



IDAHO
DEPARTMENT OF LABOR
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Profile of rural Idaho

Economic factors defining rural Idaho including employment, wages, the changing landscape of work, agriculture, housing, and recreation and tourism

Part 2: Labor market and economy

Research and Communications Bureau

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Part II – Introduction and highlights

As discussed in the previous section, the counties of Idaho are classified as either urban or rural. Due to a majority of the state's land area being rural, there are three distinct subtypes of rural counties.

- **Urban** – At least one city with 20,000+ residents
- **Rural** – No city with 20,000+ residents
 - **Commuting** – At least 25% of the workforce commutes to a metro county
 - **Rural center** – Urban cluster of at least 7,500 but without a central city of 20,000+ and no strong commuting ties to a metro county
 - **Open country** – No urban cluster of at least 7,500 and no strong commuting ties to a metro county

The economy of rural Idaho is intertwined with its natural resources, including its forests, rivers and open land. The amenities found throughout the state's landscape, most of which are located in rural counties, are highly connected with value-added industries like manufacturing and tourism.

Between 2003-2023, national trends favored job growth in service-providing industries over goods-producing industries. Idaho's urban counties followed the national trend, with employment in service-providing industries growing 2.1% annually compared with goods-producing industries growing slightly slower at 1.6%.

In contrast, employment in Idaho's rural counties over the past 20 years shifted toward goods-producing industries — agriculture, forestry, mining, construction and manufacturing — with a 1.5% annual growth rate exceeding the 1.2% annual growth for service-providing industries.

Two particularly strong rural industries in the state are natural resources and manufacturing. Rural counties in Idaho contribute more than two out of every three natural resource jobs statewide and are home to over 75% of the state's total farm acreage.

The industry focus and wage levels of rural areas of the state are significantly different than urban overall. However, each labor region's job concentration is more directly influenced by regional industry trends than whether the county is classified as urban or rural.

Over the past 20 years, Idaho's agriculture industry has been foundational to its economy, adapting through technological advancements and market shifts. Rural areas remain critical hubs for agricultural production and food processing, benefiting from the lower transportation costs and closer proximity to raw materials.

Rural open counties saw the highest agricultural employment growth at 82%, or 1,200 additional workers, during this time. However, urbanization, aging workforce demographics and other labor challenges have started to reshape traditional farm operations throughout all of Idaho.

Livestock production and specialized food processing also dominated job growth over the past 20 years, while securing labor and optimizing land use emerged as critical trends for long-term sustainability.

Labor mobility and economic stability in rural counties during this time were shaped by telework policy shifts and a reduction in housing affordability. Broadband expansion and the COVID-19 pandemic boosted rural remote work opportunities, despite the adoption of telework being slower in rural counties than urban.

The recreation economy throughout rural Idaho grew rapidly over the past two decades. Despite providing more local revenue, concerns surfaced regarding housing affordability, labor availability, sustainability and the preservation of natural beauty.

Growth and long-term stability in the state's rural recreational centers have depended on investing in infrastructure to increase public access while addressing needed amenities to attract and retain a seasonal workforce. While rural Idaho's economy has continued to adapt and integrate service-providing industry growth, it is still maintaining its foundation of natural resources.

Even though employment opportunities are an important aspect of economic health, they are not the only reason people continue to choose to relocate and remain in rural Idaho. Along with breathtaking scenery and open spaces, rural Idaho offers vast recreational opportunities, welcoming neighbors and a slower pace of life. Despite the potential for lower wages, the value of rural Idaho is enhanced by its proximity to natural amenities, community social networks and unique sense of place.

Employment and wages

A majority of the data for this section is sourced from the Quarterly Census of Employment and Wage (QCEW) data published by the U.S. Bureau of Labor Statistics along with internal data compiled by the Idaho Department of Labor for 2003-2023.

Idaho – Statewide

Industry employment, 2003-2023

The economy of rural Idaho is highly connected with its natural resources — whether that be fertile soil for agriculture, vast undeveloped land area, forests, rivers or commodities used in the manufacturing of physical goods.

However, like the U.S., Idaho's economy is shifting from a heavy reliance on the production of goods — seen in jobs within agriculture, forestry, mining, construction and manufacturing — toward service-providing roles. Between 2003-2023, goods-producing jobs in Idaho grew by a healthy 1.6% per year but were overshadowed by service-providing employment increasing at a faster 1.9%.

Annual employment growth rates for all industries combined ranged from a low of 1.2% in rural center counties to a high of 2% in the state's urban areas.

While goods-producing jobs tend to be more highly concentrated in rural counties, the less resource intensive service-providing industries generally have a stronger presence in urban areas. In fact, urban counties had the fastest growth rate for service-providing employment between 2003-2023 at 2.1%.

Annual growth rates for goods-producing jobs from 2003-2023 were 1.5% for rural counties and 1.6% for urban counties. Among rural counties, commuting counties had the fastest annual goods-producing job growth at 2%, followed by open country at 1.3% and rural center at 1.1%.

Figure 1. Annualized employment growth rate by industry classification, 2003-2023

Annual average job growth, 2003-2023	Total employment	Goods-producing jobs	Service-providing jobs
Idaho	1.8%	1.6%	1.9%
Urban counties	2.0%	1.6%	2.1%
Rural counties	1.3%	1.5%	1.2%
Commuting	1.4%	2.0%	1.2%
Rural center	1.2%	1.1%	1.2%
Open country	1.3%	1.3%	1.3%

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wage by industry

While overall goods-producing employment growth was similar for both urban and rural areas, the specific goods-producing industries of manufacturing and construction exhibited different employment growth patterns between urban and rural areas.

Manufacturing had the fastest annual growth rates in commuting counties at 2.5% while rural center and urban counties experienced slower annual growth rates closer to half a percent. Open country manufacturing jobs increased at a 1% annual rate.

In construction, commuting and urban areas each experienced annual growth rates over 3% while rural center and open country construction job growth was much slower at under 2%.

Manufacturing provided the highest share of industry employment within the rural counties. Rural counties experienced annual growth rates of 1.3% for manufacturing jobs between 2003-2023, which was double the 0.6% increase for urban counties.

As a result, the concentration of production jobs in Idaho's rural areas increased as they accounted for 29% of statewide manufacturing employment in 2023 compared with only 26% in 2003.

Construction employment shifted in the opposite direction as rural county employment accounted for 23% of construction jobs in 2023, down from 26% in 2003.

Together, approximately one fourth of all manufacturing and construction jobs statewide were located within rural areas. For the natural resource industries of agriculture, hunting, fishing, forestry, and mining, more than two-thirds of all employment was also located within rural counties.

In 2023, service-providing jobs made up nearly 80% of Idaho's total employment. Looking by county type, it accounted for over 82% of employment in urban counties. However, this job type was less predominant in the rural county types, making up only 66% of commuting employment, 72% of rural center employment and 74% of open country employment.

Between 2003-2023, annual service-providing employment growth was similar between rural county classification types in a tight range of 1.2-1.3%. Urban counties had a faster annual growth rate of 2.1% during this period.

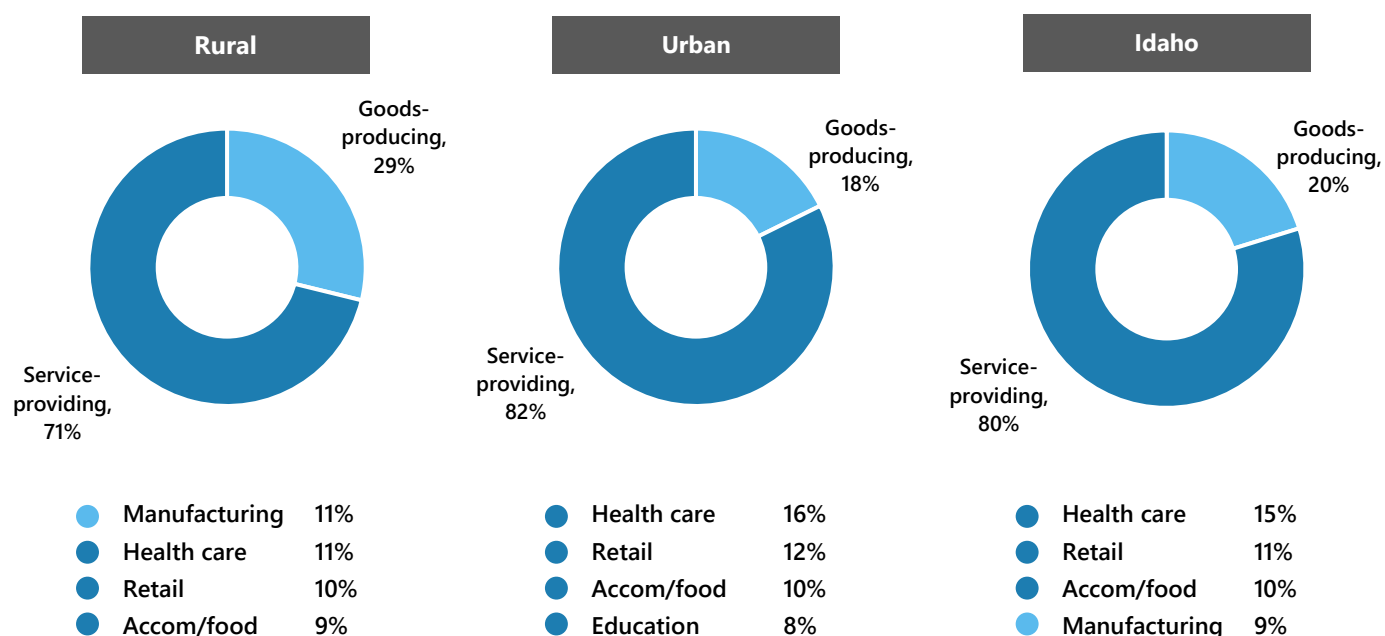
While the goods-producing industry of manufacturing is the largest industry sector for rural areas, the service-providing industry of health care is the top employment industry for both Idaho statewide as well as the urban counties.

In 2023, less than one in five health care and social assistance jobs were located within Idaho's rural counties while over 80% was located within an urban county.

Other service-providing industries where less than 20% of statewide employment was located within rural counties included finance and insurance (12%), wholesale trade (18%), and real estate rental and leasing (18%).

Service-providing industry sectors with at least 30% of statewide employment located within rural counties in 2023 included utilities (33%) and public administration (30%).

Figure 2. Employment by industry sector, 2023

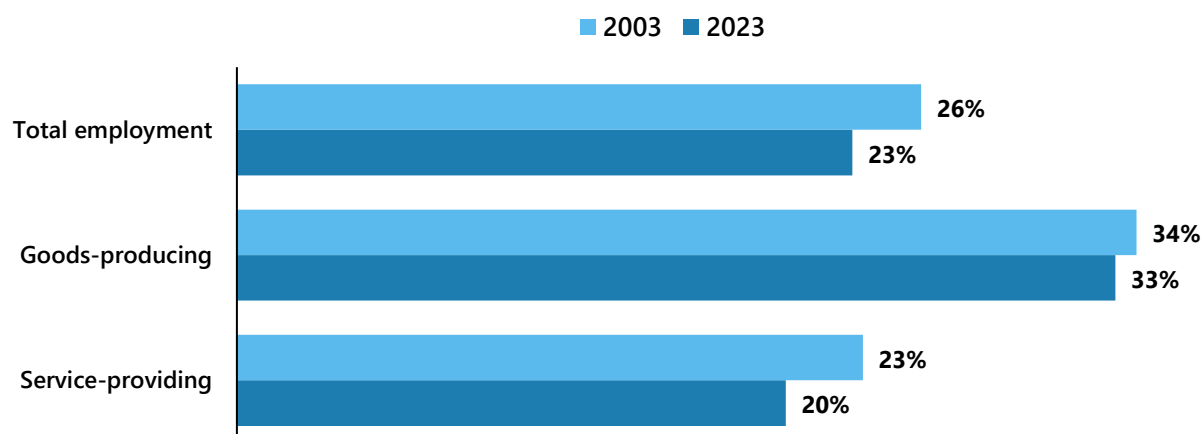


Source: Idaho Department of Labor, Quarterly Census of Employment and Wage by industry, 2023

Shifting concentration between urban and rural jobs

Rural counties comprised 23% of total statewide employment in 2023, down from 26% in 2003. Rural Idaho had a higher share of statewide jobs within goods-producing industries at 33% and a smaller share of service-providing employment at 20%. All other service-providing jobs became more concentrated in urban areas in 2023 compared with 2003, with the exception of professional and business services (increasing from 17% rural in 2003 to 20% in 2023) and information (increasing from 21% to 23%).

Figure 3. Rural county share of statewide employment by major industry sector, 2003 and 2023



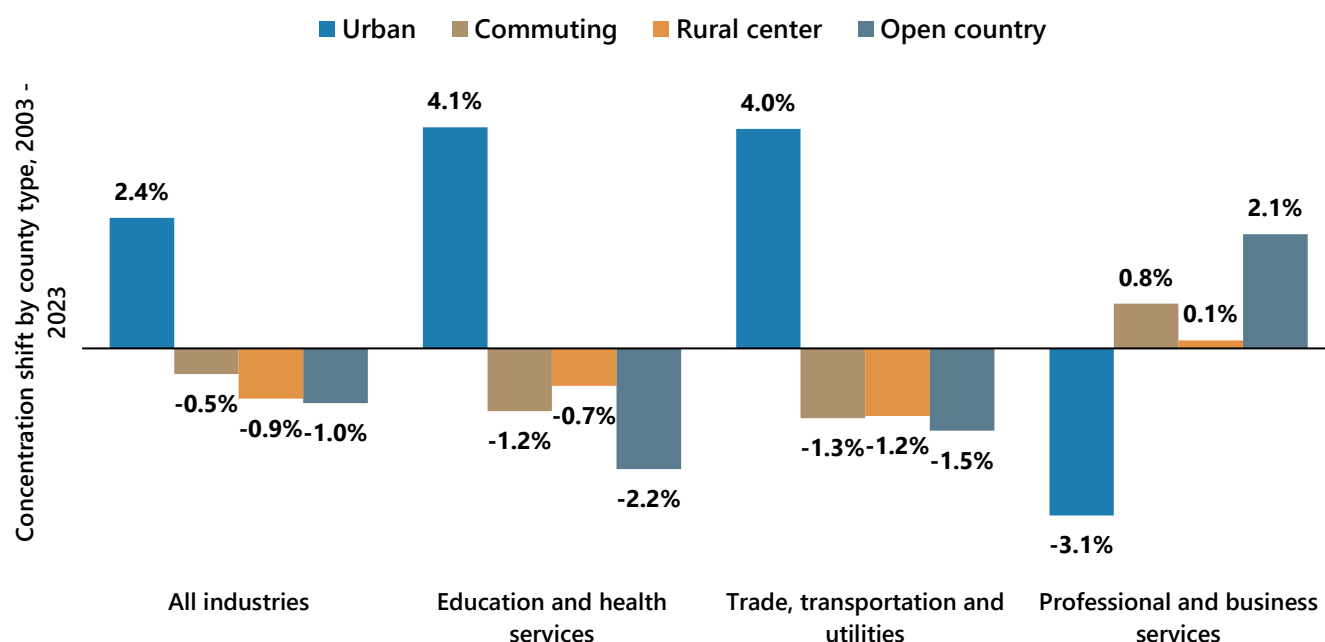
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

The share of statewide residents living within a rural county declined from 32% in 2003 to 28% in 2023 and employment concentration also shifted in a similar manner. Compared with 2003, employment for all industries combined had shifted by 2023 — concentrating toward urban areas by over 2%. However, different magnitudes of share shifts occurred between the top three service-industry sectors of: 1) education and health, 2) trade/transportation/utilities and 3) professional and business services.

Both education and health services as well as trade/transportation/utilities had an employment share shift of over 4% toward the urban areas, while professional and business services became more concentrated in the rural areas — specifically within open country counties.

Although rural counties had a lower share of 2023 statewide employment than in 2003, each rural county classification did see one or more industries shift job concentration in their favor:

- Commuting counties gained a small share of manufacturing, professional and business services, and miscellaneous service employment.
- Rural center counties had an overall decline of nearly 1% of statewide jobs but increased in information.
- Open country counties also had a 1% decline in total concentration, but managed to gain in manufacturing, information and professional and business services.

Figure 4. Employment concentration shift by county type, 2003-2023

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

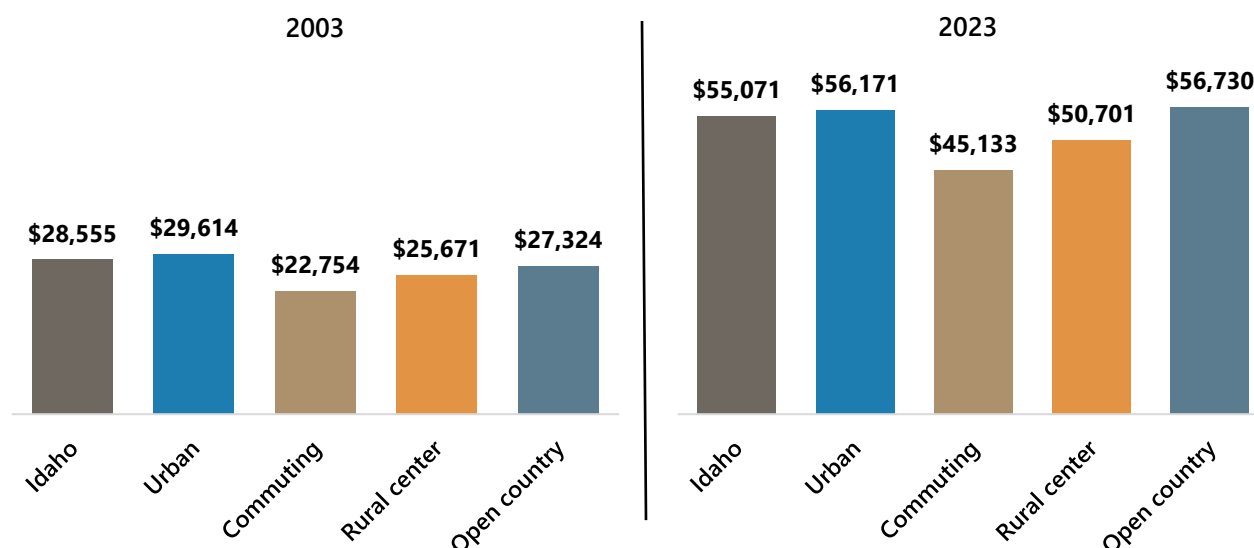
Average weekly wages

The average weekly wage for an employee based in Idaho was \$1,059 in 2023 (\$55,000 annually), nearly double the average of \$549 in 2003 (\$28,000 annually).

The low of \$868 was in commuting counties with the high of \$1,091 in open country counties. For rural and urban counties, the averages were \$988 and \$1,080, respectively.

From 2003-2023, open country counties had the highest annual wage growth of all county types at 3.7% — resulting in 2023 annual wages that were 3% higher than the statewide average. This was a change from the 2003 levels, when open country average weekly wages were only 96% of the statewide average.

Commuting and rural center counties also experienced faster wage growth than urban counties from 2003-2023, but their average weekly wages remained below the urban counties.

