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# Idaho 2020

## Labor Market and Economic Report

Summer 2021

Idaho Department of Labor

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# Idaho Labor Market and Economic Report

## 2020



Report content based on data available through March 2021

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## Labor Market Quick Facts

### Summary Table

Source: Idaho Department of Labor; Communications & Research Division

	2020	2019	2010
Population	1,826,913	1,789,060	1,570,819
Average Labor Force	892,151	879,448	762,147
Average Number Unemployed	47,786	24,319	66,882
Average Unemployment Rate	5.4	2.8	8.8
Average Total Employment	844,365	855,129	695,265
Average Covered Employment	748,595	752,277	605,560
Average Covered Wage	\$47,674	\$44,264	\$34,905
2022 Q1 Industry Short-term Projections	827,034	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 2000 to 2020

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

Year	Labor Force	Unemployed	Unemployment Rate	Employed
2000	661,066	30,838	4.7	630,228
2001	678,281	34,368	5.1	643,913
2002	685,650	38,631	5.6	647,019
2003	691,702	38,403	5.6	653,299
2004	702,872	34,234	4.9	668,638
2005	730,354	28,954	4.0	701,400
2006	744,475	25,627	3.4	718,848
2007	755,287	23,132	3.1	732,155
2008	759,676	37,848	5.0	721,828
2009	763,633	66,801	8.7	696,832
2010	762,147	66,882	8.8	695,265
2011	764,205	62,545	8.2	701,660
2012	772,112	57,143	7.4	714,969
2013	777,606	53,061	6.8	724,545
2014	776,937	34,132	4.4	742,805
2015	795,014	30,893	3.9	764,121
2016	812,921	29,741	3.7	783,180
2017	833,996	26,320	3.2	807,676
2018	855,263	24,045	2.8	831,218
2019	879,448	24,319	2.8	855,129
2020	892,151	47,786	5.4	844,365

**Quick fact 2. Labor force and unemployment, not seasonally adjusted  
Idaho metropolitan areas, 2020**

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

Metropolitan area	Labor Force	Unemployed	Unemployment rate	Employed
<b>Idaho State</b>	<b>892,151</b>	<b>47,786</b>	<b>5.4</b>	<b>844,365</b>
Coeur D'Alene	81,286	5,632	6.9	75,654
Lewiston WA-ID	31,176	1,551	5.0	29,625
Boise City	381,181	21,224	5.6	359,957
Twin Falls	53,448	2,654	5.0	50,794
Pocatello	42,560	2,065	4.9	40,495
Idaho Falls	73,669	2,879	3.9	70,790
Logan UT-ID	72,468	2,164	3.0	70,304

**Quick fact 3. Wages and employment by industry  
Idaho, 2020 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
	<b>All Industries</b>	<b>69,398</b>	<b>748,595</b>	<b>\$47,674</b>
<b>11</b>	Agriculture, forestry, fishing and hunting	2,343	24,546	\$39,717
<b>21</b>	Mining	189	2,490	\$73,423
<b>22</b>	Utilities	342	3,630	\$83,790
<b>23</b>	Construction	9,234	54,341	\$48,672
<b>31-33</b>	Manufacturing	2,886	67,703	\$65,635
<b>42</b>	Wholesale trade	3,901	30,859	\$68,109
<b>44-45</b>	Retail trade	6,439	87,831	\$34,119
<b>48-49</b>	Transportation and warehousing	2,432	25,450	\$46,813
<b>51</b>	Information	1,442	8,150	\$60,498
<b>52</b>	Finance and Insurance	3,727	25,923	\$77,354
<b>53</b>	Real Estate and Rental and Leasing	2,818	8,907	\$43,558
<b>54</b>	Professional, Scientific and Technical Services	8,518	42,157	\$73,494
<b>55</b>	Management of Companies and Enterprises	420	7,243	\$106,598
<b>56</b>	Admin. and Support and Waste Management and Remediation Services	4,066	48,471	\$40,707
<b>61</b>	Educational services (private + government)	1,805	59,778	\$40,261
<b>62</b>	Health care and social assistance (private + govt)	8,206	109,403	\$47,069
<b>71</b>	Arts, Entertainment and Recreation	1,106	12,121	\$23,543
<b>72</b>	Accommodation and Food Services	4,203	64,626	\$18,250
<b>81</b>	Other services (except public administration)	4,232	19,147	\$34,472
<b>92</b>	Public administration	1,167	45,784	\$53,179

**Quick fact 4. Projected industry average annual growth rates  
Idaho, 2020 – 2022, 2018 – 2028**

Source: Idaho Department of Labor; Communications and Research

NAICS	Industry Sector	2020 to 2022	2018 to 2028
	<b>All industries</b>	<b>1.3%</b>	<b>1.2%</b>
<b>11</b>	Agriculture, forestry, fishing and hunting	0.1%	0.8%
<b>21</b>	Mining	-0.3%	-0.6%
<b>22</b>	Utilities	-0.3%	0.3%
<b>23</b>	Construction	2.0%	2.5%
<b>31-33</b>	Manufacturing	0.6%	1.4%
<b>42</b>	Wholesale trade	0.6%	1.8%
<b>44-45</b>	Retail trade	1.0%	0.4%
<b>48-49</b>	Transportation and warehousing	1.1%	1.0%
<b>51</b>	Information	0.2%	-0.5%
<b>52-53</b>	Financial activities	1.2%	1.1%
<b>54-56</b>	Professional and Business Services	1.7%	1.3%
<b>61</b>	Educational services (private + government)	1.3%	1.1%
<b>62</b>	Health care and social assistance	2.2%	2.1%
<b>71-72</b>	Leisure and hospitality	2.1%	1.1%
<b>81</b>	Other services (except Government)	1.4%	1.2%
<b>92</b>	Government (except Education and Hospitals)	0.5%	-0.1%

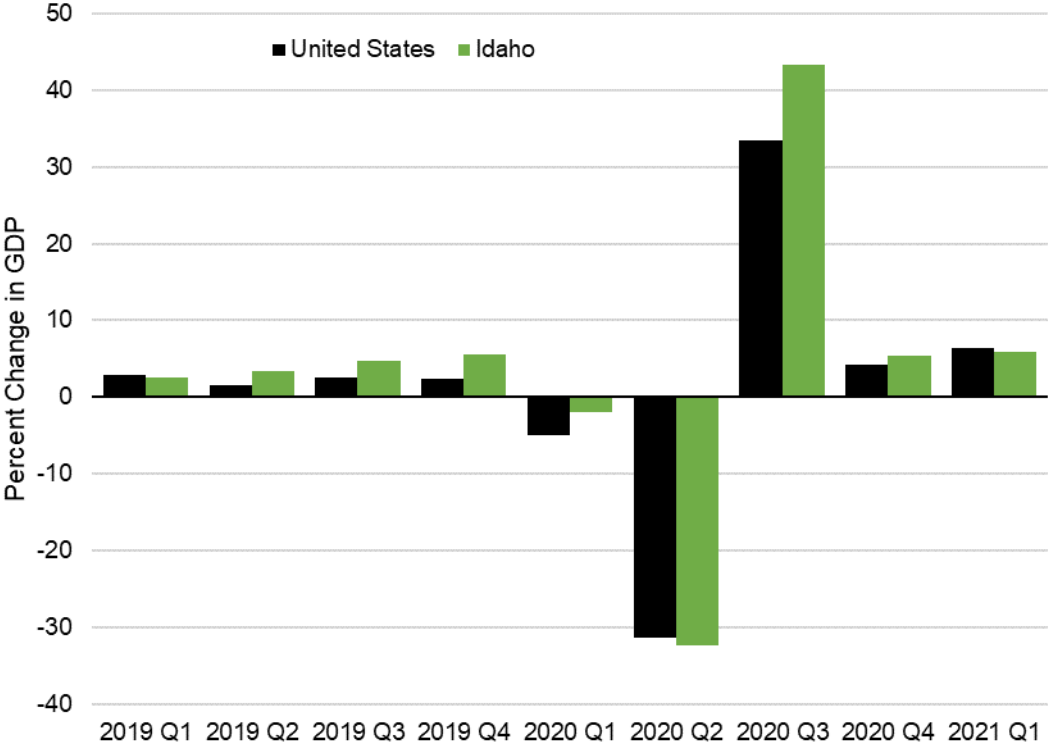
# Executive Summary

The National Bureau of Economic Research (NBER) declared March 2020 as the start of the most recent economic recession, ending the longest period of expansion in U.S. history. Though short-lived (2 months long), the COVID-19 pandemic recession had significant impact on labor market metrics for every economic sector, both statewide and nationally.

Economic activity, as measured by the Gross Domestic Product (GDP), saw a large decline shortly after the pandemic outbreak in the first quarter of 2020. Idaho's GDP declined by a modest 1.6% in the first quarter and then by 32.4% as pandemic-induced shutdowns carried into the second quarter of the year. All 50 states experienced similar GDP contractions, and the leisure & hospitality sector was the hardest hit by pandemic-related shutdowns. The sharp contraction in the second quarter was followed by an equally sharp rebound in the third quarter of the year. Idaho's GDP rebounded to grow by 43.3% in the third quarter, outpacing the nation's rebound rate of 33.4%. GDP growth continued into the fourth quarter. Despite the large contraction in the second quarter, Idaho was comparatively less impacted by the COVID-19 outbreak. Idaho's annual GDP contracted by 1.1% in 2020 and Idaho ranked fourth in the nation for GDP growth among all U.S. states and territories.

Figure 0-1. Gross domestic product, (chained 2012 dollars), annualized changes United States and Idaho, 2019Q1 through 2021Q1

Source: U.S. Bureau of Economic Analysis



The devastating impact of the pandemic was to a large extent muted by government subsidies in the form of Payment Protection Program loans to assist struggling businesses. The program from April through August 2020, approved a total of \$2.6 billion in loans to over 31,000 Idaho businesses. The pandemic impact was also lessened by Idaho's thriving housing market. As one of the fastest growing states in the nation, Idaho's housing market has seen significant growth. Record low



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mortgage rates in 2020 further increased the demand for homes despite rising home prices. This increased demand can be inferred from the rising number of new residential building permits issued. In 2020, building permits were issued for 15,475 buildings and 19,130 housing units in Idaho - nearly 2,000 more than in the previous year and a record high since 2008. While every other sector of the economy experienced GDP contraction in the second quarter of 2020, financial and insurance activities grew by 18% - likely tied to increased housing market activity. Over the course of the year, the state GDP rebound was driven by four major sectors - construction, financial activities, professional and business services, and manufacturing. Construction - the largest contributor to Idaho's GDP growth in 2020 - saw a real GDP growth of 6.1% even though this sector declined 1.9% nationally. Food processors supplying grocery chains and fast-food restaurants saw soaring demand despite the pandemic, as did wood products and chemical manufacturers with the unprecedented rise in demand for toilet paper and household cleaning products. The state's growing technology sector is largely manifested within professional and business services, which was another major contributor to GDP growth in 2020. The ability to quickly transition to remote work in tech industries offset some of the fallout from business closures and likely aided the rapid recovery of this sector.

Based on current dollar value, Idaho's GDP in 2020 was \$84 billion. Government accounted for 13% of total GDP. The largest private sector in Idaho was financial activities, accounting for 19% of the state GDP. Manufacturing was the second largest private sector at 11% and professional and business services came in third at 10.6%.

### Jobs and unemployment

Idaho jobs were least impacted by the pandemic when compared to the rest of the nation. Total nonfarm employment declined by 0.7% ranking first in the nation for least job contraction rate. The net job loss over the year amounted to 5,100 payroll jobs. In the year prior, nonfarm employment grew by 2.9%. Construction, one of the sectors most affected by the last recession, continued to expand despite the pandemic, netting 2,900 new jobs in 2020.

The state annual average unemployment rate was 5.4% in 2020, lower than the U.S. rate of 8.1%. The number of new unemployment claims reached a record high of 62,296 claims in March 2020. Despite the large drop in claims immediately following the pandemic disruption, the number of initial claims remained elevated. The largest share of unemployment insurance claimants was from accommodation & food services - the hardest hit industry by the pandemic disruption. With dipping labor force participation and record growth in online job postings, worker shortages persist as the state heads into 2021.

### Income and wages

In 2020, Idaho's average annual wage grew by 7.7% or 6.4% when adjusted for inflation. The average annual wage in 2020 in Idaho was \$47,675. The rapid growth in overall wage reflects a pandemic-induced employment shift. Thousands of relatively low-paid front-line workers in hospitality and personal care services industries lost their jobs. Few industries recorded strong job growth over the year but those that did tended to be higher-paying industries. Professional and business services dominated total wage growth where its average annual nominal wage climbed from \$55,000 in 2019 to \$59,700 in 2020 - an uptick of 8.4%. The household income and the per capita personal income both have shown steady increases since the last recession with a significant bump in income over the past year. Increased unemployment insurance benefits and one-time direct economic impact payments through the CARES Act were the primary drivers of the bump in 2020 per capita income.



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## Employment projections

Total employment in Idaho is expected to grow at an average annual rate of 1.3% from 2020 to 2022, adding about 21,000 new jobs in that time frame. The health care sector is projected to dominate job statewide growth with the fastest projected growth rate and the highest numerical job growth of all industry sectors statewide. Occupational projections estimate 97,700 average annual openings due to both growth and separations. Construction occupations are projected to be among the fastest growing while food preparation and serving occupations are projected to yield the most numerous job openings annually. As short-term projections are based on 2020 Q1 data, projections do not fully account for impacts of COVID-19 pandemic and response efforts.

## Regional economic development

The COVID-19 pandemic caused declines in job growth at the height of the pandemic with the hospitality sector suffering the most losses. Eastern Idaho was the only region to make a full recovery by the end of the year, being the region least affected by the disruptions. All regions faced increased construction workforce demand from a booming housing market fueled by heightened in-migration, low interest rates, rising housing prices and a chronically low housing inventory. In all regions, hiring deficits were rampant, particularly among industries recovering from the pandemic losses such as food service, accommodations, health care and transportation. Labor shortages have begun putting upward pressure on wages. Despite the economic disruption of 2020, the year ended the same as it did in the previous year with the common concern going forward for all regions - a tight labor market and labor supply shortage.

## Economic comparisons with other states

Although the coronavirus pandemic caused major interruptions to the state's economy, Idaho continued to outpace the much of the nation in population growth and several key economic indicators:

- Idaho's population grew 2.1% in 2020, ranking highest in the nation.
- Idaho's real GDP fell 1.1% - fourth lowest rate of decline of any state.
- Idaho nonfarm employment fell 0.7%. - the least loss of any state.
- Idaho's unemployment rate of 5.4% ranked seventh lowest in 2020.
- Idaho's entrepreneurship rate ranked fourth highest in the nation. Idaho saw 2.5 new business establishments born per 1,000 people in the civilian labor force.
- Though ranked 44<sup>th</sup> for personal income, Idaho ranked 24<sup>th</sup> in the nation for income growth.

# 1.0 Jobs and Unemployment

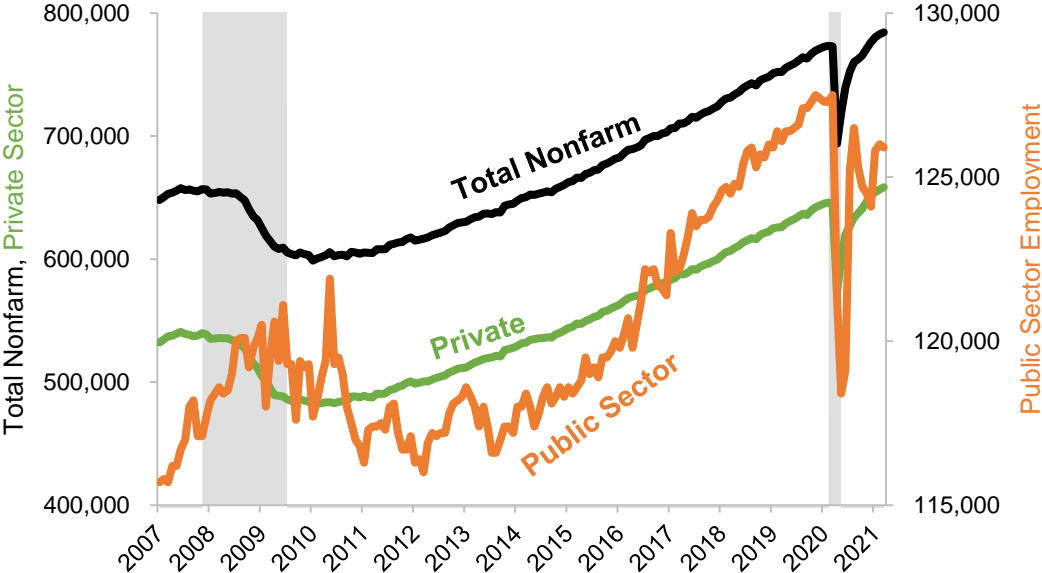
Key indicators point to a tight labor market and an economy rebounding from a pandemic-induced economic shock. In 2020, the annual average total nonfarm employment in Idaho fell by 0.7% to 755,100 jobs – losing 5,100 jobs from the previous year average. As total payroll fell, unemployment rates spiked. The 2020 annual average unemployment rate in Idaho was 5.4% – an uptick from 2.8% in the previous year. Prominent sectors leading the jobs recovery include construction, professional & business services, and financial activities. Collectively these three sectors added 5,500 jobs to Idaho’s economy in 2020. The job growth was offset by heavy losses in leisure and hospitality – the sector most impacted by business closures due to the COVID-19 pandemic disruption. Leisure and hospitality suffered a net job loss of 7,300 payroll jobs in 2020. Other services – including personal care businesses – also suffered major job losses over the year. Preliminary job numbers from 2021 Q1, indicate that job growth is expected to continue, and the economy is on track to expand in 2021. The rising volume of available and new job postings over the year is a good indicator of future employment growth. However, declining labor force participation remains a challenge.

