

Idaho 2025 rural profile

Brandon Duong, labor economist
Lisa Grigg, labor economist
Sam Wolkenhauer, labor economist

June 17, 2025



2025 rural profile

Project plan

1. **Demographics**
2. **Economics and workforce**
 - A. Employment by industry
 - B. Agriculture and natural resources
 - C. Changing work landscape
 - D. Housing
 - E. Recreation and tourism
3. **Critical trends, September 2025**
4. **Summary report, December 2025**

Today's experts

- **Brandon Duong**
 - Labor economist, southeastern Idaho
- **Lisa Grigg**
 - Labor economist, north central Idaho
- **Sam Wolkenhauer**
 - Labor economist, northern Idaho

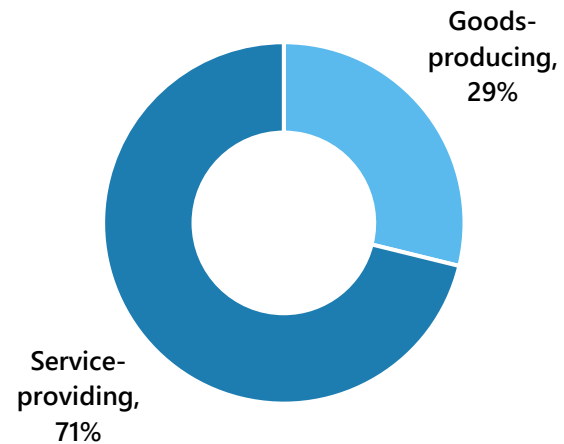


Trivia/poll 1

Please respond in Zoom.

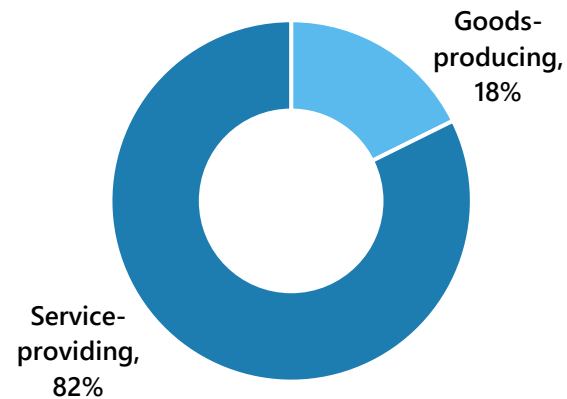
Idaho employment, 2023

Rural



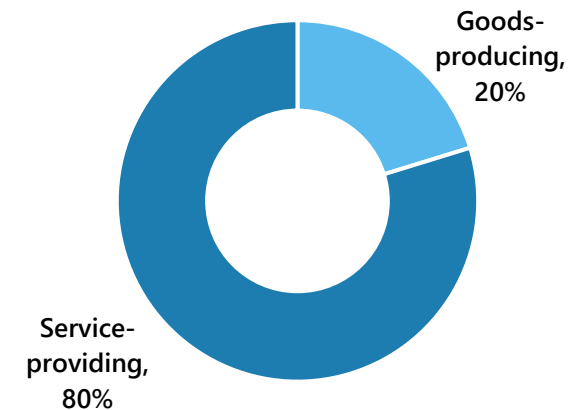
Manufacturing	11%
Health care	11%
Retail	10%
Accom/food	9%

Urban



Health care	16%
Retail	12%
Accom/food	10%
Education	8%

Idaho



Health care	15%
Retail	11%
Accom/food	10%
Manufacturing	9%

Rural Idaho: Top industries, 2023

Northern (1)

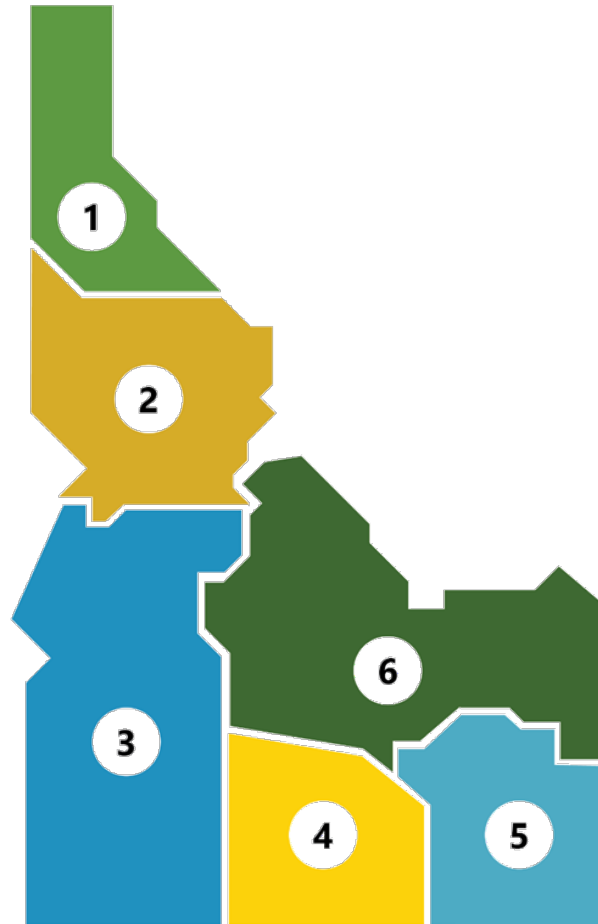
- Retail
- Health care
- Manufacturing
- Accommodation and food services