Figure 5. Annual average wages per employee by county type, 2003 and 2023

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

In 2003, 37% of Idaho's urban employees had average earnings exceeding \$640/week compared with only 28% in rural counties. By 2023, that relationship changed to where a similar share of rural and urban employees earned an inflation-adjusted level of \$1,080 per week.

High-paying jobs that often contribute to higher average weekly wages in an area can be seen in industries like information, financial activities and professional business services.

Commuting counties had the lowest share of workers earning at least \$1,080 per week in 2023 at 32% (similar to 2003). This was likely due to the fact that combined, these three industry sectors accounted for only 8% of employment within this county type.

To contrast, these industries accounted for 13% of employment in rural center counties and closer to 20% of employment in either urban or open country counties.

Especially high earners can be seen in open country counties in the eastern region of Idaho. This is notable since over 40% of jobs within this area are classified within the information, financial activities and professional business services industry classes and require high educational attainment and specialized skills.

The charts below highlight the regional and county type differences for workers earning at least \$640 per week in 2003 (upper, Figure 6a) and those earning over \$1,080 in 2023 (lower, Figure 6b). Numbers in green represent the highest share by county classification type while those in red represent the lowest.

Figure 6a. Share of statewide average weekly wages by county type (Idaho=100), 2003

Share of employees earning average weekly wages in 2003 of \$640+ (\$16+ per hour)						
Region	Total	Urban	Rural	Commuting	Rural center	Open country
Idaho	35%	37%	28%	26%	31%	29%
Northern	32%	32%	33%	--	27%	34%
North central	37%	40%	23%	--	--	23%
Southwestern	38%	40%	24%	23%	25%	23%
South central	29%	28%	30%	26%	33%	20%
Southeastern	33%	36%	30%	26%	--	37%
Eastern	33%	34%	29%	31%	--	27%

Figure 6b. Share of statewide average weekly wages by county type (Idaho=100), 2023

Share of employees earning average weekly wages in 2023 of \$1,080+ (\$27+ per hour)						
Region	Total	Urban	Rural	Commuting	Rural center	Open country
Idaho	40%	41%	39%	32%	38%	45%
Northern	38%	40%	33%	--	35%	32%
North central	38%	40%	29%	--	--	29%
Southwestern	43%	45%	30%	28%	32%	31%
South central	35%	30%	38%	37%	40%	30%
Southeastern	32%	30%	33%	31%	--	38%
Eastern	43%	34%	58%	34%	--	66%

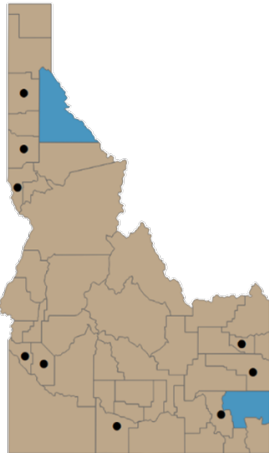
Source: Idaho Department of Labor, Aggregated unemployment insurance tax reports

Specialized counties by industry type

The 2025 U.S. Department of Agriculture's Economic Research Service typology identifies counties with a large proportion of annual earnings or jobs dedicated to a particular industry family in 2019, 2021 and 2022. Counties having a high concentration in one industry can also have a high dependence on another. For example, Caribou County in the southeast had a high concentration of both manufacturing and mining. Minimum thresholds differ for each industry family as those classified as farming dependent can have a minimum threshold of either 20% earnings or 17% percent employment while mining only needs to be reliant on at least 11% earnings or 7% employment.¹

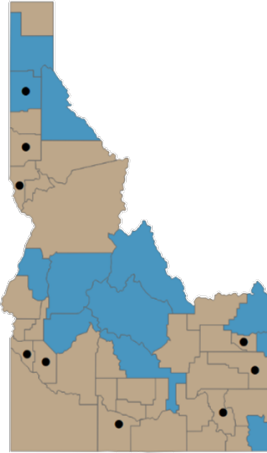
● Represents an urban county

Mining dependent



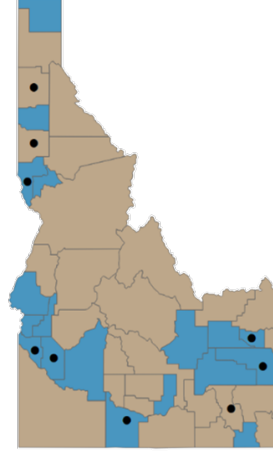
Shoshone and Caribou, both rural, were the only specialized mining counties.

Recreation dependent



12 counties - 11 rural and one urban (Kootenai), were reliant on hospitality and tourism.

Nonspecialized



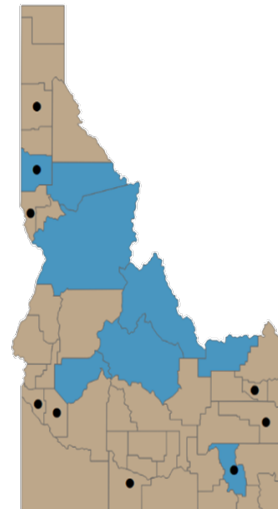
18 counties - 12 rural, did not meet earnings or employment levels to be classified as industry dependent.

Farming dependent



Nine counties, all rural and mostly in the Snake River Plain, were highly concentrated in farming income.

Government dependent



Eight counties - six rural, relied on federal or state government for earnings and employment.

Manufacturing dependent



Caribou and Power, both rural counties in the southeast, were manufacturing dependent.

¹U.S. Department of Agriculture, Economic Research Service, 2025 County Typology Codes, accessed June 2025, <https://www.ers.usda.gov/data-products/county-typology-codes>.

Region 1 - Northern

Benewah, Bonner, Boundary, Kootenai, Shoshone counties

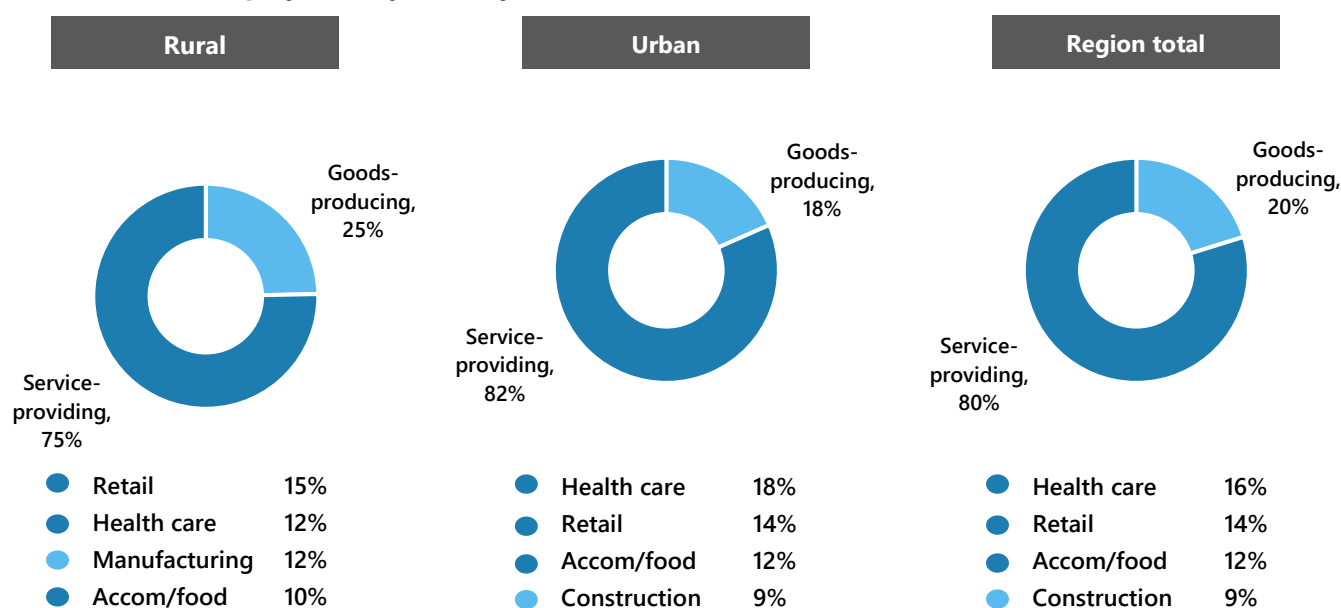
Region	Name	Urban	Commuting*	Rural center	Open country
1	Northern	Kootenai	--	Bonner	Benewah, Boundary, Shoshone

*Northern does not currently have any counties classified as commuting.

Region overview

Economic development in northern Idaho has been strongly influenced by the growing importance of goods-producing industries, such as natural resources, within the region's rural counties. It has also been strongly affected by the economic activity in the region's only urban center (Kootenai County).

Figure 7. Northern employment by industry sector, 2023



Source: Idaho Department of Labor, Quarterly Census of Employment and Wage by industry, 2023

Urban county employment

Between 2003-2023, northern Idaho's only urban county of Kootenai held a large concentration of its economic activity, increasing from 66% of the region's total employment to 71.5%. The county also had the fastest annual job growth in northern Idaho during this time period at 2.3% with employment in the county increasing 57.5%, growing more than twice the rate of the region's four remaining rural counties, which collectively grew by just 22.2%.

Rural county employment

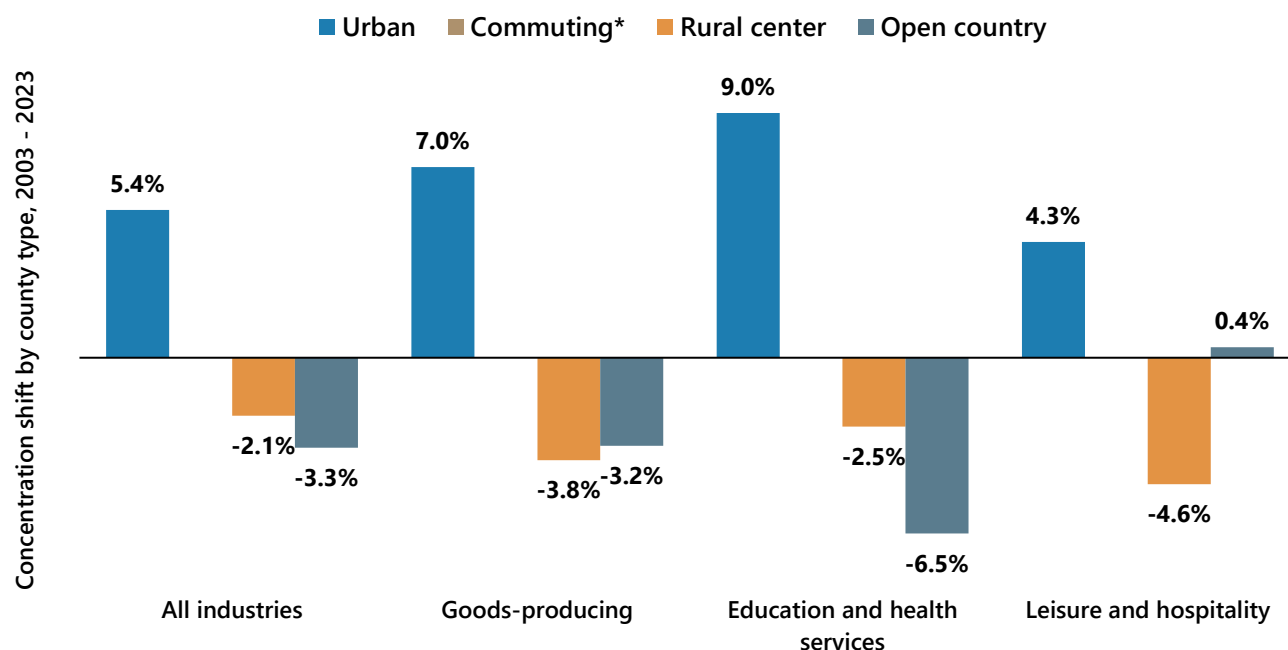
With rural counties in northern Idaho growing slower than the urban center, unique patterns in industry allocation emerged between 2003-2023. For example, the rural counties in the region retained an immense goods-producing sector, comprising industries like natural resources, construction, logging and mining.

Rural counties represented 29% of total jobs within the northern region in 2023 but accounted for nearly 35% of regional goods-producing employment. Within the goods-producing sector, the rural counties were home to over 60% of the region's natural resource jobs — specifically in forestry, logging and mining. While the rural counties of Benewah, Bonner and Boundary had natural resource jobs focused on forestry, logging and agriculture, Shoshone County instead specialized in mining.

The rural counties also accounted for 38% of regional manufacturing employment. Bonner County, the region's only rural center county, comprised three of every five rural manufacturing jobs in the northern region with a niche concentration of aerospace product and parts production.

However, compared with the employment share of goods production in rural Idaho at large (29%), rural northern Idaho's share was relatively small (25%). This difference can likely be explained by the relatively large leisure and hospitality industry in northern Idaho, such as the substantial ski resorts seen in Bonner and Shoshone counties.

Figure 8. Northern region employment concentration shift by county type, 2003-2023



*Northern Idaho does not currently have any counties classified as commuting.

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2003-2023

Regional wages

Wages in northern Idaho's rural counties remained relatively low compared with its one urban county of Kootenai and other rural counties around the state in 2023. Just 33% of wage earners in north Idaho's four rural counties earned at least \$1,080 weekly, compared with 40% in Kootenai County and 39% in rural counties statewide. In 2003, the ratio of wage earners at the equivalent percentiles was much more balanced between rural and urban counties in northern Idaho, at 33% and 32% respectively.

Region 2 - North central

Clearwater, Idaho, Latah, Lewis, Nez Perce counties

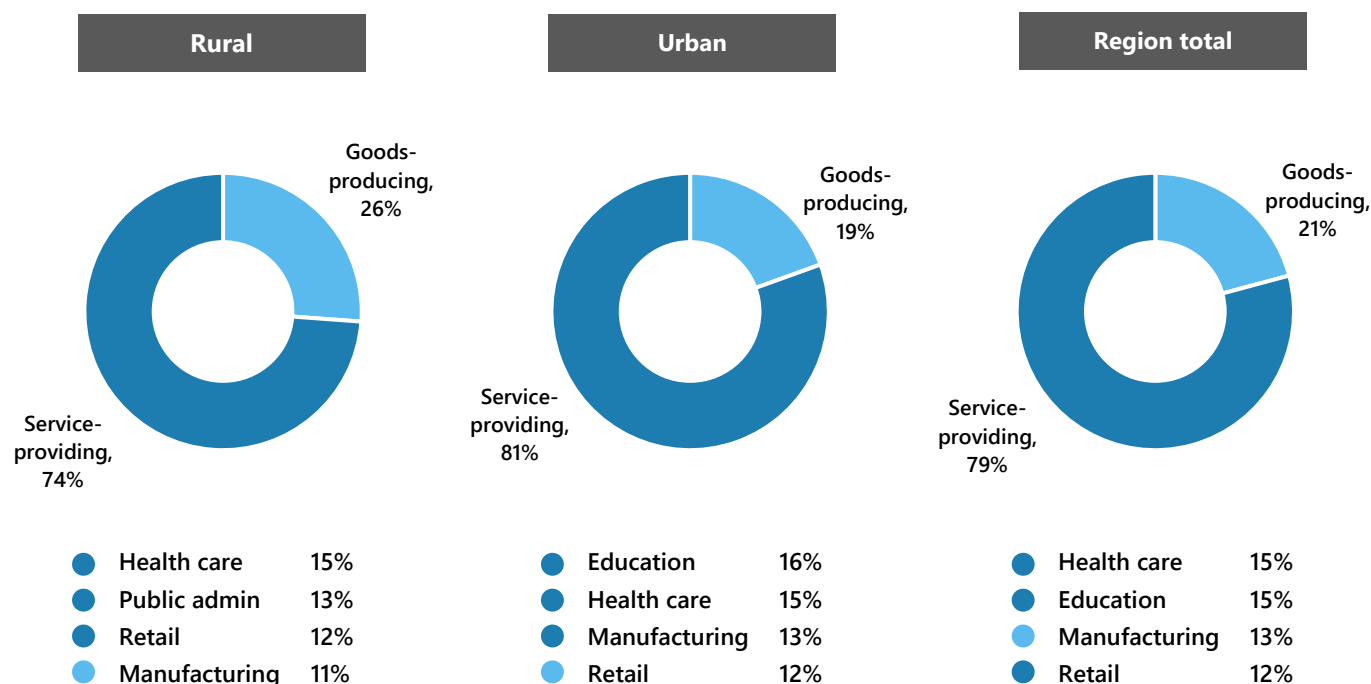
Region	Name	Urban	Commuting*	Rural center*	Open country
2	North central	Latah, Nez Perce	--	--	Clearwater, Idaho, Lewis

*North central does not currently have any counties classified as commuting or rural center.

Region overview

North central is home to three rural open country counties and two urban counties. The rural counties (Clearwater, Idaho, Lewis) cover 85% of the region's land area, comprise 27% of the population and employ 20% of its workers. While total employment concentration stayed fairly constant at 20% rural and 80% urban from 2003-2023, some notable movement occurred within individual industrial sectors.

Figure 9. North central employment by industry sector, 2023



Source: Idaho Department of Labor, Quarterly Census of Employment and Wage by industry, 2023

Urban county employment

Although both rural and urban counties in north central Idaho reported manufacturing job growth over the past 20 years, the 2.3% annual growth rate for this industry in urban counties was nearly three times the 0.8% annual growth seen in rural open country counties. This result contrasts sharply with statewide growth patterns where rural manufacturing jobs experienced a growth rate that was double that of urban areas.

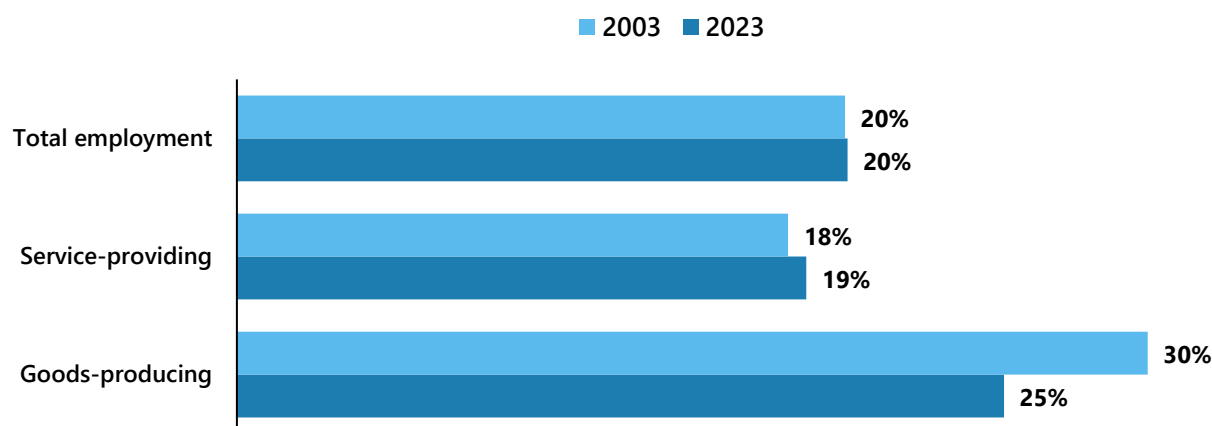
North central Idaho has the highest share of combined education and health services employment for any of Idaho's labor regions at 30% of total jobs. This is likely because Latah and Nez Perce, the region's two urban counties, are home to two of the state's public postsecondary institutions — the University of Idaho and Lewis-Clark State College, respectively. However, while education and health care establishments were top employers for Latah County in 2023, Nez Perce was dominated by large manufacturers.