## Total nonfarm employment recovering from COVID-19 pandemic shock

In the years since the recession of 2007–2009, Idaho’s labor market experienced a record-long economic expansion. This was halted in March 2020 when the COVID-19 outbreak swept across the nation. As *Figure 1-1* shows, total nonfarm employment fell by 500 jobs in March and 79,000 jobs in April before rebounding to gain 25,000 jobs in May. Employers have consistently added jobs every month since then and as of March 2021, the state had recovered a total of 90,500 jobs – reaching a new record high of 784,300 nonfarm payroll jobs. While private sector jobs reached new highs, public sector nonfarm jobs – which are much more volatile – were yet to attain pre-pandemic levels as of March 2021. Government jobs declined over the past year – March 2020 through March 2021 – by 1.3% in contrast with the strong 2% growth in private sector jobs.

**Figure 1-1. Total private and public sector nonfarm jobs, seasonally adjusted Idaho, Jan 2007 through Mar 2021**

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



Shaded area represents a national recession period.

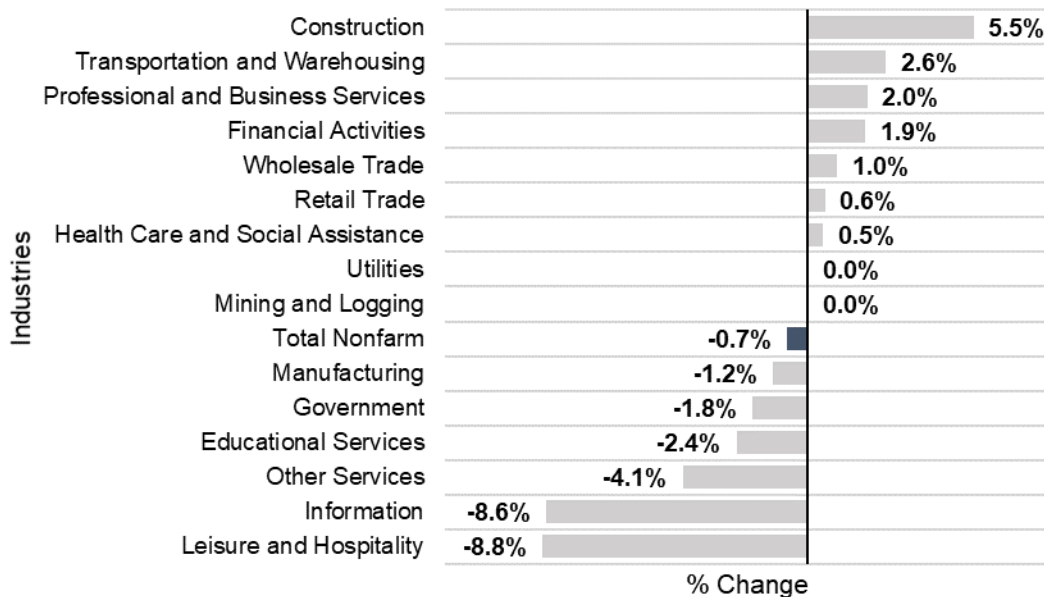
Early retirements of the large baby boomer labor force played a sizeable role in job losses, particularly government job losses. The unexpected change in work life sent a message to some that it was time to transition out of the workforce. This was especially true for public sector teachers and professors.

Figure 1-2 shows the percentage change in total nonfarm employment from 2019 to 2020. Annual total nonfarm employment declined by -0.7% from 2019 to 2020 as the economy slowly recovered from the pandemic shock in the first half of the year. The net job loss throughout the state was 5,100 jobs. Job losses were nearly equally shared by the private and public sectors. Local government jobs - primarily in public education employment – accounted for the bulk of public sector job losses. In the private sector, leisure & hospitality accounted for the majority of jobs lost, with a net loss of 7,300 payroll jobs. Although the manufacturing sector saw an expansion in its GDP in 2020, its employment declined by 1.2% with a net loss of 800 jobs.

Nonfarm employment recovery was largely driven by gains in the construction industry where 2,900 net jobs were added in 2020 despite the pandemic. The construction industry was largely propped up by a booming housing market. Building construction and contractor jobs accounted for the bulk of construction industry jobs. Professional and business services saw the second largest net job growth – expanding by 1,900 jobs in 2020. The surge in online consumerism carried the Amazon torch as the company expanded into the Treasure Valley during the pandemic.

**Figure 1-2. Percent change in employment by private sector industries and government, annual change Idaho, 2019 through 2020**

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



### Idaho Falls MSA drives economic recovery in 2020

Unlike in the prior nine-year economic expansion where the Boise Metropolitan Statistical Area (MSA) served as a major job creation center, the 2020 recession year saw the Idaho Falls metro area driving the economic recovery. As shown in Figure 1-3, while the rest of the state declined, the Idaho Falls metropolitan area expanded by 1.4%, creating 1,000 new jobs despite the pandemic. By

contrast, the rest of the state – all other MSAs and non-metropolitan areas - collectively lost 6,100 jobs. The dominant professional and business services sector, driven by the presence of the Idaho National Laboratory (INL), largely contributed to the rapid recovery of this eastern metro area. In addition, eastern Idaho has a higher share of teleworkable jobs when compared to the rest of the state. This reduced the impact of the pandemic and allowed for a quicker recovery.

**Figure 1-3: Total nonfarm employment change, annual average**  
Idaho, metropolitan areas and balance of state, 2019 through 2020

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

Area	Job Change (2019 - 2020)	Percent Change (2019 - 2020)
<b>Total For state</b>	<b>(5,100)</b>	<b>-0.7%</b>
Boise City, ID	(1,500)	-0.4%
Coeur d'Alene, ID	(300)	-0.4%
Idaho Falls, ID	1,000	1.4%
Lewiston, ID-WA	(500)	-1.8%
Pocatello, ID	(500)	-1.3%
Twin Falls, ID	(700)	-1.5%
All other non-metro areas	(2,600)	-1.6%

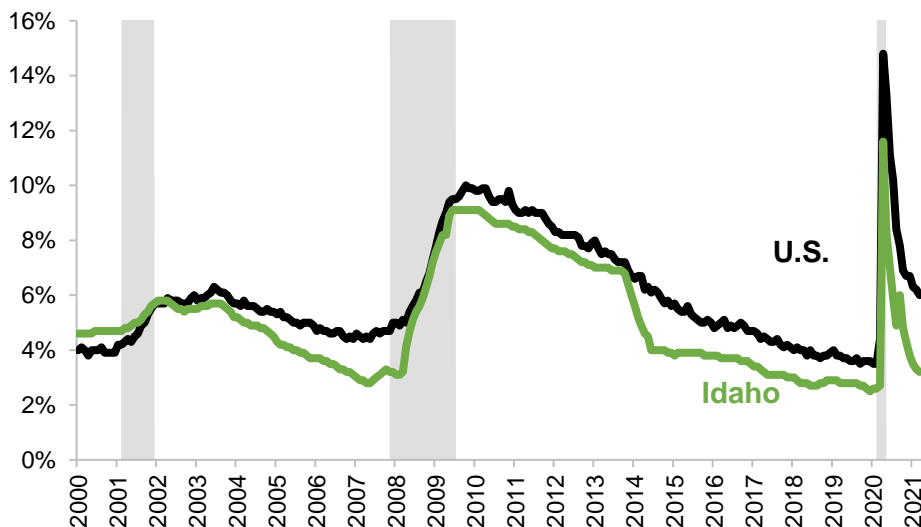
### Unemployment rate still above pre-pandemic lows

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 9.1% in 2009 – at the tail end of the Great Recession. Since then, the unemployment rate remained in steady decline until the COVID-19 pandemic took its toll on the labor market in the early months of 2020. Rates spiked from 2.7% in March 2020 to 11.6% in April 2020 – nationwide rates saw an uptick to 14.8% in April 2020. As the labor market recovered from the two-month long pandemic recession, unemployment rates have steadily declined. As of March 2021, Idaho's unemployment rate was 3.2% – half a percentage point higher than in March 2020.

**Figure 1-4: Unemployment rate, seasonally adjusted  
United States and Idaho State, Jan 2000 through Mar 2021**

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



Shaded area represents a national recession period.

### Unemployment insurance claims remain elevated

In response to the devastating impact of nationwide business closures, Congress passed the Coronavirus Aid, Relief and Economic Security (CARES) Act, signing it into law on March 27, 2020. In addition to providing aid to affected businesses, a variety of relief measures were created to help individuals and households survive through the pandemic. The CARES Act expanded unemployment insurance benefits through three programs:

- The Federal Pandemic Unemployment Compensation (FPUC) program which provided a temporary weekly supplemental payment of \$600 for people receiving unemployment benefits.
- The Pandemic Unemployment Assistance (PUA) program which provided unemployment benefits to people who are not usually eligible for state unemployment insurance benefits; and
- The Pandemic Emergency Unemployment Compensation (PEUC) program which provided expanded unemployment benefits to people who exhausted all available weeks of state unemployment benefits

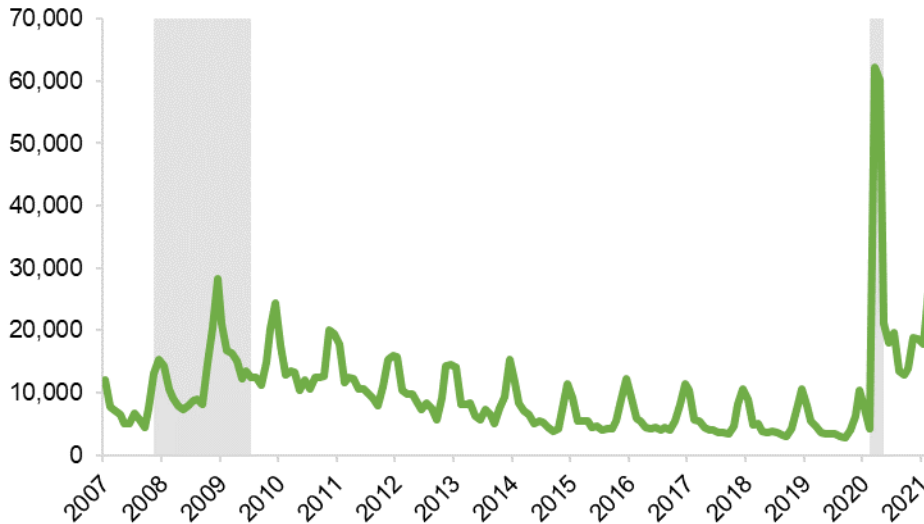
The CARES Act of 2020 also provided \$300 billion in direct support economic impact payments to individuals. A \$1,200 refundable tax credit payment was provided to individuals (\$2,400 for joint taxpayers) who met specified criteria, and qualified taxpayers with children received \$500 for each child.

**New claims.** Figure 1-5 shows that, until the most recent recession, the number of new (initial) claims filed for unemployment insurance benefits had been in sustained decline. At the height of the great recession of 2007-2009, 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. In contrast, the pandemic recession reached a peak of 62,296 new claims in March 2020. Despite the large drop in claims immediately following the pandemic disruption, the number of initial claims remained

elevated. In March 2021, there were more than 19,700 claims, uncharacteristically higher than claims over the past decade for that same month.

**Figure 1-5: Monthly initial claims, not seasonally adjusted  
Idaho, Jan 2007 through Mar 2021**

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



Shaded area represents a national recession period.

Much of the answer to the mystery of the high UI initial claims, despite improvements in unemployment rates, lie with expansions to UI eligibility through the PUA and PEUC programs. Through these expanded programs, individuals who were ineligible for regular UI benefits such as self-employed workers could file initial claims as a first step towards receiving these extended benefits.

**Insured unemployment.** The overall number of jobless workers receiving unemployment benefits saw a significant uptick in 2020 with 112,020 claimants – a 194% increase from the previous year. This does not include claimants from the PUA and PEUC benefits program. The number of insured unemployed in 2020 was only slightly lower than the 114,765 recipients in 2009.

Figure 1-6 shows that the largest share of unemployment insurance claimants was from accommodation & food services at 16.8% – the hardest hit by the pandemic disruption. Other top claimant industries included health care and retail trade. Unemployment insurance claimants also skewed female for the first time in more than a decade. In 2020, 50.4% of claimants were female. In contrast, only 34% were female during the similarly heightened level of claims in 2009.

**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
<b>Total</b>	<b>112,020</b>	<b>100.0%</b>
Accommodation & Food Services	18,861	16.8%
Health Care & Social Assistance	15,604	13.9%
Retail Trade	14,128	12.6%

Manufacturing	11,537	10.3%
Construction	11,434	10.2%
Administrative & Support & Waste Management	9,710	8.7%
Other Services (excl. Public Administration)	4,348	3.9%
Transportation & Warehousing	4,158	3.7%
Professional, Scientific, & Technical Services	3,532	3.2%
Wholesale Trade	3,484	3.1%
Educational Services	3,455	3.1%
Agriculture & Forestry	2,767	2.5%
Arts, Entertainment & Recreation	2,649	2.4%
Public Administration	1,710	1.5%
Finance & Insurance	1,391	1.2%
Real Estate & Rental & Leasing	1,300	1.2%
Information	1,196	1.1%
Mining	395	0.4%
Management of Companies & Enterprises	222	0.2%
Utilities	128	0.1%
INA*	10	0.0%

\*Information Not Available

The insured unemployment rate 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.

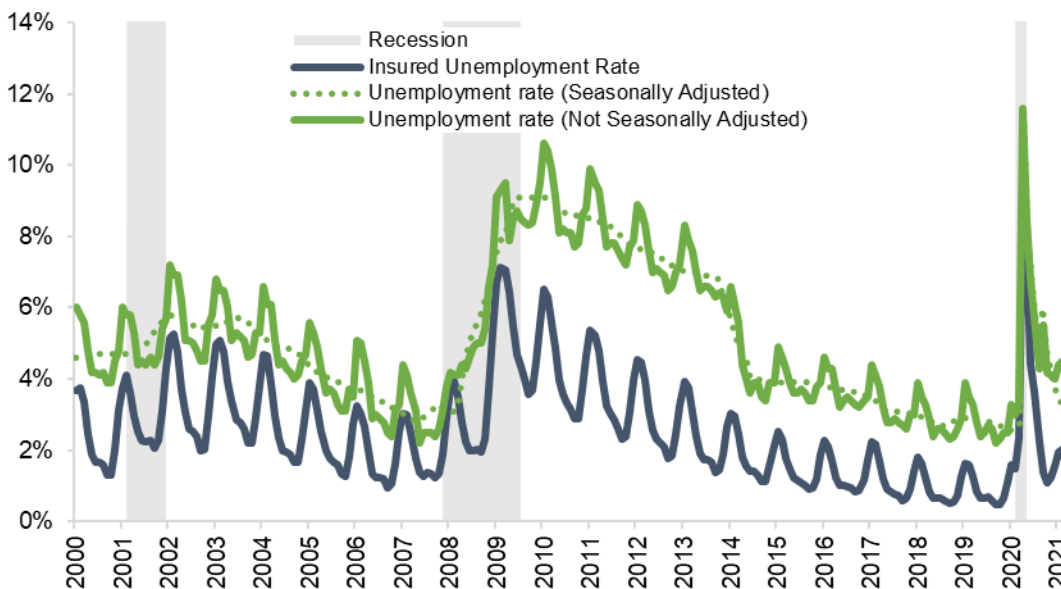
*Figure 1-7* compares the official unemployment rate in Idaho to the insured unemployment rate. As the unemployment rate jumped to 11.6% in March 2020, the insured unemployment rate also jumped to 9.2% – the highest rate on record dating back to 1986. The unemployment rates historically have moved in tandem with the insured rate. The widened gap following the Great Recession that ended in 2009 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, including the long-term unemployed who had exhausted their benefits. The CARES Act programs initiated early in the year may have prevented such widening from persisting following the pandemic recession.

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 have led to the gap between the unemployed and the insured unemployed remaining a little larger than pre-2008 levels as these gig workers tend not to be covered by the unemployment insurance typically paid 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 2021**

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



Shaded area represents a national recession period.

### Labor underutilization rises in 2020

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.