North central (2)

- Health care
- Public administration
- Retail
- Manufacturing

Southwestern (3)

- Health care
- Retail
- Accommodation and food services
- Manufacturing



Eastern (6)

- Professional, scientific, technical services
- Administrative and support
- Construction
- Retail

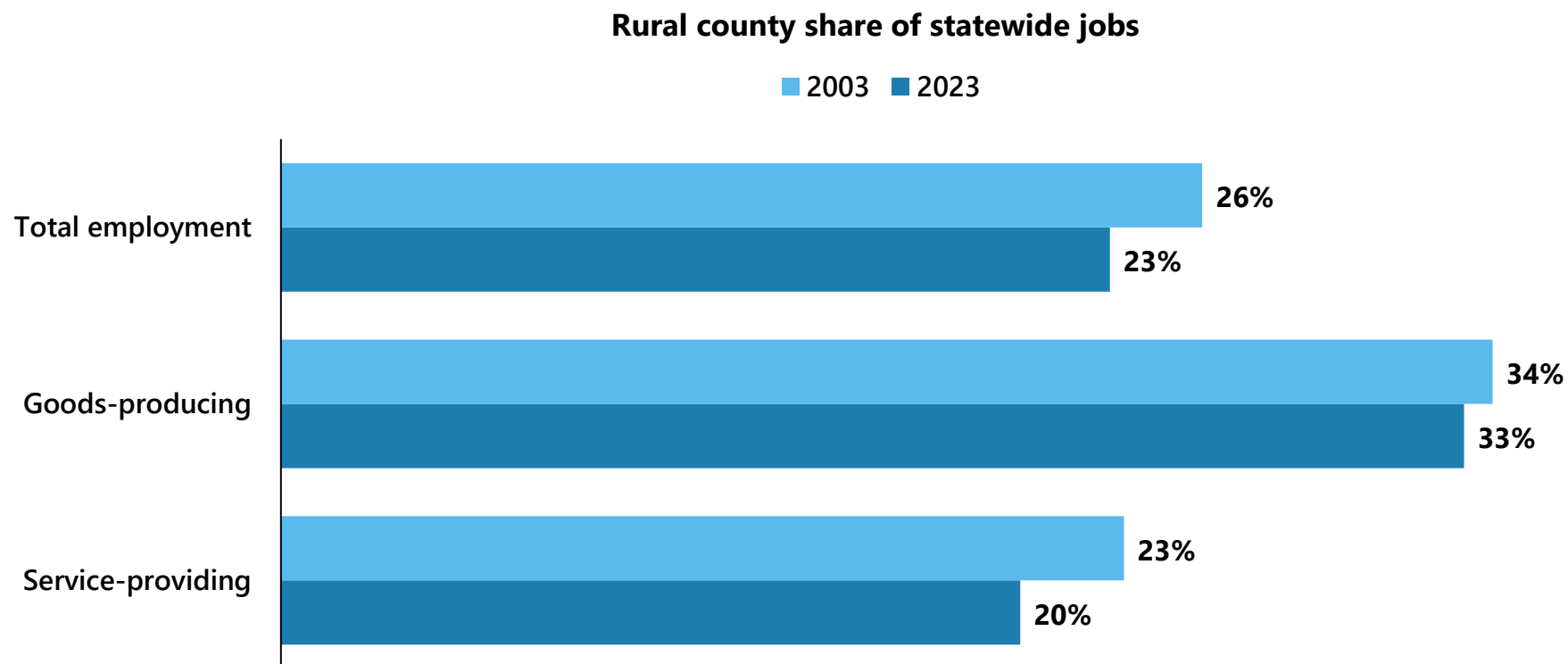
Southeastern (5)