Rural county employment

In 2003, rural counties comprised 30% of the region's goods-producing jobs, but that share declined to 25% by 2023. Although construction jobs had a slight concentration shift toward rural counties, a larger offsetting shift in manufacturing jobs occurred in the urban areas. Rural counties experienced a slightly faster growth rate in construction jobs, increasing from 26% of regional employment in 2003 to 28% in 2023 — a 2.7% annual growth rate compared with a 2.1% annual rate for urban areas. With more than two manufacturing jobs in the region for each construction job, goods-producing employment overall became more heavily concentrated within the urban counties.

In contrast, service-providing jobs, like professional and business services and financial activities, became more heavily rooted in the rural areas and increased slightly from 18% of regional employment in 2003 to 19% in 2023.

Figure 10. North central rural county share of employment by major industry sector, 2003 and 2023



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Education and health care establishments also comprised at least two of the top three employers in 2023 for each of the region's three rural counties. These rural areas accounted for 20% of total regional employment and 16% of regional education and health care jobs. The industries within these rural counties that employed at least 30% of regional workers included natural resources (52%), public administration (35%), utilities (31%) and construction (30%).

Private goods-producing industries and government enterprises combined contribute nearly half of this rural region's 2023 GDP (46%) compared with less than a third for Idaho statewide (32%)². Due to the high reliance on goods-production and government operations, these same rural counties were offset by a lower regional job share within the service-providing sectors of real estate rental and leasing (10%), education (12%), accommodation and food services (15%) and information (15%).

Regional wages

In 2023, average weekly wages per employee in north central were \$948, with rural county workers averaging \$873 compared with \$962 for urban employment. Despite lower rural wages overall, average weekly wages in 2023 were higher in the rural counties for the utilities, professional and business services, and public administration industries, which combined accounted for 18% of rural employment and 12% of urban employment. In 2023, 29% of rural employees had average weekly wages exceeding \$1,080 per week (\$56,000 per year) compared with 40% of urban employees.

² U.S. Bureau of Economic Analysis, *Gross Domestic Product by County and Metropolitan Area*, 2023, accessed May 2025, <https://www.bea.gov/>.

Region 3 - Southwestern

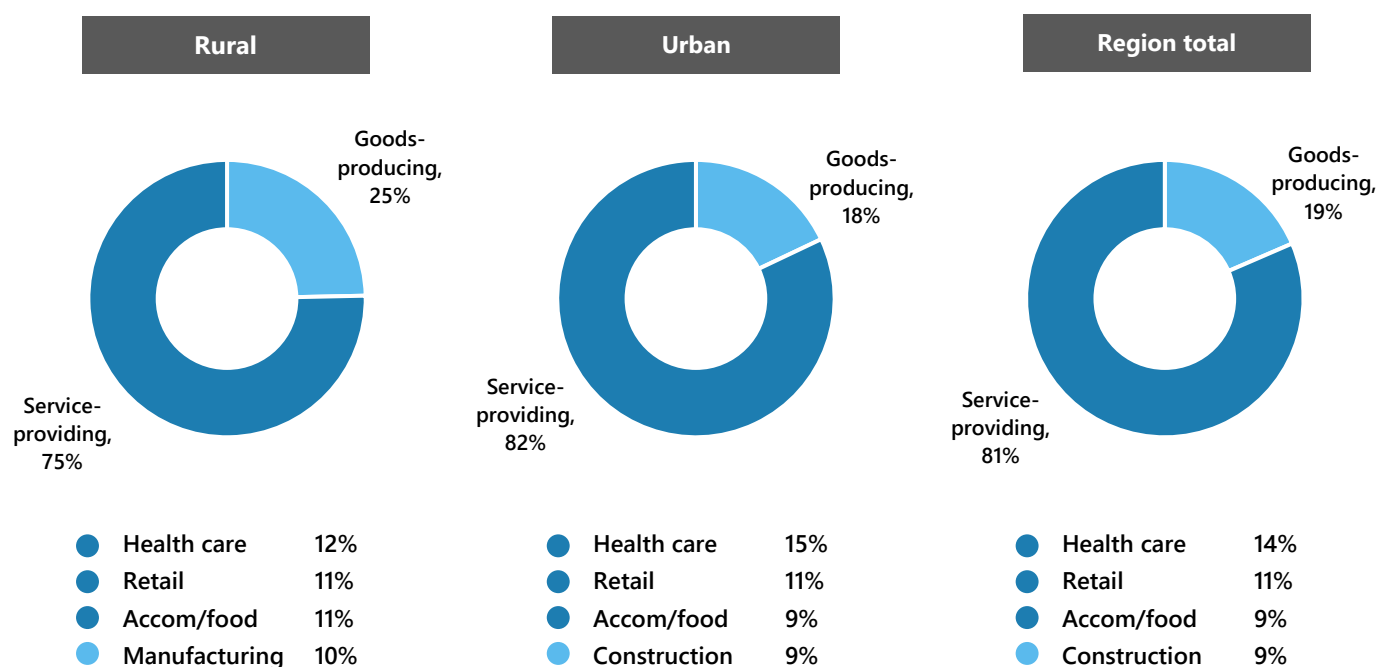
Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley, Washington counties

Region	Name	Urban	Commuting	Rural center	Open country
3	Southwestern	Ada, Canyon	Boise, Elmore, Gem, Owyhee	Payette	Adams, Valley, Washington

Region overview

From 2003 to 2023, southwestern Idaho's average employment grew by 56%, or 2.3% average annualized growth. Southwestern Idaho's rural counties accrued about half the growth of their urban neighbors. By classification type, open country rural counties grew 10 percentage points faster than rural center counties and over five percentage points faster than commuting counties (Figure 12). While growth was slower in rural counties, heightened industry diversification occurred in both rural and urban counties.

Figure 11. Southwestern employment by industry sector, 2023



Source: Idaho Department of Labor, Quarterly Census of Employment and Wage by industry, 2023

Urban county employment

In 2023, the two urban counties in southwestern Idaho comprised 40% of the state's population and 86% of the region's residents.³ While these two urban counties are neighbors, they complement each other more than they compete with each other. Canyon County offers more affordable housing options or larger lots plus a pastoral quality of life. Ada County generates many of the jobs and provides cultural and recreational opportunities.

The region's urban county job growth of 60%, or 2.4% of average annualized growth,⁴ outpaced the total growth of the region slightly. Many operations have centralized within urban counties due to their larger labor pools, preeminent transportation including an airport with commercial flights, and economies of scale for purchasing or transportation costs.

³ U.S. Census Bureau, *Annual Population Estimates for 2003, 2013, and 2023*, accessed June 2025, <https://www.census.gov/programs-surveys/popest.html>.

⁴ Idaho Department of Labor, *Quarterly Census of Employment and Wage by Industry*, 2023, accessed June 2025.

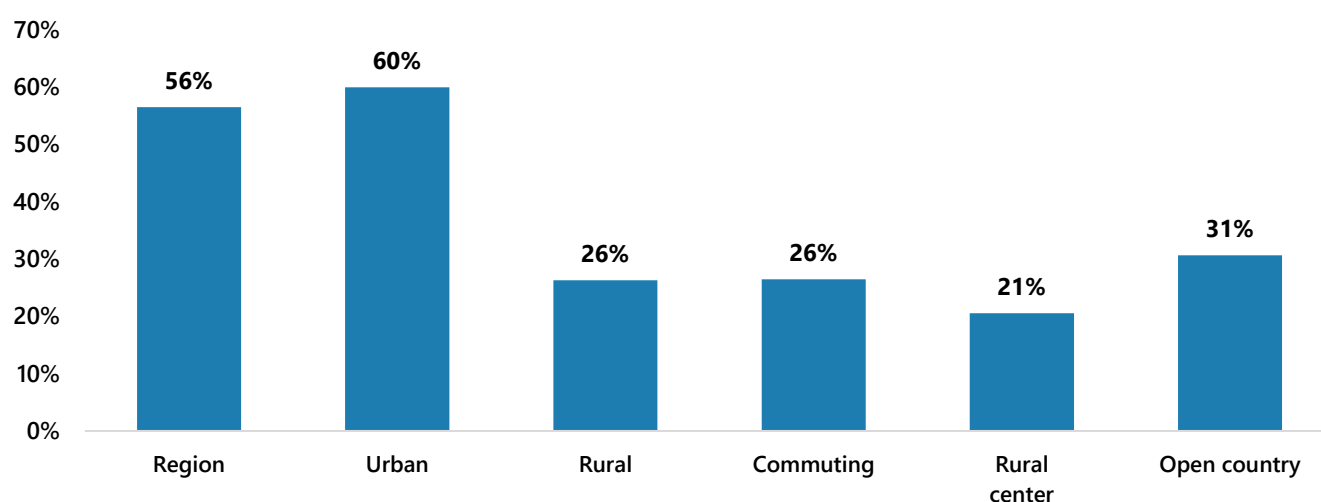
Rural county employment

The slower job growth in rural counties between 2003-2023 can be explained by the makeup of their leading industries and their location within the state. While growth was slower in southwestern Idaho's rural counties, it was sustainable for a population who prefers a quieter lifestyle.

While many operations left southwestern Idaho's rural counties, the rural counties had a larger share of manufacturing employment. This was likely due to the location of manufacturing plants near fields and transportation corridors in rural counties trimming expenses.

From 2003 to 2023, the commuting counties of Elmore, Owyhee and Gem counties experienced 46% growth of goods-producing jobs. Professional and business services grew by 48%, comprising a variety of business activities. Available jobs in the area were impacted by the seasonal nature of agricultural activities, processing a raw product in a timely fashion or completing a project in coordination with other workers' schedules. Examples of seasonal industries include leisure and hospitality, retail and educational services.

Figure 12. Average employment change for all industries by county type, 2003-2023



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wage by industry, 2003-2023

Mountain Home Air Force Base is a major employer with a flow of workers back and forth between Elmore and Ada counties. Until production stopped in 2009, Elmore County residents worked at Micron, a large semiconductor plant located in southeast Boise. The company has continued its back-office activities and has a strong research and development division. The campus is currently constructing a new fabrication plant with an investment of \$15 billion. This new plant will encourage more commuting between Elmore County and Ada County, especially considering housing prices were 34% lower in Elmore County as of April 2025.⁵

Table 1. Commuting industries by share of total average employment, 2003-2023

Commuting	2003		% change 2003-2023	Rank (1=highest)	
	2003	2023		2003	2023
Goods producing	22.0%	25.4%	3.4%	2	1
Education and health services	22.5%	22.4%	-0.1%	1	2
Trade, transportation and utilities	18.8%	18.6%	-0.3%	3	3
Leisure and hospitality	13.1%	12.7%	-0.4%	4	4
All other industries	23.7%	21.0%	-2.7%		

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wage by industry, 2003-2023

⁵ Intermountain Multiple Listing Service, *April 2025 Realtor Statistics*, accessed May 2025, <https://www.intermountainmls.com>.

Payette is the only rural center county in southwestern Idaho with food processing and agriculture comprising its base economy. Its top industries have not changed significantly since 2003. It is a slow growing county partly due to competition for workers who may choose to work in Oregon due to its higher wage structure.

From 2003-2023, southwestern Idaho's open country counties — Adams, Valley and Washington — experienced the fastest pace of employment growth compared with its rural counterparts — an increase of 31%. These three counties are not located close to the urban counties. They appear more self-sufficient due to this distance with employment spread across most sectors in correlation with population growth.

The largest industry sector for southwestern Idaho's open country counties — leisure and hospitality — experienced 84% growth. Tourism grew at a red-hot pace during the COVID-19 pandemic in these more isolated mountainous counties. To support the growth in primary and second homes, the financial activities industry thrived with 67% growth, although this industry carried smaller employment needs. The shift from goods-production to services followed an expansion of jobs overall, not a reduction of sector jobs.

Table 2. Open country industries by share of total average employment, 2003-2023

Open country			% change	Rank (1=highest)	
	2003	2023	2003-2023	2003	2023
Leisure and hospitality	15.6%	22.1%	6.4%	4	1
Goods producing	22.6%	19.9%	-2.7%	1	2
Education and health services	18.2%	18.0%	-0.2%	2	3
Trade, transportation and utilities	16.9%	16.5%	-0.4%	3	4
All other industries	26.7%	23.6%	-3.1%		

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wage by industry, 2003-2023

Region 4 – South central

Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka, Twin Falls counties

Region	Name	Urban	Commuting	Rural center	Open country
4	South central	Twin Falls	Jerome	Blaine, Cassia, Minidoka	Camas, Gooding, Lincoln

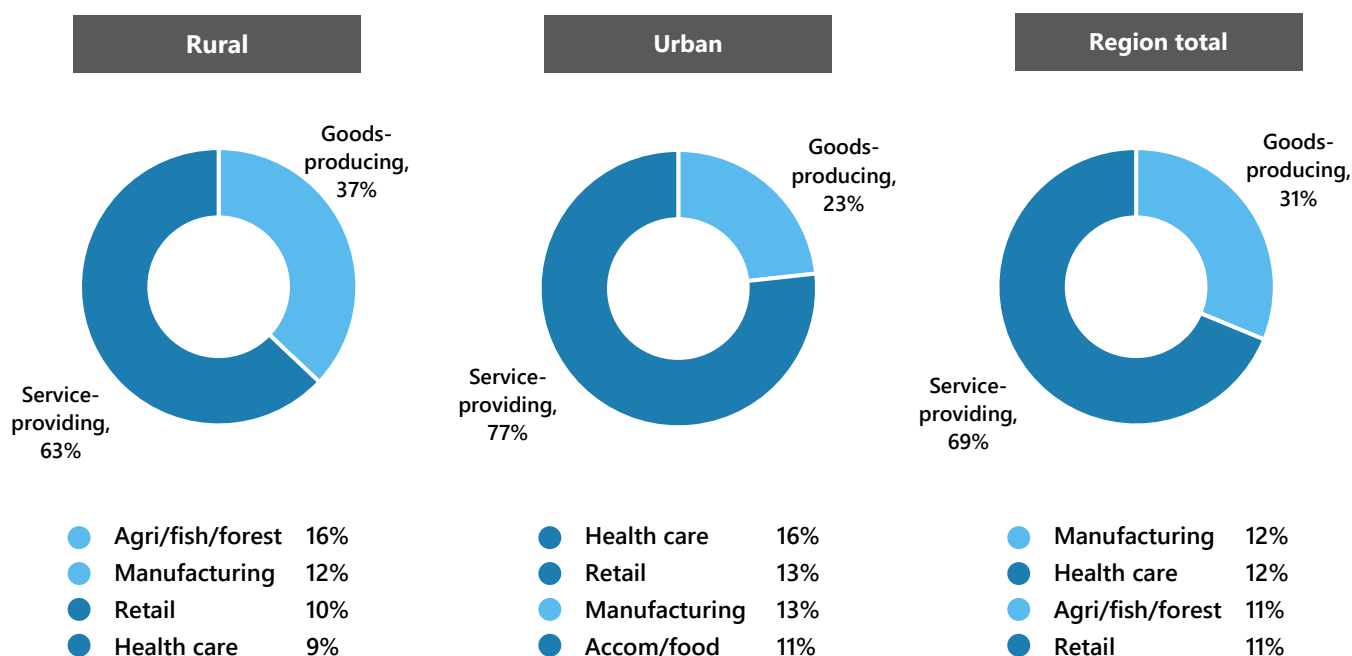
Region overview

With the expansion of food processing, agriculture has grown to 16% of total rural employment in south central Idaho as of 2023. As the only region to have agriculture as a top industry, this sector is the lifeblood of south central Idaho.

The goods-producing industry employment share in the south central region increased from nearly 28% in 2003 to over 31% in 2023. Over the past two decades, additional large food processors such as Chobani and Clif Bar have settled in the Magic Valley.

Education and health services employment share for the region increased from 17% in 2003 to 19% in 2023. As south central's population grows and ages, demand for education and health services is a growing share of total employment.

Figure 13. South central employment by industry sector, 2023



Source: Idaho Department of Labor, Quarterly Census of Employment and Wage by industry, 2023

Twin Falls County, the single urban county in the region, has a higher share of service-producing industries than rural counties as the larger population creates a greater share of diverse employment opportunities.

Jerome County has become an increasingly important complement to Twin Falls County, with a growing share of employment in agriculture, manufacturing and food processing. The connection between Jerome and Twin Falls has grown so strong that the two counties became the Twin Falls MSA (Metropolitan Statistical Area) in 2017.⁶ Unlike most other regions, south central Idaho's sole urban county declined in its concentration of total employment.

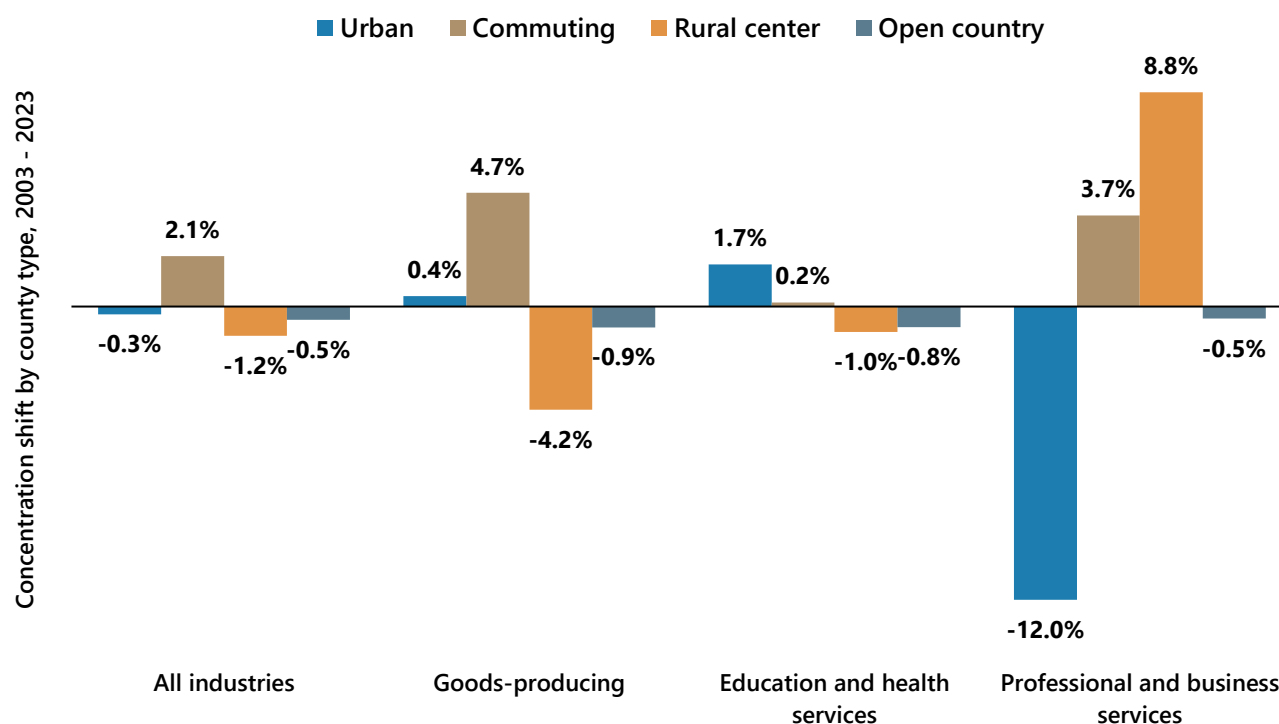
⁶ Idaho Department of Labor, "Twin Falls, Jerome Counties Elevated from Micropolitan to Metropolitan Area," *Idaho at Work (blog)*, June 2018, <https://idahoatwork.com/2018/06/14/twin-falls-jerome-counties-elevated-from-micropolitan-to-metropolitan-area/>.

