

A man with a beard and safety glasses, wearing a blue shirt, is working on a large, complex industrial engine. He is focused on a specific part of the engine, with his hands positioned to adjust or inspect it. The engine is metallic and has various pipes, wires, and components. The background is slightly blurred, showing an industrial setting with a bright light source.

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Idaho 2019

Labor Market and Economic Report

Summer 2020

Idaho Department of Labor

Idaho Labor Market and Economic Report 2019



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Communications and Research
Georgia Smith, Administrator

Report prepared by
Esther Eke Ph.D., Labor Economist

Acknowledgements
Janell Hyer and Craig Shaul, Research Analyst Supervisors
Sam Wolkenhauer, Kathryn Tacke and Jan Roeser, Labor Economists

For more information, contact Esther Eke at (208) 236-6710 ext. 4331 or
esther.eke@labor.idaho.gov

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Contents

Labor Market Quick Facts	4
Executive Summary	7
Section 1: Jobs and Unemployment	9
Section 2: Wages and Income	20
Section 3: Employment Projections	26
Section 4: Regional Economic Highlights	31
Section 5: Economic Comparisons with Other States	47
Appendices	54
Appendix 1: Idaho Labor Regions	54
Appendix 2: Estimating Labor Underutilization in Idaho Counties.....	55

Labor Market Quick Facts

Summary Table

Source: Idaho Department of Labor; Communications & Research Division

	2019	2018	2010
Population	1,787,065	1,750,536	1,567,582
Average Labor Force	881,891	857,207	761,056
Average Number Unemployed	25,646	24,921	68,230
Average Unemployment Rate	2.9	2.9	9.0
Average Total Employment	856,245	832,286	692,826
Average Covered Employment	752,368	730,834	605,560
Average Covered Wage	\$44,263	\$42,887	\$34,905
2021 Q1 Industry Short-term Projections	800,902	NA	NA
2029 Population Projection	1,990,232	NA	NA

Quick Fact 1. Labor force and unemployment, not seasonally adjusted Idaho, annual data of selected years for the period from 1999 to 2019

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Year	Labor Force	Unemployed	Unemployment Rate	Employed
1999	651,207	31,970	4.9	619,237
2000	659,824	30,980	4.7	628,844
2001	677,665	34,385	5.1	643,280
2002	684,591	38,042	5.6	646,549
2003	690,005	38,670	5.6	651,335
2004	703,062	34,621	4.9	668,441
2005	731,670	29,379	4.0	702,291
2006	747,377	26,031	3.5	721,346
2007	754,438	23,203	3.1	731,235
2008	755,153	38,500	5.1	716,653
2009	757,131	66,409	8.8	690,722
2010	761,056	68,230	9.0	692,826
2011	765,178	63,712	8.3	701,466
2012	769,256	55,552	7.2	713,704
2013	770,833	47,197	6.1	723,636
2014	779,986	37,684	4.8	742,302
2015	794,687	32,617	4.1	762,070
2016	814,668	30,777	3.8	783,891
2017	833,906	26,759	3.2	807,147
2018	857,207	24,921	2.9	832,286
2019	881,891	25,646	2.9	856,245

**Quick fact 2. Labor force and unemployment, not seasonally adjusted
Idaho metropolitan areas, 2019**

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Metropolitan area	Labor Force	Unemployed	Unemployment rate	Employed
Idaho State	881,891	25,646	2.9	856,245
Coeur D'Alene	80,102	2,845	3.6	77,257
Lewiston WA-ID	31,457	1,029	3.3	30,428
Boise City	375,882	10,319	2.7	365,563
Twin Falls	53,592	1,474	2.8	52,118
Pocatello	42,752	1,206	2.8	41,546
Idaho Falls	72,472	1,726	2.4	70,746
Logan UT-ID	71,217	1,562	2.2	69,655

**Quick fact 3. Wages and employment by industry
Idaho, 2019 annual averages**

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

NAICS	Industry Sector	Average Number of Firms	Average Employment	Average Annual Wage
	All Industries	63,258	752,296	\$44,263
11	Agriculture, forestry, fishing and hunting	2,218	24,278	\$38,050
21	Mining	174	2,296	\$73,068
22	Utilities	330	3,609	\$79,257
23	Construction	8,181	51,589	\$46,287
31-33	Manufacturing	2,663	68,453	\$62,451
42	Wholesale trade	3,613	30,635	\$63,822
44-45	Retail trade	6,032	87,554	\$31,350
48-49	Transportation and warehousing	2,231	24,640	\$45,041
51	Information	1,284	9,682	\$53,175
52	Finance and insurance	3,404	25,065	\$66,403
53	Real estate, rental and leasing	2,437	8,763	\$39,247
54	Professional, scientific and technical services	7,324	40,346	\$68,183
55	Management of companies and enterprises	375	7,107	\$98,829
56	Admin. and support and waste management services	3,574	47,499	\$37,332
61	Educational services (private + government)	1,647	62,221	\$37,125
62	Health care and social assistance	7,349	107,874	\$44,942
71	Arts, entertainment and recreation	1,032	13,633	\$21,834
72	Accommodation and food services	4,013	71,198	\$17,477
81	Other services (except public administration)	3,929	20,371	\$32,108
92	Public administration	1,151	45,557	\$51,347

**Quick fact 4. Projected industry average annual growth rates
Idaho, 2019 – 2021, 2016 – 2026**

Source: Idaho Department of Labor; Communications and Research

NAICS	Industry Sector	2019 to 2021	2016 to 2026
	All industries	1.5%	1.3%
11	Agriculture, forestry, fishing and hunting	0.3%	1.1%
21	Mining	0.0%	0.0%
22	Utilities	0.0%	-0.7%
23	Construction	2.2%	1.7%
31-33	Manufacturing	0.8%	0.9%
42	Wholesale trade	0.9%	1.1%
44-45	Retail trade	1.3%	1.2%
48-49	Transportation and warehousing	1.3%	3.6%
51	Information	0.4%	1.3%
52-53	Financial activities	1.4%	1.5%
54-56	Professional and Business Services	2.0%	1.0%
61	Educational services (private + government)	1.5%	1.1%
62	Health care and social assistance	2.5%	2.1%
71-72	Leisure and hospitality	2.3%	1.4%
81	Other services (except Government)	1.7%	1.6%
92	Government (except Education and Hospitals)	0.8%	0.2%

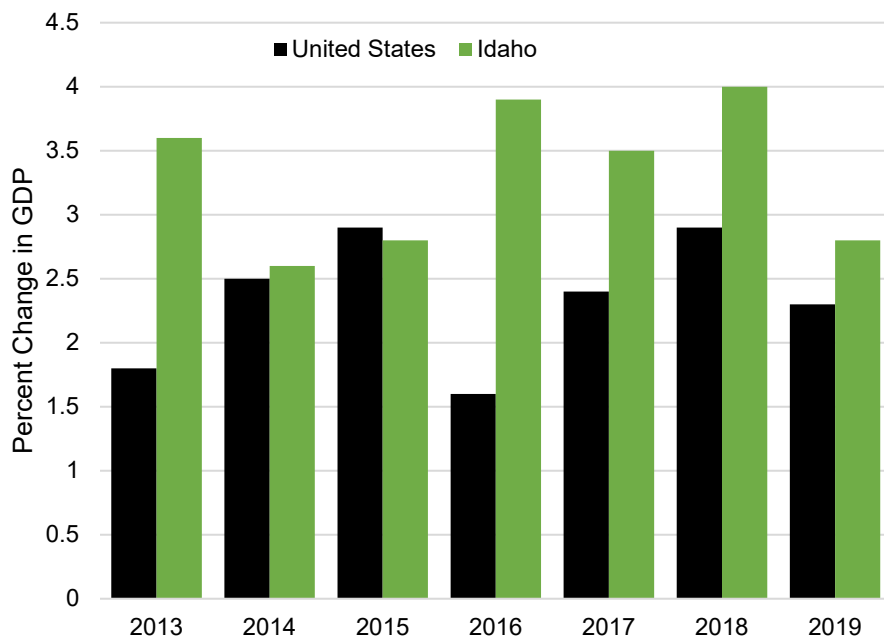
Executive Summary

Idaho's economy continued to expand in 2019 albeit at a slower pace than the previous year. The state's real Gross Domestic Product (GDP) growth has been outpacing that of the nation for most of the expansion. In 2019, real GDP expanded by 2.8 percent ranking 10th in growth among all U.S. states and territories. Agriculture was the largest contributor to the increase in real GDP. Agriculture has always been central to the Idaho economy, with the sector's total market receipts ranking first nationally in potatoes, barley and trout and third in milk production and cheese. The state's growing technology sector is largely manifested within professional and business services, which was the second largest contributor to GDP growth in 2019.

Based on current dollar value, Idaho's GDP in 2019 was \$80.9 billion. The largest industry in Idaho was financial activities. This industry accounted for 18.3 percent of Idaho's GDP and had real growth of 2.6 percent. The second largest private industry was professional and business services, which accounted for 10.6 percent of the state's GDP and had a real growth rate of 5.6 percent.

**Figure O-1. Gross domestic product, (chained 2012 dollars), annual changes
United States and Idaho, 2013 through 2019**

Source: U.S. Bureau of Economic Analysis



GDP growth is largely a reflection of Idaho's strong labor market which continued its growth trajectory in 2019.

Jobs and Unemployment

Total nonfarm employment increased by 2.8 percent over the year, adding 23,700 jobs to the economy. In the year prior, the nonfarm employment grew by 3.3 percent. In the nine years since the last recession, total nonfarm employment increased by 25.9 percent, or 156,000 jobs, from 2010 to 2019. All the major industry groups, except for the information sector, experienced employment growth during the economic expansion. Construction, one of the sectors most affected by the recession, expanded by the largest margin and manufacturing employment growth has remained strong in the state despite challenges faced both nationwide and globally.

The state annual average unemployment rate was 2.9 percent in 2019 compared with the U.S. rate of 3.7 percent. Labor force growth in the state was 2.9 percent compared with the national average of 1.1 percent. The number of new unemployment claims was 10,338 in December 2019, down from a peak of 28,314 in December 2008. The construction industry accounted for the greatest portion of workers who received unemployment benefits in 2019 – a nuance of the seasonal nature of that industry. Job demand, as measured by the number of online job listings, rose to exceed unemployed labor supply by the end of 2019.

As the state heads into the year 2020, early signs of an imminent recession are reflected in the March 2020 jobs numbers that show a slight dip in nonfarm employment and an uptick in unemployment claims. This is tied to the ongoing COVID-19 pandemic and the resulting national and statewide shutdown. The impact of the pandemic is also reflected in sharp declines in online job posting activity for the state.

Income and wages

In 2019, Idaho's average annual wage grew by 3.2 percent – 1.4 percent when adjusted for inflation. The average annual wage in 2019 in Idaho was \$44,263. Most of the wage growth was dominated by the professional and business services industry where wages climbed by 6.5 percent. Six other sectors realized average annual wage increases above the statewide rate of 3.2 percent including wholesale trade, financial activities, information, construction, transportation and warehousing, and health care. The household income and the per capita personal income both have shown increased wages since the last recession. All three indicators showed strong wage growth in 2019 – a trend reflective of job growth in the state.

Employment projections

Total employment in Idaho is expected to grow at an average annual rate of 1.5 percent from 2019 to 2021, adding about 24,200 new jobs in that time frame. The health care sector is projected to dominate job growth statewide with the fastest projected growth rate and the highest numerical job growth of all industry sectors statewide. Health care-related occupations are consequently projected to be among the fastest growing in the state. Projections do not account for impacts of COVID-19 pandemic and response efforts.

Regional economic development

All regions showed strong growth in residential construction and health care. Unlike northern Idaho where residential construction is being driven by a high in-migration of retirees, eastern Idaho has seen a boom in construction tied to its expanding student community. North central Idaho had a marked decline in jobs over the year when compared with the rest of the state while southwestern Idaho saw the greatest job and wage growth in the state. The common concern going forward for all regions is a tight labor market and labor supply shortage.

1.0 Jobs and Unemployment

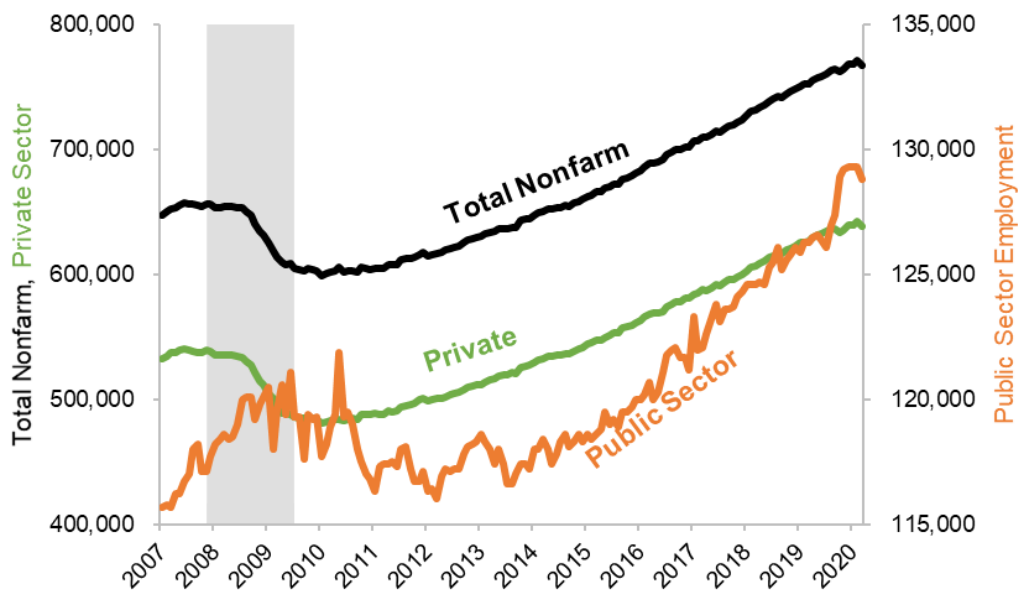
Key labor market indicators point to a strong but tight labor market and a 2019 economy in a continued state of expansion. In 2019, the annual average total nonfarm employment in Idaho rose by 2.8 percent to 759,200 jobs – adding 23,700 jobs from the previous year average. Job growth was largest in the construction industry, which added 4,200 jobs. Leisure and hospitality ranked second with a job growth of 3,900, and health care services also showed significant gains with 3,600 jobs added on average over the year. The rise in the volume of available and new job postings over the year reflects the growing job numbers and a good indicator of future employment growth. As total payroll grew, unemployment numbers maintained historic lows. The 2019 annual average unemployment rate in Idaho was 2.9 percent – the same as the previous year. Other measures of unemployment indicate that steady job growth and a strong economy are attracting more people from the sidelines to participate in the labor market. While the 2019 labor market remained strong, early signs of the impact of the ongoing COVID-19 pandemic are evident in more recent 2020 numbers that could potentially turn the tide of growth in the coming years.

Total nonfarm employment continued growth trajectory

Figure 1-1 shows how nonfarm employment in the state has changed in both the private and public sectors over the past decade. In the years since the recession of 2007–2009, both sectors have continued to add jobs to the state economy. By February 2020, private nonfarm payroll had risen to 642,500 jobs – a new record for the state – and public sector employment saw an upswing in state and local government jobs toward the end of 2019. While private sector jobs have steadily grown, public sector nonfarm jobs have been much more volatile. During the recession, the number of public sector jobs trended upward and descended rapidly as the economy gradually began to recover. For much of 2014 to the present, the public sector jobs have resumed an upward trajectory. Public sector job growth over the past year – March 2019 through March 2020 – was 2 percent compared with 1.9 percent for the private sector.

Figure 1-1. Total private and public sector nonfarm jobs, seasonally adjusted
Idaho, Jan 2007 through Mar 2020

Source: U.S. Bureau of Labor Statistics, Current Employment Statistics



Shaded area represents a national recession period.

As shown in *Figure 1-1*, total nonfarm employment continued its rise into the early months of 2020. Early signs of the impact of the ongoing COVID-19 pandemic are evident in the March 2020 job numbers, which showed a slight dip in employment. Despite this, job numbers remained high.

Annual total nonfarm employment increased by 2.8 percent from 2018 to 2019 as employers throughout the state added 23,700 jobs. The private sector accounted for the majority of jobs added, with 21,800 added to private payrolls, while government added just 2,000 jobs. Local government accounted for 80 percent of the new government jobs during this same time frame. These local government jobs primarily stemmed from public education employment.

Figure 1-2 shows the percentage gain in total nonfarm employment over the past nine years of expansion, from 2010 through 2019. During that time, Idaho employment increased by 25.9 percent, or 156,000 jobs. Employment increased in all major industry groups except for the information sector. Ten major industry sectors had employment growth above the state average. Construction, one of the sectors most affected by the last recession, expanded by the largest margin at 69.2 percent. Manufacturing employment growth has remained strong in the state despite the challenges faced both nationwide and globally.