- Manufacturing
- Health care
- Education
- Retail

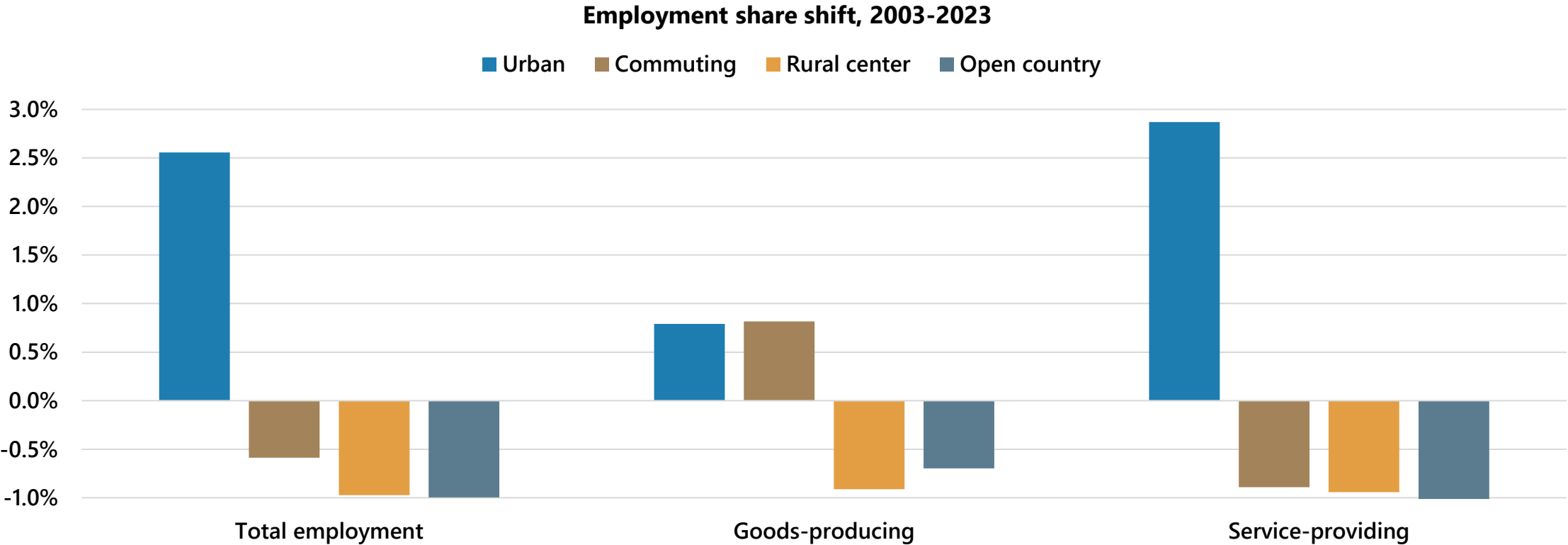
South central (4)