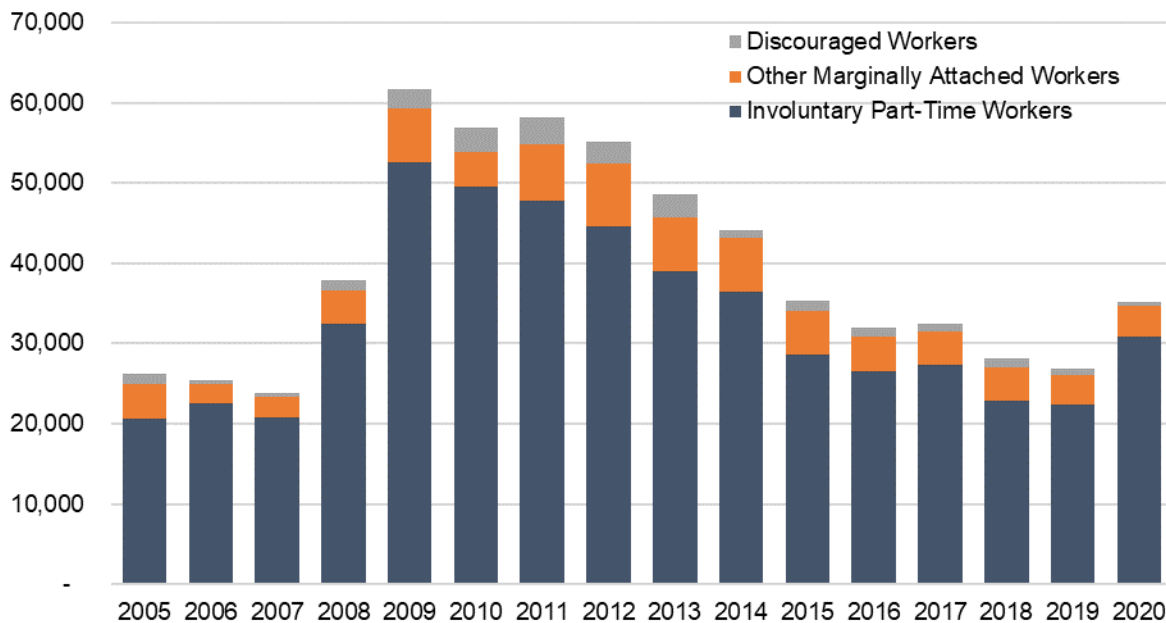
Other marginally attached workers give a non-labor market reason for not looking for work in the past four weeks. For example, they may be in school or training, having difficulties finding child care, dealing with family responsibilities, coping with an illness or facing transportation problems.

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 pandemic caused an uptick in involuntary part-time workers as businesses statewide cut back operations due to decreased demand and efforts to contain the spread of the virus. The “official” unemployed also saw a spike in 2020 following a long period of decline since 2008 as shown in Figures 1-8 and 1-9. Between 2019 and 2020, unemployed Idaho residents rose from 26,000 to 46,200, involuntary part-time workers rose from 22,400 to 30,850, discouraged workers fell from 800 to 500, and other marginally attached workers rose from 3,600 to 3,900. In total, 81,450 workers met the definitions of labor underutilization in 2020, compared to 52,800 in 2019.

**Figure 1-8: Alternatively, unemployed workers, 4-quarter moving average Idaho, 2005 through 2020**

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

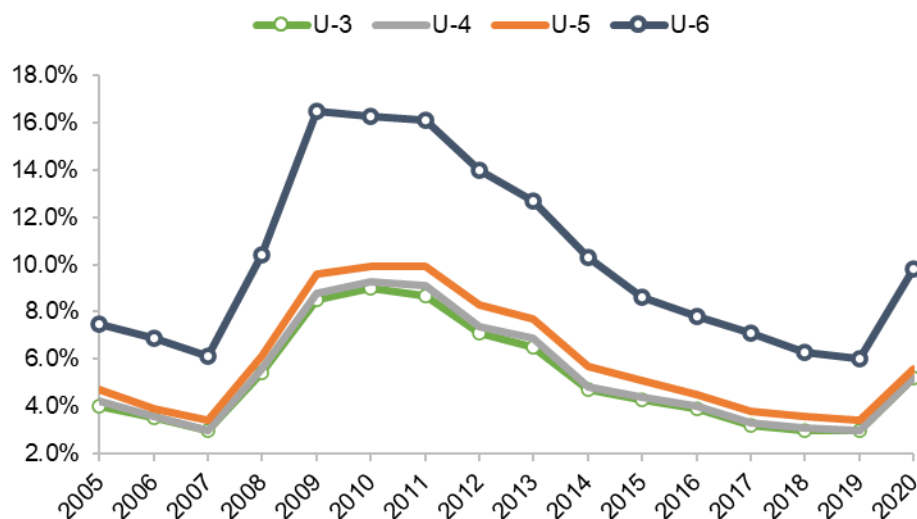


The corresponding alternative unemployment rates have also experienced an uptick. Idaho’s U-6 rate, the broadest measure of unemployment, rose from 6% in 2019 to 9.8% in 2020. That was its highest level since 2014, but considerably lower than the nation’s U-6 rate of 13.6%. The gap between the U-6 and U-3 rates has narrowed significantly since its peak in 2009 as the ranks of discouraged workers, marginally attached workers and those involuntarily working part time 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. In 2020, the gap again widened to 4.6 percentage points.

**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 2020**

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



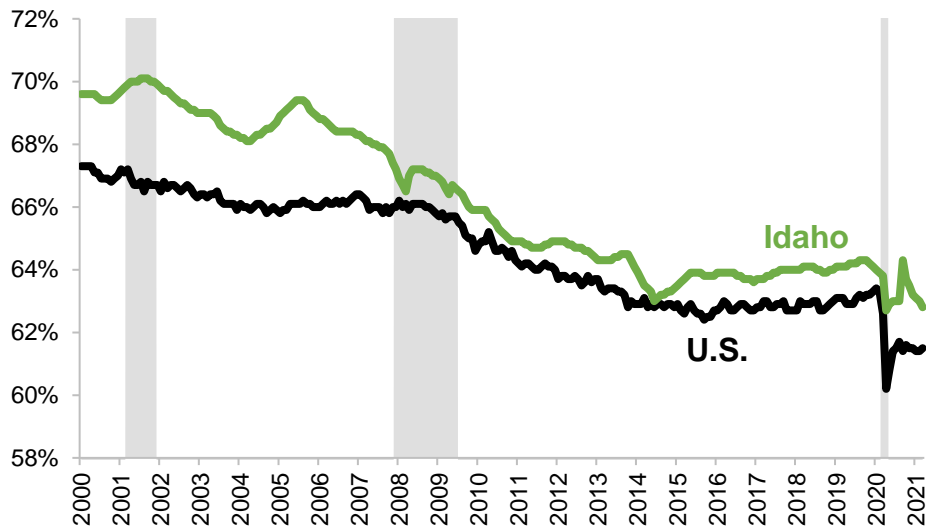
### Labor force participation shrinks as many exit the labor market

While unemployment rates have dropped steeply from their peak in April 2020 to 3.2% in March 2021, the labor-force participation rate – the share of Idaho adults either working or looking for work – has yet to recover from the economic disruption induced by the pandemic. *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. In April 2020, labor force participation fell to 62.7% from 63.9% before the pandemic, a decline of more than 13,500 workers. Participation rates fluctuated widely for the remainder of 2020, hitting a high of 64.3% in September 2020. As of March 2021, the labor force participation remained at 62.8%. The state employment-to-population ratio (*Figure 1-11*) on the other hand, has been on a steadily rising trajectory since the pandemic recession; rates are however still nearly 2 percentage points below where they were pre-pandemic.

Labor force participation usually falls in recessions, as some people give up looking for work. However, the 2020 economic recession saw a decline in the number of discouraged workers. Economists have speculated that fear of the COVID-19 virus is a major factor contributing to lower labor force participation among workers of all ages. An examination of participation rates by age indicate that national decline has been concentrated among the aged 65 and older population. The disruption may thus have facilitated a reversal in a long-running trend of rising labor force participation among senior citizens with many of them choosing to retire amid uncertainty surrounding the virus and an economy shifting more towards remote work.

**Figure 1-10: Labor force participation rate, seasonally adjusted  
United States and Idaho, Jan 2000 through Mar 2021**

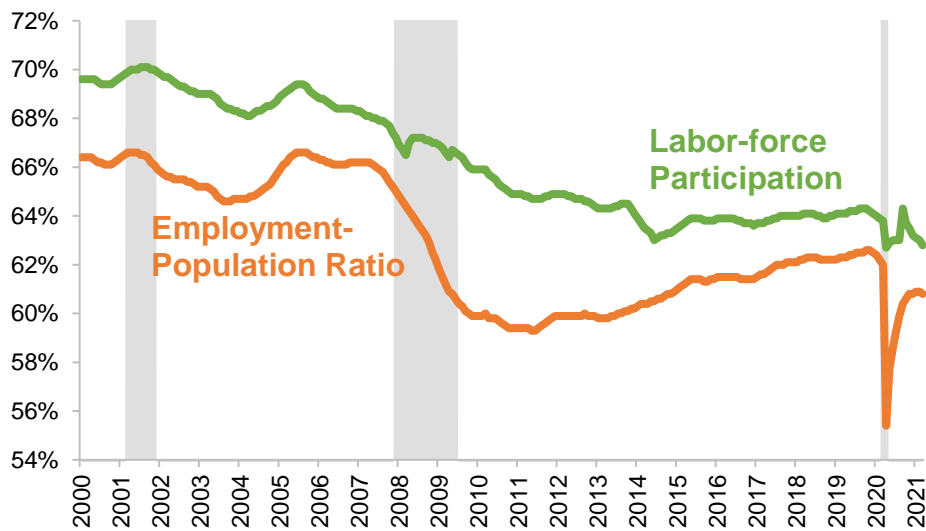
Source: U.S Bureau of Labor Statistics, Local Area Unemployment Statistics



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

A wave of retirements may be contributing to the growing number of job vacancies across the state. A Pew Research study documented an uptick in 2020 of retirees from the Baby Boomer generation — up 1.7 million (Fry, R., “The Pace of Boomer retirements has accelerated in the past year” Nov. 9, 2020, Pew Research Center).

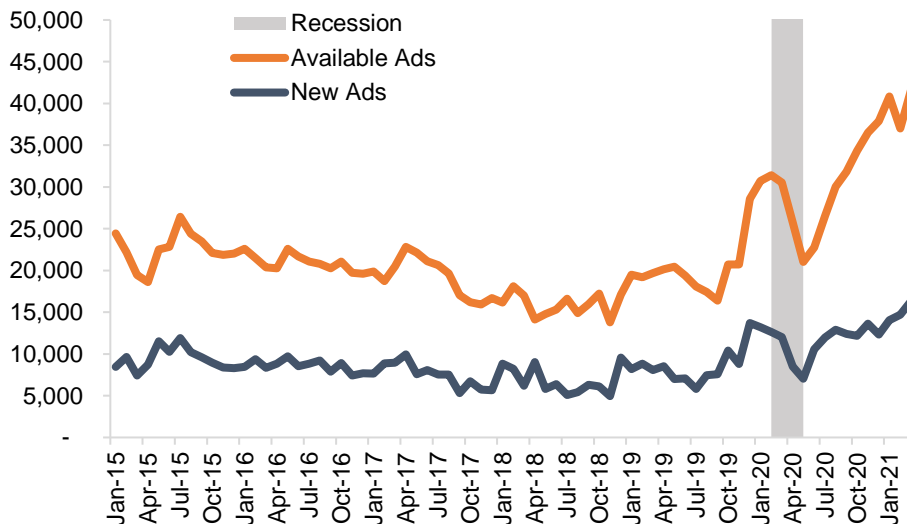
The Conference Board has been tallying monthly help wanted online reports since 2005. This data series, which pulls information from more than 1,200 job boards nationwide, is an indicator of economic and employment trends. An increase in the number of postings typically indicates that businesses have a growing confidence in the future outlook of sales and profits. A decline in number of job ads typically indicates economic concerns. Job postings are considered a conservative proxy for job openings considering some job postings may be hiring for more than one opening and some industries do not use online advertising, relying on word of mouth or physical walk ins.

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*) show an accelerated growth in number of new and available job postings since the economic disruption in March and April 2020. The latter half of 2019 saw a sharp uptick in job demand and the number of available job postings exceeded the number of unemployed for the first time in December 2019 (*Figure 1-13*). Following the disruption, job demand steadily increased as unemployment fell. By December 2020, once again, there were more available job postings than unemployed persons in the state.

**Figure 1-12: Unique available and new job ad counts, seasonally adjusted  
Idaho, Jan 2015 through Mar 2021**

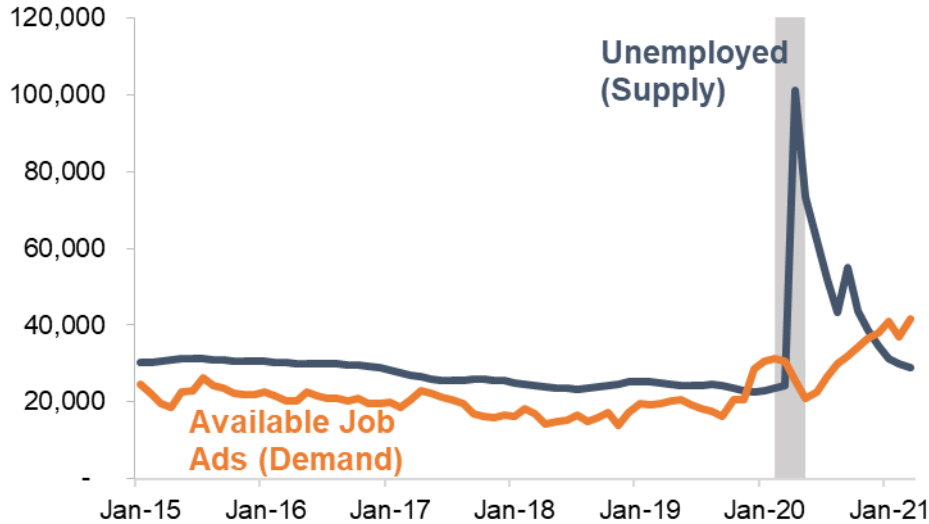
Source: Burning Glass Inc. and The Conference Board



Shaded area represents a national recession period.

**Figure 1-13: Unique available job ad counts and the number of unemployed, seasonally adjusted Idaho, Jan 2015 through Mar 2021**

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

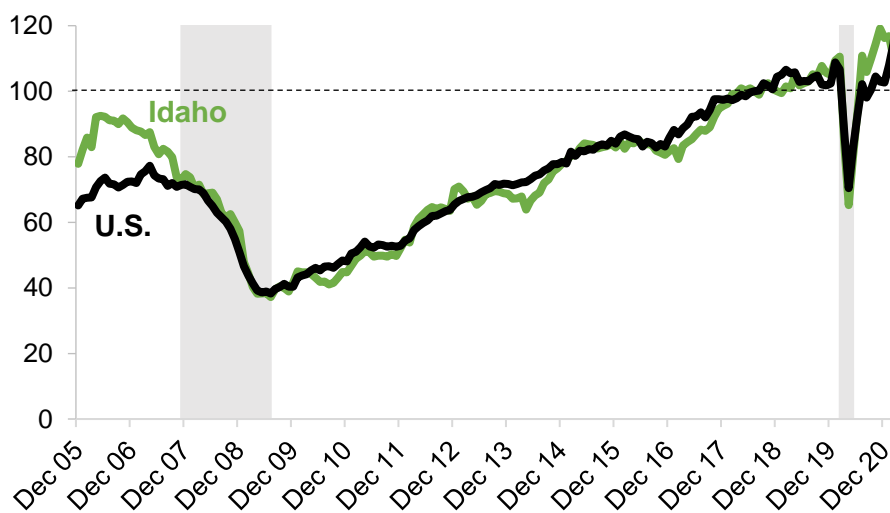


Shaded area represents a national recession period.

The HWOL Index measures change 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 the latter half of 2020 (*Figure 1-14*). Hiring activity dropped in March and April in response to the pandemic disruption but quickly recovered as the economy opened up once again. March 2021 showed the highest hiring activity on record with an index of 127.8.

**Figure 1-14: The Conference Board Help Wanted OnLine® Index United States and Idaho, Dec 2005 through Mar 2021**

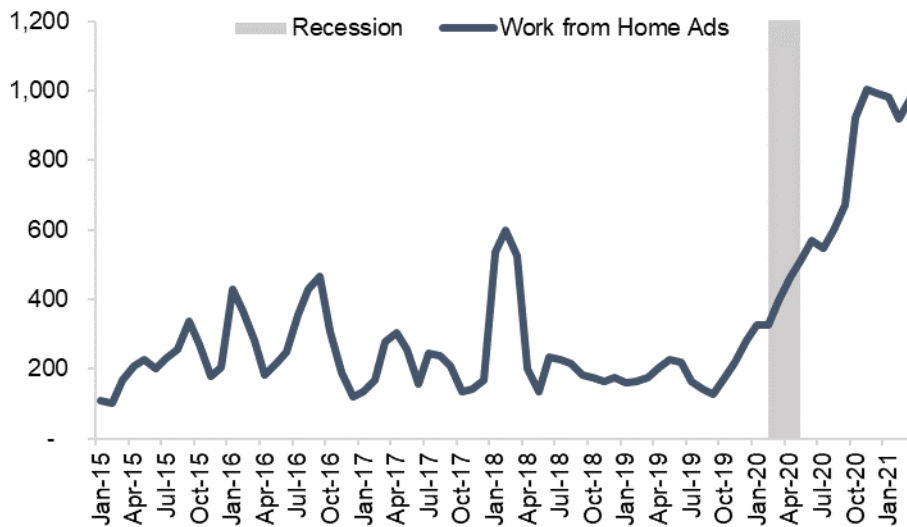
Source: Burning Glass Inc. and The Conference Board



Shaded area represents a national recession period.

As was the case in previous years, job postings in 2020 were dominated by health care and retail jobs. Following the pandemic recession, industries that have accelerated hiring include health care, with an increasing demand for registered and licensed practical nurses, and accommodation and food services as hotels and restaurants across the state struggled to ramp up operations. Demand for transportation and warehousing jobs jumped by 52% in March 2021 from the same time the prior year. A unique artifact of the pandemic and one that may be indicative of a future trend, is the increasing demand for remote work.