Figure 1-2. Percent change in employment by private sector industries and government, annual change Idaho, 2010 through 2019

Source: U.S. Bureau of Labor Statistics, Current Employment Statistics

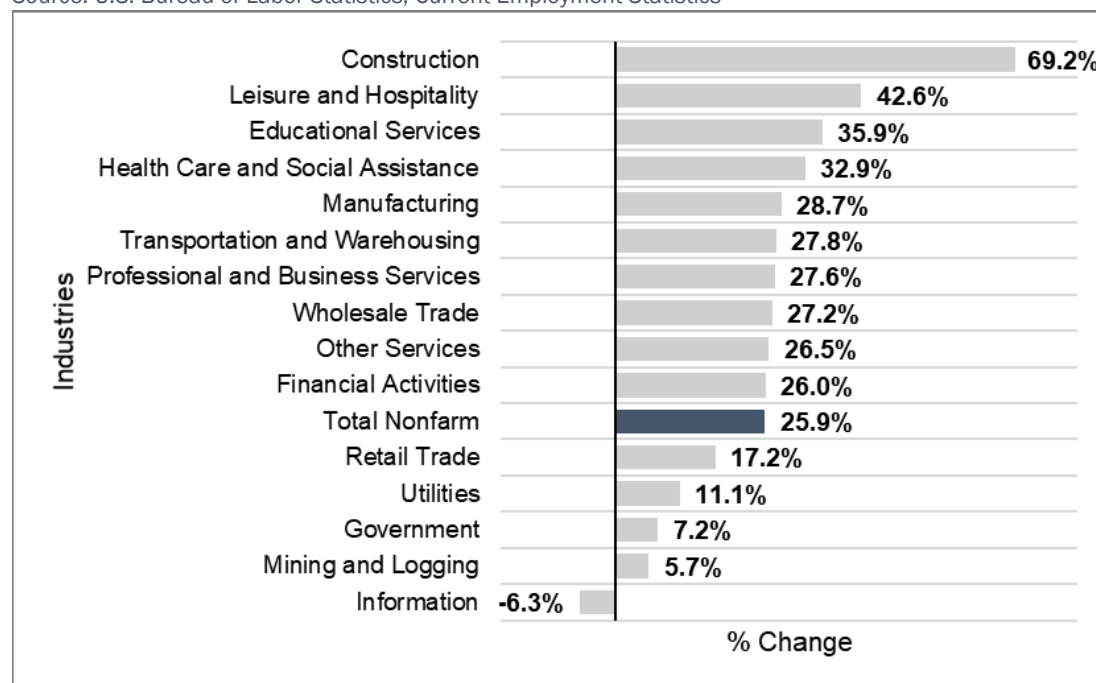


Figure 1-3 illustrates the extent to which the Boise Metropolitan Statistical Area (MSA) served as a major job creation center during the nine-year economic expansion. Since 2010, the annual average nonfarm employment in the Boise metro area grew by 91,300 through 2019, or by 36 percent. By contrast, the rest of the state – all other MSAs and non-metropolitan areas - collectively added 64,700 jobs and increased employment by 18.5 percent during the same period.

Figure 1-3: Total nonfarm employment change, annual average
Idaho, metropolitan areas and balance of state, 2010 through 2019
 Source: U.S Bureau of Labor Statistics, Current Employment Statistics

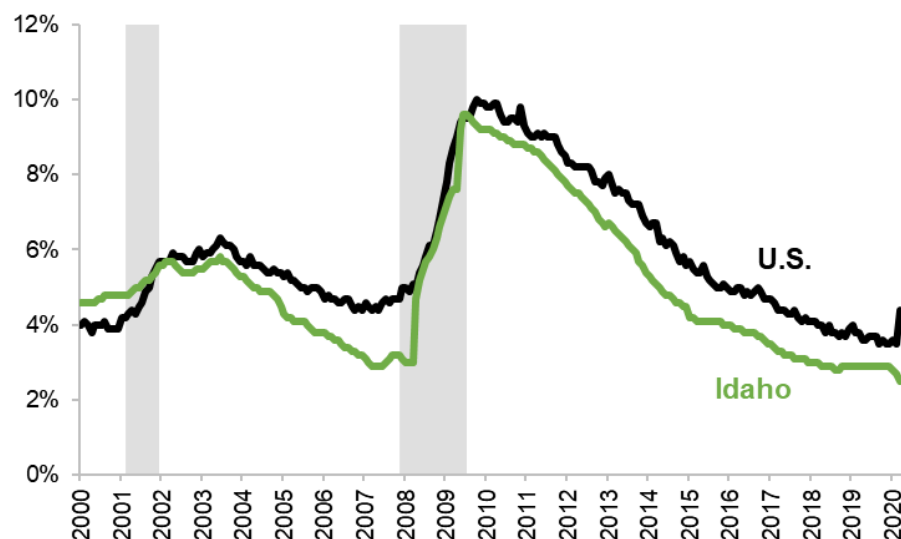
Area	Job Change (2010 - 2019)	Percent Change (2010 - 2019)
Total For state	156,000	25.9%
Boise City, ID	91,300	36.0%
Coeur d'Alene, ID	14,500	27.4%
Idaho Falls, ID	12,500	21.7%
Twin Falls, ID	7,500	18.9%
Pocatello, ID	4,100	12.3%
Lewiston, ID-WA	2,300	8.8%
All other non-metro areas	23,800	17.0%

Unemployment rate at historic lows

The overall unemployment rate is widely used as a lagging indicator of the direction of the economy. The unemployment rate is the number of unemployed who are actively seeking work divided by the labor force. The labor force is limited to individuals who are employed or seeking work.

The unemployment rate for Idaho largely tends to be lower than the national rate. As shown in *Figure 1-4*, the state unemployment rate peaked at 9.6 percent in June 2009 – at the tail end of the recession. Since then, the unemployment rate has been in steady decline, though the decline has been showing the beginnings of a slowdown in the past two years. Rates held steady at 2.9 percent through all of 2019. As the payroll numbers show, the COVID-19 pandemic began to take its toll on the labor market in the early months of 2020. While this effect is not yet evident in statewide unemployment rates - March 2020 saw a dip in rates to a historic low of 2.5 percent – nationwide rates saw an uptick to 4.4 percent in March 2020.

Figure 1-4: Unemployment rate, seasonally adjusted
United States and Idaho State, Jan 2000 through Mar 2020
 Source: U.S Bureau of Labor Statistics, Local Area Unemployment Statistics



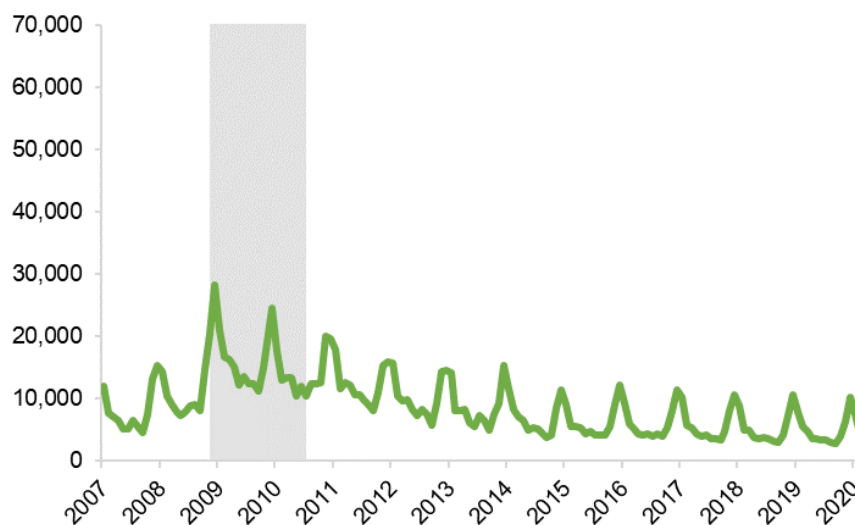
Shaded area represents a national recession period.

Unemployment insurance claims in sustained decline through 2019

New claims. Figure 1-5 shows that, until recently, the number of new (initial) claims filed for unemployment insurance benefits has been in sustained decline since the last recession. At the height of the recession, a peak of 28,314 new claims were filed in December 2008, and the average monthly initial claims jumped from 12,213 in 2008 to 15,919 in 2009. Since then, the number of new claims on average has been in decline – with a steep decline at the start of the recovery and a gradual descent in more recent years. The average monthly initial claims in 2019 was 4,891 – 5.4 percent lower than the previous year. The year 2020 saw a sudden jump in the number of new claims to more than 62,000 claims in March 2020. This jump is tied to the statewide shutdown as a result of the COVID-19 pandemic.

**Figure 1-5: Monthly initial claims, not seasonally adjusted
Idaho, Jan 2007 through Mar 2020**

Source: U.S Department of Labor, Employment and Training Administration



Shaded area represents a national recession period.

Insured unemployment. While the number of new claims declined over the year, the overall number of jobless workers receiving unemployment benefits edged up slightly. In 2019, there were 38,151 claimants – a 3.1 percent decline from the previous year¹. The number of insured unemployed in 2019 was a significant decline from the more than 114,765 recipients in 2009.

The insured unemployment rate is another statistic worth mentioning in the context of unemployment insurance. It is the proportion of individuals currently collecting unemployment insurance compared with the total number of Idaho workers (both working and not working) covered by unemployment insurance.

¹ Claimant counts differ from the data presented in the 2018 Annual report data. In the last report, the 2018 claimants count was 72,609. This included multiple counts for the same claimant unlike in this current report with distinct counts only.

Figure 1-6 shows that the largest share of unemployment insurance beneficiaries were employed in the construction industry at 18.1 percent. Manufacturing had the second largest portion of beneficiaries at 13.6 percent.

Figure 1-6: Regular unemployment claimant characteristics by industry, including UCF and UCX Idaho, 2019

Source: Idaho Department of Labor, Communication and Research

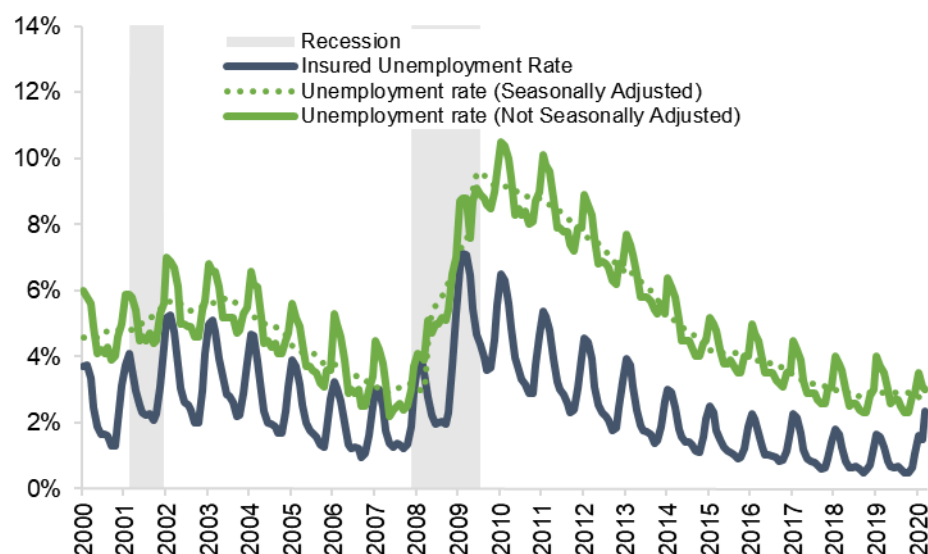
Industry of the Insured Unemployed	2019 Claimants	Percent of Total
Total	38,151	100.0%
Construction	6,912	18.1%
Manufacturing	5,206	13.6%
Administrative & Support & Waste Management	4,952	13.0%
Retail Trade	3,728	9.8%
Health Care & Social Assistance	2,804	7.3%
Agriculture & Forestry	2,336	6.1%
Transportation & Warehousing	2,098	5.5%
Accommodation & Food Services	2,064	5.4%
Professional, Scientific, & Technical Services	1,487	3.9%
Wholesale Trade	1,407	3.7%
Public Administration	1,029	2.7%
Other Services (ex. Public Administration)	849	2.2%
Finance & Insurance	801	2.1%
Arts, Entertainment & Recreation	617	1.6%
Educational Services	521	1.4%
Information	413	1.1%
Real Estate & Rental & Leasing	396	1.0%
Mining	334	0.9%
Utilities	115	0.3%
Management of Companies & Enterprises	78	0.2%
INA*	4	0.0%

*Information Not Available

Figure 1-7 compares the official unemployment rate in Idaho to the insured unemployment rate. The unemployment rates historically have moved in tandem with the insured rate. The widened gap following the recession shows the unemployed climbed at a faster pace than those who collected unemployment insurance benefits during that period, leaving an increasing number of out-of-work individuals without support. Trends show this gap to be closing in recent years. However, with structural changes in employer/employee relationships, including the rise of the “gig economy,” independent contractors and temporary workers occupy an increasingly larger share of the workforce than before. This may lead to the gap between the unemployed and the insured unemployed remaining a little larger than pre-recession levels as these gig workers tend not to be covered by the unemployment insurance typically paid in by an employer.

Figure 1-7: Overall unemployment rate (seasonally adjusted and not seasonally adjusted) and insured unemployment rate (not seasonally adjusted)
Idaho, Jan 2000 through Mar 2020

Source: U.S. Bureau of Labor Statistics, Employment and Training Administration



Shaded area represents a national recession period.

Alternative unemployment in steady decline

The unemployment rate provides information about labor market conditions including the availability of labor and the level of economic distress, but the unemployed are not the only potential pool of new hires nor the only ones experiencing economic distress. The official definition of “unemployed” includes only those people who are jobless and have actively looked for work in the past month. However, there are the jobless who want to work but have given up looking because they believe there are no jobs currently available for them. The U.S. Bureau of Labor Statistics (BLS) refers to these individuals as “marginally attached workers.” In addition, there are workers who want to work full time but currently are working part time (less than 35 hours a week) because they are unable to find full-time jobs.

Recognizing these other forms of labor market distress, the BLS has developed six alternative measures of labor underutilization that are progressively more inclusive. The standard measurement (U-3), along with three of the six measurements are:

- U-3. Total unemployed, as a percentage of the civilian labor force (the official unemployment rate).
- U-4. Total unemployed plus discouraged workers, as a percentage of the civilian labor force plus discouraged workers.
- U-5. Total unemployed, plus discouraged workers, plus all other persons marginally attached to the labor force, as a percentage of the civilian labor force plus all persons marginally attached to the labor force.
- U-6. Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percentage of the civilian labor force plus all persons marginally attached to the labor force.

Discouraged workers are one category of marginally attached workers. They have looked for work sometime in the past 12 months but are not currently looking because they believe their job search efforts would be futile. This belief may reflect economic troubles in the local labor market or arise from personal characteristics, such as a lack of schooling or training or discrimination because of age, race, sex, religion, sexual orientation, criminal record or disability.

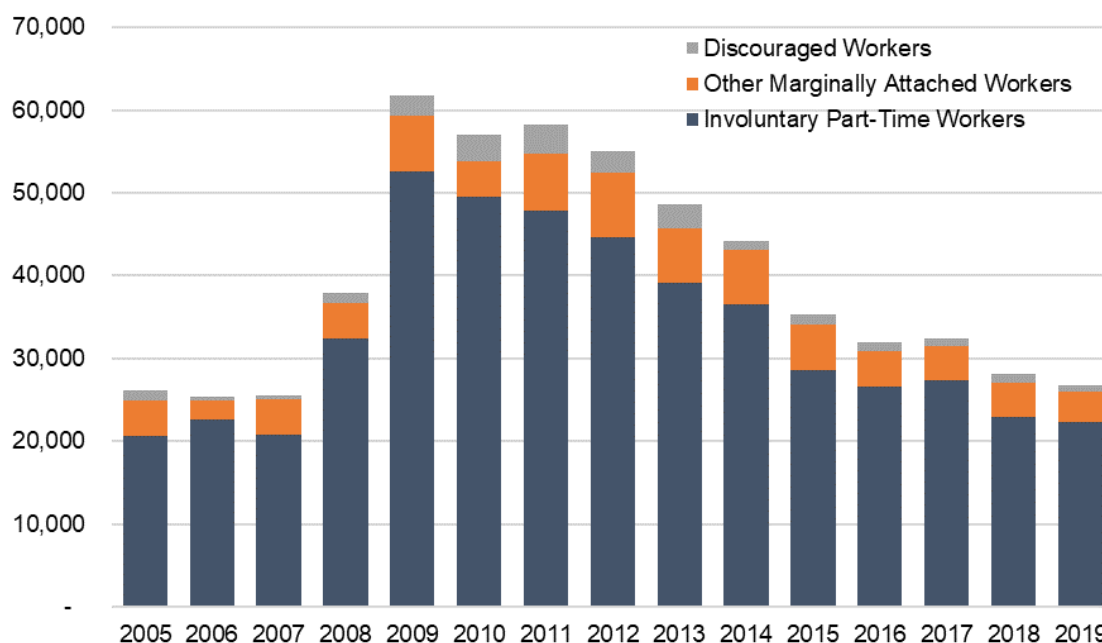
Other marginally attached workers give a non-labor market reason for not looking for work in the past four weeks. For example, they may be in school or training, having difficulties finding child care, dealing with family responsibilities, coping with an illness or facing transportation problems.

Individuals employed part time for economic reasons are those who worked fewer than 35 hours a week but want and are available to work full time. They give an economic reason for working part time like their hours had been cut back or they were unable to find a full-time job. They also are referred to as “underemployed” or “involuntary, part-time workers.”

The “official” unemployed, in addition to the previous three classes of unemployed or underemployed workforce, have been in decline since the last recession as shown in Figures 1-8 and 1-9. In 2019, Idaho had 26,000 unemployed residents, 800 discouraged workers, another 3,600 residents marginally attached to the labor force, and 22,400 involuntary, part-time workers. In total, 52,800 workers met the definitions of labor underutilization.