Rural county employment

Rural counties have a larger share of goods-producing jobs than Twin Falls County as their two largest industries are agriculture, forestry, fishing, and hunting and manufacturing. Jerome, south central's commuting county, gained share in total employment in goods producing, specifically in manufacturing employment — more than doubling from 2003-2023.⁷

However, some rural center counties, Blaine County specifically, have seen an employment shift away from agriculture and manufacturing in favor of construction and professional/scientific services. Open country counties' employment share has slightly declined in all super sectors, as the most rural parts of the region have experienced weaker economic growth than more populated counties in the region.

Figure 14. South central employment concentration shift by county type, 2003-2023



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Regional wages

The share of employees earning above average wages has increased in all county classifications from 2003-2023, with the largest percentage growth coming from Jerome County at 11%. As of 2023, half of Jerome's employment was in goods-producing industries, with both construction and manufacturing wages being significantly higher than average wages overall.³

South central rural center counties had the highest share of employees earning above average wages in both 2003 and 2023, as Blaine County had the highest median household income of any county in Idaho.

Rural counties saw greater gains in above average wage growth than urban Twin Falls County, as agribusiness and other manufacturing spread and evolved over the past two decades in addition to remote work arrangements increasing labor mobility in rural areas.

⁷ Bureau of Labor Statistics, *Quarterly Census of Employment and Wage by Industry, 2003–2023*, accessed June 2025, <https://www.bls.gov/cew/>.

³ Idaho Department of Labor, *County Profile Report*, accessed May 2025, <https://lmi.idaho.gov/regional-info>.

Region 5 - Southeastern

Bannock, Bear Lake, Bingham, Caribou, Franklin, Oneida, Power counties

Region	Name	Urban	Commuting	Rural center*	Open country
5	Southeastern	Bannock	Bingham, Franklin	--	Bear Lake, Caribou, Oneida, Power

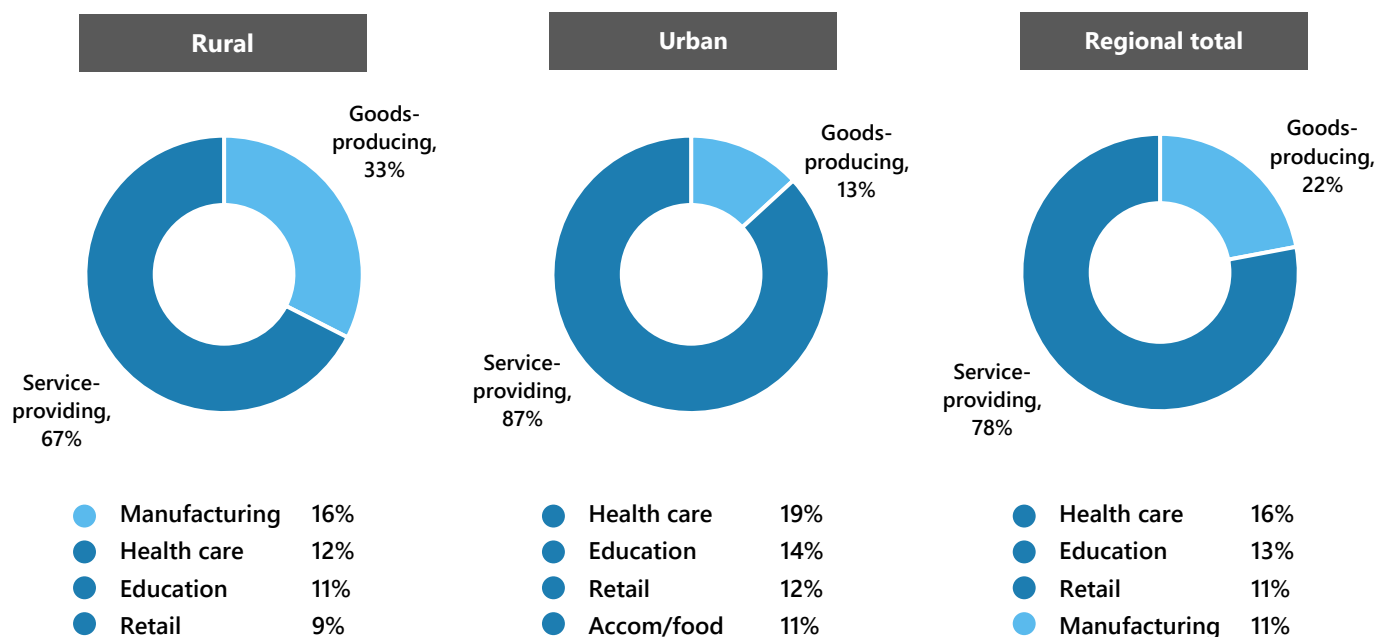
*Southeastern does not currently have any counties classified as rural center.

Region overview

Southeastern Idaho's employment concentration is similar between its urban and rural counties. For both county types, education and health care comprised two of the top three industries in 2023. Between 2003-2023, these industries combined saw a 34% increase in employment among rural counties and a slightly faster 35% increase in the sole urban county of Bannock.

Most rural area expansion for education and health services came with the addition of eight new general and surgical hospitals and five new rural elementary schools. Urban growth was broader, including strong growth in individual and family services, home health care and increased postsecondary employment.

Figure 15. Southeastern employment by industry sector, 2023



Source: Idaho Department of Labor, Quarterly Census of Employment and Wage by industry, 2023

Urban county employment

Bannock County accounted for 54% of regional employment in 2023, while the remaining rural counties combined made up 46%. Bannock County's employment grew 16% between 2003 and 2023 which was slightly outpaced by rural growth in the region of 25%. As a result of its slower job growth, Bannock County's share of regional employment declined by 2% in the period.

While Bannock County was home to over 60% of regional service-providing jobs, it comprised less than one-third of the labor region's goods-producing sector employment. Since 2003, Bannock County had growth in grocery wholesalers and building material dealers within the trade, transportation, and utilities industries. However, Bannock's manufacturing jobs actually declined between 2003-2023 while the region's rural counties experienced positive growth.

Rural county employment

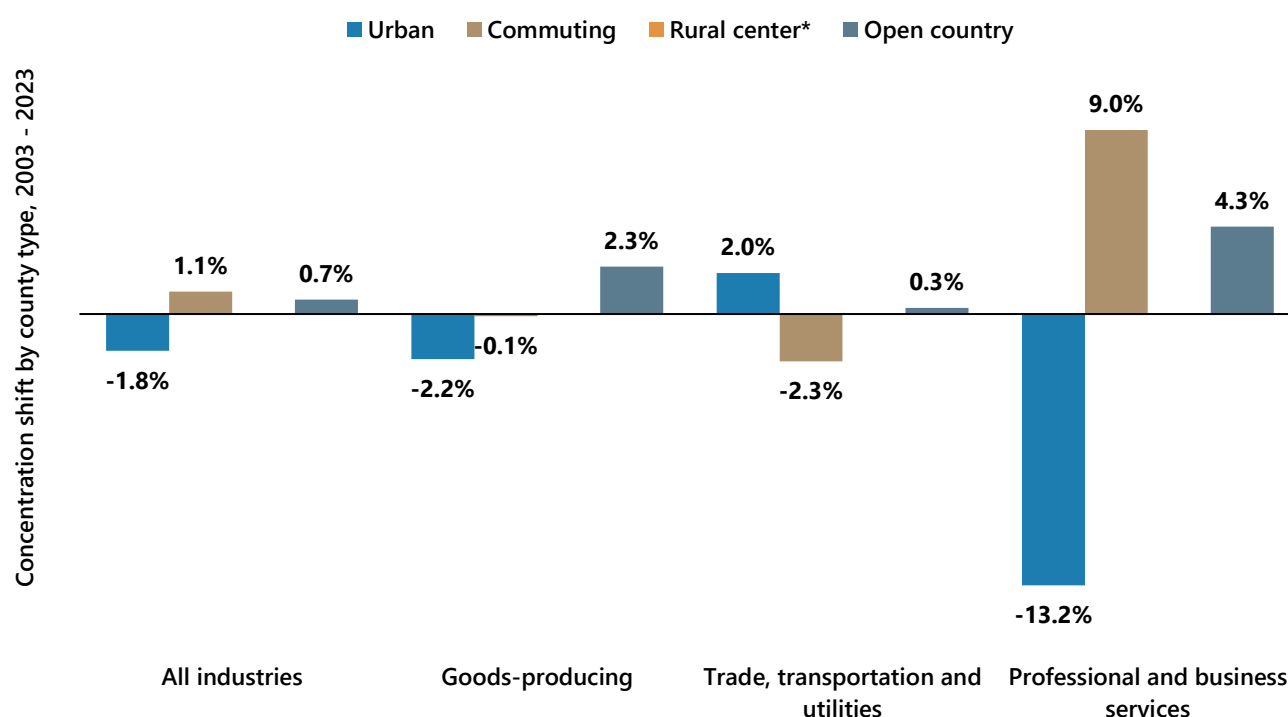
Between 2003-2023, growth in leisure and hospitality jobs was at 68% for southeastern Idaho's rural counties — nearly double the 38% seen within its urban county. Goods-producing industries were also more prominent in rural counties — maintaining 33% of total employment in 2023 compared with urban's 13%.

There were significant losses for grocery wholesalers in rural counties, but this was offset by rural increases in general freight trucking and grocery store employment.

Between 2003-2023, goods-producing industries had a 24% job growth in southeastern Idaho's rural counties. Frozen fruit and vegetable manufacturing continued to be a dominant industry, though its employment reduced by 35% from 2003. Other sources of rural job growth since 2003 included a new animal slaughter and pesticide factory, additional plastic manufacturing, phosphate mining, grain/seed farming and increased vegetable farm labor with the addition of nine new employers.

Though total employment increased overall in southeast Idaho from 2003-2023, the region's rural share of total jobs increased from 44% to 46%. This change was driven by an increase in jobs at architectural and engineering firms for the professional and business services sector in commuting counties, and telecommunications companies driving a 16% higher concentration in information jobs in open country counties.

Figure 16. Southeastern region employment concentration shift by county type, 2003-2023



*Southeastern does not currently have any counties classified as rural center.

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

Regional wages

The faster growth of southeastern Idaho's rural counties compared with its urban county also meant the share of employees earning a 2023 weekly wage of \$1,080 or more lagged behind other urban counties. While Idaho's urban counties had 41% of employees earning over \$1,080 per week in 2023, only 30% of employees in urban Bannock County reached this threshold. This compares with 33% of rural county job holders in the region earning at least \$1,080 per week, led by 38% of workers in the region's four open country counties.

Region 6 - Eastern

Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison, Teton counties

Region	Name	Urban	Commuting	Rural center*	Open country
6	Eastern	Bonneville, Madison	Jefferson	--	Butte, Clark, Custer, Fremont, Lemhi, Teton

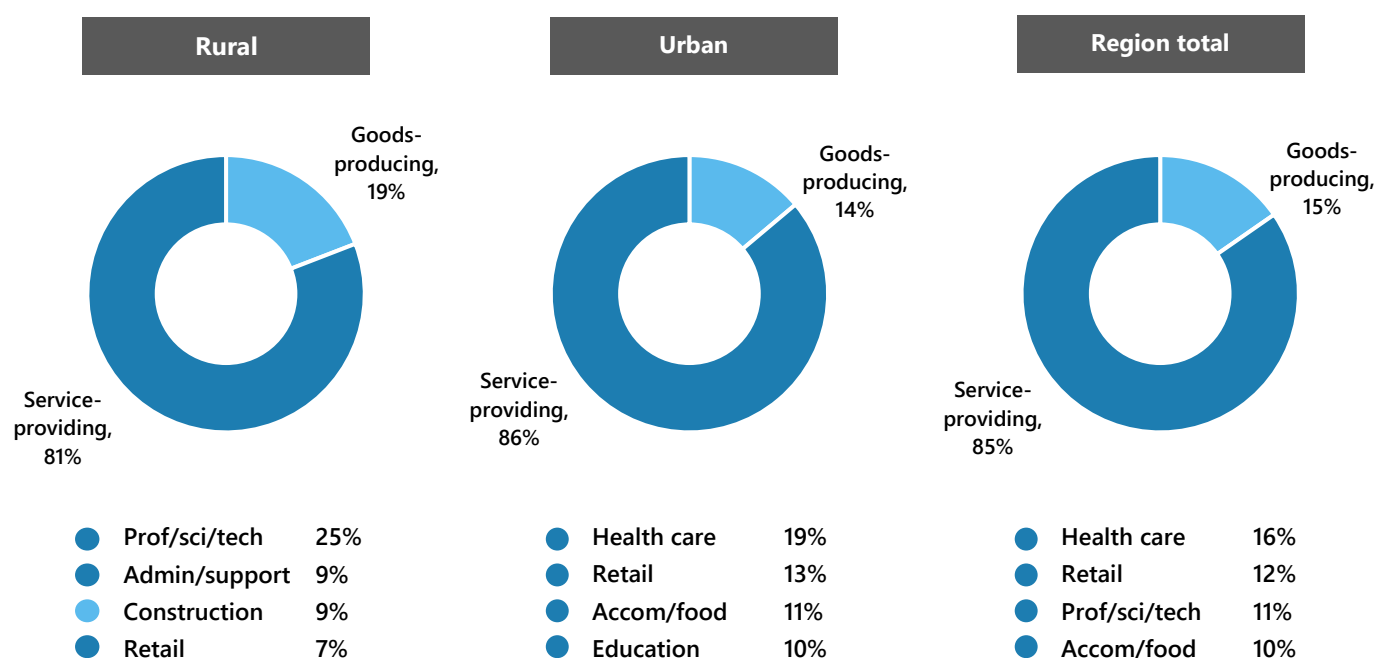
*Eastern does not currently have any counties classified as rural center.

Region overview

The majority of eastern Idaho is characterized by the open country rural classification (Butte, Clark, Custer, Fremont, Lemhi and Teton counties). There are no rural center county types in the region.

From 2003-2023, total employment in rural eastern Idaho saw a shift from urban toward open country, led specifically by a decline in the urban concentration of professional and business services sector as the Idaho National Laboratory significantly increased employment in the region's rural areas.

Figure 17. Eastern employment by industry sector, 2023



Source: Idaho Department of Labor, Quarterly Census of Employment and Wage by industry, 2023

Urban county employment

In eastern Idaho's urban counties of Bonneville and Madison, the education and health industry overtook the trade, transportation and utilities industry to become the top industry group by total jobs.

As the population grew, nearly 6% of the region's education and health workforce shifted away from rural areas into urban hospitals, clinics and schools as the urban centers offered more competitive wages, career growth and job stability. If similar trends continue, the displacement over time will likely result in more pronounced rural labor shortages in education and health services.

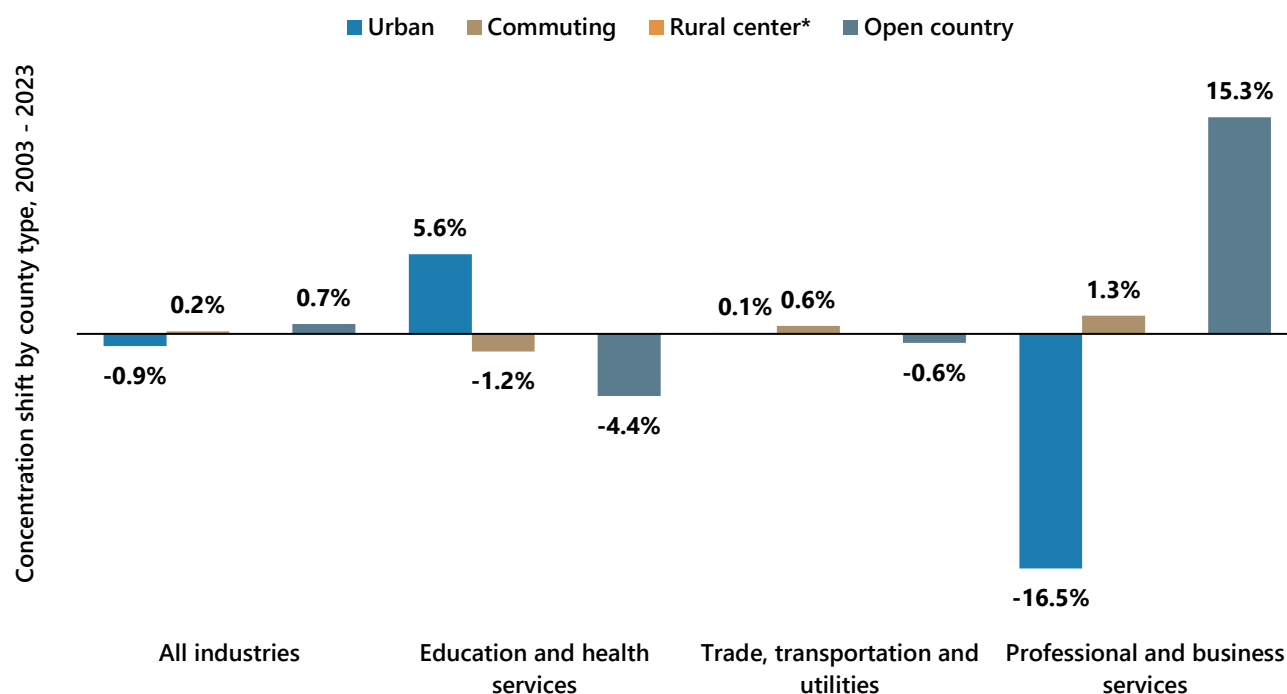
Rural county employment

Rural counties had slower population growth over the past 20 years than the overall eastern region, limiting demand for local trade and business services. Rural manufacturing employment lost share of regional jobs as

larger firms centralized operations while some transportation and logistics jobs were outsourced to larger hubs outside eastern Idaho. The area's rural region also continued to be highly dependent on the construction industry as steady population increases drove demand for residential building expansion and infrastructure investments.

Professional and business services continued as one of the top industries as a share of total employment in the region. Anchored by Idaho National Laboratory, this was the top employment sector in 2023 for rural counties in eastern Idaho, accounting for more than one in three total rural jobs.

Figure 18. Employment concentration shift by county type, 2003-2023



*Eastern does not currently have any counties classified as rural center.

