ "Planner pulls out the maps." Lewiston Tribune.
- ³⁸ "Mark Moscow City Council Repeals Living Wage." KHQ TV.
- ³⁹ "Hawkins shopping center: Dead or alive?" Moscow-Pullman Daily News.
- ⁴⁰ "It's official: Moscow Walmart will close." Moscow-Pullman Daily News.

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