**Figure 1-8: Alternatively, unemployed workers, 4-quarter moving average
Idaho, 2005 through 2019**

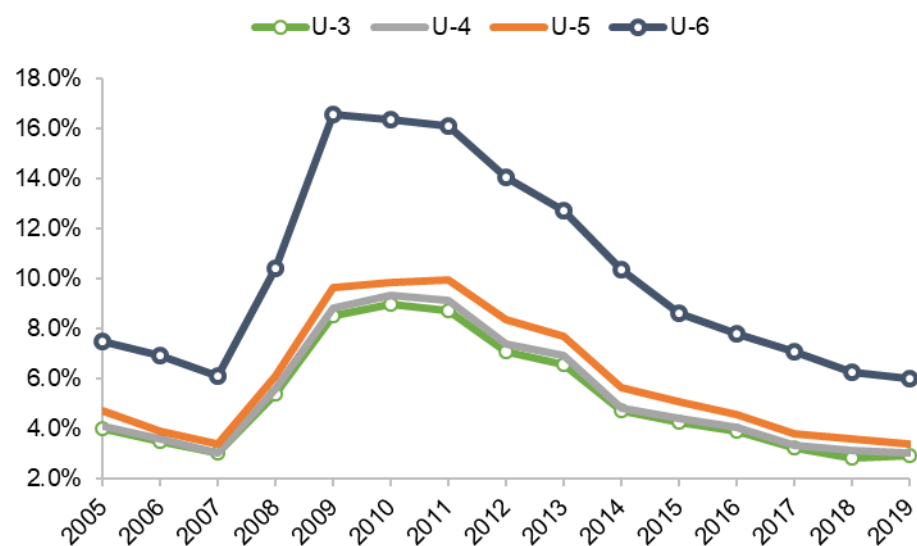
Source: U.S Bureau of Labor Statistics, Current Population Survey



The corresponding alternative unemployment rates have also been in decline. Idaho’s U-6 rate, the broadest measure of unemployment, was 6 percent in 2019 - down 0.3 percentage points from the previous year. The gap between the U-6 and U-3 rates has narrowed significantly since its peak in 2009 as the ranks of discouraged workers, marginally attached workers and those working part time involuntarily steadily declined. Idaho’s U-6 four-quarter moving average was eight percentage points above the standard unemployment rate at the height of the recession in 2009. By 2019, the gap had decreased to 3.1 percentage points – at par with the pre-recession gap in 2007.

Figure 1-9: Alternative measures of labor underutilization: U-3 (standard), U-4 (unemployed plus discouraged workers), U-5 (unemployed plus all marginally attached workers) and U-6 (unemployed with marginally attached workers and involuntary part-time), 4-quarter moving average Idaho, 2005 through 2019

Source: U.S Bureau of Labor Statistics, Current Population Survey, Local Area Unemployment Statistics



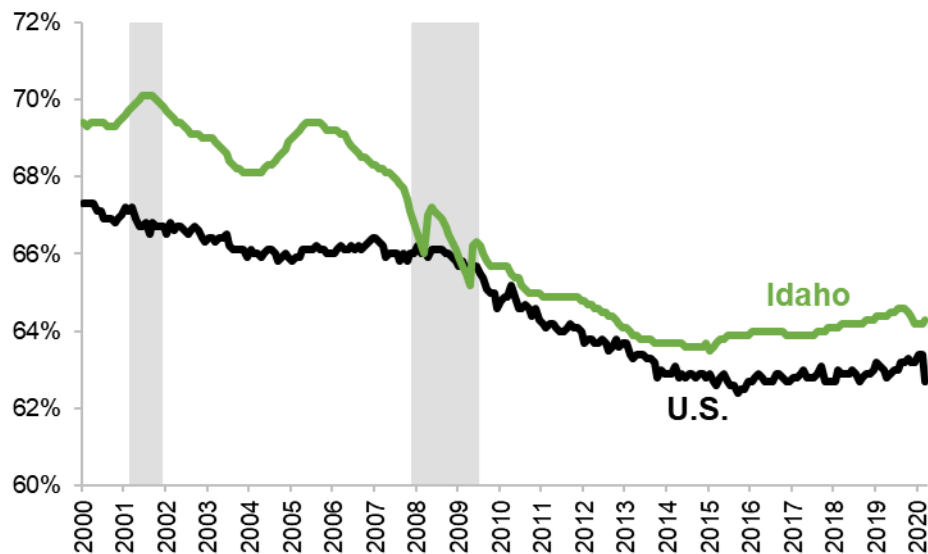
Labor force participation holds steady while employment-to-population ratio rises

The sustained pace of job growth has been attracting more participants into the labor force to compete for the number of available jobs. The increased entry of previously discouraged and marginally attached workers in addition to persistent statewide population growth has led to an increase in the size of the state's labor force in recent years. In 2019, Idaho's population grew 2.1 percent – the fastest in the nation; its labor force in turn grew by 2.9 percent. The nation saw a labor force growth of only 1.1 percent over the same period.

Idaho's labor force participation rate generally exceeds national rates. *Figure 1-10* shows Idaho's labor participation rate has seen a significant drop from the rates in the early 2000s. Since 2015, labor force participation rates have seen very measured growth. Participation rates hovered around 64.5 percent for much of 2019, dipping to 64.2 percent in December 2019. The state employment-to-population ratio (*Figure 1-11*) on the other hand, has been on a steadily rising trajectory since the last recession, revealing that the economy is consistently generating enough new jobs to accommodate Idaho's growing population.

**Figure 1-10: Labor force participation rate, seasonally adjusted
United States and Idaho, Jan 2000 through Mar 2020**

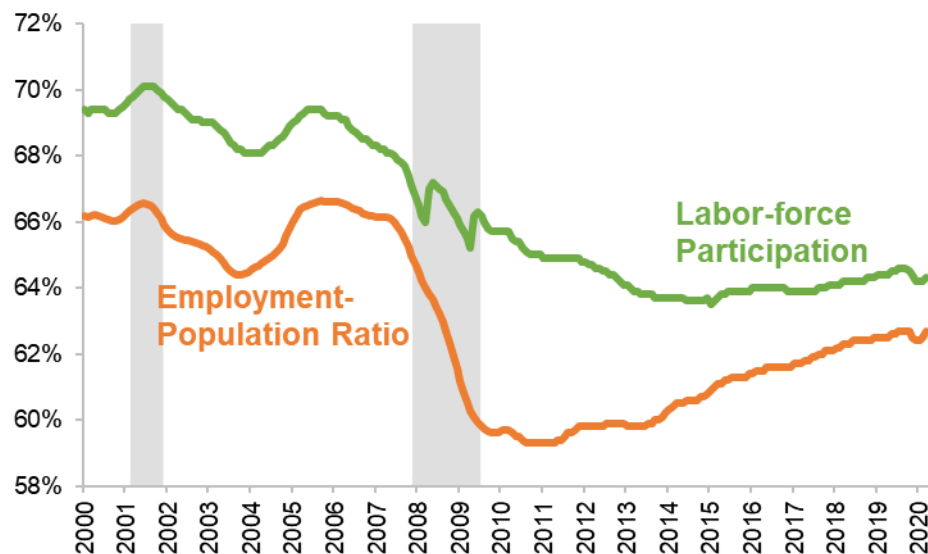
Source: U.S Bureau of Labor Statistics, Local Area Unemployment Statistics



Shaded area represents a national recession period.

**Figure 1-11: Labor force participation rate and employment-to-population ratio, seasonally adjusted
Idaho, Jan 2000 through Mar 2020**

Source: U.S Bureau of Labor Statistics, Local Area Unemployment Statistics



Shaded area represents a national recession period.

Job vacancies exceed labor supply

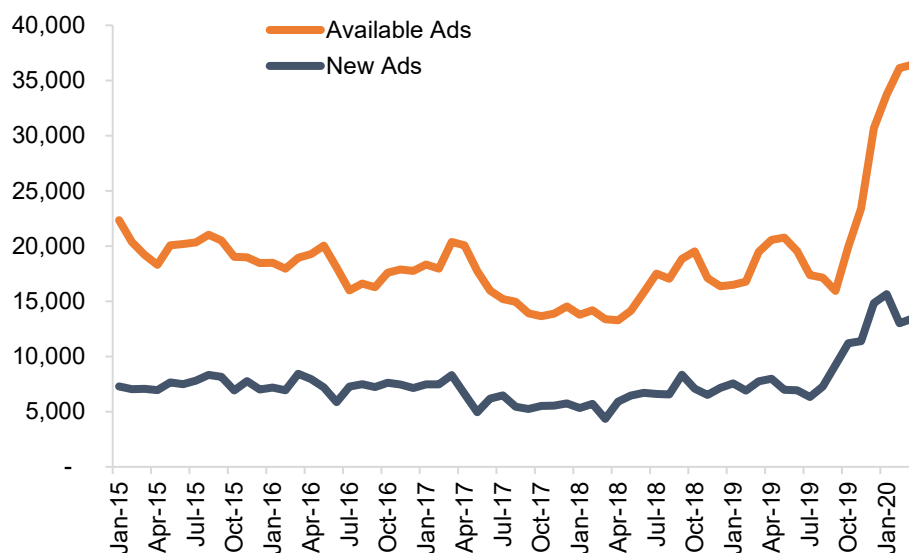
The Conference Board has been tallying monthly help wanted online reports since 2005. This data series, which pulls information from more than 1,200 job boards nationwide, is an indicator of economic and employment trends. An increase in the number of postings typically indicates that businesses have a growing confidence in the future outlook of sales and profits. A decline in number of job ads typically indicates economic concerns.

In 2019, the Help Wanted OnLine™ (HWOL) program partnered with Burning Glass Technologies, Inc., the new sole provider of online job ad data for HWOL. With the partnership, the HWOL Data Series has been revised historically to reflect a new universe and methodology of online job advertisements and therefore cannot be used in conjunction with the pre-revised HWOL Data Series.

Latest data series (*Figure 1-12*) shows a slowly declining count of new and available job postings from 2015 through the first half of 2020. The latter half of 2019 saw a sharp uptick in job demand. About 24 percent of these new job listings were tied to the health care industry – mainly for registered nurses. Retail trade also saw an uptick in demand for salespersons and supervisors. The number of available job postings exceeded the number of unemployed for the first time in December 2019 (*Figure 1-13*). By March 2020, there were 36,434 unique available job ads posted in the state. The number of unemployed persons in March 2020 was 21,974.

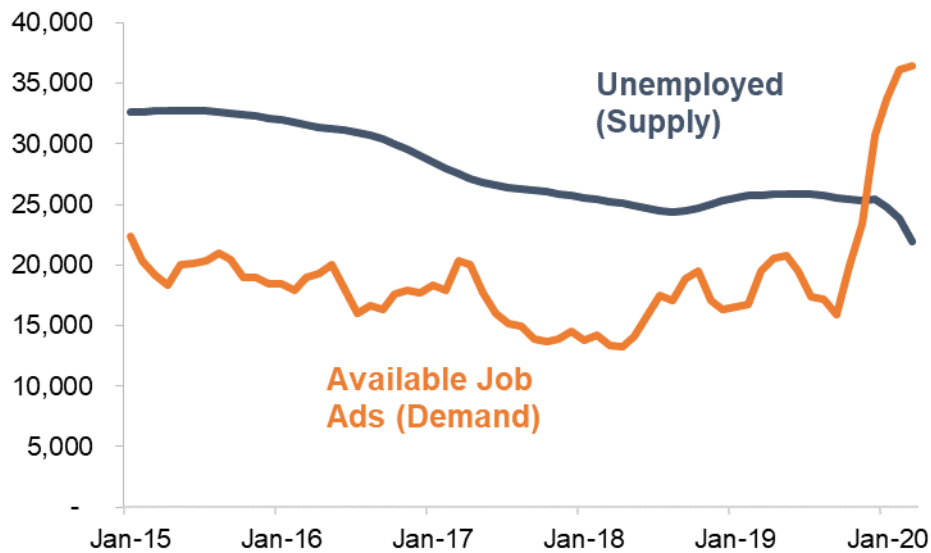
**Figure 1-12: Unique available and new job ad counts, seasonally adjusted
Idaho, Jan 2015 through Mar 2020**

Source: Burning Glass Inc. and The Conference Board



**Figure 1-13: Unique available job ad counts and the number of unemployed, seasonally adjusted
Idaho, Jan 2015 through Dec 2019**

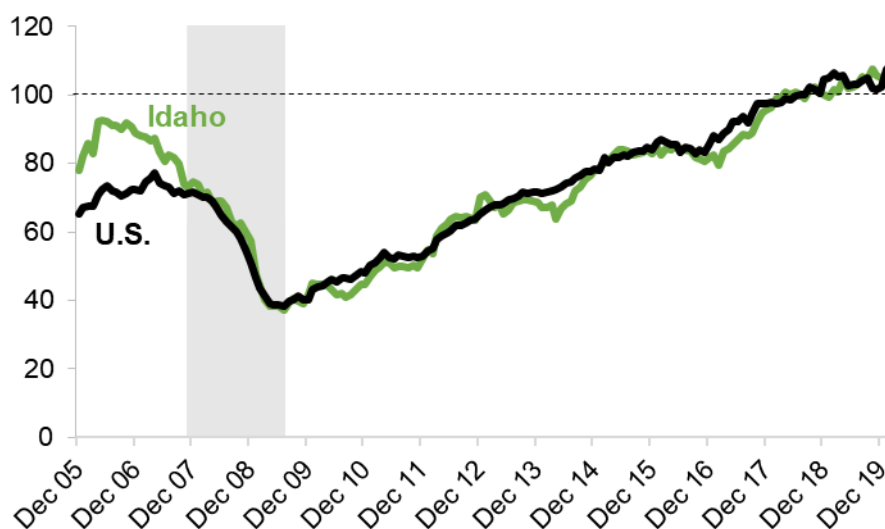
Source: Burning Glass Inc. and The Conference Board, U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics



The HWOL Index measures changes over time in advertised online job vacancies relative to the base period (July 2018=100). An increase in the index is associated with an increase in job openings and hiring activity in the economy. Index values for Idaho track well with the nation and show increasing hiring activity through much of 2019 (*Figure 1-14*). On average the index for 2019 was 103.5 compared to 100.0 the previous year. February 2020 recorded the highest hiring activity on record with an index of 112.2 followed by a drop in March 2020 to 100.4. The drop in hiring in March is tied to the beginnings of the COVID-19 pandemic effects in the U.S. and Idaho.

**Figure 1-14: The Conference Board Help Wanted OnLine® Index
United States and Idaho, Dec 2005 through Mar 2020**

Source: Burning Glass Inc. and The Conference Board



2.0 Wages and Income

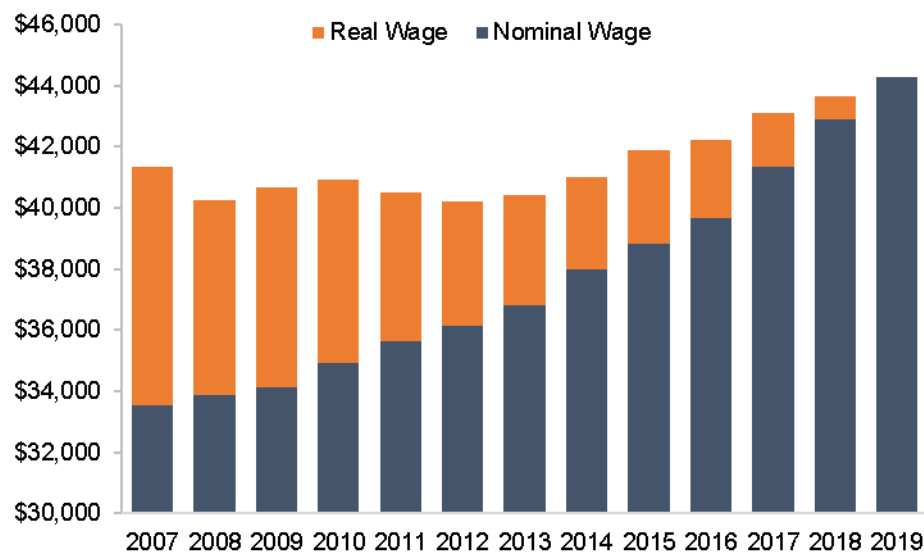
In response to strong job growth, wages and earned income have shown an over-the-year growth that has kept up with inflation. Real wages grew by 1.4 percent in 2019 while real net earned income grew by 2.3 percent – outpacing growth in the previous year. Wage growth was fastest in the professional and business services sector, which is the second largest industry sector in terms of covered employment share. Transfer payments constituted an increasing share of household income largely driven by retiring baby boomers. In 2019, transfer payments accounted for 18.6 percent of personal income. Record low poverty rates, increasing homeownership rates and declining share of rent-burdened households point to increasing income levels and a thriving economy.

Idaho wages continue to rise

A tightening labor market continued to push wages up across the board in Idaho. Annual average wages for the state are shown in *Figure 2-1*. Wages are expressed in both nominal terms and real wages – i.e. adjusted for inflation. Following a precipitous drop in 2008, the average real wage remained largely flat with an average growth rate of about 0.1 percent. Growth picked up in 2014 and remained steady, keeping up with inflation, through 2019. In the past year alone, the average annual nominal wage grew by 3.2 percent – 1.4 percent when adjusted for inflation – outpacing the wage growth of the previous year.

**Figure 2-1. Average annual wage, nominal and inflation adjusted (in 2019 dollars)
Idaho, 2007 through 2019**

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



High wage industries included utilities, mining, manufacturing and professional and business services (*Figure 2-2*). Total wage growth in the past year was dominated by professional and business services where the average annual nominal wage climbed from \$51,661 in 2018 to \$55,044 in 2019 – a 6.5 percent growth. Six other sectors with above average wages realized increases above the statewide rate of 3.2 percent. These included wholesale trade, financial activities, information, construction, transportation and warehousing, and health care. Manufacturing was the only sector to show a decline in nominal wages likely tied to contractions the

industry experienced over the year. With the exception of the construction industry, wage growth in the goods-producing sector has been muted - barely keeping up with inflation if at all.