To comply with social distancing and stay-at-home orders during the height of the pandemic disruption, employees who could, worked remotely from home. There were more than 3,000 available job postings for remote work in 2020, more than three times the number in 2019. The bulk of the work-from-home postings came from the thriving financial services sector and included many IT / computer and mathematical occupations. With the increased demand for remote work, cybersecurity concerns heightened, and this is shown in the accelerated demand for cybersecurity workers across the state.



Shaded area represents a national recession period.



## 2.0 Wages and Income

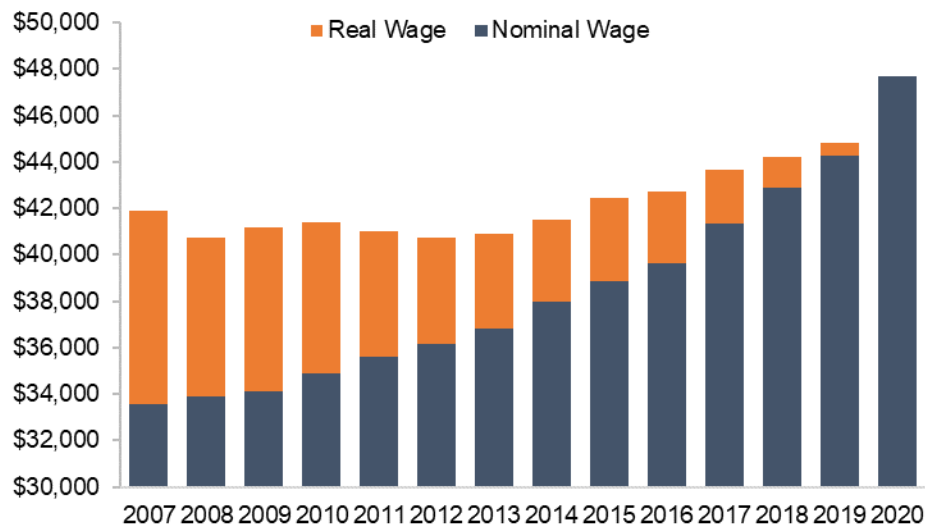
Despite net job losses, wages and earned income showed strong over-the-year growth. Real wages grew by 6.4% in 2020 while real net earned income grew by 4.6%, outpacing growth in previous years. Wage growth was largely due to the COVID-19 pandemic eliminating more low-wage jobs than high-wage jobs. Income growth was driven by transfer payments from unemployment insurance compensation for job losses due to the pandemic. In 2020, transfer payments accounted for 22.1% of personal income, a significant uptick from previous years. Data from the 2019 American Community Survey point to record low poverty rates and increasing homeownership rates. However, the increasing share of rent-burdened households indicate a growing income inequality that is likely been exacerbated by the pandemic.

### Idaho average wage skyrocketed as employment composition changes

The sharp increase in the statewide average wage was recorded in 2020 even as total covered employment dipped. Nominal wage grew by 7.7% and real wage grew by 6.4%, outpacing wage growth of prior years over the past decade. Annual average wages for the state are shown in *Figure 2-1*. Wages are expressed in both nominal terms and real wages, with real wages adjusted for inflation using the consumer price index. Following a precipitous drop in 2008, the average real wage remained largely flat with an average growth rate of about 0.1%. Growth picked up in 2014 and remained steady, keeping up with inflation, through 2020.

**Figure 2-1. Average annual wage, nominal and inflation adjusted (in 2020 dollars) Idaho, 2007 through 2020**

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



*Figure 2-2* shows the average annual wage in different industry sectors. The average wage calculation divides the total industry wage by the average employment. Retail trade and leisure and hospitality (comprised of arts, entertainment and recreation as well as accommodations and food services), when combined, accounted for 22% of all jobs in the state, but paid the lowest wages of all the industry sectors. On the other end of the spectrum, the highest paying industries – utilities and mining – account for less than 1 % of the jobs. Apart from the mining industry, wage growth in 2020 kept up with inflation in all industry sectors.

The rapid growth in overall wages reflects a pandemic-induced employment shift. Thousands of relatively low-paid front-line workers in hospitality and personal care services industries lost their jobs. Few industries recorded strong job growth over the year but those that did tended to be higher-paying industries as shown in *Figure 2-2*. Total wage growth was dominated by professional and business services where the average annual nominal wage climbed from \$55,000 in 2019 to \$59,700 in 2020 – an 8.4% growth. The booming housing market propped up growth in financial services and construction. Financial activities super sector grew by close to 1,000 jobs and saw a 15.6% increase in average wage, from \$59,451 in 2019 to \$68,795. Construction, which saw significant job growth, had a more modest wage growth of 5.1%. The information sector is a hodgepodge of different activities including movie theatres, software companies, newspaper publishing and television stations. The pandemic negatively affected movie theaters and its part-time workforce, accounting for the almost 16% drop in employment along with substantial wage growth.

**Figure 2-2. Average annual wage and wage growth by industry, not inflation adjusted Idaho, 2019 to 2020**

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

Super Sector	2020 Avg Wage	Wage Growth	2020 Job Share	Emp Growth
Utilities	\$83,790	5.8%	0.5%	0.6%
Mining	\$73,423	0.5%	0.3%	8.4%
Financial Activities	\$68,705	15.6%	4.7%	3.0%
Wholesale Trade	\$68,109	6.6%	4.1%	0.8%
Manufacturing	\$65,635	5.1%	9.0%	-1.0%
Information	\$60,498	13.6%	1.1%	-15.7%
Professional and Business Services	\$59,727	8.4%	13.1%	3.2%
Public Administration	\$53,179	3.6%	6.1%	0.5%
Construction	\$48,672	5.1%	7.3%	5.3%
<b>All Industries</b>	<b>\$47,674</b>	<b>7.7%</b>	<b>100.0%</b>	<b>-0.5%</b>
Health Care and Social Assistance (Private + Govt)	\$47,069	4.7%	14.6%	1.4%
Transportation and Warehousing	\$46,813	3.9%	3.4%	3.3%
Educational Services (Private + Govt)	\$40,261	8.4%	8.0%	-3.9%
Agriculture, Forestry, Fishing and Hunting	\$39,717	4.3%	3.3%	1.2%
Other Services (excl Public Administration)	\$34,472	7.3%	2.6%	-5.9%
Retail Trade	\$34,119	8.9%	11.7%	0.3%
Leisure and Hospitality	\$19,081	5.0%	10.3%	-9.5%

Higher Wage

Lower wage

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## 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.

Due in large part to provisions in the CARES Act, personal income rose in 2020 despite rising unemployment and dipping GDP. 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 2020, per capita income grew by 5.9% in nominal dollars and 4.6% when adjusted for inflation.

**Figure 2-3. Per capita personal income (in 2020 dollars)  
Idaho, 2007 through 2020**

Source: U.S Bureau of Economic Analysis

Year	Per Capita Personal Income	Net Earnings	Dividends, Interest and Rent	Transfer Receipts
2007	\$40,739	\$25,918	\$8,782	\$6,039
2008	\$39,334	\$24,290	\$8,402	\$6,642
2009	\$37,622	\$23,039	\$7,348	\$7,236
2010	\$37,928	\$23,004	\$7,180	\$7,744
2011	\$38,551	\$23,306	\$7,769	\$7,476
2012	\$39,654	\$23,616	\$8,670	\$7,367
2013	\$40,205	\$24,410	\$8,370	\$7,425
2014	\$41,411	\$24,945	\$8,872	\$7,594
2015	\$43,403	\$25,834	\$9,637	\$7,932
2016	\$43,702	\$25,840	\$9,847	\$8,015
2017	\$44,577	\$26,223	\$10,270	\$8,083
2018	\$45,880	\$26,966	\$10,688	\$8,226
2019	\$46,484	\$27,633	\$10,380	\$8,471
2020	\$48,616	\$27,986	\$9,904	\$10,726

Disaggregating income into its three major components confirms that growth of per capita personal income in 2020 was majorly driven by transfer receipts. Real per capita transfer receipts grew by 26.6% in 2020, up from a 3.0% growth in 2019. On the other hand, real per capita earning rose by just 1.3% and real investment income declined by 4.6%.

Transfer payments, chiefly from government programs, grew following the 2007-2009 recession when unemployment insurance benefits and food stamps pushed it as high as 20.4% of total personal income in 2010. Since then, transfer payments have remained high with an income share relatively steady at around 18% 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. In 2020, increased unemployment insurance benefits and one-time direct economic impact payments through the Cares Act pushed transfer receipts to a new high of 22.1% of personal income.

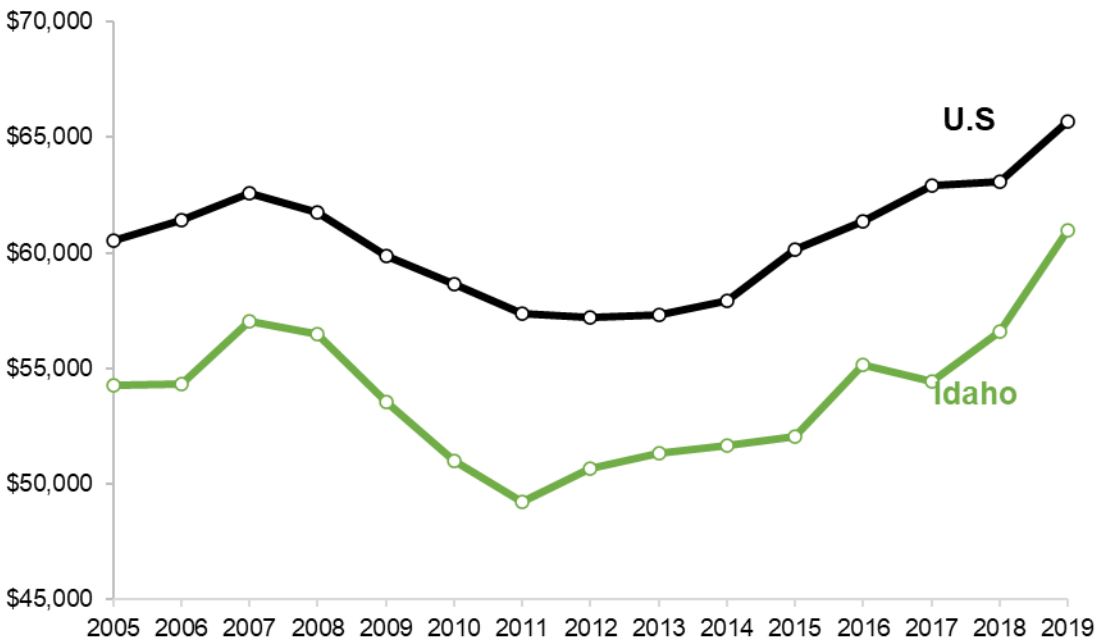
Net earned income has hovered around 59% of total personal income since 2016, a decline from the share of 63.6% in 2007. In 2020, the economic disruption caused by the COVID-19 pandemic caused the share to drop to 57.6%.

### 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 took slightly longer to materialize in Idaho. Real median household income in Idaho declined 13.6% between 2007 and 2011 (*Figures 2-4 and 2-5*). Since then, household income has been on a growth trajectory. In 2019, the median household income saw a big push upward in 2019 to \$60,999, up 7.8% from the previous year and for the first time rose above the 2007 pre-recession level. It is presumed that the increasingly tight labor market was responsible for driving up wages.

**Figure 2-4. Real median household income (in 2019 dollars)  
United States and Idaho, 2005 – 2019**

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



From the income dip in 2011 to 2019, the real median income in Idaho households rose by 23.8%. In comparison, the national real median household income grew at a slower rate of 14.5% over the same time frame. Family household income in Idaho grew by 20.6% and non-family households grew by 22.2%.

**Figure 2-5. Median household income (in 2019 dollars)  
Idaho, selected years for the period from 2011 to 2019**  
Source: American Community Survey, 1-year estimates

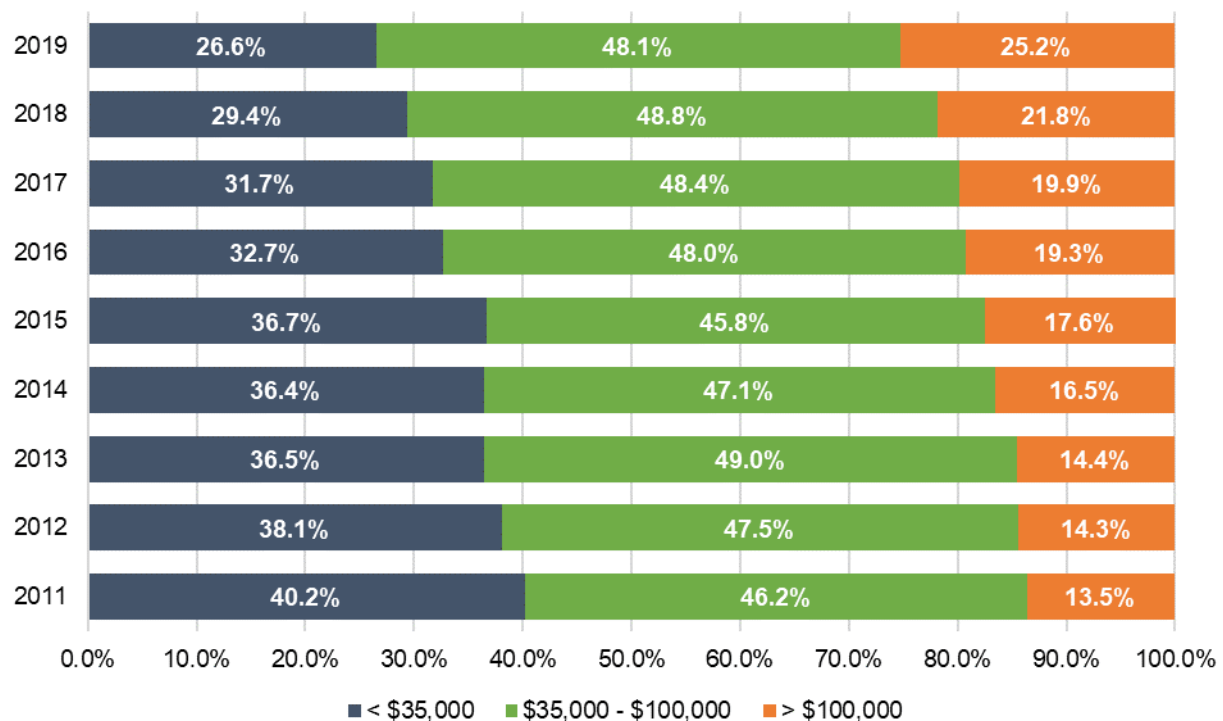
Household Type	2011	2014	2015	2016	2017	2018	2019	% Change, 2011 - 2019
All Households	\$49,260	\$51,686	\$52,072	\$55,185	\$54,470	\$56,590	\$60,999	23.8%
Family	\$60,026	\$62,745	\$64,806	\$67,302	\$66,937	\$67,183	\$72,365	20.6%
Married-couple family	\$68,077	\$70,544	\$72,875	\$75,505	\$73,887	\$74,554	\$81,048	19.1%
Non-family	\$28,762	\$28,843	\$29,395	\$31,559	\$32,026	\$32,705	\$35,157	22.2%

Examining household income ranges allows for a more nuanced view of how the economic recovery differs socioeconomically. *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% of households in 2011. By 2019, the share had dropped to 26.6%. Households making more than \$100,000 on the other hand, increased as a share of total Idaho households over the past eight years; expanding from 13.5% to nearly 25.2%.

Middle-income households experienced the least change of the three income ranges. From 2011 to 2019, the share of households with incomes between \$35,000 and \$100,000 changed by 2.6%, from 46.2% in 2011 to 48.8% in 2019.

**Figure 2-6. Percent of households by income range, not inflation adjusted  
Idaho, 2011 – 2019**

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



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 U.S. median household income after adjusting for household size. Thus, after adjusting for cost of living, a middle-class Idaho household of three making about \$35,000 a year in 2011 would need to make between \$43,000 - \$130,000 a year in 2019 to remain within the middle-class income bracket. Even with this measure, upper income families have grown at a faster rate with middle income families showing only modest growth. 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% in 2011 to 2.3% in 2019. Food stamp recipients have also seen a 39% decline from 2011. While the share of households with earnings from a job saw a decline from 78.4% in 2011 to 77.9% in 2019, the share of households with income from Social Security and retirements has risen during this time frame – a reflection of an increasingly aging population. In 2019, more than a quarter of households in Idaho were receiving retirement income, a percentage point higher than the national share of 24.5%.

The data shows poverty rates in decline from a high of 16.5% in 2011 to 11.2% in 2019 and at their lowest levels on record (i.e. since 2005). Children tend to have higher episodic poverty rates than the general population. In 2019, 13.2% of children under 18 were living below the poverty level.

As the national economy reeled from the housing crisis in 2007, homeownership rates in Idaho dropped from 72.1% in 2007 to 68.4% in 2012. Since then rates have risen but in 2019 the homeownership rate was still below prerecession levels at 71.6%. Homeownership rates have remained lower due to lingering effects of the housing bubble and Great Recession, but also changes in general consumer behavior. “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% 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 45.8% in 2017. In more recent years however, the share of renters under duress have been on the rise. In 2019, 46.7% of renters were paying 30% or more of their income for housing. On the other hand, the share of homeowners with a mortgage paying 30% or more of their income toward housing has steadily moved downward over the course of the economic recovery. By 2019, the proportion was down to 23.6%.