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

The slight decline in open country's employment in the trade, transportation and utilities sector meant a gain for the region's sole rural commuting county, Jefferson County. This commuting workforce shift absorbed some displaced workers from the surrounding rural areas. Infrastructure improvements enhanced transportation networks, while business relocations and expansion in neighboring Madison and Bonneville counties provided commuting accessibility. Local agriculture and distribution hubs — especially in warehousing and trucking — also strengthened logistics-related job growth in the area.

Regional wages

All rural county types in the eastern region enjoyed wage increases, as the largest growth in share of employees by weekly wage was from 27% to 66% in open country counties, followed by modest wage growth in the single commuting county.

Rural eastern Idaho saw an increase from 33% to 43% in total share of employees earning average weekly wages of \$640+ per week in 2003 to the inflation-adjusted equivalent of \$1,080+ per week in 2023. Idaho National Laboratory made a relatively large workforce earnings footprint as a rural open country employer in the region. As a result, eastern Idaho led the state in 2023 at 66% for the largest share for open rural county average weekly wages exceeding \$1,080 per week.

Agriculture

A majority of the data in this section is based on the most recently available 2022 Census of Agriculture which is generated every five years. Therefore, to track changes over the most recently available data for a 20-year time period, the date range will be 2002-2022. More recent data from 2023 and 2024 will also be featured when available and sourced with a citation.

Over the past 20 years, agriculture has continued to be one of the base economic drivers of Idaho's economy. The state's 2024 agricultural exports were estimated at \$2.6 billion with goods shipped to over 120 countries.⁸

Idaho's agricultural share of total gross domestic product (GDP) grew from 3.3% in 2002 to 5.3% in 2022. The state experienced overall industry diversification, the creation of innovative products, the addition of new or expanding companies and population growth over this same period.

Idaho boasts the production of more than 185 commodities from over 23,000 farms and ranches, many receiving national ranking. A major shift of dominance from crops to livestock occurred around the millennium after the migration of California dairies to Idaho in search of more business-friendly governance. During 2023, milk comprised \$3.8 billion of the \$7 billion in livestock cash receipts alone.⁹

Table 3. Idaho's national ranking for select agricultural commodities

Ranking	Product type
1	Potatoes, barley, peppermint, trout and alfalfa hay
2	Sugar beets and hops
3	Milk and cheese
4	Onions, spring wheat and lentils

Source: Idaho Department of Agriculture

Background

Agriculture maintains its status as one of Idaho's major industries with favorable weather conditions, a long growing season and rich soil found along the Snake River plains all contributing to yields that frequently outpace other states.

The water rights to the reservoirs along the Snake River have been adjudicated, thus securing irrigation during the growing season to the envy of other states still navigating water laws. Over the past 20 years, deals have been hammered out to buy water rights and ease tension between surface water users and groundwater users, with private and public monies to motivate the sellers. For utilities needing more power, the conversion of farmland into windfarms has been beneficial. Certain trout farms have conceded senior water rights to municipalities struggling to accommodate population growth.

The northern part of the state, such as the Palouse Prairie, relies on dryland farming and grazing of livestock as its niche agricultural enterprises. Agriculture is a smaller share of the economy for the northern 10 counties with their lakes, rivers and mountains compared with the drier, irrigated southern half of Idaho.

Transportation of commodities from fields to plants relies primarily on the interstate system in southern Idaho utilizing the busy east-west I-84 corridor. The northern area moves products, primarily wheat, with the rare amenity of an inland seaport. The railroad distribution system has many spurs throughout Idaho and fills the need for shipping less-perishable products.

⁸ Idaho Department of Agriculture, *Idaho Ag Facts Infographic 2024*, accessed June 2025, <https://agri.idaho.gov/wp-content/uploads/marketing/Publications&Resources/2025-Ag-Facts-Sheet.pdf>.

⁹ University of Idaho, *The Financial Condition of Idaho Agriculture: 2022*, accessed June 2025, <https://www.agproud.com/articles/56640-the-financial-condition-of-idaho-agriculture-2022>.

Land use

Agriculture is normally associated with rural areas, yet the urban county share of Idaho's farmland was third in the total number of acres following first ranked rural open counties and second ranked rural commuting counties in 2022. Change over the past 20 years indicated a downward trend in Idaho's overall acres dedicated to farming activities, with a decline of 1.9% or a loss of 219,000 acres.¹⁰

Rural open country farmland totals approximately 40% of Idaho's total farmland in acres. Half of Idaho's counties are open country making it the largest county classification by count.

The top five counties based on farmland acres in 2022 included counties large in area and represented all four county classifications (Table 4).

Table 4. Top five counties with the most farmland acres, 2022

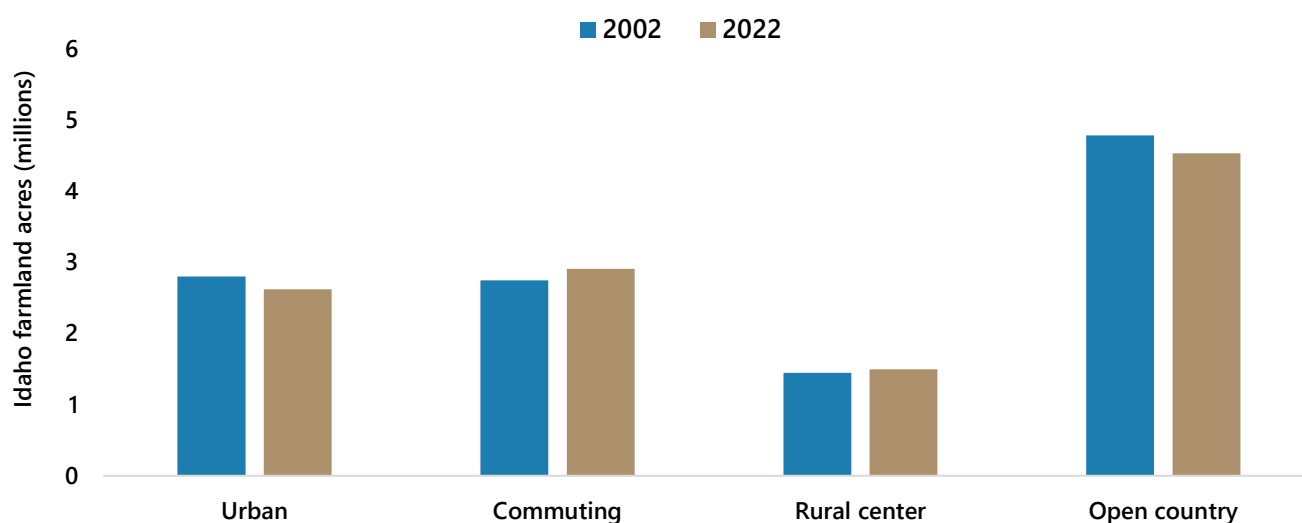
Rank	County name	County type	Acres in farmland
1	Bingham	Commuting rural	897,796
2	Owyhee	Commuting rural	729,407
3	Cassia	Rural center	657,664
4	Idaho	Open country	545,260
5	Twin Falls	Urban	459,167

Source: U.S. Department of Agriculture, National Agricultural Statistics Service. *Census of Agriculture, 2022*

Commuting counties carried the largest gain of farmland from 2002-2022, growing by 6%. This growth was largely attributed to Owyhee County, which added about 160,000 acres mainly for livestock and its feed supply chain of grain, hay and forage. This tally is not inclusive of public grazing lands owned by the federal government.

Over the past 20 years, urban counties lost the most farmed acreage at almost 180,000 acres — a decline of 6.4%. This loss was from competition for land use, primarily for housing (an acute community and workforce need in most urban and rural counties, as well as nationally) and mixed-use developments. Industrial warehousing was another growing industry over this time, eating up large acreages developed into business parks.

Figure 19. Idaho farmland in acres, 2002 and 2022



Source: U.S. Department of Agriculture, National Agricultural Statistics Service. *Census of Agriculture, 2002–2022*.

¹⁰ U.S. Department of Agriculture, National Agricultural Statistics Service, *Census of Agriculture, 2002–2022*, accessed May 2025, <https://www.nass.usda.gov/AgCensus/>.

Small hobby farmers comprised a bigger portion of Idaho's farming profile in 2022. About 25% of the farms worked nine acres or less. In 2002, this figure was 20%. The biggest share of hobby farmers was found in the urban county classification in both 2002 and 2022.

Urban's share of operations that were nine acres or less in 2002 grew from 49% of Idaho's small farms to 53% in 2022. Commuting carried the highest rural share of farms that were nine acres or less but lost ground from 2002 (26.1%) to 2022 (22.9%).

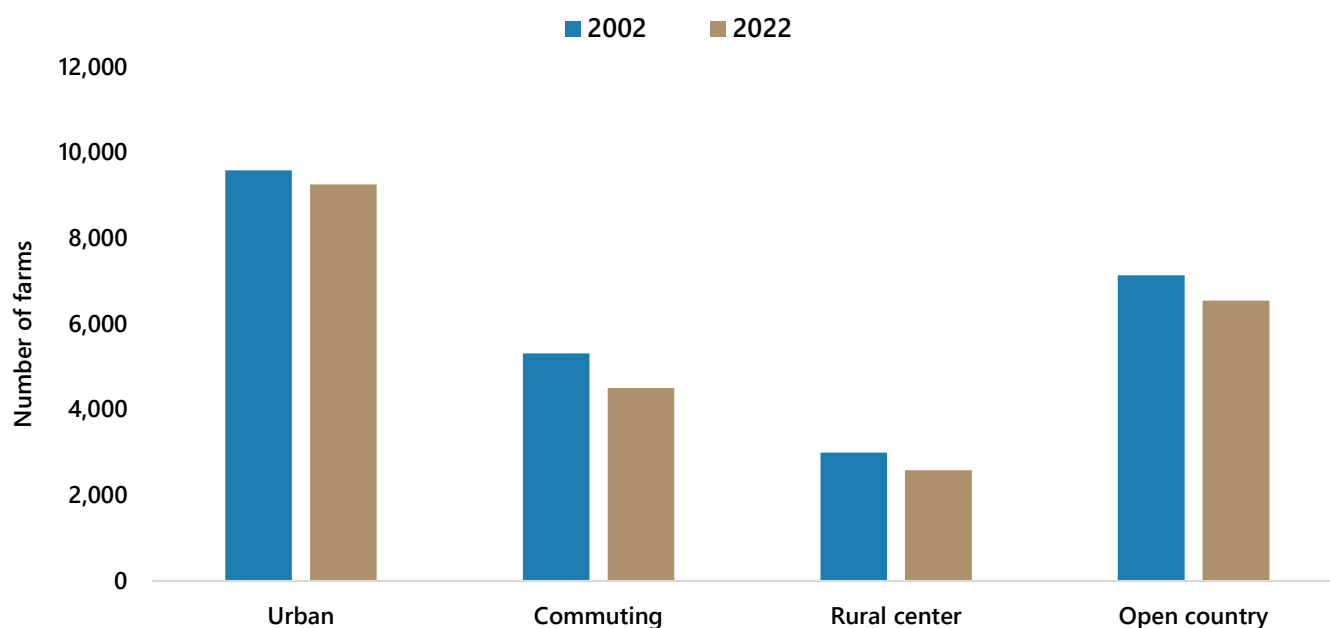
Large farms defined as 1,000 acres or more were most concentrated in rural open counties with a 43% share in 2022 versus a 24% share in the 2002 report.

The total number of Idaho farms dropped to about 23,000 in 2022, a decrease of 8.6% from 2002. Its acres continue to decline, yet the yields have not faltered due to critical research and development in technology and agronomy. For example, drones assessing water levels and soil nutrients are a common tool used by producers. No-till soil techniques and automated farming implements have also changed the process and time dedicated to ground prep, planting and harvest.

The University of Idaho, Idaho's land grant research institution, has extensive research and development facilities interspersed among specific concentration areas for crops, seeds and livestock. Seeds that are better adapted to certain climates and surviving pests have been developed and are distributed from Idaho globally.

The average farm size based on acreage has increased since 2002 by 7.4% to 505 acres.¹¹ This is likely because the industry realized the efficiencies of managing larger swaths of arable acres with more employees and equipment such as irrigation pivots versus pipes or canvas dams. This is a divergence from the small family farms that comprised the heart of agriculture in the 20th century.

Figure 20. Idaho farm count by county, urban or rural, 2002 and 2022



Source: Source: U.S. Department of Agriculture, National Agricultural Statistics Service. *Census of Agriculture, 2002-2022*

¹¹ U.S. Department of Agriculture, National Agricultural Statistics Service, *Census of Agriculture, 2002-2022*, accessed May 2025, <https://www.nass.usda.gov/AgCensus/>.

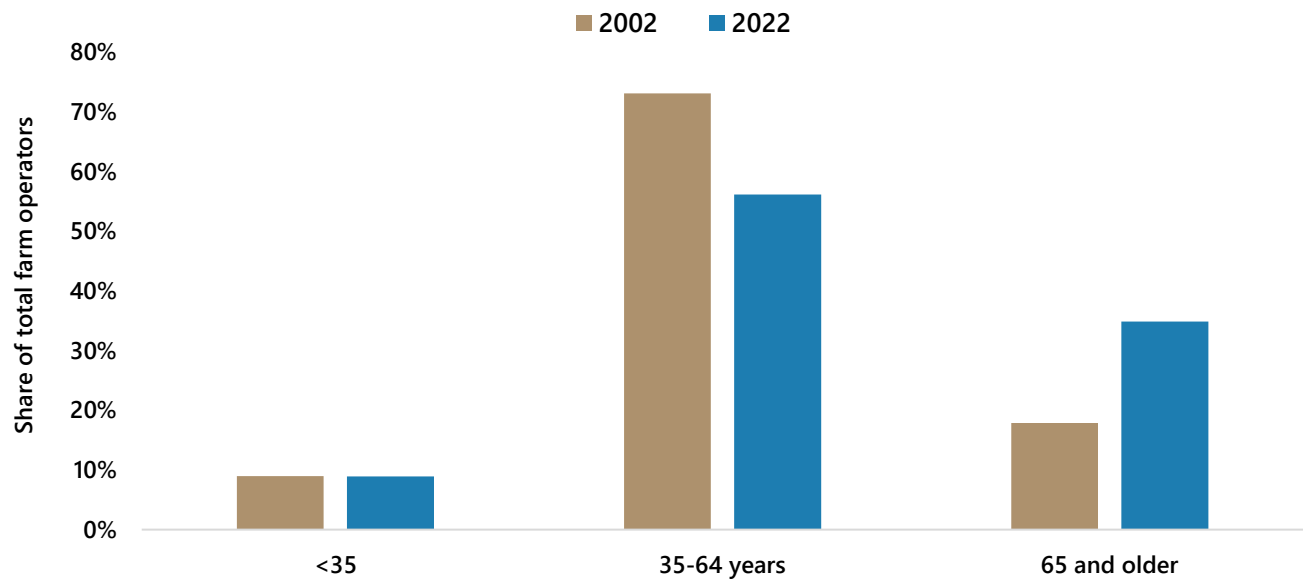
Demographics

The demographic profile of Idaho’s agricultural producers has changed since 2002 with those 65 and older increasing by 123%. In the 2022 Census of Agriculture, approximately 35% of all operators fell within this age group as compared with 18% in 2002 (Figure 21).

Agricultural producers below 35 years of age did not appear to change significantly between 2002-2022, growing by about 500 operators or 14%. This younger age group is usually the smallest share of operators since wealth is generally required to farm profitably. Without a second job or generational wealth, it is difficult to overcome the large capital investment and knowledge required for annual operating loan renewals.

Those in the 35-64 years of age category decreased in share by 12% from 2002 to be just over half of the total in 2022 when they had previously made up 73% of all operators.¹² This middle-aged group of operators likely decreased for various reasons including the opportunity to cash in farmland at a premium or to follow a different lifestyle/career choice when first entering the workforce.

Figure 21. Age of Idaho’s farm operators, 2002 and 2022



Source: U.S. Department of Agriculture, National Agricultural Statistics Service. *Census of Agriculture, 2022*

Table 5. Farm operator’s age by county classification, 2002-2022

	Average age 2002	Average age 2022	% growth	# growth
Urban	54.3	57.1	5.2%	2.8
Commuting	53.3	55.4	4.1%	2.2
Rural center	53.5	56.4	5.4%	2.9
Open country	55.4	58.1	4.8%	2.7

Source: U.S. Department of Agriculture, National Agricultural Statistics Service. *Census of Agriculture, 2002–2022*

¹² U.S. Department of Agriculture, National Agricultural Statistics Service, *Census of Agriculture, 2002–2022*, accessed May 2025, <https://www.nass.usda.gov/AgCensus/>.

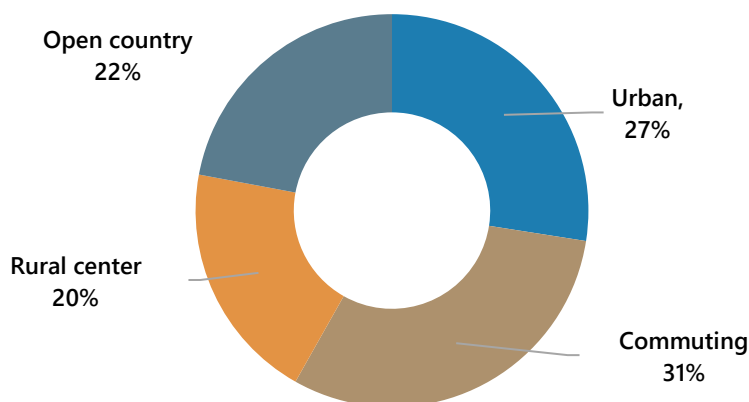
Labor

The shift away from farm work to service occupations started decades ago, manifesting in a labor shortage in the 21st century, with farmers and ranchers depending on a small group of workers who embraced the farming culture. Automation helped somewhat with the labor shortage, yet the human workforce was still needed to complete certain tasks.

The H-2A guest visas supply seasonal farm labor across the nation and in Idaho. In 2023, there were around 7,000 H-2A certifications in the state.¹³ This was about double the 3,800 certifications seen in 2008 when a similar report was prepared. The H-2A guest visa programs only allow seasonal labor for periods of six months or less, leaving the dairy industry in a lurch.

The distribution of Idaho's 2024 H-2A certified workers by primary worksite within Idaho is shown below in Figure 22. Approximately seven out of every 10 workers were primarily located within rural counties with commuting counties having the highest concentration.

Figure 22. H-2A worker distribution by worksite, 2024



Source: U.S. Department of Labor, Employment and Training Administration, H-2A Disclosure Data FY2024

Value-added food processing

Value-added food processing is when a product is improved from its raw form, usually taken directly from the field, garden or feed lot, and its value to the consumer is increased. It can also include improving a product's packaging, making it more convenient for consumer use.

Over the past 20 years, commodities from Idaho's fields, along with livestock grazing on permitted public lands or in contained feed lots, have continued to fuel the engines of national and foreign-direct-investment food processors and local artisan value-added food producers in the state.

From 2002-2022, the count or level of food processing plants across Idaho continued to be concentrated in urban counties which also had the most food processing workers and the most establishments. With the higher population, urban counties can staff large plants to a greater degree than many of the rural counties. New plants require direct investment towards land acquisition, commercial construction, along with infrastructure for wastewater systems, utilities and roads. The workforce may need more investment in housing, schools, retail and health care.