Figure 2-2 also shows some of the stark differences between wages in different industry sectors. Retail trade and leisure and hospitality (comprised of arts, entertainment and recreation as well as accommodation and food services), when combined, accounted for 23 percent of all jobs in the state, but paid the lowest wages of all the industry sectors. Retail trade saw wage growth that barely kept up with inflation. On the other end of the spectrum, the highest paying industries – utilities and mining – account for less than one percent of the jobs.

**Figure 2-2. Average annual wage and wage growth by industry, not inflation adjusted
Idaho, 2018 to 2019**

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

Industry Sector	2019 Job Share	2019 Average Wage	Wage Growth	
Utilities	0.5%	\$79,230	1.7%	Higher Wage Industries
Mining	0.3%	\$73,067	1.9%	
Wholesale Trade	4.1%	\$63,885	5.4%	
Manufacturing	9.1%	\$62,477	-2.3%	
Financial Activities	4.5%	\$59,449	6.1%	
Professional and Business Services	12.6%	\$55,044	6.5%	
Information	1.3%	\$53,229	6.2%	
Public Administration	6.1%	\$51,339	2.2%	
Construction	6.9%	\$46,293	4.3%	
Transportation and Warehousing	3.3%	\$45,068	4.0%	
Health Care and Social Assistance	14.3%	\$44,956	3.4%	
All Industries	100.0%	\$44,263	3.2%	
Agriculture, Forestry, Fishing and Hunting	3.2%	\$38,081	2.2%	Lower Wage Industries
Educational Services	8.3%	\$37,125	3.9%	
Other Services (except Public Administration)	2.7%	\$32,120	4.3%	
Retail Trade	11.6%	\$31,345	2.2%	
Arts, Entertainment, and Recreation	1.8%	\$21,861	1.9%	
Accommodation and Food Services	9.5%	\$17,475	4.5%	

Per capita personal income growth strong

Personal income is the sum of earned income (from owning a business or holding a job), investment income and transfer payments chiefly from government programs such as Social Security, Medicare and Medicaid, food stamps, Supplemental Security Income (SSI) and unemployment benefits. Per capita personal income is the total personal income of an area divided by the population of the area.

Real per capita income in Idaho, as shown in *Figure 2-3*, dropped sharply from 2007 through 2009 and then started to recover in 2010. In 2019, per capita income grew by 3.7 percent in nominal dollars and 1.9 percent when adjusted for inflation. Disaggregating income into its three major components allows for greater clarification.

**Figure 2-3. Per capita personal income in 2019 dollars
Idaho, 2007 through 2019**

Source: U.S Bureau of Economic Analysis

Year	Per Capita Personal Income	Net Earnings	Dividends, Interest and Rent	Transfer Receipts
2007	\$40,243	\$25,602	\$8,675	\$5,966
2008	\$38,855	\$23,994	\$8,300	\$6,561
2009	\$37,163	\$22,758	\$7,258	\$7,148
2010	\$37,468	\$22,725	\$7,092	\$7,650
2011	\$38,091	\$23,027	\$7,676	\$7,387
2012	\$39,136	\$23,308	\$8,557	\$7,271
2013	\$39,737	\$24,126	\$8,272	\$7,338
2014	\$40,935	\$24,658	\$8,770	\$7,506
2015	\$43,003	\$25,651	\$9,528	\$7,825
2016	\$43,336	\$25,717	\$9,705	\$7,914
2017	\$43,934	\$25,915	\$10,091	\$7,927
2018	\$44,791	\$26,234	\$10,483	\$8,074
2019	\$45,642	\$26,839	\$10,320	\$8,483

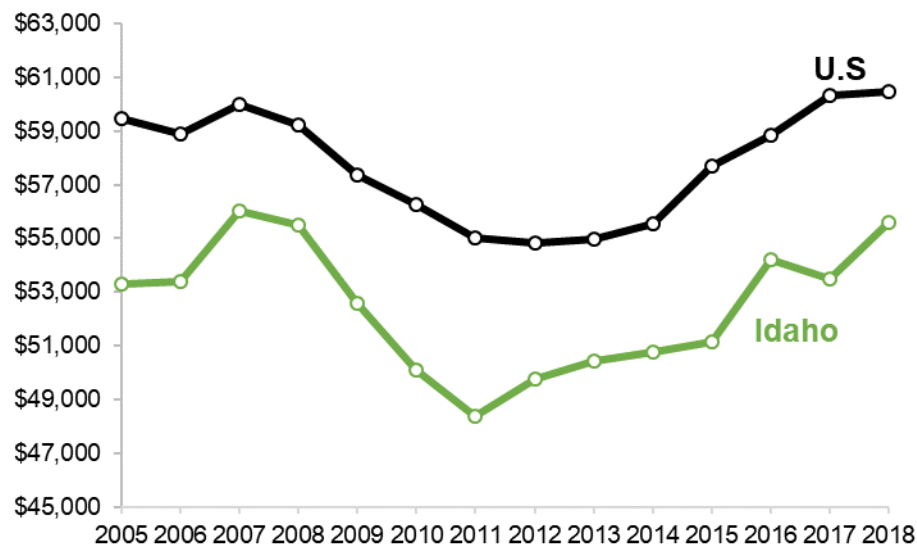
Real per capita net earned income rose by 2.3 percent in 2019 and served as the primary driver for increased incomes that year. Net earned income has hovered around 59 percent of total personal income over the past four years (2016 – 2019), a decline from the share of 63.6 percent in 2007. Investment income generally rises and falls with changes in the stock market. Transfer payments, chiefly from government programs, grew during the recession when unemployment insurance benefits and food stamps pushed it as high as 20.4 percent of total personal income in 2010. Since then, transfer payments have remained high with an income share relatively steady at around 18 percent since 2014. The sustained share of transfer payments is largely tied to baby boomers who are retiring daily to the tune of an estimated 10,000 nationwide. This large generation's income is moving out of the earnings category and into transfer payments due to receiving Social Security and Medicare. This generation's earnings may even show up in the dividends category when there are sufficiently high levels of affluence for investing in companies, businesses and properties.

Household income showing growth

In step with widespread employment losses, household incomes fell during the 2007-09 recession. However, unlike employment and the two wage and income measures reported previously, household income recovery has taken longer to materialize in Idaho. Real median household income in Idaho declined 13.6 percent between 2007 and 2011 (*Figures 2-4 and 2-5*). Since then, household income has been on a growth trajectory. The median household income in 2018 was \$55,583, up 3.9 percent from the previous year but still 4.5 percent below the 2007 pre-recession level.

**Figure 2-4. Real median household income in 2018 dollars
United States and Idaho, 2005 – 2018**

Source: U.S. Census Bureau, American Community Survey, 1-year estimates



From 2011 to 2018, the real median income in Idaho households rose by 14.9 percent. In comparison, the national real median household grew at a slower rate of 9.9 percent over the same time frame. Family household incomes in Idaho grew by 9.5 percent and non-family households grew by 12.5 percent.

**Figure 2-5. Median household income in 2018 dollars
United States and Idaho, 2011 – 2018**

Source: American Community Survey, 1-year estimates

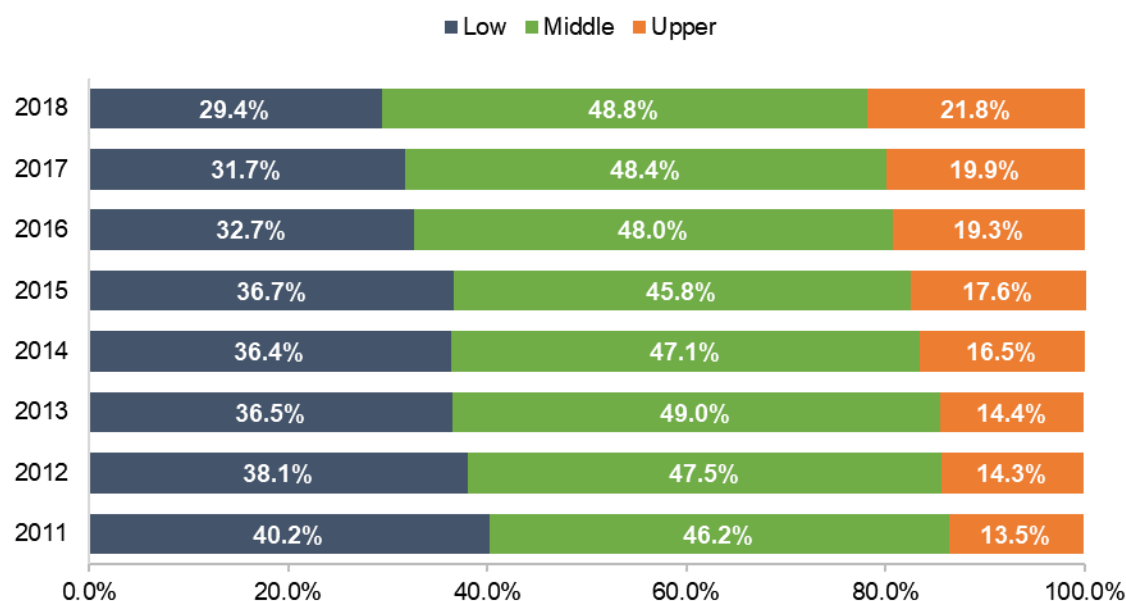
Household Type	2011	2013	2014	2015	2016	2017	2018	% Change, 2011 - 2018
All Households	\$48,383	\$50,428	\$50,766	\$51,145	\$54,203	\$53,501	\$55,583	11.0%
Family	\$58,958	\$60,553	\$61,628	\$63,653	\$66,104	\$65,746	\$65,987	9.5%
Married-couple family	\$66,865	\$67,097	\$69,288	\$71,578	\$74,161	\$72,572	\$73,227	7.5%
Non-family	\$28,250	\$28,792	\$28,329	\$28,872	\$30,997	\$31,456	\$32,123	12.5%

Examining household income ranges allows for a more nuanced view of how the economic recovery differs socioeconomically. The Pew Research Center, a nonpartisan fact tank in Washington, D.C., defines the middle class as those earning between two-thirds and double the median household income. This classification means the category of middle-income in Idaho as of 2018 was made up of people making somewhere between \$37,000 and \$111,000. For simplicity, this report defines households making between \$35,000 and \$100,000 as middle income for all the years post-recession.

Figure 2-6 illustrates the share of households that fell within certain income ranges. Over the post-recession years, the share of households making less than \$35,000 a year has been in steady decline. These lower-income households accounted for 40.2 percent of households in 2011. By 2018, the share had dropped to 29.4 percent.

Figure 2-6. Percent of households by income range
Idaho, 2011 – 2018

Source: U.S. Census Bureau, American Community Survey, 1-year estimates



Middle-income households experienced the least change of the three income ranges. From 2011 to 2018, the share of households with incomes between \$35,000 and \$100,000 changed by 2.6 percent, from 46.2 percent in 2011 to 48.8 percent in 2018.

Upper income households, meanwhile, increased as a share of total Idaho households over the past seven years. Households with incomes exceeding \$100,000 per year expanded from 13.5 percent to nearly 22 percent.

A number of other indicators of the financial situation of Idaho households have also shown improvements since the last recession. Figure 2-7 highlights select Idaho household statistics from the American Community Survey (ACS). According to the ACS, the share of households receiving welfare dropped from 3.5 percent in 2011 to 2.5 percent in 2018. Food stamp recipients have also seen a 34 percent decline from 2011. While the share of households with earnings from a job saw a decline from 78.4 percent in 2011 to 76.8 percent in 2018, the share of households with income

from Social Security and retirements has risen during this time frame – a reflection of an increasingly aging population.

The data shows poverty rates in decline from a high of 16.5 percent in 2011. At 11.8 percent in 2018, poverty rates are at the lowest levels on record (i.e. since 2005). Children tend to have higher poverty rates than the general population. In 2018, 14.3 percent of children under 18 were living below the poverty level.

Homeownership rates in Idaho dropped from 72.1 percent in 2007 to 68.4 percent in 2012. Since then rates have seen an unsteady rise. In 2018, the homeownership rate was still below prerecession levels at 70.7 percent. After subpar underwriting standards imploded, the real estate bubble left many homeowners bruised and wary after having to let a home go in foreclosure proceedings then suffering the adverse effects on their credit record. Homeownership rates have remained lower due to this slow credit report recovery, but also changes in consumer behavior generationally. “The drop in homeownership is largely due to a delay in home buying by the millennials, who have the lowest ownership rate of their age group in history. Millennials are not only burdened by student loan debt, but they have also delayed life choices like marriage and parenthood, which are the primary drivers of homeownership.” (“Millennials cause homeownership rate to drop to lowest level since 1965”, Olick, CNBC, 2016)

The federal government considers any household paying more than 30 percent of its income toward housing costs to be under duress. The percentage of renters under duress due to housing costs has declined since 2011 to 46.1 percent in 2018. The share of homeowners with a mortgage paying 30 percent or more of their income toward housing has also moved downward over the course of the economic recovery. By 2018, the proportion was down to 25.7 percent.

**Figure 2-7. Percent of households by income range
Idaho state, 2011 – 2018**

Source: U.S. Census Bureau, American Community Survey, 1-year estimates

Household Characteristics	2011	2013	2014	2015	2016	2017	2018
Poverty rate for all people	16.5%	15.6%	14.8%	15.1%	14.4%	12.8%	11.8%
Poverty rate for children under 18	20.4%	19.1%	18.8%	17.8%	17.7%	15.3%	14.3%
Households with earnings from a job	78.4%	78.3%	77.2%	76.5%	77.1%	77.0%	76.8%
Households receiving Social Security	29.9%	30.7%	31.2%	31.8%	32.1%	32.6%	32.9%
Households receiving retirement income	17.1%	18.0%	18.6%	19.8%	18.9%	18.9%	19.5%
Households receiving Supplemental Security Income	4.4%	5.1%	4.5%	5.1%	4.9%	4.9%	4.6%
Households receiving welfare cash payments	3.5%	3.4%	3.1%	3.1%	3.1%	2.9%	2.5%
Households receiving food stamps	13.5%	13.0%	11.8%	11.5%	10.9%	9.7%	8.9%
Homeownership rate	68.7%	69.4%	68.0%	69.0%	68.5%	69.7%	70.7%
Renters paying 30 percent or more of income for housing	51.6%	47.7%	46.8%	47.1%	45.9%	45.8%	46.1%
Homeowners paying 30 percent or more of income for housing	36.9%	30.1%	27.3%	29.0%	25.1%	26.1%	25.7%

3.0 Employment Projections

Every year, the Idaho Department of Labor produces short-term (two-year) employment projections to provide job seekers, policy makers and training providers with an idea of how much an industry or occupation is projected to change over time and show the future demand for workers. The most recent short-term projections (first quarter 2019 – first quarter 2021) highlight the following key findings:

- The average annual growth rate for total employment is projected to be 1.5 percent for the 2019 to 2021 period.
- The health care and social services industry sector is projected to dominate job growth statewide with the fastest projected growth rate and the highest numerical job growth of all industry sectors statewide. Health care-related occupations were consequently projected to be among the fastest growing in the state.

Because the base year precedes the pandemic, the 2019–21 projections do not include impacts of COVID-19 pandemic and response efforts.

Statewide industry projections show a 1.5 percent job growth rate

Idaho's employment is projected to grow by 24,200 jobs by 2021. This translates to a 3.1 percent total growth – an annual growth rate of 1.5 percent. *Figure 3.1* shows the projected growth rates for the state by industry. As the figure indicates, growth will come from a broad range of Idaho's industry sectors. Health care is projected to be the fastest-growing sector with a projected annual growth rate of 2.5 percent. Leisure and hospitality is projected to be the second fastest-growing industry with a growth rate of 2.3 percent. In terms of numerical job growth, the health care and social assistance sector as well as the leisure and hospitality sector and professional/business services were projected to bring the most jobs into the state. Collectively, these three sectors account for roughly 36 percent of the employment share in the base year (2019) and 52 percent of total projected job growth. Projections anticipate no growth for two sectors – mining and utilities.