**Figure 2-7. Percent of households by income range  
Idaho state, select years between 2011 – 2019**

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

Household Characteristics	2011	2012	2015	2016	2017	2018	2019
Poverty rate for all people	16.5%	15.9%	15.1%	14.4%	12.8%	11.8%	11.2%
Poverty rate for children under 18	20.4%	20.7%	17.8%	17.7%	15.3%	14.3%	13.2%
Households with earnings from a job	78.4%	78.5%	76.5%	77.1%	77.0%	76.8%	77.9%
Households receiving Social Security	29.9%	29.9%	31.8%	32.1%	32.6%	32.9%	32.1%
Households receiving retirement income	17.1%	17.7%	19.8%	18.9%	18.9%	19.5%	25.5%

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Households receiving Supplemental Security Income	4.4%	5.1%	5.1%	4.9%	4.9%	4.6%	4.5%
Households receiving welfare cash payments	3.5%	3.0%	3.1%	3.1%	2.9%	2.5%	2.3%
Households receiving food stamps	13.5%	13.8%	11.5%	10.9%	9.7%	8.9%	8.3%
Homeownership rate	68.7%	68.4%	69.0%	68.5%	69.7%	70.7%	71.6%
Renters paying 30% or more of income for housing	51.6%	49.9%	47.1%	45.9%	45.8%	46.1%	46.7%
Homeowners paying 30% or more of income for housing	36.9%	32.7%	29.0%	25.1%	26.1%	25.7%	23.6%

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## 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 2020 – first quarter 2022) highlight the following key findings:

- The average annual growth rate for total employment is projected to be 1.3% for the 2020 to 2022 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.

Projections are largely based on historical trends and because the full pandemic effect was not felt until the 2020-Q2, the 2019–21 projections do not fully include impacts of COVID-19 pandemic and response efforts.

### Short-term industry projections show 1.3% future job growth rate

Idaho’s employment is projected to grow by 21,000 jobs by 2022. This translates to a 2.6% total growth – an annual growth rate of 1.3%. *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 was projected to be the fastest-growing sector with a projected annual growth rate of 2.2%. Leisure and hospitality was projected to be the second fastest-growing industry with a growth rate of 2.1%. 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% of the employment share in the base year (2020) and 55.6% 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 2020 to first quarter 2022**

Source: Idaho Department of Labor, Communications and Research

NAICS Title	2020 Employment	2022 Projection	Net Change	Annual Growth
<b>Total All Industries</b>	<b>805,990</b>	<b>827,034</b>	<b>21,044</b>	<b>1.3%</b>
Agriculture, Forestry, Fishing and Hunting	21,356	21,396	40	0.1%
Mining	2,334	2,322	(12)	-0.3%
Construction	49,818	51,825	2,007	2.0%
Manufacturing	66,946	67,700	754	0.6%
Utilities	3,574	3,556	(18)	-0.3%
Wholesale Trade	30,894	31,277	383	0.6%
Retail Trade	86,116	87,904	1,788	1.0%
Transportation and Warehousing	25,178	25,726	548	1.1%
Information	8,553	8,580	27	0.2%
Financial Activities	33,644	34,446	802	1.2%

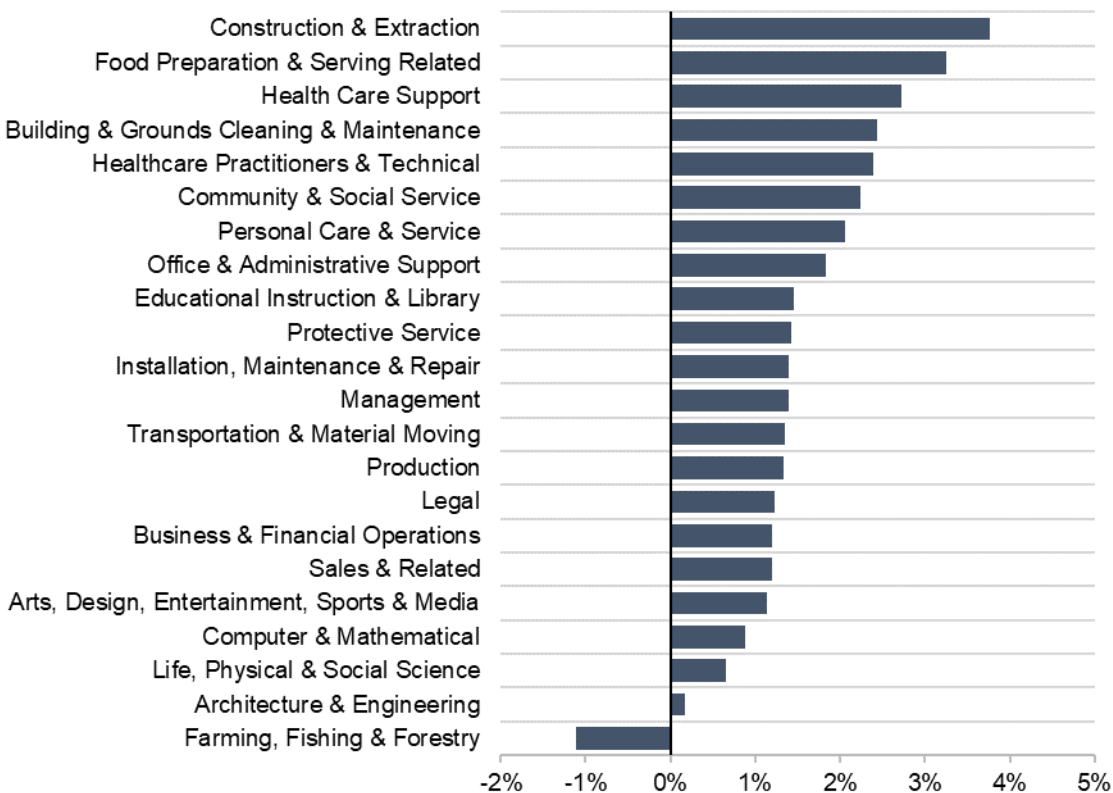
Professional and Business Services	95,802	99,123	3,321	1.7%
Educational Services (Private + Govt)	64,074	65,703	1,629	1.3%
Health Care and Social Assistance (Private + Govt)	111,025	115,988	4,963	2.2%
Leisure and Hospitality	81,776	85,201	3,425	2.1%
Other Services (except Government)	20,075	20,651	576	1.4%
Self Employed	61,273	61,563	290	0.2%
Public Administration	43,551	44,029	478	0.5%

### Occupational projections show rapid growth in construction jobs

The projected annualized growth rates for the major occupational groups in Idaho is shown in *Figure 3-2*. Construction occupations (3.8%) and food preparation occupations (3.3%) were projected to outpace most other occupational groups. This reflects the state’s rapidly expanding population and booming housing market. Growth in health care support occupations (2.7%), health care practitioners and technical occupations (2.4%) and personal care and service occupations (2.1%) reflect the strong growth in the health care industry and, in part, the rapidly growing share of the state’s aging population. Only agricultural occupations are projected to decline (-1.1%).

**Figure 3.2. Projected annualized growth rates for major occupational groups Idaho, 2020 to 2022**

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 2022 include food preparation and serving (4,500 jobs), construction (4,200 jobs) and office and administrative support (1,900 jobs). These three occupation groups alone represent 28% of total employment shares for the state.

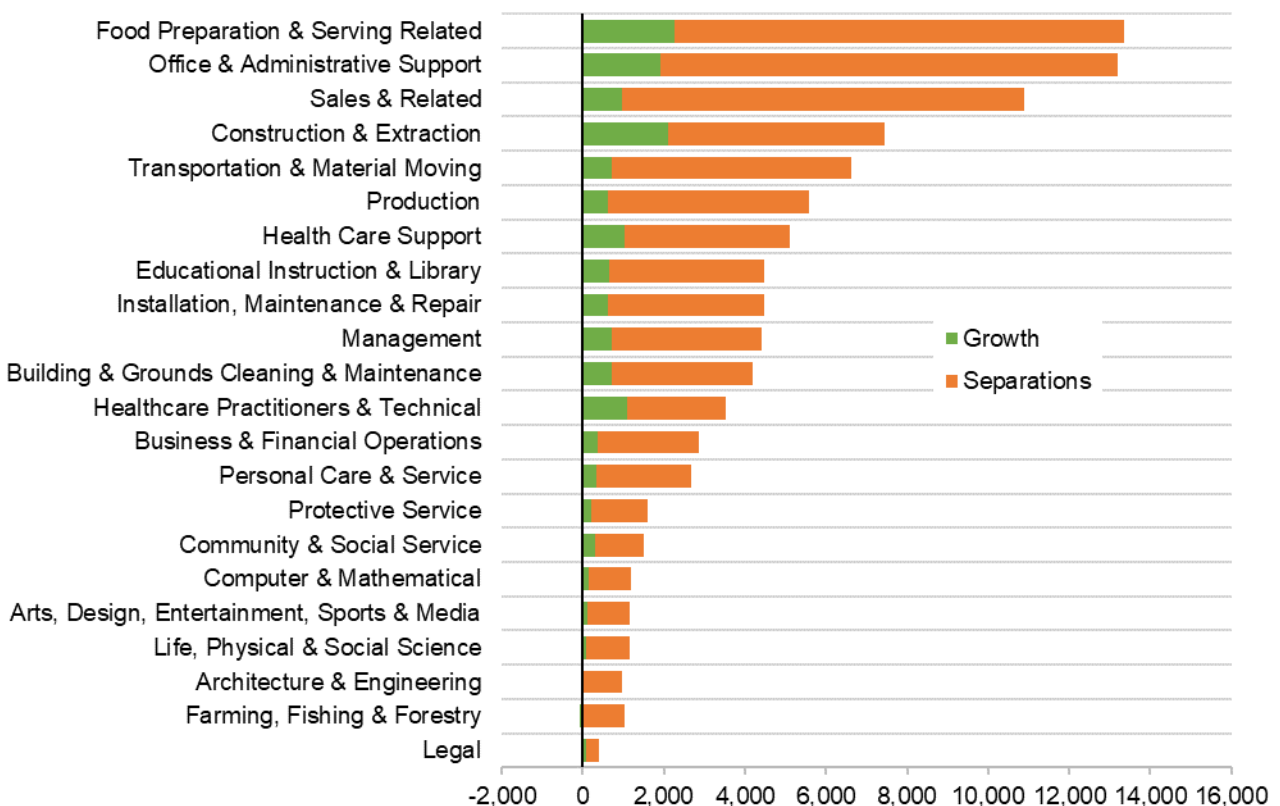
### Food prep jobs projected to have the most numerous openings annually

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 jobs filled by interstate movement, when workers stay within occupations, are not identified as new jobs.

For the 2020-2022 period, Idaho Department of Labor projects a total of 97,700 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 2022**

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 for entry. The average annual wages demonstrate the link between educational attainment level and monetary compensation by occupation. The average wage for the top five occupations requiring a high school education or less is \$24,766 per year, while for master’s or doctoral degrees the average wage is \$70,171.

**Figure 3-4. Top five occupations typically requiring high school education or less for entry Idaho, 2020 through 2022**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2020 Annual Avg Wage
Retail Salespersons	4,100	\$30,950
Fast Food and Counter Workers	3,510	\$21,341
Waiters and Waitresses	3,010	\$23,733
Cashiers	3,010	\$24,690
Customer Service Representatives	2,660	\$33,259
		<b>\$26,766</b>

**Figure 3-5. Top five occupations typically requiring a postsecondary certificate for entry Idaho, 2020 through 2022**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2020 Annual Avg Wage
Heavy and Tractor-Trailer Truck Drivers	1,490	\$44,304
Nursing Assistants	1,140	\$29,370
Automotive Service Technicians and Mechanics	750	\$43,451
Medical Assistants	460	\$36,754
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	420	\$46,675
		<b>\$39,576</b>

**Figure 3-6. Top five occupations typically requiring an associate degree for entry Idaho, 2020 through 2022**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2020 Annual Avg Wage
Forest and Conservation Technicians	280	\$39,874
Dental Hygienists	170	\$76,669
Paralegals and Legal Assistants	150	\$49,816
Preschool Teachers, Except Special Education	140	\$26,312
Architectural and Civil Drafters	120	\$53,144
		<b>\$48,525</b>

**Figure 3-7. Top five occupations typically requiring a bachelor's degree for entry  
Idaho, 2020 through 2022**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2020 Annual Avg Wage
General and Operations Managers	1,350	\$69,320
Registered Nurses	1,190	\$46,420
Tutors and Teachers and Instructors, All Other	1,010	\$66,590
Elementary School Teachers, Except Special Education	690	\$32,700
Accountants and Auditors	440	\$49,390
		<b>\$55,635</b>

**Figure 3-8. Top five occupations typically requiring a master's degree or greater for entry  
Idaho, 2020 through 2022**

Source: Idaho Department of Labor, Communications & Research

Title	Average Annual Openings	2020 Annual Avg Wage
Rehabilitation Counselors	190	\$42,141
Educational, Guidance, and Career Counselors and Advisors	160	\$50,544
Lawyers	150	\$108,472
Physical Therapists	120	\$82,472
Education Administrators, Kindergarten through Secondary	110	\$81,490
		<b>\$70,171</b>

The leisure and hospitality industry was by far the most impacted by the recent economic disruption. At the height of the COVID-19 pandemic, food preparation jobs recorded the largest number of total unemployment insurance claims. It is estimated approximately one in four jobs were lost in this occupation as a result of closures tied to the pandemic. As the economy opened up, food service job openings have accelerated as employers struggle to fill vacancies. Projections currently show the hospitality industry as one of the fastest-growing industries in the state and a major job creator. However, with the current trends towards remote work and more flexible work schedules, it is unclear how the demand for front-line service jobs will be impacted going forward. It is likely that computer and mathematical occupations would become more prominent in projections going forward, as the professional and business services sector expands and growth in computer occupations – particularly cybersecurity jobs – pick up.

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## 4.0 Regional Economic Highlights

The previous chapters have discussed current and future job and wage growth statewide. These economic changes expressed differently across the six regions of the state. However, a handful of issues were similar across all geographies causing issues for the populace:

- The COVID-19 pandemic caused declines in job growth at the height of the pandemic with the hospitality sector suffering the most job losses. Eastern Idaho was the only region to make a full recovery by the end of the year, being the region least affected by the disruptions.
- All regions faced increased construction workforce demand from a booming housing market fueled by heightened in-migration, low interest rates, rising housing prices and a chronically low housing inventory.
- Hiring deficits were rampant, particularly among industries recovering from the pandemic losses such as food service, accommodations, health care and transportation. Labor shortages have begun putting upward pressure on wages.

Despite the economic disruption of 2020, the year ended the same as it did in the previous year with the common concern going forward for all regions - a tight labor market and labor supply shortage.

### Northern Idaho

2019-20 Population Growth: 2.6%

2019-20 Job Growth: -0.9%

2019-20 Average Pay Growth: 7.3% (not inflation adjusted)

2020 Unemployment Rate: 7.1%

2019 Unemployment Rate: 3.9%

For several years, northern Idaho has experienced rapid population growth, especially in the urban center of Kootenai County. High immigration has fueled strong job growth, rising home prices and a hot construction market. In 2020, COVID-19 caused a severe shock to the labor market in the region, which proved short lived notwithstanding the scale of the disruption. After extreme job losses in the spring months, the labor market made a rapid recovery, buoyed by unrelenting demand and an uninterrupted stream of new residents moving to the area.

When COVID-19 led to business closures and stay-at-home policies in the spring, job losses accumulated rapidly in northern Idaho, as they did around the state and the country. In total, the five counties in the region shed just under 14,000 jobs in April 2020, or roughly 12% of the total. These severe job losses caused the regional unemployment rate to spike from only 3.6% in March to 16.1% in April. Unemployment insurance claims exploded by similar proportions. After averaging only 206 new unemployment claims per week through the first 11 weeks of 2020, northern Idaho began seeing more than 2,000 new claims filed per week at the end of March, marking a tenfold increase.

These jobs losses were undoubtedly severe, but thanks to the region's characteristic resilience and its continued desirability for urban residents seeking a move to less densely populated areas, the region bounced back quickly. By December, total employment was slightly higher in northern Idaho than it was in March, pre-COVID, while the labor force managed to grow by 2%.

Any questions that existed concerning whether COVID-19 would slow down northern Idaho's hot housing market were quickly answered with an emphatic no. If anything, COVID-19 only increased the demand for housing in the region, with the shift to teleworking allowing professionals to move, and the pandemic increasing the desirability of living in less crowded areas. Northern Idaho's

average wages in the financial services sector rose by 11.1% in 2020 – a shocking increase tied to both the extreme levels of activity and rising prices in real estate. The strength of the housing market also allowed construction employment to grow by 2.2% in 2020 – a number which likely would have been much higher if it were not limited by the shortage of skilled labor.

In the end, despite the massive scale of the spring disruption from COVID-19, the region ended 2020 with the same challenges and opportunities with which it began the year. Continued in-migration pressure has powered a growing economy, pushed the construction industry to operate at the limits of its capacity – due to both raw material shortages, especially in lumber, as well as a shortage of skilled labor – and driven home prices ever higher. Meanwhile, unemployment has subsided, and area employers again find themselves struggling to find qualified labor. These tight conditions have occurred while leisure and hospitality employment remain down a significant 8.6% from 2019 to 2020. As a return to normalcy allows a resurgence in tourism to scenic northern, labor supply could become even more constrained.