¹³ U.S. Department of Labor, Employment and Training Administration, *H-2A Performance Disclosure Data, 2023–2024*, accessed June 2025, <https://www.dol.gov/agencies/eta/foreign-labor/performance>.

When looking at the county type with the greatest changes in food manufacturing between 2002-2022, open country counties experienced the highest percentage change in both employment and establishments created, as shown in Table 6.¹⁴

Table 6. Food manufacturing by county type, 2002-2022

Average employment						
County type	2002	2022	Change #	Change %	Share '02	Share '22
Urban	8,774	11,022	2,248	25.6%	53.8%	53.6%
Commuting	3,045	3,797	752	24.7%	18.7%	18.5%
Rural center	2,975	2,998	23	0.8%	18.2%	14.6%
Open country	1,510	2,743	1,233	81.7%	9.3%	13.3%
Totals	16,304	20,560	4,256	26.1%		
Establishments						
County type	2002	2022	Change #	Change %	Share '02	Share '22
Urban	136	211	75	55.1%	61.5%	61.2%
Commuting	31	45	14	45.2%	14.0%	13.0%
Rural center	29	45	16	55.2%	13.1%	13.0%
Open country	25	44	19	76.0%	11.3%	12.8%
Totals	221	345	124	56.1%		

Source: Idaho Department of Labor, Quarterly Census of Employment and Wages, 2002 and 2022

Urban areas have a greater pool of skilled workers needed for modern food manufacturing, such as engineers, programming logic controls operators, lab techs and wholesale salespeople.

The 2002-2022 growth rate for average employment is highest in the rural open country counties at almost 82%, adding about 1,200 workers. The urban counties added about 2,200 workers but grew only 25% due to their larger share of average employment.

The rural open country counties carried the most farmland dedicated to growing crops or fattening livestock. These counties were also in prime locations for manufacturers, lowering the distance and cost to haul commodities for processing.

Agriculture, including both livestock and crops, requires a robust supply chain of national and local businesses. Agri-business is the combination of producing food in the form of fresh or value-added products and marketing the food products. It is not uncommon for some companies to be vertically integrated with in-house transportation and warehousing activities.

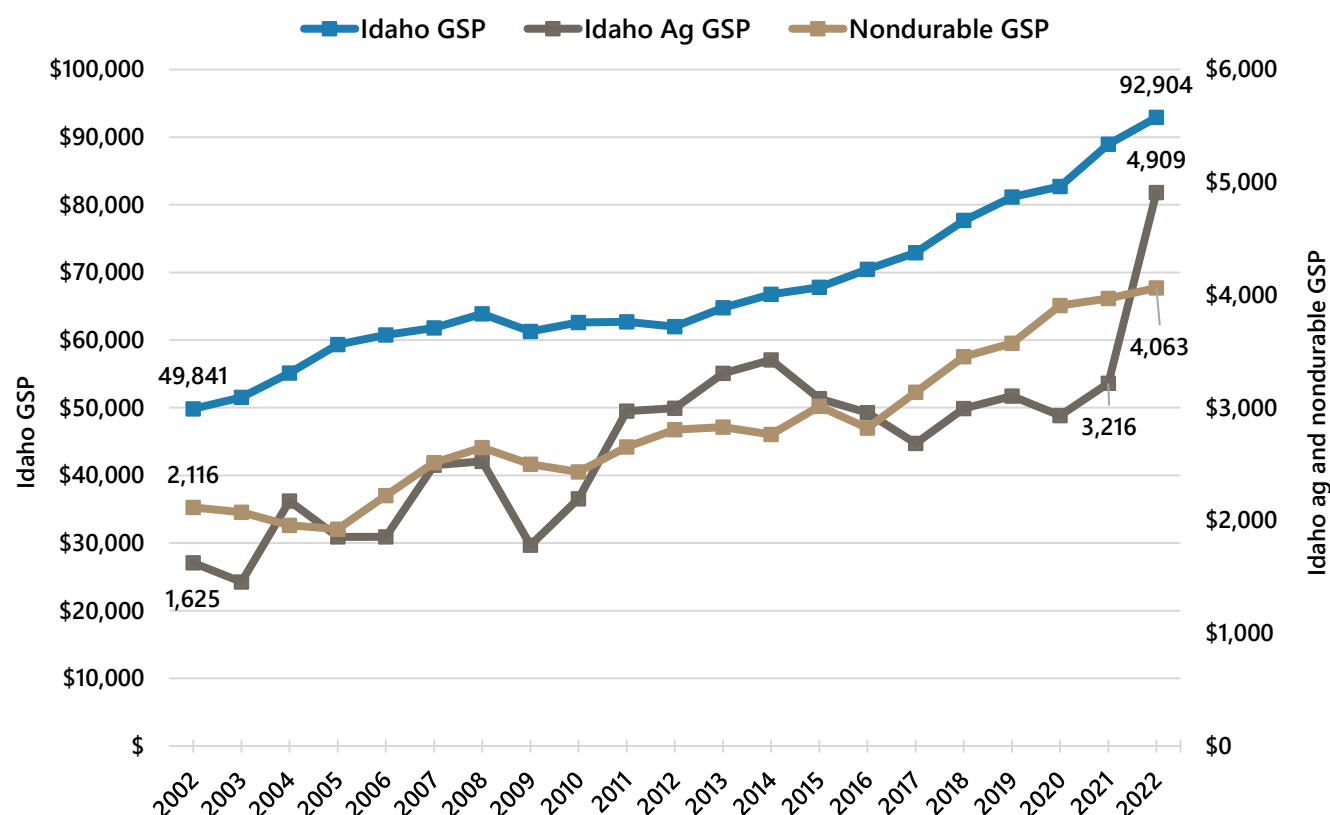
¹⁴ Idaho Department of Labor, *Quarterly Census of Employment and Wages by Industry, 2023*, accessed June 2025, <https://lmi.idaho.gov/data-tools/industry-wages/>.

Gross state product

Idaho's agriculture industry is about 5.3% of total gross state product (GSP) while food processing, or nondurable goods manufacturing, comprises 4.4% of total GSP. Figure 23 shows nondurable goods following the total GSP historically but flattening during the COVID-19 pandemic. To contrast, the agricultural sector had some of its most dramatic growth during the pandemic, evidenced by the steep growth starting in 2020.

From 2002 to 2022, Idaho's agricultural GSP doubled with non-durable manufacturing almost doubling as well, keeping pace with Idaho's total GSP growth of 86%.¹⁵ However, the dominance of the sectors flipped — non-durable manufacturing held a higher share of the GSP in 2002, but by 2022, agriculture had taken the lead.

Figure 23. Idaho gross state product, in real dollars (\$ million)



Source: U.S. Bureau of Economic Analysis. "Gross Domestic Product by State," 2002–2024.

Two urban counties were among the top agricultural producers in 2022 based on receipts (Canyon and Twin Falls). The other three top producing counties were evenly spread among the three rural classifications. The revenue share among classifications did not change significantly from 2002 to 2022 as certain areas are consistently prime locations for specific commodities.¹⁶

¹⁵ U.S. Bureau of Economic Analysis, *Gross Domestic Product by State, 2002–2024*, accessed May 2025, <https://www.bea.gov/>.

¹⁶ U.S. Department of Agriculture, National Agricultural Statistics Service, *Census of Agriculture, 2002–2022*, accessed May 2025, <https://www.nass.usda.gov/AgCensus/>.

Table 7. County distribution by agricultural product revenue, 2022 (in thousands)

Counties	2002	2022	Change %	Change #	Share '02	Share '22
Urban	\$1,025,943	\$2,891,623	181.9%	\$1,865,680	26.3%	26.5%
Commuting	\$1,215,414	\$3,132,355	173.7%	\$1,916,941	31.1%	28.8%
Rural center	\$706,464	\$2,094,208	196.4%	\$1,387,744	18.1%	19.2%
Open country	\$960,443	\$2,774,013	188.8%	\$1,813,570	24.6%	25.5%
Total	\$3,908,264	\$10,892,199	178.7%	\$6,983,935		

Source: U.S. Department of Agriculture, National Agricultural Statistics Service. *Census of Agriculture, 2002-2022*

Exports

In 2023, Idaho's largest agricultural export partners, by a large margin, shared borders with the U.S. — Canada received 31% of Idaho's agricultural products while Mexico received 19%. Other major importers of Idaho's agricultural products included the Netherlands at 5% and the Pacific Rim countries of China, Japan and South Korea with a combined total of 19%.¹⁷

It was estimated by the Idaho State Department of Agriculture that 25% of Idaho's barley and 20% of Idaho's potatoes were exported in 2023. Approximately 17% of Idaho's value-added milk products were exported to other countries including products such as dehydrated milk, protein powder and cheese.

Exports experience volatility based on a plethora of factors including the country's foreign currency exchange, trade relations and reporting challenges. The 2023 estimate of exports at \$2.6 billion was a small portion of Idaho's inflation adjusted GSP of \$95.9 billion.¹⁸

¹⁷ Idaho Department of Agriculture, *Idaho Agriculture: Growing for the World*, accessed June 2025, <https://agri.idaho.gov/wp-content/uploads/marketing/Publications&Resources/Idaho-Exports-2025.pdf>.

¹⁸ U.S. Bureau of Economic Analysis, *Gross Domestic Product by State, 2002–2024*, accessed May 2025, <https://www.bea.gov/data/gdp/gdp-state>.

Changing landscape of work

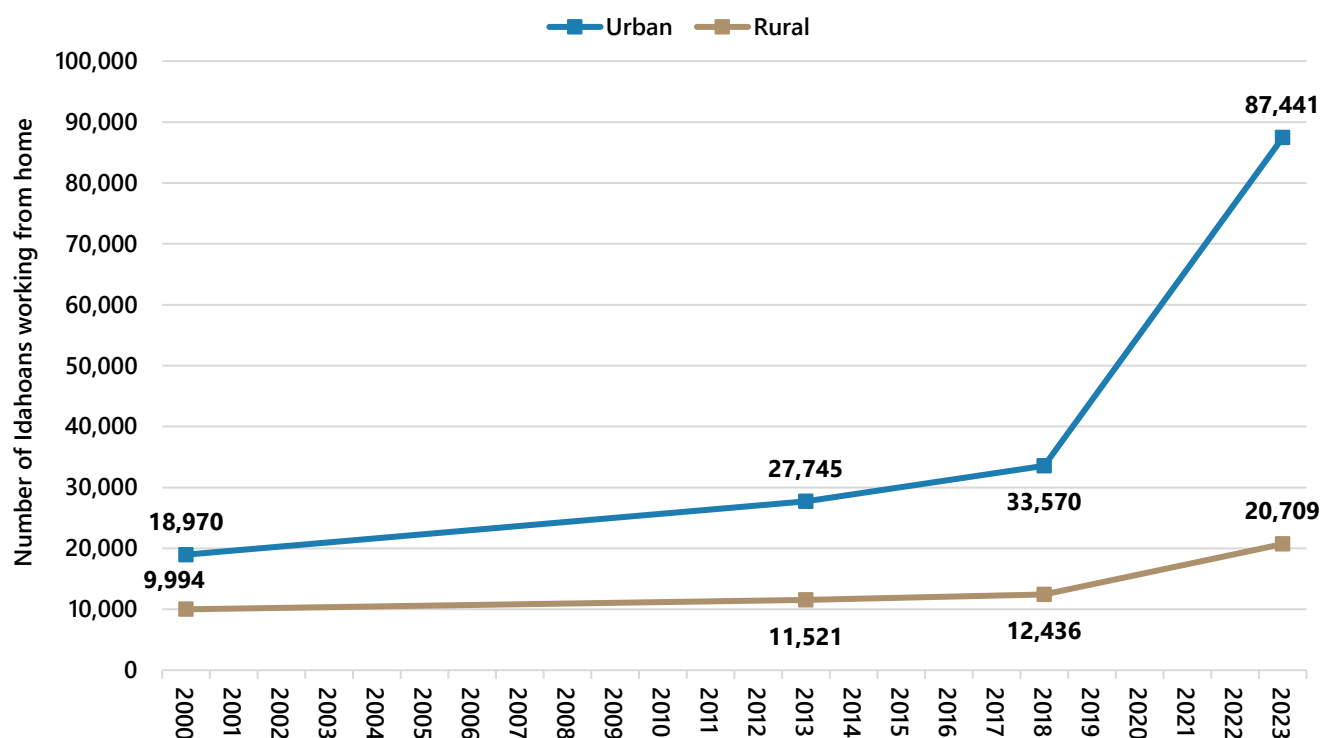
A majority of the data for this section is derived from a combination of the 2000 decennial census along with more recent 5-year data from the U.S. Census Bureau American Community Survey covering the periods of 2009-2013, 2014-2018, and 2019-2023.

The 2020 COVID-19 Pandemic changed the work from home landscape. Idaho's unemployment skyrocketed to over 11% as lockdowns caused businesses to temporarily close and furlough or lay off their workforce. Initially a short-term solution to the workforce issues during the pandemic, work from home and telework began to rise to prominence well after the pandemic.

Work from home jobs include self-employed people who run a business out of their homes while telework refers to an employee needing specialized telecommunication equipment to remote in. This enabled an increase in individuals moving to Idaho from out of state, as many were able to telework and maintain their old job or a similar role based out of state.

Before the pandemic, between 2000-2018, the number of at-home workers remained relatively stagnant for rural counties and only slightly increased year over year for urban counties. As shown in Figure 24, work from home employee numbers increased at a much faster pace after 2018 until 2023, due to the effects of the pandemic.

Figure 24. Number of rural and urban Idaho employees working from home, 2000-2023



Source: U.S. Census Bureau, American Community Survey Table B99087, U.S. Census Bureau 2000 Decennial Census Table P030

From 2013-2018, broadband access improvements allowed some modest growth in at-home work, with 8% growth in rural counties and 21% growth in urban counties. During the time of the pandemic and immediately after (2019-2023) growth in urban counties skyrocketed to 160% while rural increased to 67%.¹⁹

Even though a greater number of at-home workers were located in urban areas during the pandemic, rural counties still saw significant increases. Open country counties — historically the rural county subtype with the most at-home workers — increased by an additional 3,800 at-home workers (81%) from 2018 to 2023. Open

¹⁹ U.S. Census Bureau, American Community Survey, 5-year data files for 2009-2013, 2014-2018, and 2019-2023, accessed June 2025, <https://data.census.gov/>.

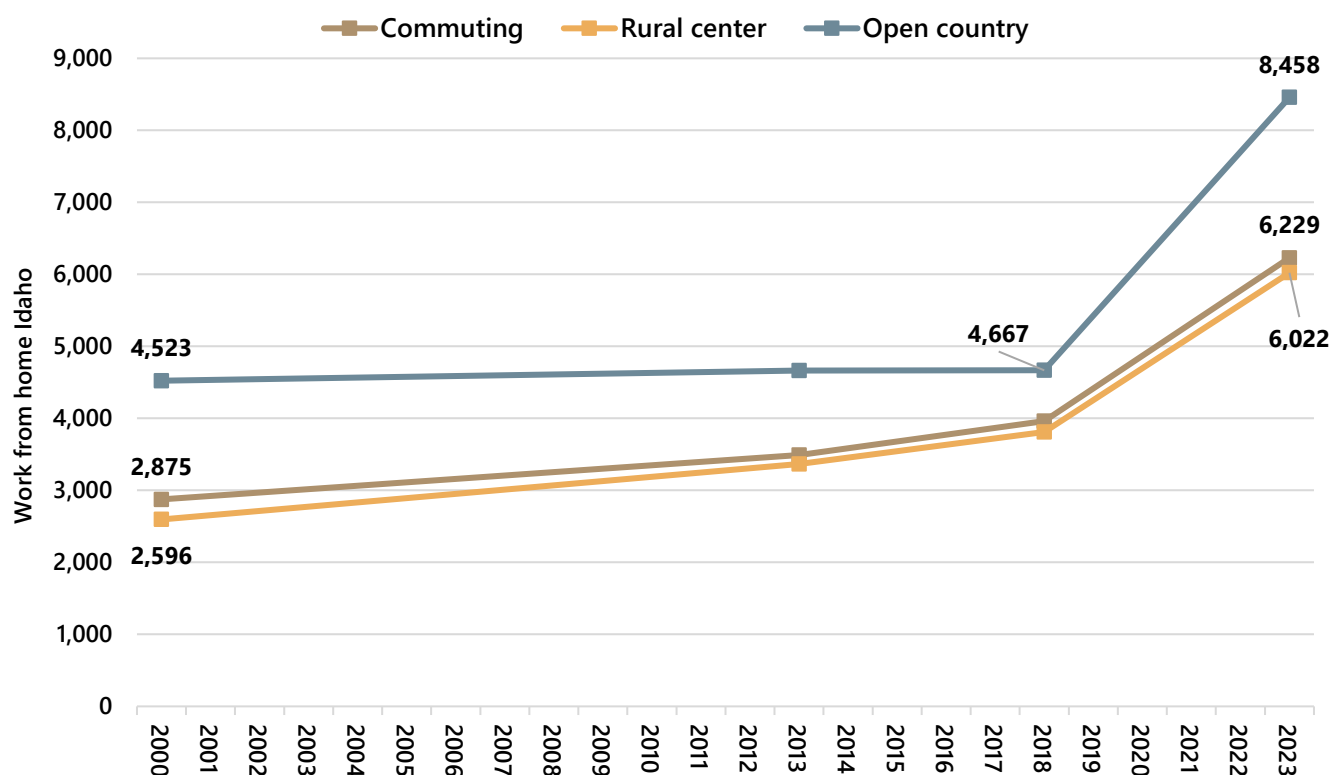
country counties also had the highest growth among rural county subtypes, nearly doubling.²⁰ Commuting counties and rural center counties each saw 2,000 more people working from home in the same period, growing by 57% and 58%, respectively. (Figures 25 and 26)

Figure 25. Growth rate of at-home workers in Idaho by five-year period and county types

Time frame	Urban	Rural			
		Total	Commuting	Rural center	Open country
2013-2018	21%	8%	13%	13%	0%
2018-2023	160%	67%	57%	58%	81%

Source: U.S. Census Bureau, American Community Survey, Table B99087

Figure 26. Number of at-home workers in Idaho by rural county subtype, 2000-2023



Source: U.S. Census Bureau, American Community Survey, Table B99087. 2000 U.S. Census Decennial Census Table P030

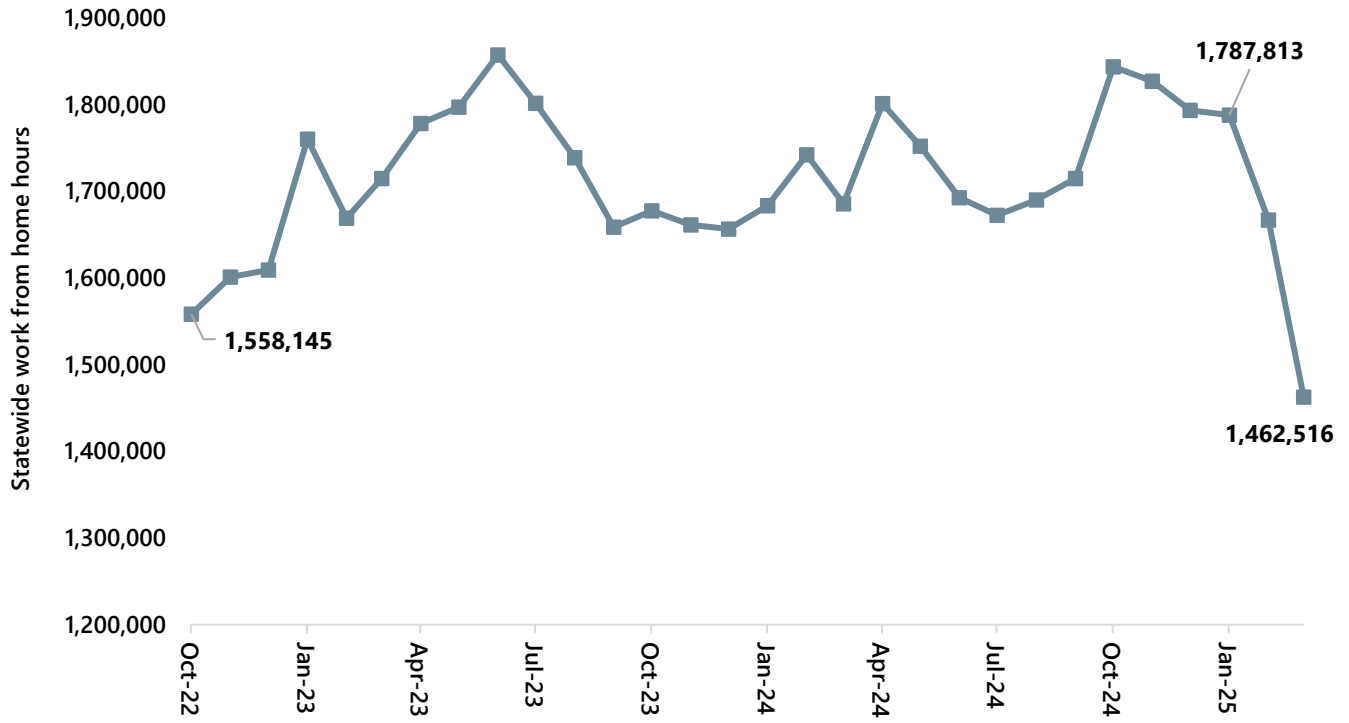
Data from 2023 suggests a slowdown in work from home, but not a decline. More up-to-date data exists from the current population survey through 2024 but not on the individual county level.