Figure 3-1: Base and projected total employment (industry and self-employed)
Idaho, First quarter 2019 to first quarter 2021

Source: Idaho Department of Labor, Communications and Research

NAICS Title	2019 Employment	2021 Projection	Net Change	Annual Growth
Total All Industries	776,738	800,902	24,164	1.5%
Agriculture, Forestry, Fishing and Hunting	20,683	20,825	142	0.3%
Mining	2,071	2,071	-	0.0%
Construction	46,893	49,016	2,123	2.2%
Manufacturing	67,983	69,089	1,106	0.8%
Utilities	3,515	3,515	-	0.0%
Wholesale Trade	29,808	30,326	518	0.9%
Retail Trade	86,018	88,234	2,216	1.3%
Transportation and Warehousing	24,127	24,773	646	1.3%
Information	9,498	9,575	77	0.4%
Financial Activities	32,911	33,859	948	1.4%
Professional and Business Services	91,050	94,662	3,612	2.0%

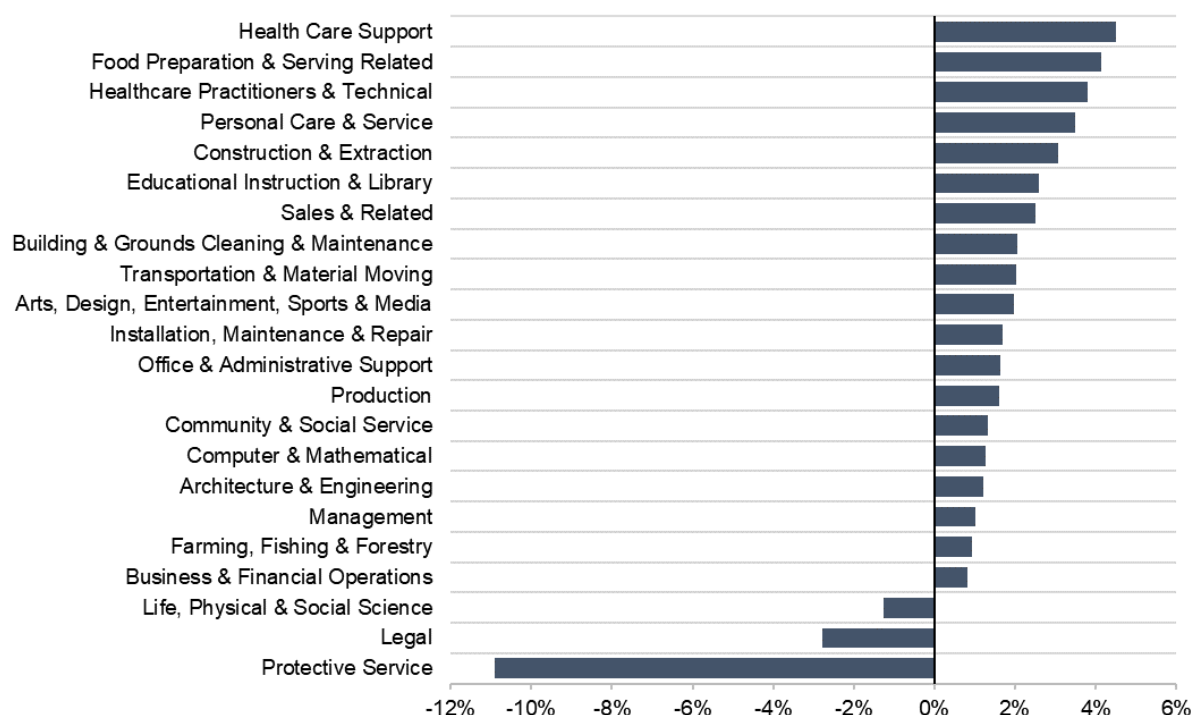
Educational Services (Private + Govt)	63,459	65,390	1,931	1.5%
Health Care and Social Assistance (Private + Govt)	105,617	110,867	5,250	2.5%
Leisure and Hospitality	79,945	83,693	3,748	2.3%
Other Services (except Government)	19,747	20,413	666	1.7%
Self Employed	49,837	50,322	485	0.5%
Public Administration	43,576	44,272	696	0.8%

Occupational projections show rapid growth in health care jobs

The projected two-year growth for the major occupational groups in Idaho is shown in *Figure 3-2*. Health care support occupations (4.5 percent), health care practitioners and technical occupations (3.8 percent) and personal care and service occupations (3.5 percent) were projected to outpace most other occupational groups. This is, in part, a reflection of the rapidly growing share of the state's aging population. Occupation groups projected to decline included protective services (-10.9 percent), legal (-2.8 percent), and life, physical and social sciences (-1.3 percent).

**Figure 3.2. Projected percent change for major occupational groups
Idaho, 2019 to 2021**

Source: Idaho Department of Labor, Communications and Research



In terms of numerical growth, the top three occupation groups projected to add the most jobs by 2021 include food preparation and serving (2,690 jobs), Sales and related (1,770 jobs) and office and administrative support (1,680 jobs). These three occupation groups alone represent one-third of total employment shares for the state.

Food prep jobs projected to have the most numerous openings annually

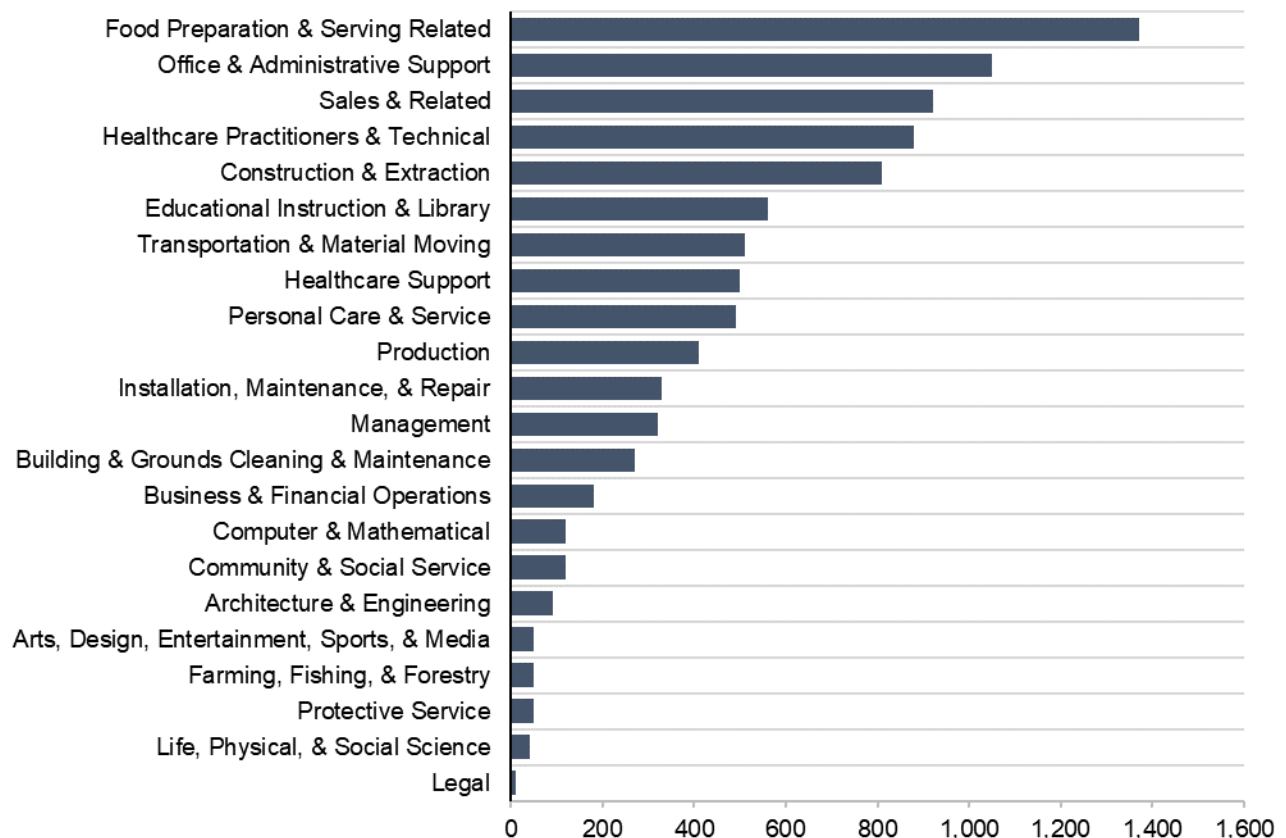
In addition to projecting the number of new jobs to be created, the occupational projections estimate a broader measure of future job availability, which includes the projected number of occupational

separations. The total number of occupational openings is the sum of three components: occupational growth, occupational transfers (such as an accountant becoming a manager) and labor force exits (such as a worker retiring). Collectively, occupational transfers and labor force exits are known as “separations,” and they are the primary driver of job openings. The separations methodology used here does not track turnover within occupations. Turnovers within occupations occur when workers stay in occupations but change employers. This also means that jobs filled by interstate movement, when workers stay within occupations, are not identified as new jobs.

For the 2019-2021 period, Idaho Department of Labor projects a total of 9,400 openings each year due to growth and separations. *Figure 3-3* shows the projected annual openings for the major occupation groups. Food preparation and serving jobs are projected to dominate with the most annual openings.

**Figure 3-3. Projected annual openings due to growth and separations
Idaho, 2019 to 2021**

Source: Idaho Department of Labor, Communications and Research



Top occupations ranked by projected job openings

The following tables show specific occupations (six-digit SOC – standard occupational codes) ranked by total annual openings. *Figures 3-4 to 3-8* show the top five occupations sorted by educational requirement. The average of the annual median wages demonstrates the link between educational attainment level and monetary compensation by occupation. The average median wage for the top five occupations requiring a high school education or less is \$24,239 per year, while for master's or doctoral degrees the average median wage is \$104,466.

**Figure 3-4. Top five occupations typically requiring high school education or less for entry
Idaho, 2019 through 2021**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2019 Annual Median Wage
Retail Salespersons	340	\$25,220
Personal Care Aides	320	\$23,160
Waiters and Waitresses	280	\$19,100
Combined Food Preparation and Serving Workers, Including Fast Food	270	\$22,120
Customer Service Representatives	260	\$32,020
Average Median		\$24,239

**Figure 3-5. Top five occupations typically requiring a postsecondary certificate for entry
Idaho, 2019 through 2021**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2019 Annual Median Wage
Heavy and Tractor-Trailer Truck Drivers	200	\$41,780
Nursing Assistants	180	\$28,470
Medical Assistants	80	\$34,480
Automotive Service Technicians and Mechanics	80	\$42,730
Licensed Practical and Licensed Vocational Nurses	60	\$45,780
Average Median		\$37,340

**Figure 3-6. Top five occupations typically requiring an associate degree for entry
Idaho, 2019 through 2021**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2019 Annual Median Wage
Dental Hygienists	50	\$75,510
Architectural and Civil Drafters	20	\$49,740
Preschool Teachers, Except Special Education	20	\$23,960
Respiratory Therapists	20	\$58,840
Radiologic Technologists	20	\$60,100
Average Median		\$58,679

**Figure 3-7. Top five occupations typically requiring a bachelor's degree for entry
Idaho, 2019 through 2021**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2019 Annual Median Wage
Registered Nurses	330	\$69,320
Elementary School Teachers, Except Special Education	130	\$46,420
General and Operations Managers	120	\$66,590
Teachers and Instructors, All Other	100	\$32,700
Secondary School Teachers, Except Special and Career/Technical Education	80	\$49,390
Average Median		\$58,056

**Figure 3-8. Top five occupations typically requiring a master's degree or greater for entry
Idaho, 2019 through 2021**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2019 Annual Median Wage
Physical Therapists	40	\$80,640
Family and General Practitioners	30	\$227,160*
Education Administrators, Elementary and Secondary School	20	\$80,700
Educational, Guidance, School, and Vocational Counselors	20	\$46,370
Mental Health and Substance Abuse Social Workers	20	\$49,940
Average Median		\$104,466

* Mean annual wage was used

In conclusion, it is uncertain how these occupational trends will shift in light of recent events with the COVID-19 pandemic. Food preparation jobs so far have recorded the largest number of total unemployment insurance claims. It is estimated that approximately one in four jobs will be lost in this occupation as a result of closures tied to the pandemic. Along with the unprecedented job losses is a rapid trend towards remote work. To comply with social distancing and stay-at-home orders, employees who can are increasingly being allowed to work from home. Latest trends in online job postings show that while online job postings overall have fallen in recent months, postings specifically labeled as work-from-home roles have been on the rise. The number of new Idaho work-from-home job postings jumped 49 percent from February to March 2020 alone.

4.0 Regional Economic Highlights

The previous chapters have discussed current and future job and wage growth statewide. These economic changes are expressed differently across the six regions of the state. All regions showed strong growth in residential construction and health care. Unlike northern Idaho where residential construction is being driven by a high in-migration of retirees, eastern Idaho has seen a boom in construction tied to its expanding student community. North central Idaho had marked decline in jobs over the year when compared with the rest of the state while southwestern Idaho saw the greatest job and wage growth. The common concern going forward for all regions is a tight labor market and labor supply shortage.

Northern Idaho

2018-19 Population Growth: 2.5%

2018-19 Job Growth: 2.6%

2018-19 Wage Growth: 3.1% (not inflation adjusted)

2019 Unemployment Rate: 3.9%

Northern Idaho has enjoyed consistent and robust population growth in recent years. The region has added 24,000 new residents over the past five years, with the total population growing to more than 244,000 in 2019. New residents continue to be attracted to northern Idaho by the relatively low cost of living, low levels of congestion and traffic, beautiful scenery and abundant access to lakes, rivers, skiing, hiking and other outdoor amenities. This particular combination of outdoor recreation opportunities and a lower cost of living has proved particularly attractive to retirees, who continue to migrate to northern Idaho in large numbers from more expensive and congested urban areas in surrounding states. This trend held in 2019, when more than half of the new residents who moved to northern Idaho were over age 65.

Population growth continues to fuel strong growth in the construction sector, which grew by about 10 percent from 2018 to 2019 to employ roughly 7,000 people across the region. Construction has been particularly strong in Kootenai County, which experiences most of the region's population growth. In-migration to Kootenai County has prompted a boom in residential construction, with a variety of new single-family developments as well as multifamily complexes being built in 2019. The growing population of retirees has also supported steady growth in health services, as well as the leisure and hospitality sector.

Employment in northern Idaho continued to grow in 2019, despite a very constrained labor supply. Entering 2019, unemployment rates in northern Idaho were at historically low levels, as across the rest of the state. Continued economic expansion added more than 2,000 new jobs to the region, raising total employment above 110,000 by the end of 2019. Unemployment rates inched even farther down, with Kootenai County's rate reaching as low as 2.4 percent by the end of the year.

Going forward, the Idaho Department of Labor projects population growth to remain robust, with the total population in northern Idaho forecast to surpass 270,000 by 2029. However, the forecasted demographic picture suggests labor supply may remain tight in the long run. Population growth is expected to remain heavily weighted towards retirees, with the Labor department forecasting only one-third of new residents will be in the labor force. This suggests that population growth will drive housing construction and demand for health care, real estate services and consumer services.

**Figure 4-1. Average employment and average wage growth by industry, not inflation adjusted
Northern Idaho, 2009 through 2019**

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

	2019 Average Employment	Job Growth		
		2018-19	2014-19	2009-19
All Industries	90,315	2.6%	14.5%	17.4%
Agriculture, Forestry, Fishing and Hunting	1,109	-0.8%	14.3%	5.8%
Mining	729	4.6%	-30.7%	-8.0%
Construction	7,120	10.0%	47.7%	25.3%
Manufacturing	8,312	3.0%	6.3%	16.4%
Utilities	547	-6.9%	-3.1%	-6.1%
Wholesale Trade	2,208	10.0%	20.5%	19.9%
Retail Trade	12,904	0.2%	5.5%	8.9%
Transportation and Warehousing	1,993	7.3%	7.4%	10.3%
Information	1,041	-5.3%	14.0%	-12.7%
Financial Activities	4,232	-0.5%	20.3%	10.0%
Professional and Business Services	7,777	-1.5%	7.3%	6.0%
Educational Services (Private + Govt)	6,028	2.6%	11.5%	12.3%
Health Care and Social Assistance (Private + Govt)	14,837	3.1%	19.7%	39.9%
Leisure and Hospitality	13,904	4.8%	22.8%	30.4%
Other Services (except Public Administration)	2,345	-2.2%	13.8%	19.6%
Public Administration	5,229	1.8%	7.3%	0.2%
	2019 Average Wage	Wage Growth		
		2018-19	2014-19	2009-19
All Industries	\$40,069	3.1%	16.3%	28.1%
Agriculture, Forestry, Fishing and Hunting	\$42,608	4.5%	14.7%	30.7%
Mining	\$84,731	-5.8%	-2.5%	31.2%
Construction	\$44,743	4.3%	20.9%	29.3%
Manufacturing	\$47,631	0.0%	13.9%	31.8%
Utilities	\$71,370	6.4%	21.1%	41.4%
Wholesale Trade	\$61,877	4.5%	19.8%	47.9%
Retail Trade	\$31,673	2.9%	10.1%	18.0%
Transportation and Warehousing	\$43,844	1.2%	22.8%	38.5%
Information	\$57,481	8.7%	25.2%	47.2%
Financial Activities	\$52,780	2.3%	20.3%	37.7%
Professional and Business Services	\$44,520	3.9%	26.5%	32.4%
Educational Services (Private + Govt)	\$34,462	3.4%	10.9%	13.8%
Health Care and Social Assistance (Private + Govt)	\$45,900	5.7%	22.9%	32.5%
Leisure and Hospitality	\$19,544	3.0%	14.4%	26.9%

Other Services (except Public Administration)	\$30,065	-1.4%	28.2%	36.5%
Public Administration	\$50,329	2.1%	14.3%	26.9%

North Central Idaho

2018-19 Population Growth: 0.6%

2018-19 Job Growth: 0.4%

2018-19 Wage Growth: 2.4% (not inflation adjusted)

2019 Unemployment Rate: 3.3%

While Idaho's population grew an impressive 2.1 percent between 2018 and 2019, north central Idaho's population grew only 0.6 percent from 109,151 to 109,777. Its slow population growth reflects sluggish economic growth and makes the aging population more pronounced. People 65 years and older make up 20 percent of the region's population, compared with 16 percent of Idaho's total population. The population's age structure and slow growth limit the available labor force, reduce opportunities for business start-ups and pose challenges for rural communities relying on volunteers for local services such as fire and emergency medical services. The region's population is projected to continue to grow slowly, reaching 113,620 by 2029. Individuals 65 years and older will make up 23 percent of that number.