**Figure 4-1. Average employment and average wage growth by industry, inflation adjusted Northern Idaho, 2010 through 2020**

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

	2020 Average Employment	Job Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>89,535</b>	<b>-0.9%</b>	<b>11.2%</b>	<b>18.7%</b>
Agriculture, Forestry, Fishing and Hunting	1,157	4.3%	14.3%	21.7%
Mining	936	28.6%	-10.3%	16.1%
Utilities	567	3.8%	-0.9%	-0.9%
Construction	7,272	2.2%	43.0%	51.3%
Manufacturing	8,057	-3.0%	0.1%	17.7%
Wholesale Trade	2,343	6.1%	32.9%	34.3%
Retail Trade	12,859	-0.3%	4.2%	9.0%
Transportation and Warehousing	2,119	6.4%	13.1%	16.6%
Information	1,042	-0.5%	7.1%	-2.7%
Financial Activities	4,316	2.3%	21.1%	14.5%
Professional and Business Services	8,051	3.6%	14.2%	5.9%
Educational Services (Private + Govt)	5,794	-3.9%	6.9%	8.7%
Health Care and Social Assistance (Private + Govt)	14,823	-0.2%	13.5%	36.5%
Leisure and Hospitality	12,705	-8.6%	8.4%	22.7%
Other Services (except Public Administration)	2,224	-5.2%	5.9%	16.9%
Public Administration	5,260	0.6%	7.1%	0.8%
	2020 Average Wage	Real Wage Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>\$43,373</b>	<b>6.9%</b>	<b>11.8%</b>	<b>15.0%</b>
Agriculture, Forestry, Fishing and Hunting	\$43,148	0.0%	3.6%	7.1%



Mining	\$82,833	-3.6%	-12.5%	-18.1%
Utilities	\$74,607	3.0%	8.8%	18.7%
Construction	\$47,016	3.8%	12.8%	18.1%
Manufacturing	\$50,928	5.6%	9.2%	15.7%
Wholesale Trade	\$63,055	0.5%	2.1%	21.2%
Retail Trade	\$34,333	7.1%	9.4%	8.6%
Transportation and Warehousing	\$46,373	4.4%	12.4%	20.3%
Information	\$62,042	6.3%	15.9%	31.8%
Financial Activities	\$59,790	11.8%	16.0%	28.9%
Professional and Business Services	\$48,058	6.7%	21.1%	18.4%
Educational Services (Private + Govt)	\$37,813	8.4%	9.2%	5.4%
Health Care and Social Assistance (Private + Govt)	\$49,084	5.7%	16.1%	18.1%
Leisure and Hospitality	\$21,103	6.5%	10.0%	13.0%
Other Services (except Public Administration)	\$31,738	4.4%	18.0%	20.6%
Public Administration	\$53,028	4.0%	5.2%	13.3%

## North Central Idaho

2019-20 Population Growth: 0.8%

2019-20 Job Growth: -3.2%

2019-20 Average Pay Growth: 6.1% (not inflation adjusted)

2020 Unemployment Rate: 5.3%

2019 Unemployment Rate: 3.3%

North central Idaho's economy entered 2020 with high hopes. Its growth rate looked likely to accelerate, after nonfarm jobs grew 1.1%, from 46,600 jobs at the beginning of 2019 to 47,100 jobs by the end of 2019. By February 2020, its seasonally adjusted unemployment rate fell to a record low of 2.6%. Then, the pandemic started inflicting economic devastation in the third week of March. By April, the unemployment rate jumped from a historic low to 10.9%, its highest level since the early 1980s. Many people who remained employed were working fewer hours than they did before the coronavirus crisis, reducing their take-home pay significantly. In addition, bonuses, tips and commissions fell steeply. Many self-employed people lost much, if not all, of their business income during that period. The University of Idaho and Lewis-Clark State College sent their students back to their hometowns, causing misery for businesses in the surrounding communities.

Despite the decrease in students living in the region, its population growth rate edged up from 0.7% in 2019 to 0.8% in 2020. A surge in people from California and western Washington caused the faster population growth.

As stay-at-home restrictions were eased, the region's economy began to recover its jobs at a faster rate than the U.S. By December, nonfarm payroll jobs were only 2.1% lower than December 2019, while U.S. nonfarm payroll jobs were 6% lower. North central Idaho's seasonally unadjusted unemployment rate fell to 4.2% by December, significantly lower than the U.S. rate of 6.7%.

The remarkable strength of the region's manufacturing sector partly explains why its economy performed better than the national economy. While U.S. manufacturing jobs fell 5% between 2019

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and 2020, the region's manufacturing employment rose 6.7%. Record high prices for lumber in the last half of the year and increased timber sales by the U.S. Forest Service buoyed sawmill jobs. The region's largest manufacturer, Clearwater Paper in Lewiston, benefited from strong demand for toilet paper and other paper products. The national ammunition shortage and surge in gun purchases raised employment at Vista Outdoors ammunition plant in Lewiston from 1,000 jobs to 1,200, and increased jobs at gun and gun parts manufacturers. Schweitzer Engineering Laboratories, which manufactures equipment for controlling electrical power grids, added more than 30 jobs in Lewiston, bringing its employment to 620. Aluminum jet boat builders and bow hunting equipment makers also expanded as the coronavirus increased interest in outdoor recreation.

Construction was another high-performance sector in 2020. Its employment in north central Idaho grew 3.2% between 2019 and 2020. Construction's growth boosted employment at cement, concrete and gravel providers; building material stores; appliance stores; real estate; and related financial and insurance agencies.

The sector most devastated by the pandemic was leisure and hospitality where employment fell 12.2% between 2019 and 2020. Among the restaurants, lodging operations and recreation providers that suffered the most were those that host conventions and other meetings, rely more on business travelers and serve a high proportion of travelers who visit as commercial airplane passengers. Moscow, where tourism primarily revolves around events and conferences at the University of Idaho and Washington State University, was hit especially hard. Lower school enrollments and financial problems at the U of I also depressed dining, leisure and retail spending in Latah County. The coronavirus-caused shutdown of all cruises to Clarkston hurt many Lewiston businesses that catered to high-end tourists and the ships' crews. Lewiston hotels and restaurants also noticed the decrease in business travelers and business lunches. On the other hand, many lodging operations, golf courses and businesses serving hikers, campers, whitewater enthusiasts, anglers and hunters saw a surge in demand in the summer and fall, as Americans escaped to the great outdoors. Dworshak Reservoir and Elk City, for examples, hosted record numbers of tourists during the summer of 2020.

Jobs cuts and early retirements resulting from pre-pandemic financial problems, coupled with lower employment due to decreases in enrollments at the U of I and LCSC caused most of the 7.1% drop in education jobs between 2019 and 2020.

With locals reducing their spending, long-term declines in brick-and-mortar retailers and fewer tourists, the region lost 1.8% of its retail jobs between 2019 and 2020. While stores specializing in clothing and accessories suffered the biggest losses, groceries and building material stores added some jobs.

Health care and social assistance employment fell 4.7% between 2019 and 2020. The businesses in this sector most likely to cut jobs were dental offices, offices of physicians that provide elective care, child care centers and counseling offices. Higher costs of operation and sharp revenue reductions from their most profitable operations — elective surgeries, many outpatient services and emergency services — also caused some job losses at some hospitals.

Nonprofits, membership organizations, hair and nail care salons and dry cleaners all reduced employment because of COVID-19. Employment in other services fell 4.2% between 2019 and 2020.

By the end of 2020, good news prevailed. Those industries that suffered most during 2020 appeared to be likely to return to pre-pandemic levels in 2021.

In 2020, Moscow learned about plans that will increase high-paying jobs in the next couple of years. Emsi, a high-tech labor market analytics firm in downtown Moscow, added a few dozen jobs in 2020, bringing its employment close to 200. Construction progresses on its new headquarters, which will be able to accommodate up to 500 employees. Emsi officials predict the company will employ 500 in about six years. Pullman-based Schweitzer Engineering Laboratories broke ground on a 140,000-square-foot manufacturing facility for printed circuit boards in Moscow in spring 2021. It expects to open the plant before the end of 2022.

Two career-tech centers that will benefit the entire region opened in Lewiston last fall. The state-of-the-art career and technical education (CTE) centers at the new Lewiston High School and nearby for LCSC promise great job opportunities for the region’s youth and a skilled workforce for employers throughout the region.

The region took several steps forward on improved broadband access in 2020. Idaho and Lewis counties received more than \$1.6 million in federal coronavirus relief funds through the Idaho Department of Commerce for improved Internet access. The city of Orofino won a \$1.178 million grant to improve internet access. It awarded a contract to Ziplly to build a fiber network to serve the community of Orofino. The Port of Lewiston plans to spend \$400,000 in 2021 to extend its 35-mile fiber optic network toward Clearwater Paper.

Another bright spot was agriculture. Exceptionally high yields for wheat and other crops benefitted the region’s farmers, which in turn will boost spending in the region.

While many families and businesses experienced extreme distress in 2020, others enjoyed a good year economically, especially professionals who could work from home, the region’s thriving manufacturing sector and some of the retail and service sectors that grew during the pandemic.

Despite the daunting disruptions caused by the pandemic, the average pay per job grew 6.1% when not adjusted for inflation, between 2019 and 2020. The pandemic’s greatest losses came in low-paying sectors such as retail, temporary employment and leisure and hospitality, while most high-paying sectors remained stable, and the high-paying manufacturing sector grew rapidly. In addition, within an industry that laid off workers, the affected workers tended to be the lower-paid staff, while professionals, managers and workers with more seniority continued to work and receive raises.

**Figure 4-2. Average employment and annual average wage growth by industry, inflation adjusted North Central Idaho, 2010 through 2020**

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

	2020 Average Employment	Job Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>42,095</b>	<b>-3.2%</b>	<b>-1.6%</b>	<b>0.7%</b>
Agriculture, Forestry, Fishing and Hunting	939	2.4%	-14.9%	5.0%
Mining	215	3.4%	0.0%	30.3%
Utilities	145	-4.6%	-0.7%	-7.1%
Construction	2,127	3.2%	20.0%	23.2%



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## Southwestern Idaho

2019-20 Population Growth: 2.6%

2019-20 Job Growth: -0.6%

2019-20 Average Pay Growth: 6.9% (not inflation adjusted)

2020 Unemployment Rate: 5.6%

2019 Unemployment Rate: 2.8%

Over the past decade, southwestern Idaho experienced the greatest growth among Idaho's six regions with a population uptick of 22.8% and annualized average growth over the decade of 2.3%. The addition of 157,580 people to the area over 10 years drove up demand for housing and services. It also heightened road traffic and corresponding wear and tear while expediting timelines for multi-family developments and approval of new subdivisions. From 2010 to 2020, the region's population grew from 691,591 to 849,171. The area's growth averages around 15,000 people annually over the decade, though the last three years surged to more than 20,000 annually.

Ada and Canyon counties led the growth of southwestern counties, arriving at similar rates exceeding 25% over the decade. Ada County's population started at double Canyon County's in 2010. The numeric growth was more than 100,000 for Ada County and roughly 50,000 in Canyon County over the decade. Ada and Canyon counties comprised 84% of the region's population in 2010, ratcheting up to 86% in 2020. Valley County neared southwestern Idaho's population hub in percentage growth at 20.5%, with much development and interest in both McCall and the newer Tamarack Resort, particularly over the past five years. The pandemic caused workers with appropriate job duties to set up home offices — some even renting alternative housing like an Airbnb or VRBO in tourist and recreational areas while others parked their RVs in mountain communities across Idaho.

The region contributed 61.5% of the state's population growth over the period from July 2010 to July 2020. Its share of the population grew from 44% in 2010 to 46.5% in 2020. Its share of Idaho's growth from 2019 to 2020 was just over 50%.

The smaller, more rural counties of Elmore and Washington experienced the slowest growth over the decade at 1.2% and 1.8% respectively. The military town of Mountain Home in Elmore County has grown slower than previous decades, potentially due in part to fewer manufacturing jobs available in Ada County or less stringent requirements for living in the community by the Air Force. Micron is located on the eastern fringe of Boise and made for an easy commute for those seeking lower real estate prices and access to central Idaho mountain ranges. However, higher costs of living in urban Idaho and smaller inventories of homes on the market should create some growth for counties with lower land costs. Some rural counties are developing downtown amenities to keep dollars in the community.

Jobs were lost during the COVID-19 pandemic across all geographies including southwestern Idaho, especially early on. The loss of jobs was mostly recovered by the end of the 2020 with southwestern Idaho posting a loss of 0.6%, second only to eastern Idaho reporting a job gain of 1.2%. The biggest losses sustained through the end of the year were borne by industries such as information, leisure and hospitality and other services.

The rapid development of Amazon facilities in Nampa, Boise and Meridian, plus its strategically fast hiring and onboarding process, curtailed potential job losses regionally. This hurt businesses that lost workforce to Amazon and is creating a more worker-focused marketplace. Amazon limited its

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interview process, offered \$15-\$17 starting hourly wage and, in most cases, paid a sign-on bonus of \$1,000.

There are a portion of workers who are looking to upskill and change occupations held pre-pandemic. Some of the part-time front-line workforce – especially those requiring in-person customer interaction - sought opportunities for full-time work that offered benefits and the option to telework.

The number of multi-family projects under construction usurped the building of hotels in Ada County as the need to accommodate new residents became urgent. An anticipated 2,500 new units in Boise will come on board in the next two years to ease some of the pressure. The number of new subdivisions is also burgeoning, many platted for more than 2,000 homes.

Wage growth was more than double the 10-year average, growing at a rate of 6.9% from 2019 to 2020. Employment levels dipped during the COVID-19 pandemic, especially among industries such as food service, accommodations, health care and social assistance, and education. With a percentage of lower-wage workers no longer on the employment rolls, the remote workforce and those being paid premiums to work frontline jobs at grocery stores and big box stores dictated this higher wage growth. On the flip side, the ability to work remotely opened up opportunities for Idahoans to capture higher-paying jobs normally located elsewhere, without moving from Idaho.

The median sales price for homes across the 10-county region surged in 2020 as the population grew due to migration from other states. Idaho was the fastest-growing state in the nation again. Those in the workforce who wanted to work remotely got their wish as an estimated 36.6% of the occupations in the Boise metropolitan statistical area (MSA) had job duties conducive to telework. (Eke, E., May 19, 2020, Employment News, “One-third of Idaho Jobs Can Be Performed Teleworking.”) Those occupations tend to pay more on average than those jobs not suitable for flexible arrangements. This is a similar ratio to that across the nation.

Many cost-burdened workers in high-cost housing areas could sell or give up their rentals and work from an Airbnb, a recreational vehicle or a lower cost apartment or home in Idaho. The baby boomers’ retirement seemed even more attainable with a longstanding bullish stock market and the ability to sell their equity-rich homes in high-cost coastal or urban cities. For those with a surplus of cash, winning a bidding war during a tight housing market in Idaho became easier. In-migration was also driven by access to recreation, less population density during a pandemic and relatively lower housing costs – albeit prices continue to creep up. According to Red Fin, a national real estate firm, the net in-migration to Boise based on its clients soared 128% from almost 500 in 2019 to more than 1,000 in 2020, due to the COVID-19 pandemic providing the telework option. The three top areas that lost residents to Boise included Los Angeles, San Francisco Bay Area and Seattle.

Ada County closed out 2020 with a December median home sales price of \$434,628, an uptick of 24% from the previous December. From December 2019 to December 2020, home sales increased by 5% to 11,730 and the days on market dropped from 49 to 19 days. Inventory was only 20% in December 2019 with active listings dropping from 1,631 to 331 – a blow to those hoping to purchase homes in a low-interest rate environment.

In Canyon County the December 2020 median price was lower than Ada County at \$339,445, an increase of 33% year over year. In 2020, close to 6,000 homes were sold through the MLS compared to almost 5,500 in 2019. The days on market at the end of 2020 had dropped to from 39 days one year earlier to 17. This strong market was impacted by those moving out of the higher-



priced Ada County market along with in-migration from other western states such as California, Oregon and Washington, driving up demand. Active listings were 23% of what they were at the end of 2019, down to 193 from 844.

Southwestern Idaho's economy seemed to strengthen with despite the pandemic. Many businesses, such as grocery stores, were sustained because consumers could continue to spend due to federal CARES Act payroll protection programs and temporary enhanced unemployment benefits. The gig or self-employed workforce was propped up receiving that group's first-ever unemployment benefit, underwritten by the CARES Act. Many restaurants pivoted their marketing or product. Some added drive-through windows or developed new menus to create a buzz. New projects like Boise's BODO district converting space to a food hall concept created new construction and brought in new business.