For Idaho statewide, a decline in work from home hours was not seen until February 2025 when the number of hours decreased by 100,000 and then again by an estimated 200,000 hours in March 2025.²¹ It's possible this was related to realignment in federal policy due to the executive order ending federal work from home. County level data assessing the impact of this recent trend in rural counties will further elucidate this change in the future.

²⁰ U.S. Census Bureau, American Community Survey, 5-year data files for 2009–2013, 2014–2018, and 2019–2023, accessed June 2025, <https://data.census.gov/>.

²¹ University of Minnesota, IPUMS CPS Telework Data, accessed June 2025, <https://www.ipums.org/>.

Figure 27. Total hours per month worked from home in Idaho, 2022-2025



Source: IPUMS CPS Telework Data

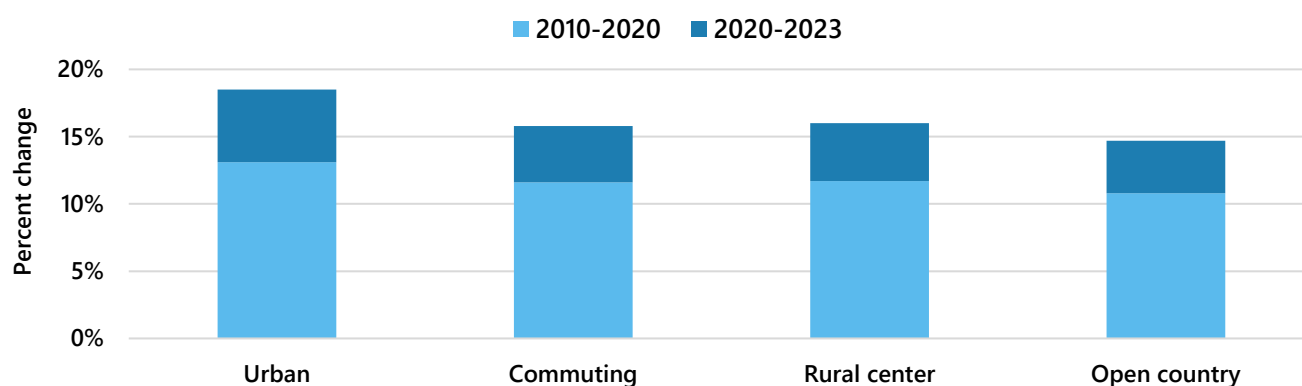
Housing

A majority of the data for this section comes from a combination of U.S. Census Bureau data covering the decennial census, annual housing unit estimates, and American Community Survey data covering the periods of 2009–2013, 2014–2018, and 2019–2023. Additional data was supported by fair market rental rates published annually by the U.S. Department of Housing and Urban Development.

Housing affordability is a challenge significantly impacting both renters and owners in recent years, particularly in states like Idaho that have experienced rapid population growth.

From 2010–2023, growth in the number of housing units in rural and urban Idaho reflected population trends, with urban counties growing faster than rural ones. The urban counties of Ada, Canyon, Kootenai and Madison experienced growth of 25% or more during this time.²² However, there were some rural counties with exceptional growth as well — the number of housing units in Jefferson and Teton both grew by over 25%.

Figure 28. Growth in number of housing units, 2010–2020 and 2020–2023



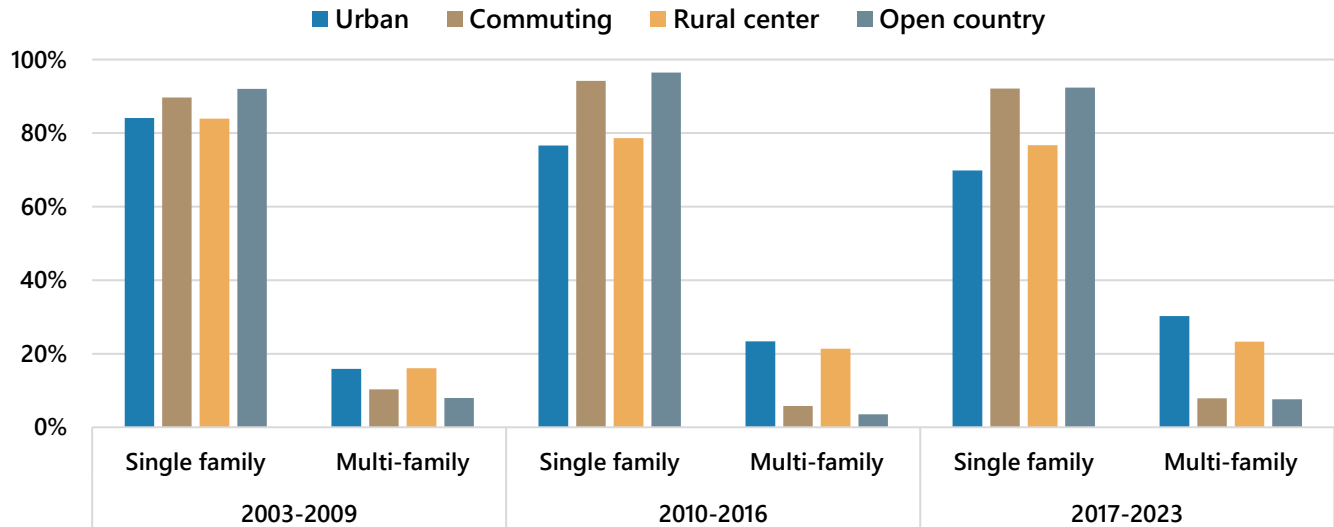
Source: U.S. Census Bureau, American Community Survey. Demographic and Housing Estimates, decennial data for 2010, 2020, and 5-year data file for 2019–2023.

During the recovery of the Great Recession (2010–2016) multi-family housing permits were in high demand and became a growing share of overall housing permits in Idaho’s urban and rural centers.

Multi-family permits continued to rise in number through 2017–2023 as continued migration into Idaho pressured home prices. Commuting and open country counties had the largest share of single-family housing permits (92%) and had 10% or less of overall housing permits for multi-family units during this time.

²² U.S. Census Bureau, American Community Survey, Demographic and Housing Estimates, decennial data for 2010, 2020, and 5-year data file for 2019–2023, accessed June 2025, <https://data.census.gov/>.

Figure 29. Single and multi-family housing unit permits by county classification, 2003-2009, 2010-2016, and 2017-2023



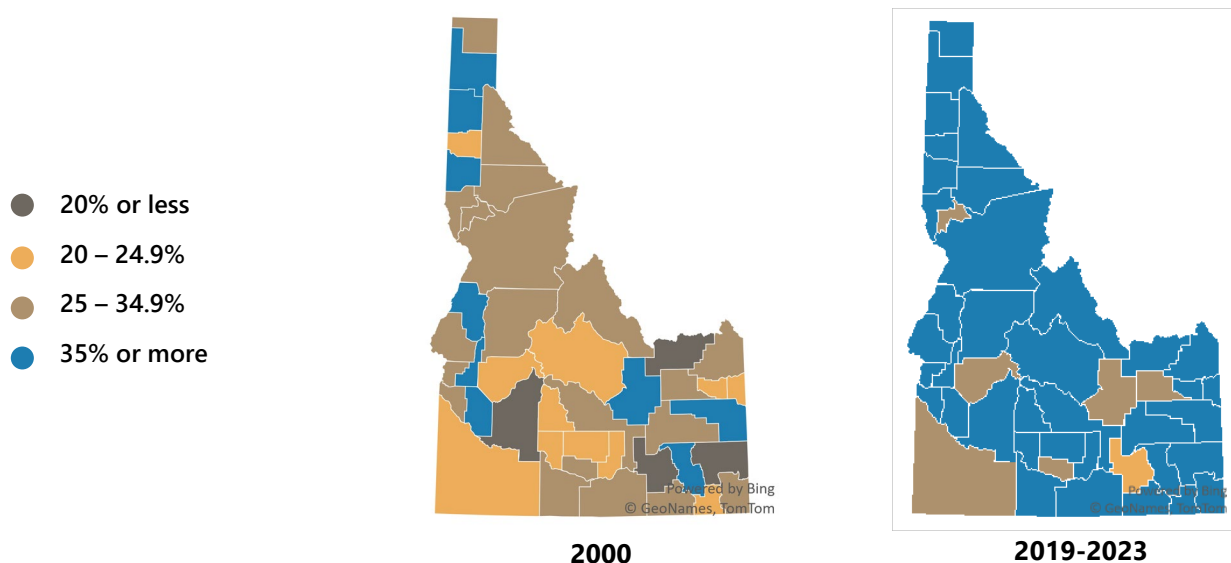
Source: U.S. Census Bureau. Building Permits Survey, 2003–2023.

One commonly used indicator of affordability is the proportion of households paying more than 30% of their income for housing.

- In 2003, nine counties (five urban, one commuting, one rural center and two open country) had at least 35% of all renters spend more than 30% of their income on gross rent.
- In 2023, 37 counties (nine urban, four commuting, five rural center and 19 open country) had at least 35% of all renters spend more than 30% of their income on gross rent.

No counties saw a decline in the share of renters who spent at least 30% of their income on gross rent between 2003-2023. As Idaho's population has grown, so has the demand for housing, not just in urban counties, but all across the state.

Figure 30. Share of renter-occupied households spending more than 30% of income on gross rent



Source: U.S. Census Bureau, American Community Survey. Occupancy Status, 2000 Decennial Census and 5-year data file for 2019–2023.

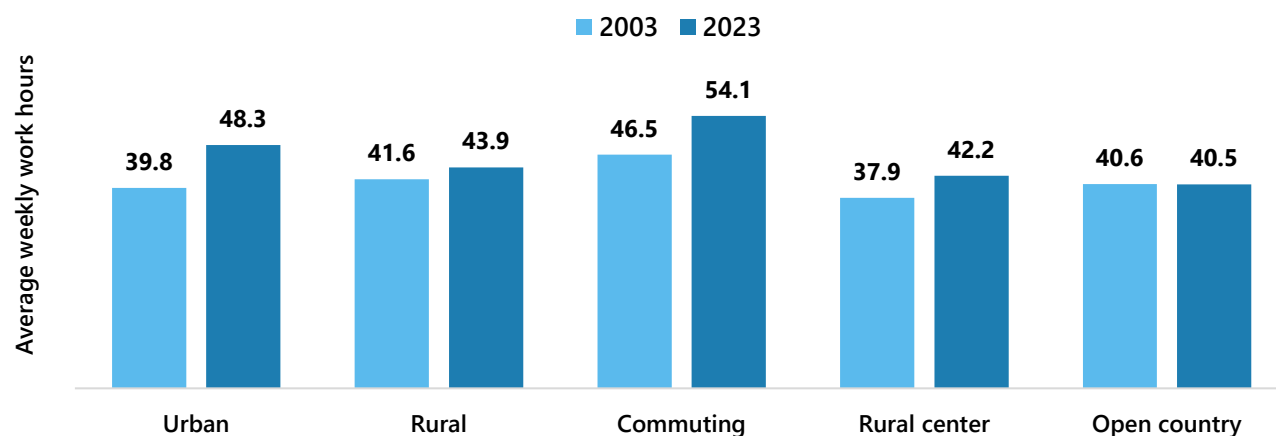
In 2003, a single, full-time worker could afford fair market rents on two-bedroom rentals in all 44 Idaho counties by working at least 40 hours per week. By 2023, rental rate increases in five counties — Boise,

Canyon, Gem, Oneida and Owyhee — surpassed wage growth as two-bedroom fair market rents required either above average wage rates or more than 40 weekly work hours.

When looking at three-bedroom rentals, housing looks even less accessible for a single-wage household. In 2023, an average employee would need to work more than 40 hours per week in 33 of Idaho's 44 counties (nine urban, 24 rural) to afford three-bedroom fair market rents; in 2003, it was 26 counties (five urban, 21 rural).

Of the rural county subtypes, all eight of the commuting counties had three-bedroom rental rates unaffordable to single full-time workers in 2023. Open country counties showed the highest potential, yet rental rates in over half of these counties continued to be out of reach for your average worker.

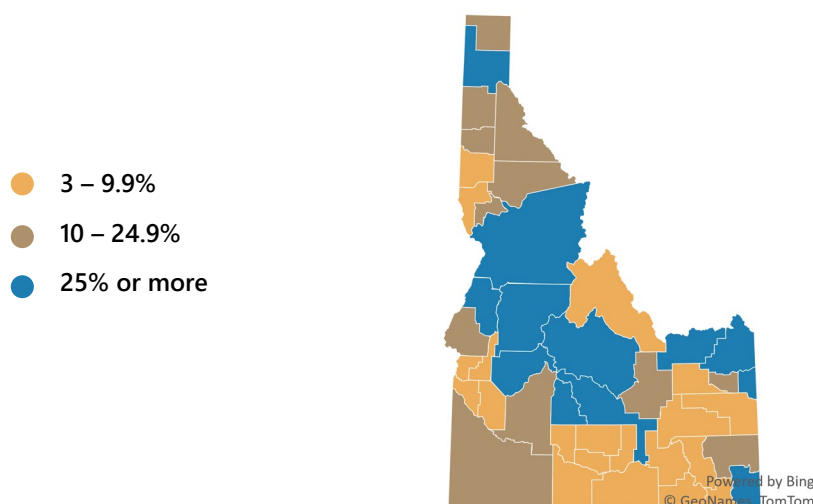
Figure 31. Weekly work hours, at average wage rates, required to afford three-bedroom fair market rents, 2003 and 2023



Source: U.S. Department of Housing and Urban Development, Fair Market Rents, 2003–2023.

In addition to lower housing demand, rural Idaho had a significant portion of vacant homes reserved for part-time seasonal and recreational uses in 2023. In five rural counties — Bear Lake, Camas, Clark, Fremont and Valley counties — 40% or more of housing units were vacant.²³ In Valley County, 70% of housing units were vacant.²⁴

Figure 32. Percentage of housing units that are vacant by county, 2019-2023



Source: U.S. Census Bureau, American Community Survey. Occupancy Status, 5-year data file for 2019–2023.

²³ U.S. Census Bureau, *American Community Survey, Occupancy Status, 2000 Decennial Census and 5-year data file for 2019–2023*, accessed June 2025, <https://data.census.gov/>.

²⁴ U.S. Department of Housing and Urban Development, *Fair Market Rents, 2003–2023*, accessed May 2025, <http://www.huduser.org/portal/datasets/fmr.html>.

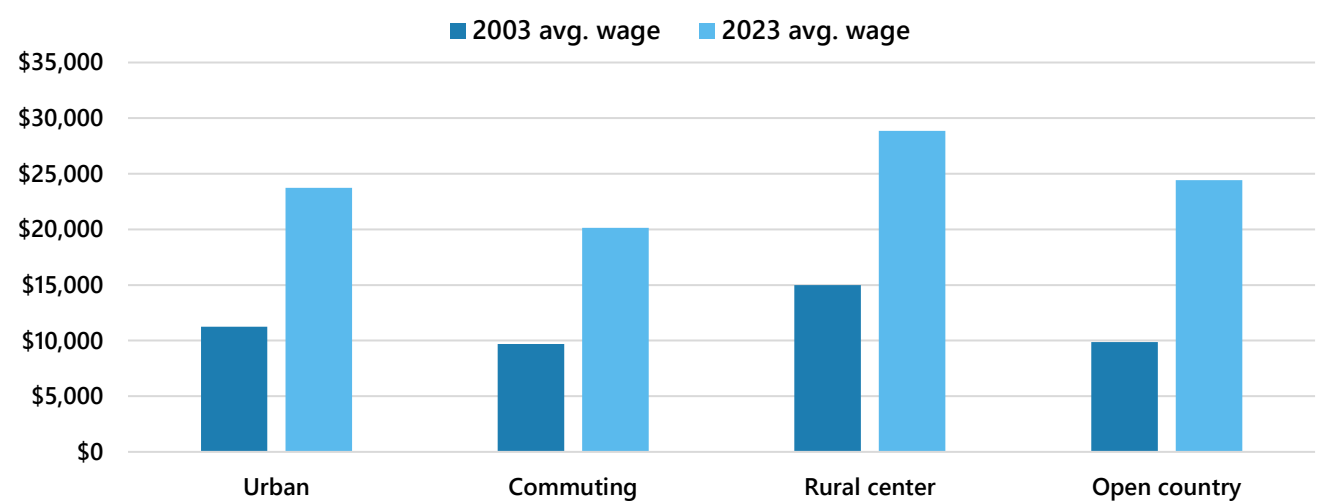
Recreation and tourism

A majority of the data for this section is sourced from quarterly employment data from the U.S. Bureau of Labor Statistics and the Idaho Department of Labor from 2003-2023 along with more recent 2024 tourism and lodging data from Idaho Commerce and the Idaho Tax Commission.