The region's unemployment rate remained at 3.3 percent in 2019. Clearwater County's unemployment rate edged down from 6.9 percent in 2018 to 6.8 percent, a record low. Despite that drop, its rate tied with Adams County's rate for the highest among Idaho counties. For three decades, the decline of its mainstay industry, forest products, has kept rates high. In 2019, Latah County had the region's lowest jobless rate at 2.7 percent, even though financial troubles at the University of Idaho and a sharp cut in retail jobs made its rate rise from 2.5 percent the year before. Nez Perce County's unemployment rate in 2019 remained at 2.8 percent — a record low. Job gains in leisure and hospitality, construction and health care offset losses in manufacturing and retail. Between 2018 and 2019, Idaho County's rate dropped from 4.7 percent to 4.5 percent — a record low. Most of its new jobs came from manufacturing, leisure and hospitality, wholesale and transportation. Lewis County enjoyed strong job growth in almost all sectors, allowing its jobless rate to fall from 5.7 percent in 2018 to 5.5 percent in 2019. Throughout the region, employers continued to find it difficult to recruit and keep workers. The region's labor force grew only 1.1 percent in 2019 after declining marginally the year before.

North central Idaho's covered employment grew only 0.4 percent in 2019, adding only 183 jobs. That marginal growth is typical of what has occurred in recent years. The region added only 1,148 jobs — growing 2.7 percent — from 42,370 in the recession year of 2009 to 43,518 in 2019. The three sectors adding the most jobs between 2014 and 2019 were health care and social assistance, 604; leisure and hospitality, 413; and construction, 358. The three losing the most jobs were retail trade, 247 jobs; manufacturing, 181; and agriculture and forestry, 130.

A sharp decrease in ammunition purchases nationwide following the 2016 presidential election caused layoffs in the region's largest manufacturing sector. Despite the losses of the past five years, the region's manufacturing employment grew 25 percent — adding 925 jobs — between 2009 and 2019. The opening and subsequent expansions of Schweitzer Engineering Laboratories in Lewiston and job creation by firearms manufacturers, boat builders and other metal fabricators were responsible for the 10-year growth.

Strong home-building activity and a considerable amount of commercial construction in the past few years pushed construction jobs to 2,065 by 2019.

The aging of the region's population, along with an increase in population, boosted employment in the region's largest sector — health care and social assistance — to 7,143 by 2019.

**Figure 4-2. Average employment and annual average wage growth by industry, not inflation adjusted
North Central Idaho, 2009 through 2019**

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

	2019 Average Employment	Job Growth		
		2018-19	2014-19	2009-19
All Industries	43,518	0.4%	2.7%	2.7%
Agriculture, Forestry, Fishing and Hunting	918	-6.0%	-12.4%	9.6%
Mining	209	2.0%	3.6%	24.2%
Construction	2,065	6.0%	20.9%	16.8%
Manufacturing	4,600	-5.3%	-3.8%	25.2%
Utilities	152	0.7%	2.1%	0.4%
Wholesale Trade	1,280	-0.7%	10.2%	31.4%
Retail Trade	5,067	-0.7%	-4.7%	-8.9%
Transportation and Warehousing	1,169	0.5%	-2.1%	-18.2%
Information	659	5.2%	-1.1%	-7.5%
Financial Activities	1,870	-0.6%	-2.8%	-11.9%
Professional and Business Services	2,228	0.3%	6.9%	3.6%
Educational Services (Private + Govt)	6,618	-1.2%	2.1%	-8.6%
Health Care and Social Assistance (Private + Govt)	7,143	4.7%	9.2%	12.6%
Leisure and Hospitality	4,973	2.6%	9.1%	11.3%
Other Services (except Public Administration)	1,020	-2.2%	4.8%	-3.2%
Public Administration	3,548	1.4%	-1.7%	-4.4%
	2019 Average Wage	Wage Growth		
		2018-19	2014-19	2009-19
All Industries	\$40,035	2.4%	12.3%	27.0%
Agriculture, Forestry, Fishing and Hunting	\$48,856	-1.3%	14.6%	38.4%
Mining	\$61,335	1.9%	15.2%	31.6%
Construction	\$41,775	6.7%	19.8%	25.6%
Manufacturing	\$56,164	3.8%	11.6%	24.1%
Utilities	\$70,298	2.3%	11.2%	31.2%
Wholesale Trade	\$48,980	5.7%	10.7%	30.5%
Retail Trade	\$27,662	1.6%	6.8%	16.9%
Transportation and Warehousing	\$44,349	-2.1%	12.4%	34.3%
Information	\$37,623	4.9%	18.9%	36.2%
Financial Activities	\$52,395	3.4%	11.6%	45.9%

Professional and Business Services	\$40,746	3.1%	12.6%	-1.7%
Educational Services (Private + Govt)	\$45,246	3.5%	18.2%	32.3%
Health Care and Social Assistance (Private + Govt)	\$39,655	2.0%	11.7%	27.4%
Leisure and Hospitality	\$16,398	1.9%	13.3%	29.8%
Other Services (except Public Administration)	\$27,034	4.2%	12.4%	34.6%
Public Administration	\$47,696	2.1%	12.1%	24.6%

Southwestern Idaho

2018-19 Population Growth: 2.7%

2018-19 Job Growth: 3.5%

2018-19 Wage Growth: 2.9% (not inflation adjusted)

2019 Unemployment Rate: 2.8%

Southwestern Idaho is the largest of the six regions in both area and population at 826,544 in 2019. The region experienced its strongest population growth since 2007, up 2.7 percent. More than 80 percent of the population growth is due to domestic migration, those moving to the region from any other area in Idaho or another state. The growth rate for the region was greater than the state or nation during 2019.

Ada and Canyon counties are classified as urban area because they have a population of 50,000 or greater. These two counties account for 86 percent of the region's population and 40 percent of the state's population. The remaining eight counties in the region are classified as rural. As a result, the 10 counties are both geographically and economically diverse. Adams and Valley counties are known for timber among its rugged mountains and wild rivers. Owyhee County boasts expansive canyon lands while Elmore County has the Mountain Home Air Force Base. The 10 counties comprising southwestern Idaho account for 46 percent of the state's population. Eight of the state's 22 cities with a population greater than 10,000 are located in southwestern Idaho, as well the state's three largest cities - Boise, Meridian and Nampa. Southwestern Idaho also includes one metropolitan statistical area (MSA) – Boise MSA – made up of Ada, Boise, Canyon, Gem and Owyhee counties. The Boise MSA accounts for 91 percent of the region's labor force.

Ada is the largest county in the state, home to Boise, Idaho's capitol, and Boise State University. Boise State University has an enrollment of 26,272 students seeking both undergraduate and graduate degrees, based on fall 2019 Census Day Enrollment– an increase of 2.9 percent from 2018. Canyon County is comprised of agricultural communities and two private universities – the College of Idaho, with a fall 2019 enrollment of 1,091 students, grew 13.2 percent from 2018. Northwest Nazarene University had 2,201 students on campus in 2019 growing 9.3 percent from 2018. The College of Western Idaho, a recently accredited community college also in Canyon County, serves more than 31,000 credit and noncredit students across the state. Due to its rapid growth, this total includes dual-credit students and duplicate student counts among continuing education and basic skills education.

Southwestern Idaho's annual average unemployment rate for 2019 was 2.8 percent, one-tenth of a percentage point below the state average of 2.9 percent and 6.9 percentage points below the record high of 9.7 percent in 2009 during the Great Recession. The region's labor force accounted for 45 percent of the state's labor force. Since 2009 the labor force has increased 24 percent. The unemployment rate in the region ranged from a low of 2.5 percent in Ada County to 6.8 percent in

Adams County. Six counties had rates around 3 percent, with Boise and Washington counties rates slightly above 4 percent.

As the region's population has grown, the demand for housing, health care services, eating and drinking establishments and other supporting service activities have followed suit. The number of building permits for housing issued in the Boise MSA, the only data available for the region, has increased yearly since 2011, reaching nearly 10,700 in 2019. The previous high was in 2005 with 11,600 and then fell to 1,700 in 2010. Nearly half of the state's construction employment is in southwestern Idaho and 95 percent of the region's construction jobs are in the Boise MSA, disbursed across all subsectors – residential, non-residential, highway and special trade contractors. Construction jobs peaked in 2019 at 26,689, edging past the previous record in 2006 of 26,034. The average wage is at a record high of \$48,425. Over the past 12 months, planning and zoning commissions have approved thousands of homes in numerous subdivisions. A number of low-income housing projects and many multi-family complexes are underway throughout the region. Several large commercial developments continue to expand in Ada County, such as Eagle View Landing, Ten Mile Crossing and Pioneer Crossing.

The health care industry continues to grow in the region. Both St. Luke's and Saint Alphonsus Health Systems are expanding facilities throughout the region. Primary Health opened several new clinics in the region. Saltzer Medical Group was purchased by Ball Ventures Ahlquist (BVA) and renamed Saltzer Health. It plans to expand its services with new clinics and medical facilities throughout the region. Employment in ambulatory health care services is the largest sector surpassing hospital employment during 2019. The fastest growing sectors in this industry are offices of physicians and home health care services. Another area of significant growth in health care is assisted care and skilled nursing facilities for the elderly. Social assistance has also increased providing services to the elderly and those with disabilities. Day cares are another growing segment.

In 2019, strong growth occurred in the arts, entertainment and recreation industry. The region's ski resorts including Bogus Basin, Brundage and Tamarack reported record-breaking seasons. Tamarack was purchased and reopened in 2019. The city of McCall is funding a study to reroute Highway 55 away from downtown to ease the traffic congestion due the ski and summer tourist season. Caldwell's Indian Creek Plaza celebrated its one-year anniversary in 2019 and reported of the 137,000 visitors who came to events and activities, 35,000 skated on the outdoor ice-skating ribbon. Fitness centers, another segment of this industry, experienced employment growth.

Employment in the food and drinking establishments grew about 4 percent in 2019 but has increased nearly 45 percent since 2009. This industry experienced significant churn during the year with several restaurants closing while as many or more opened for a net gain of 38 establishments. There was a slight increase in annual average wages from \$16,587 in 2018 to \$17,154 in 2019. Although wages have increased, this sector traditionally has the lowest wages relying on its patrons to tip.

Slow growth of employment and wages in manufacturing can be tied to the many contractions that occurred over the year. In addition to job losses at Micron and Hewlett Packard, MotivePower is in the process of closing its Boise plant after more than 40 years of building more than 2,800 locomotives. At its peak, the plant employed 700 workers. The parent company is consolidating operations with a plant in Pennsylvania.

In other developments, Amazon announced intentions to build a fulfillment center in Nampa. Construction is underway on the 650,000-square-foot building that is set to open in the fall of 2020. The center will create more than 1,000 full-time jobs.

The city of Mountain Home has developed a multi-year plan to revitalize its downtown, which is sandwiched between two roads described as a highway bisecting the community. The first phase, covering North Main Street, was completed in 2019 and Phase 2 will be completed in 2020. Mountain Home also worked with the air force base to transfer the old railroad spur from the military to the city. The city plans to refurbish the tracks in an effort to bring economic development to the city.

Figure 4-3. Average employment and annual average wage growth by industry, not inflation adjusted Southwestern Idaho, 2009 through 2019

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

	2019 Average Employment	Job Growth		
		2018-19	2014-19	2009-19
All Industries	355,420	3.5%	20.7%	30.1%
Agriculture, Forestry, Fishing and Hunting	6,702	-1.6%	3.5%	1.9%
Mining	265.75	-0.5%	-5.5%	47.6%
Construction	26,689	8.1%	56.9%	76.5%
Manufacturing	31,505	0.5%	18.0%	26.4%
Utilities	1,685	-1.2%	-3.0%	39.8%
Wholesale Trade	15,474	5.3%	15.4%	32.2%
Retail Trade	40,113	2.1%	12.7%	22.1%
Transportation and Warehousing	11,967	5.5%	33.8%	38.5%
Information	4,662	-0.6%	-9.8%	-6.2%
Financial Activities	18,264	4.5%	25.5%	32.3%
Professional and Business Services	48,887	1.8%	22.7%	24.3%
Educational Services (Private + Govt)	26,124	3.0%	13.1%	17.0%
Health Care and Social Assistance (Private + Govt)	51,283	5.5%	19.6%	40.6%
Leisure and Hospitality	39,105	4.9%	31.3%	50.3%
Other Services (except Public Administration)	10,299	7.5%	28.3%	32.8%
Public Administration	22,395	1.5%	6.8%	5.0%
	2019 Average Wage	Wage Growth		
		2018-19	2014-19	2009-19
All Industries	\$47,716	2.9%	15.6%	29.9%
Agriculture, Forestry, Fishing and Hunting	\$36,121	-0.1%	19.1%	53.4%
Mining	\$61,210	-4.6%	-29.2%	3.8%
Construction	\$48,425	4.2%	16.4%	18.2%
Manufacturing	\$75,511	-5.0%	2.3%	36.9%
Utilities	\$86,852	0.6%	11.1%	47.7%
Wholesale Trade	\$69,229	4.5%	22.2%	36.4%

Retail Trade	\$33,488	3.2%	13.7%	32.0%
Transportation and Warehousing	\$46,607	4.5%	12.2%	24.0%
Information	\$55,536	4.9%	14.1%	21.8%
Financial Activities	\$64,134	5.5%	21.4%	44.2%
Professional and Business Services	\$54,619	9.1%	30.7%	38.7%
Educational Services (Private + Govt)	\$37,571	3.6%	17.4%	19.3%
Health Care and Social Assistance (Private + Govt)	\$48,819	2.9%	13.8%	22.0%
Leisure and Hospitality	\$18,682	4.8%	24.3%	35.9%
Other Services (except Public Administration)	\$33,630	6.6%	27.4%	39.1%
Public Administration	\$55,746	2.4%	15.6%	24.0%

South Central Idaho

2018-19 Population Growth: 1%

2018-19 Job Growth: 1.6%

2018-19 Wage Growth: 2.6% (not inflation adjusted)

2019 Unemployment Rate: 2.7%

The population growth from 2018-2019 for south central Idaho was 1 percent, continuing a cooling trend that started in 2018. The annualized average population growth since 2009 was 0.9 percent, tepid compared with regions such as southwestern at 1.9 percent and northern at 1.5 percent. Camas and Lincoln counties lost population in 2019, albeit slight outmigration tilting the pendulum. Camas and Gooding counties were the only two of the eight regional counties to lose population since the 2010 Census. Twin Falls and Jerome counties plus the Twin Falls Metropolitan Statistical Area, brought almost 12,000 new residents to the region since the last census. The region grew by 15,244 residents over the nine years.

The components of population change in south central area since the 2010 census were driven by natural increases (births less deaths), accounting for 76 percent of growth. In-migration (both international and from other states) added 24 percent of the growth. In 2019, growth was mainly attributed to the natural increase accounting for 57 percent of change, with net migration accounting for 43 percent. Twin Falls County with its growing base of jobs, housing and amenities brought in the most out-of-state and international new residents — more than 5,000, mostly from other states and compensating for net migration losses in six of the other regional counties. Blaine County was the only other county with positive net migration over the nine-year period, adding just over 600 new residents — mostly international in origin. South central Idaho has a combination of demographics that in aggregate have larger families compared with pockets of Idaho with older populations. These big shares of Hispanic population contribute to its higher natural increases of population.

The eight-county region has spent a good part of 2019 focused on issues that impact its community vibrancy and quality of life. While the end game is workforce attraction, these pertinent issues are common across political borders, as well as the urban and rural divide – housing inventory and downtown revitalization.

Twin Falls and Rupert have experienced the greatest renaissance in downtown placemaking with investments in its community gathering spots. Twin Falls continues to build on its Downtown Commons area with more eateries, parking and housing. Two downtown multi-family apartment

complexes are being reviewed by Twin Falls Planning and Zoning Commission. Rupert's plaza attracts the region with its Christmas village and programs around the holidays. The iconic Wilson Theatre located on the plaza has an active schedule throughout the year and has been renovated by the community.

Twin Falls reported 2019 had the highest single-family building permits pulled – 377 – since its record-breaking pre-recession years from 2003 through 2006. The highest number of permits was 664 in 2005. A difference in 2019 was the concentration of town homes that were built to accommodate a growing need for affordable housing. The estimated single-family home values were at \$20.7 million in 2019 versus \$13.5 million in 2018, an uptick of 50 percent.

The national retail shift continued to occur in Twin Falls, the regional consumer hub, with the loss of jobs and shopping opportunities as Shopko, Chico's and Kmart left Twin Falls. D&B Supply is moving into the Kmart space and other national retailers such as Kohl's are considering the popular mall area. Burley's retail mix has contracted and expanded similarly but on a smaller scale.

New hotels to the area include Marriott's TownePlace in Twin Falls, Hampton Inn in Burley and a Marriott Fairfield Inn under construction in Hailey with plans to open in the third quarter of 2020.

Employment growth in 2019 was 1.6 percent with construction and leisure and hospitality leading the growth at 4.7 percent. Next was manufacturing and transportation and warehousing with 2.3 percent growth. Those industries experiencing losses include retail, professional and business services, and information, a sector that can include television stations, newspapers and radio stations as well as the tech industry.

The workforce shortage was a driver behind wage increases in excess of annual inflation. Wages, workforce culture and benefits continue to be ongoing discussions among companies investing in methods to retain and attract employees. Wage growth for all industries in south central Idaho was 2.6 percent, down from 2018 at 3.3 percent.

The top two industries with the greatest wage boost in 2019 were financial activities, reporting 7.2 percent, and transportation and warehousing up 4.2 percent. Health care, agriculture and wholesale all hovered around 3.5 percent wage increases in 2019. Two industries lost ground in wage advancement including mining and other services. Flat wage growth was evident in retail, professional and business services – which includes call centers and temporary staffing agencies – along with the utilities sector.

Only six industries report 2019 average wages below the average for all industry. These lower-paying industries include a large percentage of part-time or seasonal workers – agriculture, retail, professional and business services, leisure and hospitality, educational services and other services.

The region has been slowing down for several years after a red hot run attracting national companies to its urban and rural counties. The distinguishing trait of 2019 would be the emphasis on growing the communities – a classic segue after significant job creation and diversification.