**Figure 4-3. Average employment and annual average wage growth by industry, inflation adjusted Southwestern Idaho, 2010 through 2020**

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

	2020 Average Employment	Job Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>353,470</b>	<b>-0.6%</b>	<b>16.4%</b>	<b>30.6%</b>
Agriculture, Forestry, Fishing and Hunting	6,639	-0.7%	-3.2%	6.9%
Mining	297	12.1%	29.7%	59.7%
Utilities	1,683	-0.1%	-4.0%	3.8%
Construction	28,334	6.1%	56.6%	101.8%
Manufacturing	30,787	-2.2%	12.5%	27.5%
Wholesale Trade	15,652	1.2%	15.9%	36.6%
Retail Trade	40,314	0.4%	8.5%	23.5%
Transportation and Warehousing	12,568	5.0%	34.5%	44.9%
Information	3,609	-22.2%	-31.2%	-27.0%
Financial Activities	19,115	4.5%	26.8%	42.0%
Professional and Business Services	50,117	2.6%	24.1%	29.8%
Educational Services (Private + Govt)	25,049	-4.1%	5.9%	11.5%
Health Care and Social Assistance (Private + Govt)	52,022	1.4%	16.8%	37.1%
Leisure and Hospitality	34,927	-10.7%	13.2%	37.5%
Other Services (except Public Administration)	9,610	-6.7%	14.0%	25.3%
Public Administration	22,737	1.5%	7.1%	7.6%
	2020 Average Wage	Real Wage Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>\$51,426</b>	<b>6.4%</b>	<b>12.6%</b>	<b>15.4%</b>
Agriculture, Forestry, Fishing and Hunting	\$38,601	5.3%	15.9%	28.0%
Mining	\$63,038	1.4%	-18.4%	-14.6%
Utilities	\$91,892	4.5%	8.0%	10.5%



Construction	\$51,147	4.3%	11.5%	5.1%
Manufacturing	\$79,520	4.0%	10.3%	12.7%
Wholesale Trade	\$74,765	6.6%	12.5%	20.9%
Retail Trade	\$36,488	7.7%	9.1%	18.6%
Transportation and Warehousing	\$47,716	1.1%	4.0%	6.0%
Information	\$63,826	13.4%	23.1%	17.5%
Financial Activities	\$74,661	14.8%	25.0%	40.1%
Professional and Business Services	\$58,857	6.4%	22.4%	25.1%
Educational Services (Private + Govt)	\$41,168	8.2%	15.0%	11.5%
Health Care and Social Assistance (Private + Govt)	\$50,908	3.0%	3.8%	6.6%
Leisure and Hospitality	\$19,427	2.8%	12.6%	16.1%
Other Services (except Public Administration)	\$35,727	4.9%	18.3%	23.1%
Public Administration	\$57,222	1.4%	4.0%	6.2%

### South Central Idaho

2019-20 Population Growth: 1.4%

2019-20 Job Growth: -1.7%

2019-20 Average Pay Growth: 6.1% (not inflation adjusted)

2020 Unemployment Rate: 5.0%

2019 Unemployment Rate: 2.7%

Population in south central Idaho has continued to grow sturdily despite the economic challenges that ensued from the pandemic. Between 2019 and 2020, the region's population increased by 1.4% from 201,293 to 204,014 – the largest growth since 2009. About 47% of this growth was driven by Twin Falls County, which is also home to 43.3% of the region's residents.

The year 2020 will go down in history as a turbulent period for the labor market. For the south central region, April's pandemic-related restrictions and business closures caused about 9,400 workers to lose their jobs. By December, however, employment had recovered by about 97% of its pre-COVID level. Overall, the region's employment in 2020 was 1.8% lower when compared with 2019, for a loss of about 1,500 jobs. The unemployment rate was also high during this period, estimated at 5% - the highest level on record since 2013. Blaine County had the highest unemployment rate at 7.8% followed by Lincoln county at 5.3%.

Although total employment figures suggest that job losses in south central Idaho were somewhat moderate, a cross-sectional examination of the industries shows that some industries were severely hit while others experienced slight growth. Leisure and hospitality, education and health services, and other services recorded some of the highest job losses in 2020, accounting for about 87% of all jobs lost. This is not surprising since COVID-19 restrictions were particularly targeted towards these industries. Restaurants, hotels, cinemas, activity centers, schools and other related businesses were temporarily closed in the region following the CDC COVID-19 guidelines. Although the majority of these affected businesses had reopened by the end of the year, most of them were still operating below full capacity and reduced employment.

In contrast, construction, natural resource, and mining and manufacturing were the only industries in the region that saw positive net employment gains. These industries saw a combined net growth of more than 500 jobs. With the demand for housing continuing to grow during the year, multiple development projects were approved across cities in the region. Most notably, the city of Twin Falls issued more than 600 permits for single family dwellings with an estimated value of work of over \$80 million.

**Figure 4-4. Average employment and annual average wage growth by industry, inflation adjusted South Central Idaho, 2010 through 2020**

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

	2020 Average Employment	Job Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>89,750</b>	<b>-1.7%</b>	<b>5.8%</b>	<b>16.7%</b>
Agriculture, Forestry, Fishing and Hunting	10,954	1.9%	7.7%	20.5%
Mining	131	-20.6%	-25.1%	-5.1%
Utilities	595	-0.3%	0.2%	2.6%
Construction	5,610	3.8%	29.5%	43.6%
Manufacturing	10,513	1.4%	9.9%	35.8%
Wholesale Trade	3,638	-1.6%	0.7%	17.9%
Retail Trade	10,228	-0.1%	4.4%	8.9%
Transportation and Warehousing	4,192	-0.1%	-0.9%	8.5%
Information	766	-19.5%	-17.0%	-37.5%
Financial Activities	2,649	-6.1%	5.1%	-1.7%
Professional and Business Services	7,763	-2.5%	-3.9%	24.5%
Educational Services (Private + Govt)	6,508	-5.0%	0.7%	2.3%
Health Care and Social Assistance (Private + Govt)	10,639	0.5%	11.3%	23.0%
Leisure and Hospitality	9,055	-8.1%	6.9%	19.7%
Other Services (except Public Administration)	2,313	-10.8%	-1.8%	8.9%
Public Administration	4,184	-2.1%	5.6%	-2.1%

	2020 Average Wage	Real Wage Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>\$40,999</b>	<b>5.3%</b>	<b>9.6%</b>	<b>14.3%</b>
Agriculture, Forestry, Fishing and Hunting	\$39,943	2.6%	10.8%	19.2%
Mining	\$42,383	3.2%	6.8%	6.5%
Utilities	\$72,996	3.5%	5.3%	13.3%
Construction	\$44,718	2.6%	6.3%	12.5%
Manufacturing	\$52,184	2.0%	5.8%	13.2%
Wholesale Trade	\$58,557	2.8%	8.7%	22.0%
Retail Trade	\$31,982	6.5%	9.7%	14.4%
Transportation and Warehousing	\$45,831	3.1%	11.0%	13.1%

Information	\$48,956	7.8%	13.1%	16.7%
Financial Activities	\$61,782	17.5%	31.3%	28.5%
Professional and Business Services	\$41,941	8.0%	10.9%	11.2%
Educational Services (Private + Govt)	\$35,307	8.0%	12.1%	5.6%
Health Care and Social Assistance (Private + Govt)	\$43,318	4.6%	6.8%	13.5%
Leisure and Hospitality	\$19,242	2.0%	7.5%	7.4%
Other Services (except Public Administration)	\$36,934	9.0%	15.9%	24.6%
Public Administration	\$44,065	4.5%	4.1%	7.6%

## Southeastern Idaho

2019-20 Population Growth: 1.0%

2019-20 Job Growth: -2.2%

2019-20 Average Pay Growth: 5.7% (not inflation adjusted)

2020 Unemployment Rate: 4.3%

2019 Unemployment Rate: 2.7%

As was the case nationally, southeastern Idaho's economy was disrupted by the COVID-19 pandemic. By the close of 2020, the region had seen a 2.2% dip in covered employment from 2019. Average wage, however, rose by 6.2% to \$40,400 over the year. This, to a large extent, was due to employment losses disproportionately affecting lower-wage industries.

Nearly all sectors saw a decline in employment over the year, but leisure and hospitality was by far the worst hit. The region saw many temporary closures of restaurants, retail and recreational facilities due to the pandemic, some that resulted in permanent. Idaho State University (ISU) lost an estimated \$3 million due to the cancellation of concerts, events and other revenue generators.

To survive during the height of the disruption, the region saw many businesses pivot to making face shields to meet the growing demand for personal protective equipment. LiveFree Emergency Response Inc. that specializes in manufacturing medical alert devices, launched a new face mask production line and hired more staff to run it. Titan Power, a battery manufacturer, began making 3D face masks, and many Idaho educators also began printing 3D masks including ISU and Bingham Academy.

While several businesses experienced closures and reduced staffing, others were ramping up amidst the crises. Local gun shops reported higher-than-usual sales of firearms and ammunition as people turned to outdoor recreational activities that present less risk of COVID-19 exposure like camping and hunting. Grocery stores looked to hire more workers to accommodate increased demand. Frozen food processors like Amy's Kitchen in Pocatello and Lamb Weston in American Falls saw a boom in business and added more shifts and/or new production lines. These gains in manufacturing were offset however by the closures of Creative Mines in Malad and ATCO in Pocatello.

The construction industry was one of the few bright spots of the year with a job growth of 2.3%. Much of that can be attributed to the growing housing market. The region saw modest population growth in 2020 when compared to the rest of the state – 1.0% from 2019 to 2020. Still that modest growth added 1,700 residents to the growing demand for an already sparse housing supply. Within the Northgate District, 404 multifamily apartment and townhouse units commenced construction along with another 80 single-family homes in the adjacent city of Chubbuck. In south Bannock county,

development got underway for 107 single-family homes in the city of Inkom’s Portneuf Meadows subdivision. Bingham County also experienced housing growth with three subdivisions under construction. Outside of housing construction, ISU —, despite waning enrollment, state budget cuts and plummeting revenue — embarked on several construction projects this year. The university completed a \$7.1 million Davis Field renovation project that began in March 2020. The University also completed the \$22 million renovation of the William M. and Karin A. Eames Advanced Technical Education and Innovations Complex.

Health care suffered major financial losses as a result of the coronavirus pandemic, yet towards the end of the year, they were able to recover and expand jobs by 1.1% (110 jobs) over the year. Health care is the largest sector in the region accounting for 16% of all jobs. This dominance is expected to remain going forward.

The future is also looking bright for the region’s IT sector. As the pandemic forced many employees to go fully remote, cybersecurity has become a growing national concern. Southeastern Idaho is poised to benefit from federal government spending on cybersecurity infrastructure with the presence of the FBI data center in Pocatello and the INL close by. With the CARES act providing funding to update rural broadband infrastructure, statewide higher institutions renewed focus on cybersecurity programs, and ECS, a new cybersecurity business entrant already in area, the region is hopeful to see more high-paying jobs in the area going forward.

**Figure 4-5. Average employment and annual average wage growth by industry, inflation adjusted Southeastern Idaho, 2010 through 2020**

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

	2020 Average Employment	Job Growth		
		2019-20	2015-20	2010-20
All Industries	62,132	-2.2%	4.8%	8.4%
Agriculture, Forestry, Fishing and Hunting	2,474	-0.2%	-5.5%	14.6%
Mining	770	-2.9%	51.3%	67.8%
Utilities	296	-1.0%	1.0%	-3.6%
Construction	3,590	2.3%	27.4%	18.5%
Manufacturing	6,619	-5.2%	12.0%	6.1%
Wholesale Trade	2,526	-0.2%	0.0%	-7.4%
Retail Trade	7,032	-1.6%	-0.4%	4.0%
Transportation and Warehousing	1,835	1.8%	7.3%	8.9%
Information	462	-15.5%	-29.7%	-36.3%
Financial Activities	2,065	-3.9%	-28.7%	-10.6%
Professional and Business Services	5,427	-2.1%	15.1%	30.4%
Educational Services (Private + Govt)	7,343	-4.0%	-0.1%	-1.5%
Health Care and Social Assistance (Private + Govt)	9,766	1.1%	9.2%	23.1%
Leisure and Hospitality	5,894	-7.9%	8.2%	11.8%
Other Services (except Public Administration)	1,348	-0.1%	8.6%	-1.2%
Public Administration	4,675	-0.1%	2.0%	-0.7%

	2020 Average Wage	Real Wage Growth		
		2019-20	2015-20	2010-20
All Industries	\$40,399	4.9%	8.2%	9.3%
Agriculture, Forestry, Fishing and Hunting	\$36,624	0.6%	3.3%	12.2%
Mining	\$72,880	-1.4%	22.4%	11.8%
Utilities	\$88,242	6.0%	7.4%	10.0%
Construction	\$44,013	2.7%	10.2%	-0.1%
Manufacturing	\$55,718	4.0%	-7.0%	1.3%
Wholesale Trade	\$51,909	8.3%	4.7%	19.6%
Retail Trade	\$27,701	3.7%	9.4%	10.9%
Transportation and Warehousing	\$44,336	2.1%	11.2%	13.9%
Information	\$34,209	-1.2%	4.7%	11.5%
Financial Activities	\$53,497	9.9%	19.5%	17.5%
Professional and Business Services	\$45,757	15.0%	28.2%	24.7%
Educational Services (Private + Govt)	\$38,052	6.6%	10.2%	8.7%
Health Care and Social Assistance (Private + Govt)	\$41,494	1.8%	9.9%	6.8%
Leisure and Hospitality	\$16,004	1.2%	5.0%	8.4%
Other Services (except Public Administration)	\$31,207	4.3%	8.6%	13.4%
Public Administration	\$44,382	1.4%	2.4%	4.8%

## Eastern Idaho

2019-20 Population Growth: 1.8%

2019-20 Job Growth: 1.1%

2019-20 Average Pay Growth: 5.3% (not inflation adjusted)

2020 Unemployment Rate: 3.9%

2019 Unemployment Rate: 2.4%

Eastern Idaho stood out as being the region economically least impacted by the COVID-19 pandemic. In April 2020, at the height of the pandemic, the region saw its unemployment rate rise to 7.9% – the lowest across the state. By December 2020, the unemployment rate had dropped down to 3.1% and employment levels had reached record highs. A reason for the relatively muted impact of the pandemic can be attributed to the comparatively low share of leisure and hospitality jobs in the region. This was the sector most impacted by the pandemic. In addition, eastern Idaho has a relatively high proportion of jobs in professional and business services – 18% – when compared to the rest of the state. This sector was shown to be highly adaptable to remote work and thus fared well in the face of business closures.

Teton County with its high share of hospitality jobs, was the only county in the region to see unemployment rates rise to double digits in April 2020. A Jackson Hole Chamber of Commerce survey of 200 CEOs and directors at the height of the disruptions showed that about 47% of businesses in the area had laid off employees and almost a third of them expected their 2020 revenues would be decreased by 26% to 49%.

Many of these job losses in hospitality were offset by thriving businesses elsewhere. The region is home to prominent chemical manufacturers like Melaleuca and Elevation Labs, both of which saw soaring demand for their health and wellness products. Both companies expanded despite the pandemic - Melaleuca added more than 1,300 employees over the year. Food processors in the region also had a good year despite of the pandemic. Idahoan Foods saw a 250% increase in sales, as demand for non-perishable food products continued throughout the pandemic. The company hired close to 200 new employees over the year. A new meatpacking plant - Intermountain Packing - is hoping to open in Idaho Falls next year, bringing 200 high-wage jobs to the area.

With a strong economy overall and strong population growth, the region saw an uptick in airport activity as traffic picked up over the summer. Towards the close of the year, the Idaho Falls Regional Airport began to see demand for flights return to last year's rates. The airport added four new nonstop flights to Portland, Dallas, Phoenix and Seattle. The growing number of flights reflected a \$12 million expansion of Idaho Falls Regional Airport. The airport added two terminal gates over the summer.

In terms of numerical job growth, the professional and business services sector dominated in the region, adding a net of 860 jobs from 2019 to 2020. Battelle Energy Alliance, a private contractor that runs day-to-day operations at the INL, employed an average of more than 5,000 workers in 2020 and remained a key player in Idaho's economy. Contributing to the sector growth in 2020 was the entry of FCR, an outsourcing call center, bringing in 300 new work-from-home jobs. The region is expected to see more growth in this sector in light of recent developments including the College of Eastern Idaho and its proposed \$35 million Future Tech facility. which will be instrumental in creating a strong talent pipeline to support future growth. Also, the CARES Act funding broadband expansions in much of rural eastern Idaho will provide much needed infrastructure. An estimated 189 households in Carmen are pegged to get wireless coverage, 690 households in Driggs and 88 households in Custer County.

Health care was also a key contributor to job growth in the region, growing by an average of 830 jobs in 2020. Despite major financial losses as a result of the coronavirus pandemic, the health care industry managed to post strong job growth over the year. The region saw a new hospital —Mountain View Hospital Medical Plaza in Rexburg and a new orthopedics clinic in Idaho Falls.

The construction industry thrived as housing developments popped up across the state. In eastern Idaho, Swan Valley completed a new mixed-use development including 12 1,800-square-foot duplex townhomes on the east side of Rainey Creek and six bay homes on the west side with five units each. Construction also began on a 72-unit housing complex, The Teton Mesa Apartments, in Idaho Falls. In the scenic cities of Driggs, Victor and Stanley demand for homes has risen, with house prices surging especially in the last year, and Madison County has seen a surge in housing developments.

**Figure 4-6. Average employment and annual average wage growth by industry, inflation adjusted Eastern Idaho, 2010 through 2020**

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

	2020 Average Employment	Job Growth		
		2019-20	2015-20	2010-20
<b>All Industries</b>	<b>96,807</b>	<b>1.1%</b>	<b>14.2%</b>	<b>22.1%</b>





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## 5.0 Economic Comparisons with Other States

Although the coronavirus pandemic caused major interruptions to Idaho's economy, Idaho continued to experience rapid population growth, relatively low unemployment rates and high business births. The following tables compare Idaho to the nation as a whole as well as other states and the District of Columbia. Population growth, job growth, unemployment rates, business births and per capita income are presented for comparison, showing the 2020 rankings for Idaho.