Rural Idaho offers vast stretches of publicly owned land, plentiful outdoor recreation opportunities and relatively small populations. These elements contribute to the region's strong reliance on recreation and tourism as a key economic driver. Idaho's leisure and hospitality industries have enhanced the quality of life across rural Idaho communities, making them attractive destinations for a talented and skilled workforce in various industry sectors.

In 2003, the average annual wages of leisure and hospitality workers were higher in Idaho's rural counties than urban. This pattern continued in 2023 — rural leisure and hospitality workers' average annual wages were \$24,476 while urban's were \$23,726 (Figure 33). Rural average annual wages grew at a slightly higher rate than urban from 2003-2023, 4% per year for all sectors, while urban average annual wages grew at a rate of 3.8% per year.

Figure 33. Leisure and hospitality* annual wages per employee by county type, 2003-2023



Source: Idaho Department of Labor, Quarterly Census of Employment and Wages, 2003-2023

*Note: Together, art, entertainment, recreation, accommodation and food service industries data falls under the leisure and hospitality sector.

State urban leisure and hospitality employment experienced more rapid growth than rural from 2003-2023 at 77%, or about 3% annually (Figure 34). Combined rural employment growth trended slower at 44%, or about 2% annually. However, over 6,300 new leisure and hospitality jobs were created in rural Idaho from 2003-2023.

In 2023, one out of every 10 total private jobs in rural Idaho were directly supported by the leisure and hospitality sector,²⁵ more than they were in 2003.

Figure 34. Leisure and hospitality employment by county type in rural Idaho, 2003-2023

County type	2003 employment	2023 employment	Annual growth rate, 2003-2023
Urban	41,758	73,713	2.9%
Communting	3,595	5,333	2.0%
Rural center	5,786	7,664	1.4%
Open country	4,864	7,559	2.2%

Source: Idaho Department of Labor, Quarterly Census of Employment and Wages, 2003-2023

²⁵ Idaho Department of Labor, *Quarterly Census of Employment and Wages by Industry*, 2023, accessed June 2025, <https://lmi.idaho.gov/data-tools/industry-wages/>.

Tourism growth is largely measured in year-round rural lodging dollars spent over time. In 2024, tourism was the state's third-largest industry, generating \$5.83 billion in direct travel spending. This marked a 37% increase from 2019 and a 2% increase since 2022.²⁶

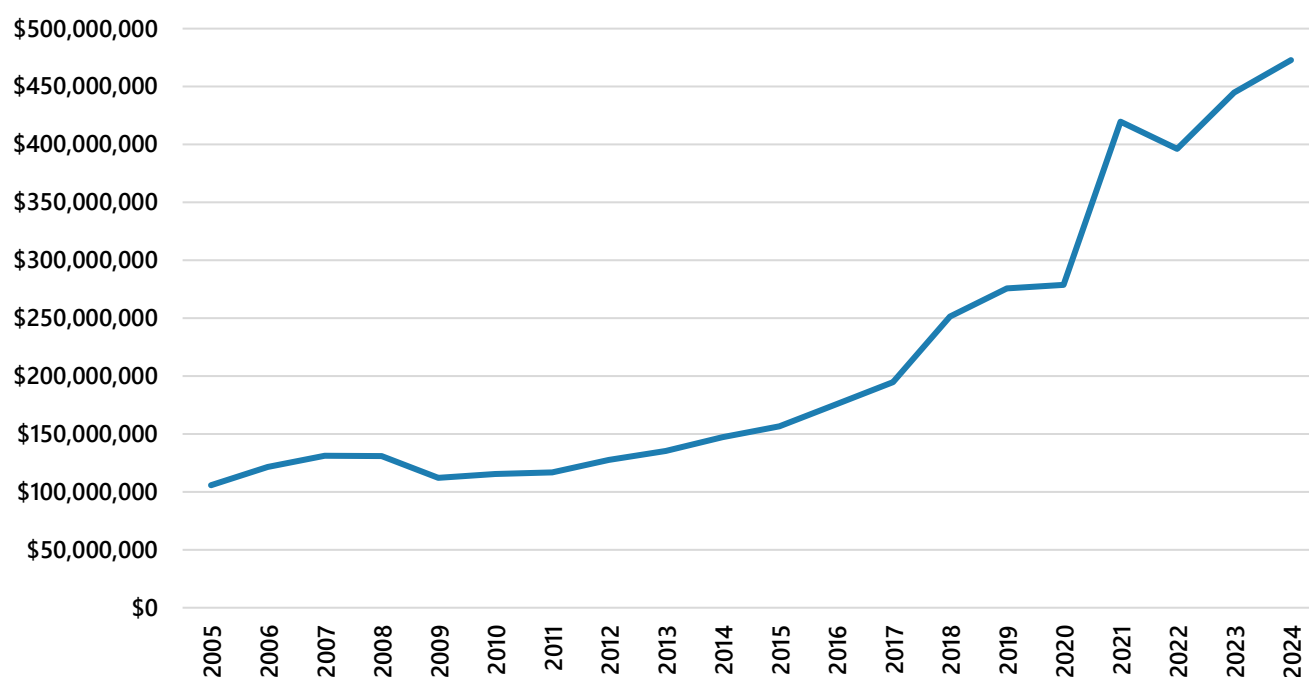
Rural recreation remains a major draw, with visitors spending \$164 million at campgrounds and \$916 million annually on short-term vacation rentals.²⁷

Idaho's tourism industry in 2005 was much smaller than it was in 2024, with total travel spending estimated at \$2.7 billion. The industry has more than doubled in size since then, reflecting increased visitor interest in outdoor recreation, lodging and entertainment.²⁸

Tourist travel in rural Idaho, where most state recreation is located, has been on the rise for the past 20 years. Tourist numbers spiked 51% during the short pandemic era (2020-2021) from tourists visiting the state. Since 2005, the gain in tourism popularity has propelled construction of new hotels and resorts to accommodate the rooms needed to meet demand. In 2024, lodging sales revenue peaked at nearly \$473 million in rural Idaho, the highest in history.²⁹

The higher-than-normal lodging sales revenue seen between 2020-2024 has been a boon to Idaho's rural tourism economy. These numbers have not reverted to pre-pandemic levels, a testament to new tourists' desire to return to the state after discovering all it has to offer.

Figure 35. Lodging revenue in rural Idaho, in nominal dollars, 2005-2024



Source: Idaho Department of Commerce, *Idaho lodging data, 2005-2024*

²⁶ Visit Idaho, *Idaho Tourism Economic Impact Report*, prepared by Dean Runyan Associates, 2023, accessed June 2025, <https://industry.visitidaho.org/>.

²⁷ Ibid.

²⁸ Ibid.

²⁹ Idaho Department of Commerce, *Idaho Lodging Data, 2005-2024*, accessed June 2025, <https://commerce.idaho.gov/tourism-resources/research/>.

Amenities and social economy

A majority of the data for this section is derived from many sources and incorporates the most recently available data.

The value of Idaho's rural counties would be significantly understated if only viewed in a quantitative sense. While rural counties comprise 88% of the state's land area, they are only responsible for 28% of its population and 25% of annual gross domestic product (GDP).

However, when other qualitative aspects of the rural lifestyle are considered — such as the close proximity to recreational opportunities; the fostering of social networks; and the impact of tourism, history and heritage — rural Idaho emerges as a vital organ of the state's economy and well-being. The true value of rural Idaho rests more with its ability to create unique experiences and less with financial statistics.

Figure 36. Distribution of Idaho's geography, population and income

Data type	Statewide total	Statewide share within rural counties	Data source
Land area	82,645 square miles	88%	U.S. Census TIGERweb spatial files
Water area	923 square miles	80%	U.S. Census TIGERweb spatial files
Acres in farmland	11.5 million acres	77%	U.S. Census of Agriculture
Resident population	2 million residents	28%	U.S. Census Annual Population Estimates
Share of GDP, 2023	\$120 billion	25%	U.S. Bureau of Economic Analysis

Amenities found throughout rural Idaho

While Idaho is an agricultural powerhouse, it is also a mecca for outdoor enthusiasts. Idaho offers unique geography with over 3,100 wild river miles of navigable whitewater, rugged peaks, diverse wildlife, designated dark sky areas and high volumes of publicly accessible lands.

Over 60% of Idaho's land area is currently managed by federal agencies and state endowments — most of which is available for public use on a seasonal or year-round basis.

Rural Idaho is currently home to an international dark sky reserve (Central Idaho Dark Sky Reserve) and three dark sky parks (Craters of the Moon National Monument and Preserve, Bruneau Dunes State Park and City of Rocks National Reserve).

In 2017, the Central Idaho Dark Sky Reserve was named the first international dark sky reserve in the U.S and in 2025 was one of only 24 such sites globally³⁰. The greatest opportunities for experiencing Idaho's other natural amenities, such as public lands, are found within rural counties (Figure 37).

Figure 37. Idaho's recreational amenities within its rural counties

Data type	Statewide total	Statewide share within rural counties	Data source
National Forest Service acreage	11.4 million acres	97%	U.S. Forest Service
Idaho endowment land	2.4 million acres	90%	Idaho Department of Lands
State Park campsites and cabins	1,900+ sites	81%	Idaho State Parks and Recreation
Idaho Birding Trail	355 sites	66%	Idaho Fish and Game
Fish hatcheries	36 hatcheries	92%	Idaho Fish and Game
Ski lifts	91 lifts	80%	Skiresort.info
Dark sky reserve/parks	4 sites	100%	Visit Idaho

³⁰ Central Idaho Dark Sky Reserve, accessed June 2025, <https://idahodarksky.org>.

History, heritage and sense of place

An excerpt from a 2014 University of Washington Press blog notes: “Idaho’s place is properly understood to be a product of its spaces, cultures, and times... The here and now of the state, after all, is the product of its past.”³¹

In 1900 — only 10 years after Idaho achieved statehood — the urban counties of Nez Perce and Latah were the first and second most populated counties in the state. The rural counties of Fremont and Shoshone followed at third and fourth, respectively. Ada — the state’s most populous county and home to more than one of every four Idaho residents in 2023 — was ranked sixth in 1900.³²

Over the past 120+ years, Idaho’s nine urban counties have become hubs of commerce. However, they are not always the most populated. In 2023, the rural counties of Bonner and Bingham had higher resident populations than the once top-ranking urban counties of Nez Perce and Latah. Despite the large populations in these rural counties, they are not considered urban because they lack a large principal city.

While the concentration of Idaho’s population has shifted significantly over the years, the associated heritage and history embedded within its regions results in a strong sense of place and identity for its residents. Rural counties remain the site of more than half of each of the state’s nationally recognized historic places, national historic landmarks and century farms (Figure 38).

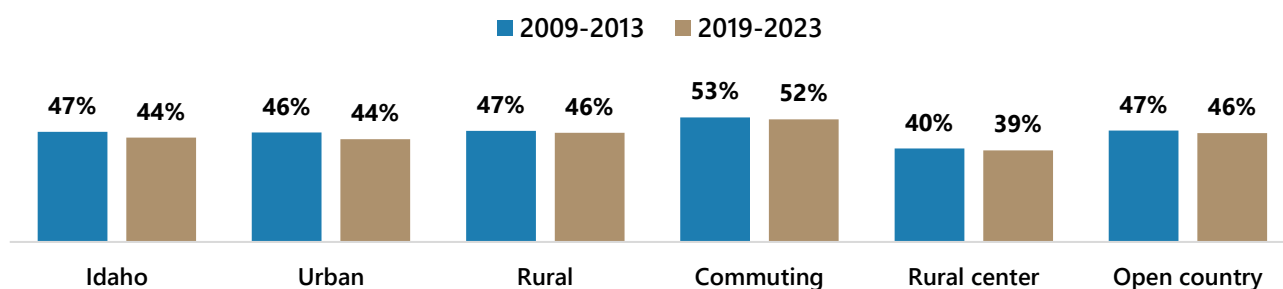
Figure 38. Idaho’s history and heritage sites within its rural counties

Data type	Statewide total	Statewide share within rural counties	Data source
National Register of Historic Places	1,084 historic places	58%	National Park Service
National Historic Landmarks	11 historic landmarks	73%	National Park Service
State highway historical markers	252 historical markers	74%	State of Idaho GIS Office
Century Farms	450+ farms	65%	Idaho State Historical Society

In 2023, the U.S. Census estimated 44% of Idaho’s residents were born in the state — down from 47% in 2013.³³ The remaining resident population was comprised of people who chose Idaho to be their permanent home.

In the three rural counties of Bingham, Jefferson and Power, over 60% of residents were born in Idaho. This contrasts with less than 30% of residents born in the state in the rural counties of Bonner, Oneida, Teton and Elmore. The highest share of residents born in Idaho was in rural commuting counties while rural center counties had the lowest concentration.

Figure 39. The share of current residents that were born in Idaho, by county type



Source: U.S. Census American Community Survey, 5-year data file for 2013 and 2023, Table B05002

³¹ Adam Sowards, “Idaho’s Place: Making a Case for a New History of the Gem State,” *University of Washington Press Blog*, July 9, 2014, <https://uwpressblog.com/2014/07/09/idahos-place-making-a-case-for-a-new-history-of-the-gem-state/>.

³² U.S. Census Bureau, *1900 Decennial Census, Statistics of Population*, accessed June 2025, <https://www2.census.gov/library/publications/decennial/1900/volume-1/volume-1-p5.pdf>.

³³ U.S. Census Bureau, *American Community Survey, 2009–2013 and 2019–2023*, accessed June 2025, <https://data.census.gov/>.

The social economy of rural Idaho

An economy is not simply defined by the production and consumption of its goods and services. Other emotional aspects, such as levels of well-being, quality of life and community connections are important considerations for measuring the social economy of rural Idaho.

Since 1984, the Idaho Department of Health and Welfare has conducted the Behavioral Risk Factor Surveillance System (BRFSS) to identify the prevalence of disease, injury, health conditions and health-related behaviors associated with death and disability.

The results of the BRFSS are presented within three demographic residence categories:

1. Frontier counties with less than six residents per square mile.
2. Rural counties that are neither frontier nor urban.
3. Urban counties with at least one principal city of 20,000+ residents.

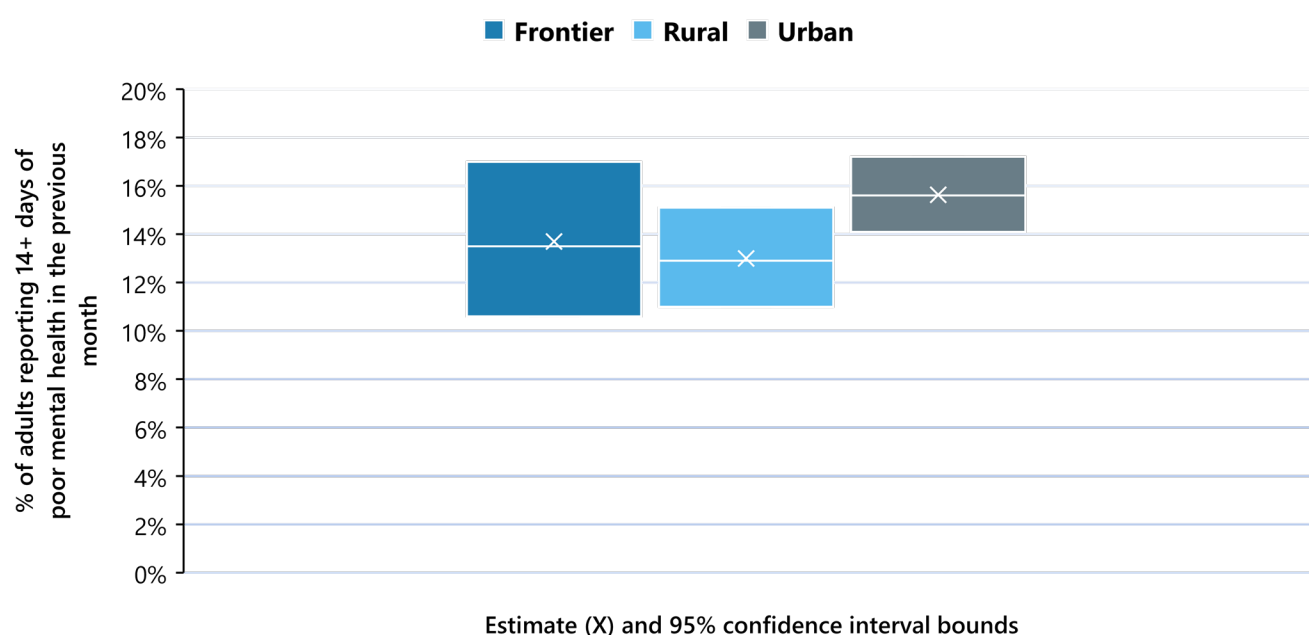
Together, the frontier and rural categories defined in this data grouping compose the 35 rural counties that have been previously defined in this report.

Between 2014-2023, the share of Idaho adults that reported fair or poor general health in the BRFSS increased from 13% in 2014 to 16% in 2023. While 16% of urban adults were estimated to have fair or poor general health in 2023, that share rose to just under 18% for rural counties and nearly 20% for frontier counties.

A higher share of frontier and rural residents were more likely to report at least 14 days of poor physical health in the previous month than urban residents. Residents in rural and frontier counties were also less likely to have health insurance or a primary health care provider and were more likely to delay medical care for cost reasons.

The pattern between rural and urban residents shifts when discussing mental health instead of physical. Both frontier and rural counties had a lower response rate in 2023 for adults who struggled with at least 14 poor mental health days over the previous month (Figure 40) as well as lower overall depression diagnoses.³⁴

Figure 40. Adult residents reporting 14+ days of poor mental health in the previous month



Source: Idaho Department of Health and Welfare, Idaho Behavioral Risk Factor Surveillance System 2023

³⁴ Idaho Department of Health and Welfare, *Idaho Behavioral Risk Factor Surveillance System, 2023*, accessed June 2025, <https://www.gethealthy.dhw.idaho.gov/idaho-brfss>.

Similarly, the 2023 Needs Assessment by the Idaho Commission on Aging showed 83% of rural respondents rated their quality of life as either good or very good compared with 74% for urban dwellers³⁵. Approximately 97% of survey respondents were over the age of 60.

Compared with urban residents, rural individuals were less likely to report not being able to participate as often as they would prefer in activities such as community events or social/support groups, park or nature visits, religion or worship services, senior center meals or activities and volunteer work.

For nearly all categories of activities where the respondent was unable to complete it themselves and did not have the help they required, the Needs Assessment showed rural residents consistently appeared to have a stronger social network with lower response rates for necessary tasks going undone. This included recurring activities such as home and yard maintenance, shopping for necessities, transportation and meeting social needs. While urban residents were more frequently worried about loneliness, falling and living in pain, rural respondents were more likely to be concerned with paying their bills.

Rural Idaho plays a vital role in the accessibility of Idaho's natural resources, recreational amenities and heritage. While urban areas may be better defined by financial prosperity, rural areas can be defined by their social economy, providing residents with a sense of place, identity and community. Going forward, the challenge for rural Idaho lies in preserving natural resources and affordability while simultaneously promoting economic development and population growth.

³⁵ Idaho Commission on Aging, *2023 Needs Assessment*, accessed June 2025, <https://libraries.idaho.gov/wp-content/uploads/2023-ICOA-Needs-Assessment-Booklet.pdf>.

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