**Figure 4-4. Average employment and annual average wage growth by industry, not inflation adjusted
South Central Idaho, 2009 through 2019**

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

	2019 Average Employment	Job Growth		
		2018-19	2014-19	2009-19
All Industries	91,331	1.6%	10.5%	16.1%
Agriculture, Forestry, Fishing and Hunting	10,756	0.8%	9.4%	16.7%
Mining	166	-3.3%	-0.3%	0.5%
Construction	5,401	4.7%	39.8%	17.8%
Manufacturing	10,382	2.3%	12.5%	32.2%
Utilities	598	0.1%	5.5%	33.4%
Wholesale Trade	3,704	1.7%	8.0%	13.2%
Retail Trade	10,239	-0.1%	9.3%	7.2%
Transportation and Warehousing	4,198	2.3%	0.7%	7.6%
Information	952	-2.3%	-1.8%	-25.0%
Financial Activities	2,825	1.1%	12.5%	-0.4%
Professional and Business Services	7,948	-0.4%	-2.3%	15.5%
Educational Services (Private + Govt)	6,853	1.6%	6.8%	7.6%
Health Care and Social Assistance (Private + Govt)	10,581	1.2%	13.2%	25.1%
Leisure and Hospitality	9,857	4.7%	17.6%	31.8%
Other Services (except Public Administration)	2,598	0.2%	19.5%	20.4%
Public Administration	4,275	1.6%	5.0%	1.3%
	2019 Average Wage	Wage Growth		
		2018-19	2014-19	2009-19
All Industries	\$38,452	2.6%	16.0%	28.6%
Agriculture, Forestry, Fishing and Hunting	\$38,441	3.5%	22.1%	39.0%
Mining	\$40,291	-1.0%	18.0%	26.3%
Construction	\$43,082	2.2%	17.4%	30.1%
Manufacturing	\$50,488	3.0%	14.4%	34.2%
Utilities	\$69,556	1.6%	15.5%	57.2%
Wholesale Trade	\$56,133	3.4%	17.2%	41.2%
Retail Trade	\$29,694	0.6%	15.4%	27.2%
Transportation and Warehousing	\$43,885	4.2%	20.4%	28.5%
Information	\$44,807	2.7%	17.4%	33.0%
Financial Activities	\$51,913	7.2%	22.1%	34.0%
Professional and Business Services	\$38,431	0.6%	19.7%	18.4%
Educational Services (Private + Govt)	\$32,305	3.5%	13.0%	14.3%
Health Care and Social Assistance (Private + Govt)	\$40,853	3.6%	9.9%	27.5%
Leisure and Hospitality	\$18,639	1.9%	15.7%	24.2%

Other Services (except Public Administration)	\$33,470	-0.1%	14.0%	34.9%
Public Administration	\$41,644	2.2%	13.6%	20.7%

Southeastern Idaho

2018-19 Population Growth: 1.3%

2018-19 Job Growth: 2.0%

2018-19 Wage Growth: 2.7% (not inflation adjusted)

2019 Unemployment Rate: 2.7%

In 2019, southeastern Idaho experienced a two percent growth in jobs, a welcome improvement from the lackluster 2018 when job growth was under 1 percent. Job growth was largely driven by the construction industry which saw a 9.4 percent increase — a net change of about 300 jobs. The industry also accounted for much of the wage uptick over the year. Since 2009, the region has experienced strong growth — total covered employment grew by about 4,800 jobs — a net change of 8.2 percent. Ranked by growth rate and most jobs added, the top five fastest-growing industries in the region were professional and business services, health care and social assistance, leisure and hospitality, mining and construction. The largest job growth was in health care and social assistance.

Additional employment in construction reflects the numerous developments ongoing in the region. Several large-scale construction projects were completed in 2019, including the FBI \$100 million facility expansion in Pocatello and the Shoshone-Bannock casino expansion in Fort Hall. The Northgate Interchange project was completed in 2019 providing a new entrance to northeast Pocatello and adjacent Chubbuck. This represented an investment of roughly \$31 million, including connecting roads and infrastructure.

The Northgate interchange project was driven in part by plans to build the Northgate development, a large mixed-use community consisting of smart homes and walkable, bike friendly paths in Pocatello. Much of this residential development is still underway – fewer than a dozen homes had been built by the end of 2019. Just west of this development, in the city of Chubbuck, a similar development – the New Day District - is also under construction. Both developments when completed would do much to alleviate the chronic housing shortage in the region. According to the Census Bureau, the number of housing units in 2019 grew by 700 units regionally – more than half of them in the metropolitan Bannock County.

The hospitality industry was another sector to post strong growth numbers in 2019, largely driven by growth in accommodation and food services. The region saw a plethora of openings for new fast food and specialty restaurants, bars and arcades. The biggest contributor to growth in this sector was the opening of the Shoshone-Bannock Casino Hotel in Fort Hall.

Health care has seen consistent job growth over the past decade and now dominates the region's economy boasting a 15.2 percent employment share in 2019 with an accompanying average wage well above the regional average. With ongoing projects such as the expansion of the Power County Hospital in American Falls and the State Hospital South in Blackfoot, construction of a new Bingham Healthcare Medical Campus in Chubbuck and another medical campus in the proposed Northgate development, health care is on target for further increases in employment share. The shift toward health care jobs has followed a declining share in retail, which traditionally tends to have lower wages. Retail in the region was notably hit this year with the closure of Shopko in Chubbuck.

Regional manufacturing saw modest growth in 2019. Basic American Foods announced plans to close its manufacturing plant in Shelley and its ingredients plant in Blackfoot, phasing out production at both facilities over two years. In addition, ON Semiconductor Corp. laid off fewer than 40 employees due to an anticipated reduction in demand. Despite the job losses, manufacturing remains a dominant sector in the region's economy. Portneuf Capital recently purchased the long-vacant Hoku Materials plant with a plan to open an industrial business park. Possible tenants at the park include a light manufacturing company. Midvale, Utah-based Savage Services is evaluating the feasibility of building an intermodal facility at the Pocatello regional airport. This proposal to increase freight access has potential to boost food processing in the region.

Idaho State University, the region's largest employer, embarked on several projects aimed at enhancing the university presence in the region and reestablishing its connection to the local community. These include the return of the historic landmark Redhill "I", ongoing renovations to the historic Davis Field and plans to construct an \$8.3 million alumni and visitors center. Although the university secured \$10 million in funding to boost vocational programs this year, it will be expected to cut more than \$1.644 million from its budget by Fiscal Year 2021.

**Figure 4-5. Average employment and annual average wage growth by industry, not inflation adjusted
Southeastern Idaho, 2009 through 2019**

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

	2019 Average Employment	Job Growth		
		2018-19	2014-19	2009-19
All Industries	63,553	2.0%	7.9%	8.2%
Agriculture, Forestry, Fishing and Hunting	2,478	-3.3%	-4.7%	10.0%
Mining	794	15.3%	64.7%	79.7%
Construction	3,511	9.4%	27.3%	12.4%
Manufacturing	6,984	1.3%	16.6%	4.2%
Utilities	298	-0.6%	2.6%	40.9%
Wholesale Trade	2,533	-0.7%	-4.8%	-7.1%
Retail Trade	7,140	-1.6%	2.8%	1.7%
Transportation and Warehousing	1,805	4.4%	10.0%	3.4%
Information	549	-3.2%	-22.2%	-27.9%
*Financial Activities	2,150	-17.0%	-23.4%	-12.1%
Professional and Business Services	5,547	9.8%	16.0%	15.2%
Educational Services (Private + Govt)	7,650	0.6%	4.7%	2.5%
Health Care and Social Assistance (Private + Govt)	9,666	2.2%	9.9%	26.4%
Leisure and Hospitality	6,418	8.9%	21.7%	19.1%
Other Services (except Public Administration)	1,350	3.7%	8.7%	-1.7%
Public Administration	4,679	1.0%	1.7%	0.8%
	2019 Average Wage	Wage Growth		
		2018-19	2014-19	2009-19
All Industries	\$38,017	2.7%	12.9%	25.0%
Agriculture, Forestry, Fishing and Hunting	\$35,934	3.3%	12.8%	36.1%
Mining	\$72,936	10.7%	33.3%	41.0%
Construction	\$42,315	3.9%	16.3%	26.8%
Manufacturing	\$52,904	-2.1%	-2.1%	18.4%
Utilities	\$82,065	1.9%	15.0%	28.3%
Wholesale Trade	\$47,276	1.1%	6.4%	29.1%
Retail Trade	\$26,405	2.7%	16.8%	28.3%
Transportation and Warehousing	\$42,860	4.2%	19.9%	33.9%
Information	\$34,129	9.9%	19.0%	30.1%
*Financial Activities	\$48,058	10.2%	17.3%	32.2%
Professional and Business Services	\$39,266	8.5%	20.7%	28.4%
Educational Services (Private + Govt)	\$35,255	4.4%	14.6%	18.2%
Health Care and Social Assistance (Private + Govt)	\$40,269	2.4%	17.3%	23.5%
Leisure and Hospitality	\$15,592	1.9%	14.4%	31.3%

Other Services (except Public Administration)	\$29,535	2.7%	12.3%	31.0%
Public Administration	\$43,218	2.0%	14.7%	22.0%

* Note: The large decline in the financial activities sector is largely driven by non-market causes - a NAICS code change for a major employer in the sector. The employer industry code was moved from financial activities to professional and business services.

Eastern Idaho

2018-19 Population Growth: 1.9%

2018-19 Job Growth: 2.8%

2018-19 Wage Growth: 3.3% (not inflation adjusted)

2019 Unemployment Rate: 2.4%

In December 2019, the Idaho Falls metropolitan area earned nationwide recognition by having the fastest year-over-year growth in nonfarm jobs, bringing a spectacular end to a year of solid expansion. On average, nonfarm jobs in the metro area grew by 3.4 percent – the 11th fastest of more than 400 metropolitan areas across the nation. Outside of the metro area, Teton County saw its population grow by 4.2 percent - 10th in the nation. Madison County, home of the rapidly expanding Brigham Young University-Idaho in Rexburg, reported a growth in housing units that ranked second fastest in the nation. The eastern Idaho region saw the number of housing units increase by 2,209, with Madison County contributing the largest share of new housing. Madison and Bonneville counties both accounted for 74 percent of housing growth in 2019.

Due largely to the residential building sector, construction was one of the fastest-growing industries in the region. The sector saw a 6.5 percent growth from 2018 and accounted for 14 percent of all the new jobs in the region. Ongoing construction projects included the expansion of the Falls Apartments at Snake River Landing in Idaho Falls, construction of a 60,000-square foot three-story office building, also at Snake River Landing, and a Holiday Inn Hotel at the Jackson Hole Junction development, near Snake River Landing. Other large-scale construction projects outside of Idaho Falls included the \$125 million expansion of Basic American Foods Rexburg facility and the construction of the new Jefferson Joint School District No. 251 elementary school.

As expected with a growing population, the hospitality industry was another sector to post strong growth numbers in 2019, largely driven by the accommodation and food services entities. A new hotel opened in Idaho Falls and the entire region experienced a rise in fast food and specialty restaurants. On the other hand, retail lost jobs, largely due to the wave of nationwide retail closures. Notable closures in the region included Shopko and three Payless Stores in Idaho Falls; Sears and Kmart in Ammon; and a Payless store in Rexburg. Some of the job losses are expected to be partially offset in 2020 by a new entrant – Costco – to the Idaho Falls retail cluster. Construction is expected to be complete by August 2020.

The Idaho National Laboratory (INL) is the region's largest employer and the major driver for growth in the professional and business services sector. This sector saw significant growth over the year and accounted for much of the wage growth in the region. The steady stream of federal funding to advance nuclear research in addition to increased collaborations with varied energy stakeholders ensure INL continues as the largest player in the region's economy. In 2019, the INL, the Idaho State Board of Education and the Idaho State Building Authority officially opened a new Cybercore Integration Center and a Collaborative Computing Center. Both facilities will help foster collaboration

between researchers and students from Idaho State University, the University of Idaho and Boise State University.

Within the energy corridor, plans to build the nation's first commercial small modular reactors (SMR) inched a step closer to being realized. The Utah-based energy cooperative managing the project, Utah Associated Municipal Power Systems (UAMPS), acquired sales contracts for enough carbon-free power to begin a license application process with the Nuclear Regulatory Commission. Nuscale, the company that plans to build the reactors, received federal grants to build reactor plant simulators at three universities. The SMR project is expected to go live by 2026 or 2027. The project leaders anticipate a workforce need of between 4,000 – 5,000 construction jobs on site by 2024. About 300 operational staff are planned to run the facility once completed.

By far the most dominant contributor to job growth in the region was the health care sector. This sector grew by more than 800 jobs – 31 percent of total job growth in the region. A new hospital – the Idaho Falls Community Hospital – opened its doors in November 2019. The region welcomed a new assisted living facility in Idaho Falls and a surgical center in Arco. The Eastern Idaho Regional Medical Center and the Mountain View Hospital in Idaho Falls were in expansionary mode, as well.

Going into 2020, it is expected the region would maintain its current growth trajectory. Economic development organizations and educators within the region are collaborating to ensure the region has the workforce it needs to fuel the job growth. In 2019, more than 100 local high school students participated in Your Future in Technology, also known as YourFIT, a career expo geared at creating awareness of technical jobs in high-demand fields requiring only a two-year degree or certificate. In addition, the College of Eastern Idaho rolled out the Part-Time Registered Nurse Program and the LPN (Licensed Practical Nurse) to RN (Registered Nurse) Bridge Program to prepare more students to fill a growing demand for nurses in Idaho.

The region has been aggressively expanding its fiber-optic network. The Idaho Falls Residential Fiber Pilot Program officially launched in March and expanded to multiple neighborhoods. In light of recent developments with the coronavirus, this would put the region in a better position to accommodate a massive transition to working from home.

Figure 4-6. Average employment and annual average wage growth by industry, not inflation adjusted Eastern Idaho, 2009 through 2019

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

	2019 Average Employment	Job Growth		
		2018-19	2014-19	2009-19
All Industries	95,810	2.8%	16.6%	20.1%
Agriculture, Forestry, Fishing and Hunting	2,255	-0.3%	-8.5%	-4.2%
Mining	100	-15.1%	-56.5%	-75.8%
Construction	5,943	6.4%	42.6%	27.4%
Manufacturing	6,016	3.9%	23.7%	45.2%
Utilities	295	1.9%	3.6%	20.8%
Wholesale Trade	4,077	1.8%	-24.5%	-18.4%
Retail Trade	11,610	-1.2%	10.1%	16.1%
Transportation and Warehousing	3,124	-1.1%	11.6%	24.5%

Information	1,154	3.3%	-5.6%	-29.3%
Financial Activities	3,274	4.9%	22.8%	15.7%
Professional and Business Services	17,555	2.5%	27.6%	21.7%
Educational Services (Private + Govt)	8,572	1.8%	12.7%	17.4%
Health Care and Social Assistance (Private + Govt)	13,873	6.1%	27.3%	41.1%
Leisure and Hospitality	10,336	4.8%	25.1%	45.6%
Other Services (except Public Administration)	2,383	1.8%	16.8%	14.0%
Public Administration	5,246	1.79%	5.32%	0.30%
	2019 Average Wage	Wage Growth		
		2018-19	2014-19	2009-19
All Industries	\$42,452	3.3%	16.4%	21.5%
Agriculture, Forestry, Fishing and Hunting	\$36,495	2.6%	26.7%	40.0%
Mining	\$87,073	18.3%	-12.8%	48.7%
Construction	\$43,218	4.6%	14.2%	22.9%
Manufacturing	\$45,085	4.7%	23.4%	39.8%
Utilities	\$72,705	1.9%	8.8%	16.0%
Wholesale Trade	\$49,871	3.5%	18.3%	30.6%
Retail Trade	\$28,568	4.2%	14.0%	28.8%
Transportation and Warehousing	\$39,964	4.9%	15.3%	25.6%
Information	\$40,179	-0.7%	14.4%	21.3%
Financial Activities	\$46,959	0.2%	16.6%	39.6%
Professional and Business Services	\$70,551	3.5%	18.3%	19.2%
Educational Services (Private + Govt)	\$36,091	4.3%	11.0%	14.7%
Health Care and Social Assistance (Private + Govt)	\$37,935	2.7%	13.3%	17.7%
Leisure and Hospitality	\$15,864	4.1%	19.5%	31.7%
Other Services (except Public Administration)	\$27,706	3.0%	17.2%	23.2%
Public Administration	\$50,098	1.2%	13.6%	22.8%

5.0 Economic Comparisons with Other States

Labor market indicators show the Idaho economy has maintained a growth trajectory in 2019. The following tables of economic data compare Idaho to the nation as well as other states and the District of Columbia. Population and job growth, unemployment rate, business births and per capita income are presented as economic indicators for comparison as well as a current ranking for Idaho.

- *Figure 5-1* shows annual population growth rates for Idaho compared with other states and the nation. In 2019, Idaho ranked first in the nation for population growth.
- *Figure 5-2* shows annual real gross domestic product (GDP) growth rates for Idaho compared with other states and the nation. In 2019, Idaho tied with Florida as 10th in the nation for GDP growth.
- *Figure 5-3* shows the average annual job growth rate of each state. As of 2019, Idaho had an average annual job growth rate of 2.8 percent, second highest in the nation.
- *Figure 5-4* shows the unemployment rate for Idaho compared with other states and the nation. In 2019, Idaho tied with Massachusetts to rank 10th.
- *Figure 5-5* shows the number of business births per 1,000 persons in the labor force. In the first and second quarters of 2018, Idaho ranked third in the nation. In the third quarter of 2018, Idaho ranked second.
- *Figure 5-6* compares per capita income –price adjusted - by state. Idaho had one of the lowest per capita personal incomes – 46th of 50 states and the District of Columbia – after adjusting for cost-of-living differences. Idaho ranked 28th in the nation for income growth.