- *Figure 5-1* shows population growth rates for Idaho compared to other states and the nation. In 2020, Idaho grew 2.1%, ranking highest 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 2020, Idaho's real GDP fell 1.1%. That was the fourth lowest rate of decline.
- *Figure 5-3* shows the average annual job growth rate of each state. In 2020, Idaho nonfarm employment fell slightly – 0.7%. It had the smallest loss of any state.
- *Figure 5-4* shows the unemployment rate for Idaho compared to other states and the nation. In 2020, Idaho's unemployment rate of 5.4% ranked seventh lowest.
- *Figure 5-5* shows the number of business births per 1,000 persons in the labor force. In the first three quarters of 2020, Idaho's entrepreneurship rate ranked fourth highest in the nation. Idaho saw 2.5 new business establishments born per 1,000 people in the civilian labor force.
- *Figure 5-6* compares per capita income by state. Idaho had one of the lowest per capita personal incomes – 44<sup>th</sup> of 50 states and the District of Columbia. After adjusting for cost-of-living differences, Idaho's per capita personal income ranked 45<sup>th</sup>. Idaho ranked 24<sup>th</sup> in the nation for per capita personal income growth.

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## Population Growth

Figure 5-1: Highest and lowest state population growth rates  
United States and Idaho, 2019 to 2020

Source: U.S Census Bureau, Population Division

Rank	State*	Population Growth Rate
	<b>United States</b>	<b>0.4%</b>
1	Idaho	2.1%
2	Arizona	1.8%
3	Nevada	1.5%
4	Utah	1.5%
5	Texas	1.3%
6	South Carolina	1.2%
7	Florida	1.1%
8	Washington	1.0%
9	Delaware	1.0%
10	Montana	1.0%
11	North Carolina	0.9%
12	Colorado	0.9%
13	Tennessee	0.8%
14	Georgia	0.8%
15	District of Columbia	0.6%
36	Massachusetts	0.0%
37	Ohio	0.0%
38	Rhode Island	-0.1%
39	New Jersey	-0.1%
40	Vermont	-0.1%
41	Pennsylvania	-0.1%
42	California	-0.2%
43	Michigan	-0.2%
44	Connecticut	-0.3%
45	Louisiana	-0.3%
46	Alaska	-0.3%
47	Mississippi	-0.4%
48	West Virginia	-0.6%
49	Hawaii	-0.6%
50	Illinois	-0.6%
51	New York	-0.6%

\* Includes the District of Columbia

## Gross Domestic Product Growth

Figure 5-2: Highest and lowest state gross domestic product growth rates, inflation adjusted  
United States and Idaho, 2019 to 2020

Source: Bureau of Economic Analysis

Rank	State*	Real GDP Growth Rate
	<b>United States</b>	<b>-3.5%</b>
1	Utah	-0.1%
2	Washington	-0.7%
3	Arizona	-0.9%
4	<b>Idaho</b>	<b>-1.1%</b>
5	Colorado	-1.5%
6	District of Columbia	-1.5%
7	South Dakota	-1.7%
8	Nebraska	-2.1%
9	Iowa	-2.3%
10	Virginia	-2.5%
11	North Carolina	-2.5%
12	Georgia	-2.5%
13	Arkansas	-2.6%
14	Maryland	-2.6%
15	Alabama	-2.7%
36	Maine	-4.1%
37	Pennsylvania	-4.4%
38	Wisconsin	-4.5%
39	Rhode Island	-4.5%
40	Nevada	-4.6%
41	New Hampshire	-4.7%
42	Tennessee	-4.9%
43	Alaska	-4.9%
44	Michigan	-5.4%
45	Vermont	-5.4%
46	Louisiana	-5.5%
47	West Virginia	-5.5%
48	New York	-5.9%
49	Oklahoma	-6.1%
50	Wyoming	-7.0%
51	Hawaii	-8.0%

\* Includes the District of Columbia

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## Nonfarm Employment Growth

Figure 5-3: Highest and lowest state average annual job growth rates, nonfarm employment United States and Idaho, 2019 to 2020

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

Rank	State*	Job Growth Rate
	<b>United States</b>	<b>-6.0%</b>
1	Idaho	-0.7%
2	Utah	-1.6%
3	Arkansas	-3.0%
4	Montana	-3.1%
5	Arizona	-3.1%
6	South Dakota	-3.4%
7	Nebraska	-3.7%
8	Tennessee	-4.0%
9	Alabama	-4.3%
10	Texas	-4.3%
11	Mississippi	-4.3%
12	North Carolina	-4.3%
13	Kansas	-4.6%
14	Georgia	-4.6%
15	Missouri	-4.8%
36	Maryland	-6.8%
37	Minnesota	-6.9%
38	Illinois	-7.1%
39	California	-7.4%
40	Pennsylvania	-7.6%
41	Connecticut	-7.7%
42	Louisiana	-7.8%
43	New Jersey	-8.4%
44	Alaska	-8.7%
45	Rhode Island	-8.8%
46	Massachusetts	-9.0%
47	Michigan	-9.2%
48	Vermont	-9.3%
49	New York	-10.3%
50	Nevada	-10.4%
51	Hawaii	-15.4%

\* Includes the District of Columbia

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## Unemployment Rates

Figure 5-4: Lowest and highest state unemployment rates, not seasonally adjusted  
United States and Idaho, 2020

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

Rank	State*	Unemployment Rate
	<b>United States</b>	<b>8.1</b>
1	Nebraska	4.2
2	South Dakota	4.6
3	Utah	4.7
4	North Dakota	5.1
5	Iowa	5.3
6	Maine	5.4
7	<b>Idaho</b>	<b>5.4</b>
8	Vermont	5.6
9	Wyoming	5.8
10	Montana	5.9
11	Kansas	5.9
12	Alabama	5.9
13	Oklahoma	6.1
14	Missouri	6.1
15	Arkansas	6.1
36	Ohio	8.1
37	Mississippi	8.1
38	West Virginia	8.3
39	Louisiana	8.3
40	Washington	8.4
41	New Mexico	8.4
42	Massachusetts	8.9
43	Pennsylvania	9.1
44	Rhode Island	9.4
45	Illinois	9.5
46	New Jersey	9.8
47	Michigan	9.9
48	New York	10.0
49	California	10.1
50	Hawaii	11.6
51	Nevada	12.8

\* Includes the District of Columbia

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## Entrepreneurship Rates

Figure 5-5: Highest and lowest establishment births\* per 1,000 persons in the labor force, seasonally adjusted United States and Idaho, 2020 Q1 – Q3

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

Rank	State**	Entrepreneurship Rate
	<b>United States</b>	<b>1.6</b>
1	Washington	4.6
2	District of Columbia	2.8
3	Montana	2.5
4	Idaho	2.5
5	Utah	2.3
6	Florida	2.3
7	California	2.2
8	Wyoming	2.1
9	Nevada	2.0
10	Oregon	2.0
11	Missouri	2.0
12	Colorado	2.0
13	New Hampshire	1.9
14	Rhode Island	1.9
15	Delaware	1.8
36	Illinois	1.3
37	Wisconsin	1.2
38	Vermont	1.2
39	New York	1.2
40	Oklahoma	1.2
41	West Virginia	1.2
42	Iowa	1.1
43	Alabama	1.1
44	Pennsylvania	1.1
45	Mississippi	1.0
46	Louisiana	1.0
47	Indiana	1.0
48	Michigan	1.0
49	Minnesota	1.0
50	Ohio	1.0
51	Maryland	0.9

\* Does not include non-employer establishments

\*\* Includes the District of Columbia

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## Personal Income

Figure 5-6: Highest and lowest state per capita personal income  
United States and Idaho, 2020

Source: U.S Bureau of Economic Analysis

Rank	State*	Adjusted Income
	<b>United States</b>	<b>\$59,729</b>
1	District of Columbia	\$87,064
2	Connecticut	\$79,771
3	Massachusetts	\$79,721
4	New York	\$75,548
5	New Jersey	\$75,245
6	California	\$71,480
7	Washington	\$68,322
8	Maryland	\$68,258
9	New Hampshire	\$66,418
10	Alaska	\$64,780
11	Colorado	\$63,522
12	Wyoming	\$63,263
13	Illinois	\$62,977
14	Virginia	\$62,362
15	Pennsylvania	\$62,198
36	Indiana	\$51,340
37	Missouri	\$51,177
38	Georgia	\$51,165
39	Tennessee	\$50,547
40	North Carolina	\$50,086
41	Louisiana	\$50,037
42	Oklahoma	\$49,249
43	Arizona	\$48,950
44	<b>Idaho</b>	<b>\$48,616</b>
45	South Carolina	\$47,502
46	Arkansas	\$47,109
47	Alabama	\$46,908
48	Kentucky	\$46,507
49	New Mexico	\$45,803
50	West Virginia	\$45,109
51	Mississippi	\$41,745

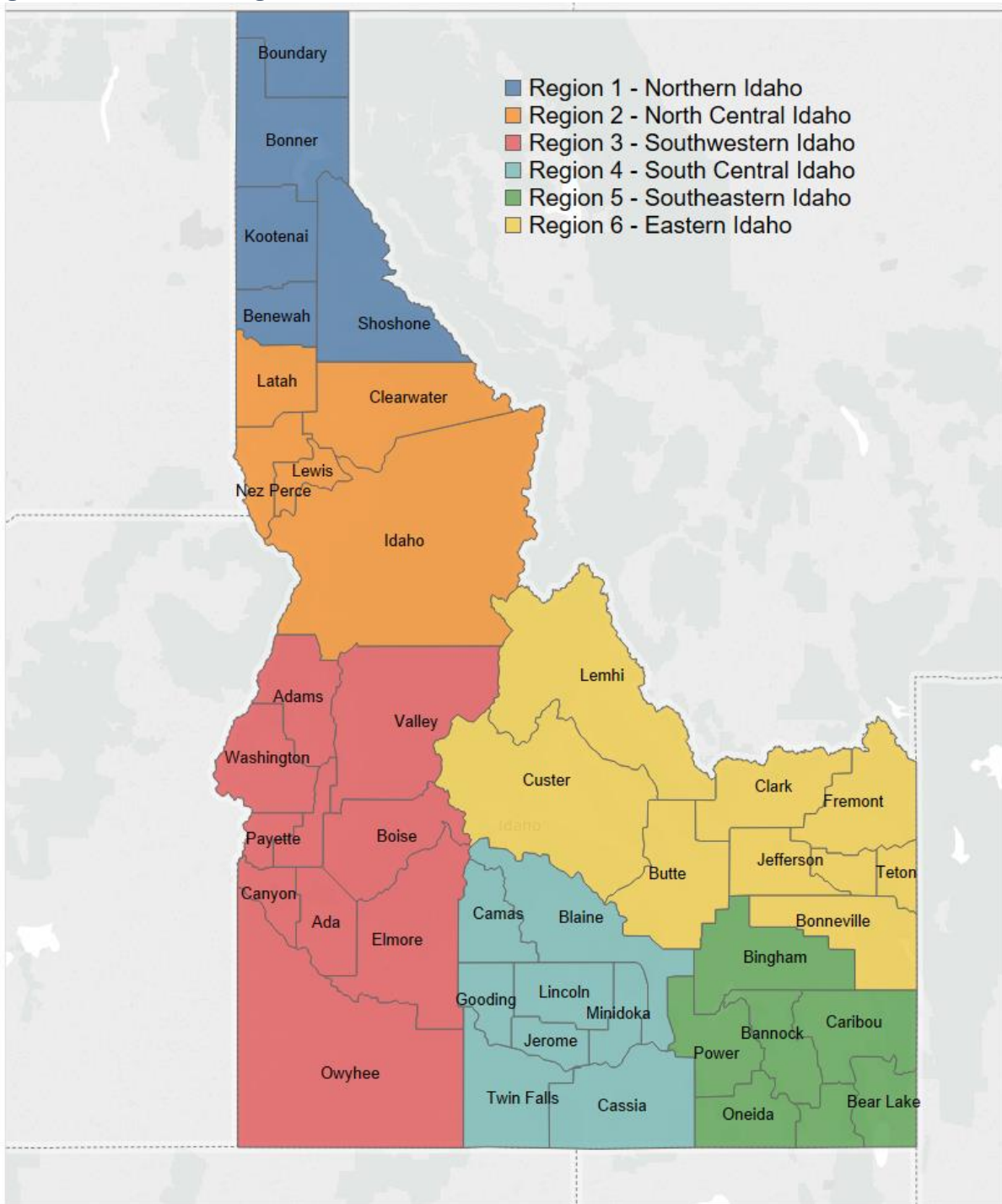
\* Includes the District of Columbia



# 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 2020, 30 of Idaho's 44 counties had U-6 rates below the statewide average of 9.8%. Gooding and Power counties had the lowest rates at 6.1%. Shoshone and Adams counties had the highest U-6 rates at 13.3% and 13% respectively. Northern Idaho had the highest unemployment rate in 2020, so it is not surprising that it also had the highest U-6 rate of 10.9%. North central Idaho had the next highest rate at 10.1%. Eastern Idaho had the lowest U-6 at 8.1%

**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, 2020

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
<b>State of Idaho</b>	<b>893,200</b>	<b>46,200</b>	<b>500</b>	<b>3,900</b>	<b>30,850</b>	<b>9.8</b>
<b>1: Northern</b>	<b>117,629</b>	<b>8,093</b>	<b>88</b>	<b>684</b>	<b>4,092</b>	<b>10.9</b>
Benewah	4,145	300	3	25	103	10.3
Bonner	21,143	1,539	17	130	879	12.0
Boundary	5,508	327	4	28	180	9.7
Kootenai	81,382	5,445	59	460	2,728	10.6
Shoshone	5,451	482	5	41	202	13.3
<b>2: North Central</b>	<b>52,003</b>	<b>2,685</b>	<b>30</b>	<b>227</b>	<b>2,269</b>	<b>10.0</b>
Clearwater	3,025	241	3	20	94	11.7
Idaho	6,717	434	5	37	242	10.6
Latah	19,779	907	10	77	1,228	11.2

Lewis	1,664	123	1	10	55	11.3
Nez Perce	20,818	980	11	83	650	8.2
<b>3: Southwestern</b>	<b>417,664</b>	<b>22,527</b>	<b>244</b>	<b>1,903</b>	<b>13,470</b>	<b>9.1</b>
Ada	257,980	13,432	145	1,134	8,328	8.9
Adams	1,760	158	2	13	57	13.0
Boise	3,613	278	3	23	101	11.1
Canyon	106,106	6,012	65	508	3,503	9.5
Elmore	11,911	557	6	47	393	8.4
Gem	8,432	482	5	41	291	9.7
Owyhee	5,499	316	3	27	160	9.2
Payette	11,955	611	7	52	273	7.8
Valley	5,650	433	5	37	213	12.1
Washington	4,758	248	3	21	151	8.8
<b>4: S. Central</b>	<b>101,864</b>	<b>4,875</b>	<b>53</b>	<b>413</b>	<b>3,024</b>	<b>8.2</b>
Blaine	12,681	954	10	81	377	11.1
Camas	684	32	-	3	16	7.4
Cassia	12,399	439	5	37	335	6.6
Gooding	8,265	301	3	25	175	6.1
Jerome	12,212	471	5	40	317	6.8
Lincoln	2,669	150	2	13	86	9.4
Minidoka	11,655	433	5	37	245	6.2
Twin Falls	41,299	2,095	23	177	1,473	9.1
<b>5: Southeastern</b>	<b>87,157</b>	<b>3,651</b>	<b>41</b>	<b>308</b>	<b>3,230</b>	<b>8.3</b>
Bannock	42,610	1,996	22	168	1,818	9.4
Bear Lake	3,078	124	1	10	111	8.0
Bingham	23,804	886	10	75	759	7.2
Caribou	4,115	143	2	12	124	6.8
Franklin	7,069	245	3	21	272	7.6
Oneida	2,345	95	1	8	69	7.3
Power	4,136	162	2	14	77	6.1
<b>6: Eastern</b>	<b>116,884</b>	<b>4,370</b>	<b>48</b>	<b>369</b>	<b>4,766</b>	<b>8.1</b>
Bonneville	58,203	2,269	25	192	2,123	7.9
Butte	1,395	48	1	4	37	6.4
Clark	379	15	-	1	8	6.3
Custer	2,220	108	1	9	56	7.8
Fremont	7,903	279	3	24	191	6.3
Jefferson	14,158	467	5	39	546	7.4
Lemhi	3,655	235	3	20	111	10.0
Madison	22,331	585	6	49	1,549	9.8
Teton	6,640	364	4	31	145	8.1

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*. With the COVID-19 pandemic causing major economic disruptions, all six regions saw U-6 rates climb in 2020.

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

**Idaho Labor Regions, 2010 - 2020**

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

Region	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Northern	19.7	19.3	16.5	14.9	12.1	10.1	9.4	8.5	7.5	7.2	10.9
N. Central	17.5	16.9	14.8	13.6	11.1	9.4	8.6	8.0	7.3	7.1	10.0
Southwest	16.2	15.9	13.7	12.4	10.1	8.4	7.6	6.8	6.0	5.8	9.1
S. Central	14.1	14.0	12.2	10.8	8.8	7.2	6.7	6.0	5.5	5.4	8.2
Southeast	15.5	15.4	13.6	12.4	10.2	8.6	7.8	7.0	6.2	6.0	8.3
Eastern	15.6	15.7	14.2	12.9	10.5	8.5	7.6	6.9	6.1	5.9	8.1