Population Growth

Figure 5-1: Highest and lowest state population growth rates
United States and Idaho, 2018 to 2019

Source: U.S Census Bureau, Population Division

Rank	State*	Population Growth Rate
	United States	0.5%
1	Idaho	2.1%
2	Nevada	1.7%
2	Arizona	1.7%
2	Utah	1.7%
5	Texas	1.3%
5	South Carolina	1.3%
7	Washington	1.2%
7	Colorado	1.2%
9	Florida	1.1%
10	North Carolina	1.0%
10	Georgia	1.0%
12	Delaware	0.9%
12	Oregon	0.9%
14	Tennessee	0.8%
14	Montana	0.8%
36	California	0.1%
36	Ohio	0.1%
36	Rhode Island	0.1%
36	Kansas	0.1%
40	Michigan	0.0%
40	Pennsylvania	0.0%
40	New Jersey	0.0%
43	Vermont	-0.1%
44	Mississippi	-0.2%
44	Connecticut	-0.2%
44	Louisiana	-0.2%
47	Hawaii	-0.3%
48	New York	-0.4%
48	Illinois	-0.4%
50	Alaska	-0.5%
51	West Virginia	-0.7%

* Includes the District of Columbia

Gross Domestic Product Growth

Figure 5-2: Highest and lowest state gross domestic product growth rates, inflation adjusted (chained 2012 dollars)

United States and Idaho, 2018 to 2019

Source: Bureau of Economic Analysis

Rank	State*	Real GDP Growth Rate
	United States	2.3%
1	Texas	4.4%
2	Utah	3.8%
2	Washington	3.8%
4	New Mexico	3.7%
5	Colorado	3.5%
6	Wyoming	3.3%
7	Arizona	3.1%
8	South Carolina	3.0%
9	Nevada	2.9%
10	Florida	2.8%
10	Idaho	2.8%
12	New Hampshire	2.7%
12	Oregon	2.7%
12	Rhode Island	2.7%
15	California	2.6%
36	Maryland	1.5%
36	New Jersey	1.5%
38	Minnesota	1.4%
38	Wisconsin	1.4%
40	Louisiana	1.3%
40	Mississippi	1.3%
42	Kentucky	1.1%
43	Hawaii	1.0%
43	West Virginia	1.0%
45	Iowa	0.9%
45	Kansas	0.9%
47	Delaware	0.8%
47	Indiana	0.8%
49	Michigan	0.7%
49	South Dakota	0.7%
51	Nebraska	0.6%

* Includes the District of Columbia

Nonfarm Employment Growth

Figure 5-3: Highest and lowest state average annual job growth rates, nonfarm employment United States and Idaho, 2018 to 2019

Source: U.S Bureau of Labor Statistics, Current Employment Statistics

Rank	State*	Job Growth Rate
	United States	1.2%
1	Utah	3.0%
2	Idaho	2.8%
2	Arizona	2.8%
4	Nevada	2.5%
5	Texas	2.3%
6	Colorado	2.1%
7	Washington	2.0%
8	Florida	1.9%
8	Tennessee	1.9%
8	North Carolina	1.9%
11	Georgia	1.7%
12	South Carolina	1.6%
12	New Mexico	1.6%
14	California	1.5%
14	Oregon	1.5%
36	Alaska	1.0%
37	Kansas	0.5%
37	Minnesota	0.5%
39	Kentucky	0.4%
39	Ohio	0.4%
39	Mississippi	0.4%
42	Michigan	0.3%
42	Nebraska	0.3%
42	Illinois	0.3%
45	Wisconsin	0.2%
46	Iowa	0.1%
47	Vermont	0.0%
47	Louisiana	0.0%
49	Connecticut	-0.2%
50	Hawaii	-0.4%
51	West Virginia	-0.9%

* Includes the District of Columbia

Unemployment Rates

Figure 5-4: Highest and lowest state unemployment rates, not seasonally adjusted
United States and Idaho, 2019

Source: U.S Bureau of Labor Statistics, Local Area Unemployment Statistics

Rank	State*	Unemployment Rate
	United States	3.7
1	North Dakota	2.4
1	Vermont	2.4
3	New Hampshire	2.5
4	Utah	2.6
5	Hawaii	2.7
5	Iowa	2.7
7	Colorado	2.8
7	South Carolina	2.8
7	Virginia	2.8
10	Idaho	2.9
10	Massachusetts	2.9
12	Alabama	3.0
12	Maine	3.0
12	Nebraska	3.0
15	Florida	3.1
36	North Carolina	3.9
37	California	4.0
37	Illinois	4.0
37	New York	4.0
40	Michigan	4.1
40	Ohio	4.1
42	Kentucky	4.3
42	Washington	4.3
44	Pennsylvania	4.4
45	Arizona	4.7
46	Louisiana	4.8
47	New Mexico	4.9
47	West Virginia	4.9
49	Mississippi	5.4
50	District of Columbia	5.5
51	Alaska	6.1

* Includes the District of Columbia

Entrepreneurship Rates

Figure 5-5: Highest and lowest establishment births* per 1,000 persons in the labor force, seasonally adjusted
United States and Idaho, 2019 Q1 – Q3

Source: U.S Bureau of Labor Statistics, Business Employment Dynamics

Rank	State**	Entrepreneurship Rate
	United States	1.6
1	District of Columbia	2.8
2	Idaho	2.4
3	Montana	2.3
4	California	2.2
4	Wyoming	2.2
4	Florida	2.2
7	Utah	2.1
8	Missouri	2.0
8	Colorado	2.0
10	Georgia	1.9
11	Delaware	1.8
11	Nevada	1.8
11	Rhode Island	1.8
14	Oregon	1.7
14	North Dakota	1.7
36	Kentucky	1.3
36	Alabama	1.3
38	Connecticut	1.2
38	Wisconsin	1.2
38	Tennessee	1.2
38	Illinois	1.2
38	Louisiana	1.2
38	Iowa	1.2
38	Minnesota	1.2
38	Maryland	1.2
46	West Virginia	1.1
46	Pennsylvania	1.1
48	Indiana	1.0
48	Mississippi	1.0
48	Michigan	1.0
48	Ohio	1.0

* Does not include non-employer establishments

** Includes the District of Columbia

Personal Income

Figure 5-6: Highest and lowest state per capita personal income, adjusted for cost of living using the regional price parity index (RPP)

United States and Idaho, 2019

Source: U.S Bureau of Economic Analysis

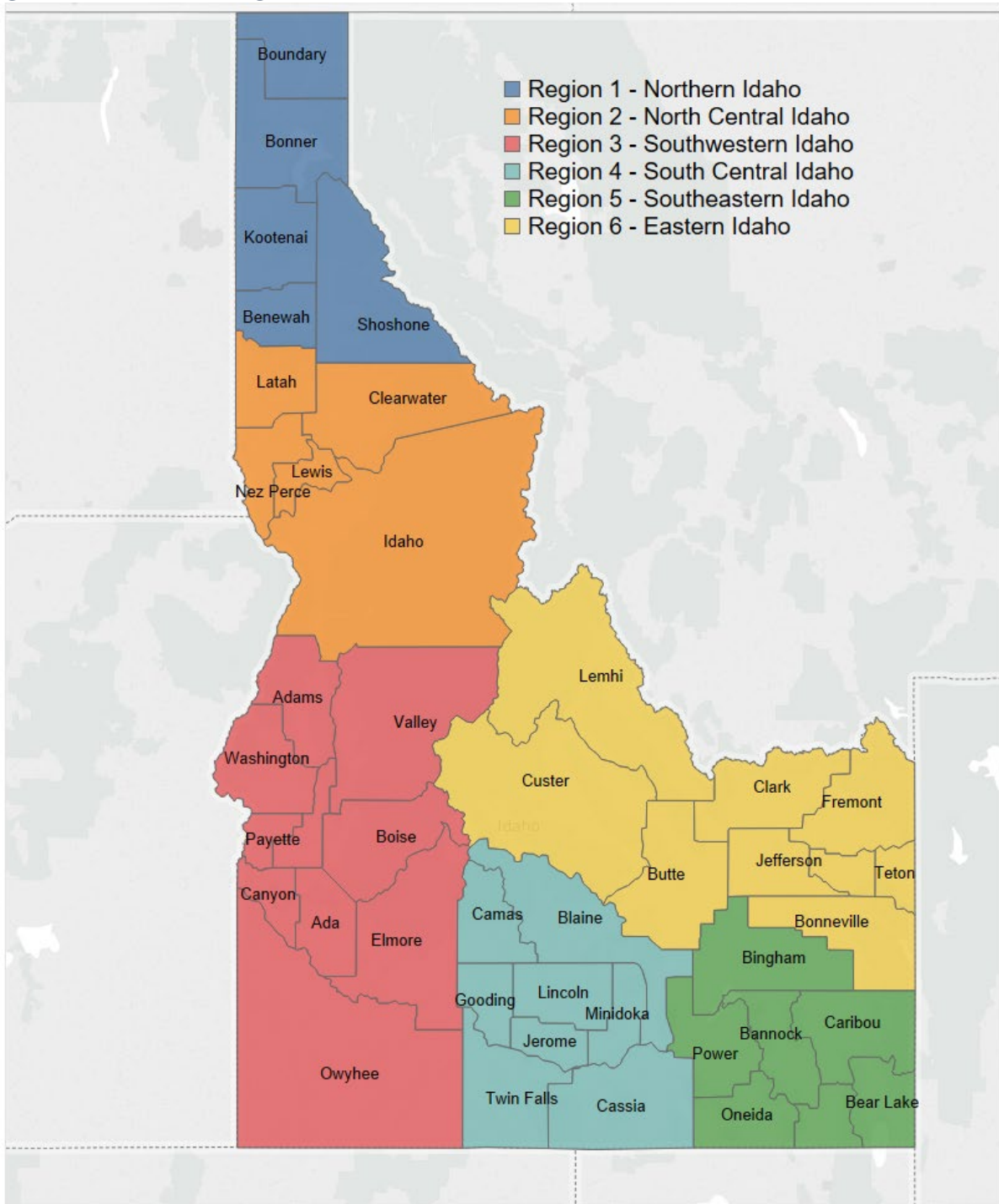
Rank	State*	Adjusted Income
	United States	\$56,663
1	Connecticut	\$74,540
2	District of Columbia	\$72,815
3	Massachusetts	\$68,338
4	Wyoming	\$68,302
5	North Dakota	\$63,467
6	New Jersey	\$61,614
7	New York	\$61,375
8	South Dakota	\$61,348
9	Nebraska	\$61,308
10	Minnesota	\$61,213
11	Maryland	\$60,593
12	Pennsylvania	\$60,282
13	New Hampshire	\$60,264
14	Colorado	\$60,204
15	Washington	\$60,202
36	Oregon	\$52,361
37	Nevada	\$52,188
38	North Carolina	\$52,073
39	Georgia	\$51,827
40	Florida	\$51,679
41	Maine	\$50,950
42	Alabama	\$50,787
43	Kentucky	\$50,133
44	Utah	\$50,098
45	South Carolina	\$49,741
46	Idaho	\$49,343
47	Hawaii *	\$48,645
48	New Mexico	\$48,281
49	West Virginia	\$48,219
50	Arizona	\$47,910
51	Mississippi	\$45,777

* Includes the District of Columbia

Appendices

Appendix 1. Idaho Labor Regions

Figure A1-1. Idaho Labor Regions



Appendix 2. Estimating Labor Underutilization for Idaho Counties

To develop estimates of the alternative measures of labor underutilization for Idaho counties, the model draws from the following data sources:

- *County labor force and unemployment statistics from the Local Area Unemployment Statistics program.*
- *Five-year estimates of part-time workers from the Census Bureau's American Community Survey.*
- *Statewide measures of marginally attached workers and involuntary part-time workers from Current Population Survey Estimates.*

To estimate discouraged workers and marginally attached workers by county, the model assumes each county has the same ratio of the state's totals as its unemployment bears to total state unemployment. Similarly, the number of part-time workers in each county is estimated by multiplying each county's percentage of the statewide total of part-time workers from the American Community Survey by the statewide involuntary part-time workers.

It is important to remember these are only estimates. The assumption that the percentage of involuntary part-time workers is the same as its percentage of part-time workers is questionable. However, they are the best ballpark estimates of labor underutilization in Idaho counties that limited data allow. Regional data comes from summing up county data.

As shown in *Figure A2-1*, in 2019, 19 of Idaho's 44 counties had U-6 rates below the statewide average of 6 percent. Teton, Minidoka, Fremont and Gooding counties had the lowest rates — ranging from 4.3 to 4.6 percent. Adams, Clearwater and Shoshone counties had the highest U-6 rates — above 9 percent but below 12 percent. Northern Idaho had the highest unemployment rate in 2019, so it is not surprising that it also had the highest U-6 rate of 7.2 percent. North central Idaho had the next highest rate at 7.1 percent. South central Idaho had the lowest at 5.4 percent

Figure A2-1. Alternative measures of labor underutilization: labor force, unemployed, discouraged workers, all other marginally attached workers, involuntary part-time workers and U-6 rate (unemployed with marginally attached workers and involuntary part-time)

Idaho and Counties, 2019

Source: U.S Bureau of Labor Statistics, Current Population Survey, Local Area Unemployment Statistics, American Community Survey 5-year estimates

Area	Labor Force	Unemployed Residents	Discouraged Workers	Other Marginally Attached	Involuntary Part-Time Workers	U-6
State of Idaho	870,900	26,000	800	3,600	22,400	6.0
1: Northern	113,356	4,499	138	622	2,953	7.2
Benewah	4,057	218	7	30	76	8.1
Bonner	19,808	848	26	117	639	8.2
Boundary	5,309	241	7	33	102	7.2
Kootenai	79,103	2,884	89	399	1,996	6.7
Shoshone	5,079	308	9	43	140	9.7
2: North Central	52,064	1,761	54	245	1,678	7.1
Clearwater	2,868	199	6	28	64	10.2
Idaho	6,481	302	9	42	192	8.3
Latah	20,293	563	17	78	905	7.7

Lewis	1,628	91	3	13	39	8.9
Nez Perce	20,794	606	19	84	478	5.7
3: Southwest	405,857	11,799	365	1,632	9,714	5.8
Ada	251,055	6,457	199	894	6,003	5.4
Adams	1,700	119	4	16	53	11.2
Boise	3,472	153	5	21	71	7.1
Canyon	103,100	3,390	104	469	2,472	6.2
Elmore	11,403	383	12	53	309	6.6
Gem	8,204	277	9	38	203	6.4
Owyhee	5,366	186	6	26	106	6.0
Payette	11,518	421	13	58	223	6.2
Valley	5,485	219	7	30	166	7.6
Washington	4,554	194	6	27	108	7.3
4: South Central	99,926	2,753	85	380	2,242	5.4
Blaine	12,164	327	10	45	284	5.5
Camas	687	20	1	3	9	4.8
Cassia	12,063	299	9	41	241	4.9
Gooding	8,120	220	7	30	122	4.6
Jerome	12,048	320	10	44	227	5.0
Lincoln	2,669	97	3	13	58	6.4
Minidoka	11,299	295	9	41	164	4.5
Twin Falls	40,876	1,175	36	163	1,137	6.1
5: Southeast	86,048	2,416	75	334	2,341	6.0
Bannock	42,219	1,223	38	169	1,327	6.5
Bear Lake	2,940	88	3	12	83	6.3
Bingham	23,519	643	20	89	525	5.4
Caribou	4,083	112	3	16	87	5.3
Franklin	6,954	168	5	23	205	5.7
Oneida	2,293	54	2	7	53	5.0
Power	4,040	128	4	18	61	5.2
6: Eastern	113,647	2,772	86	383	3,466	5.9
Bonneville	56,331	1,383	43	191	1,517	5.5
Butte	1,379	37	1	5	26	5.0
Clark	373	14	-	2	10	6.9
Custer	2,201	95	3	13	48	7.2
Fremont	7,772	186	6	26	144	4.6
Jefferson	13,859	330	10	46	406	5.7
Lemhi	3,521	172	5	24	82	8.0
Madison	21,667	407	13	56	1,125	7.4
Teton	6,544	148	5	20	108	4.3

All six labor regions show declining U-6 rates over the years since the severe recession that began in 2008 as shown in *Figure A2-2*. All six regions saw U-6 rates decrease between 2018 and 2019.

Figure A2-2. *Alternative measures of labor underutilization: U-6 rate* (unemployed with marginally attached workers and involuntary part-time)

Idaho Labor Regions, 2019

Source: U.S Bureau of Labor Statistics, Current Population Survey, Local Area Unemployment Statistics, American Community Survey 5-year estimates

Region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
1: Northern	18.9	19.7	19.3	16.5	14.9	12.1	10.1	9.4	8.5	7.5	7.2
2: N. Central	18.4	17.5	16.9	14.8	13.6	11.1	9.4	8.6	8.0	7.3	7.1
3: Southwest	16.9	16.2	15.9	13.7	12.4	10.1	8.4	7.6	6.8	6.0	5.8
4: S. Central	13.0	14.1	14.0	12.2	10.8	8.8	7.2	6.7	6.0	5.5	5.4
5: Southeast	15.9	15.5	15.4	13.6	12.4	10.2	8.6	7.8	7.0	6.2	6.0
6: Eastern	15.8	15.6	15.7	14.2	12.9	10.5	8.5	7.6	6.9	6.1	5.9

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