- Agriculture, forestry, fishing, hunting
- Manufacturing
- Retail
- Health care

Rural employment, 2003-2023



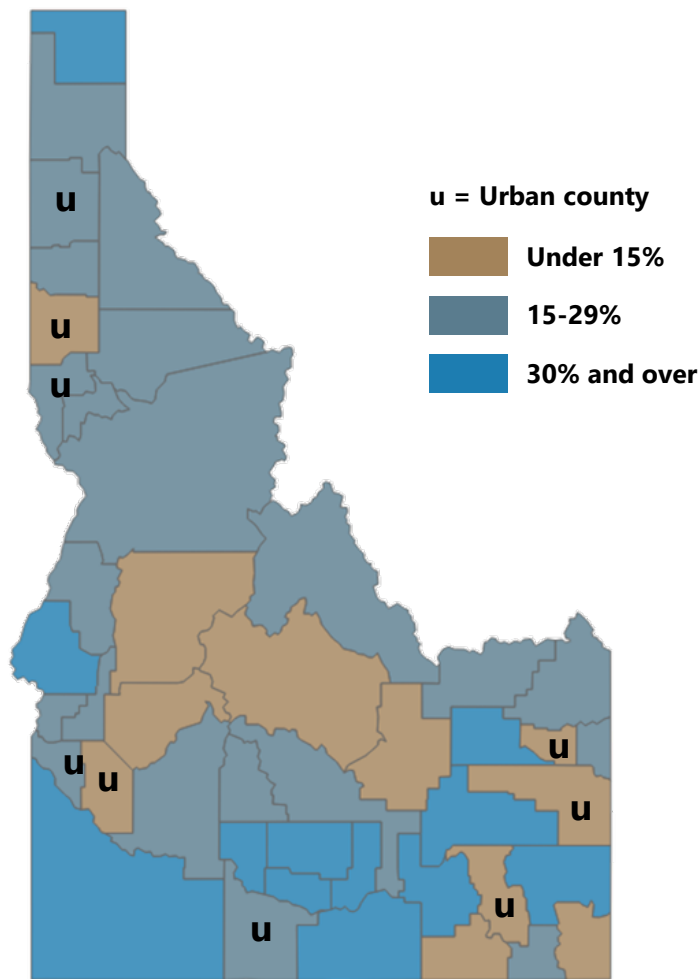
Rural employment, 2003-2023



Source: Bureau of Labor Statistics, QCEW

Goods-producing employment, 2023

County total percentage

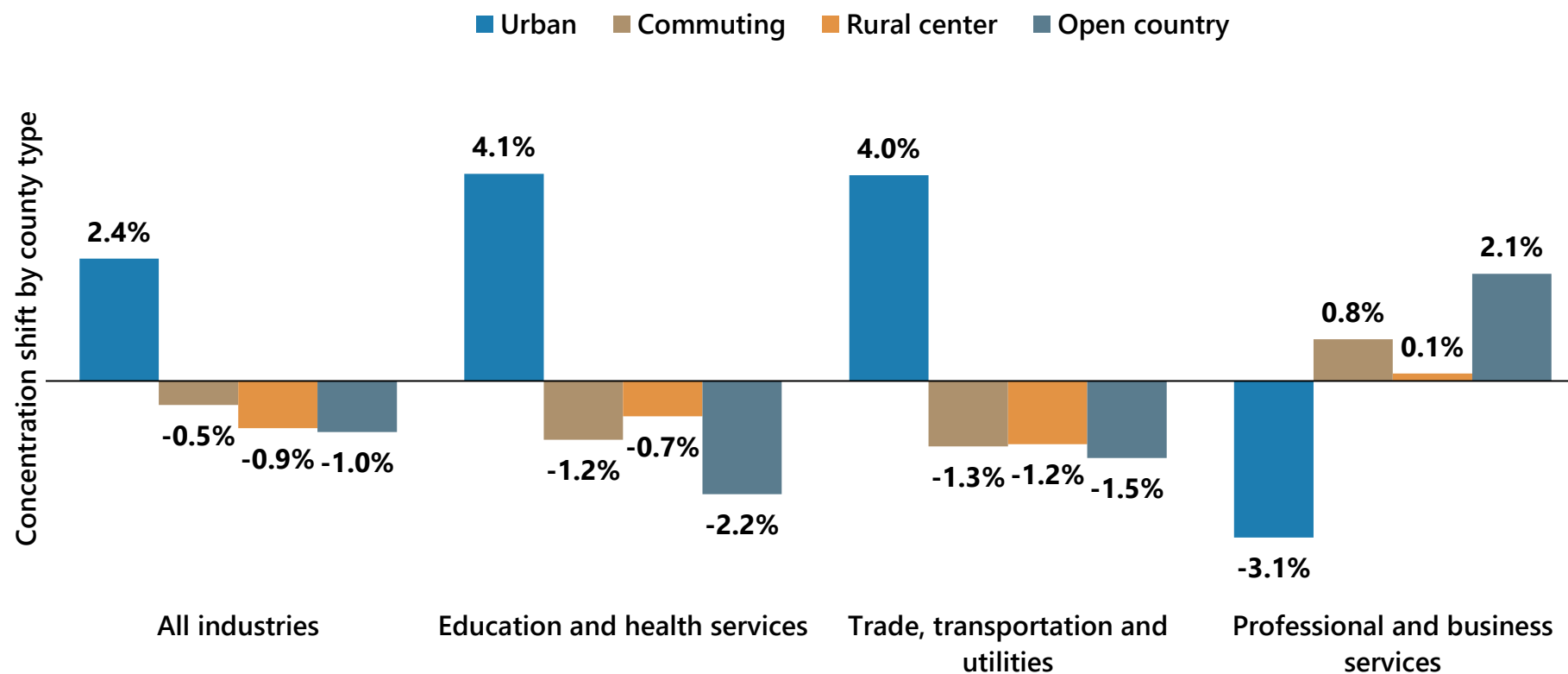


Goods-producing job concentration			
County	<15%	15-29%	30%+
Idaho	11	21	12
Rural	6	17	12
Urban	5	4	0

Percentage of statewide employment within rural counties for goods-producing industries:

- 67% of natural resources jobs.
- 29% of manufacturing jobs.
- 23% of construction jobs.

Service jobs share shift, 2003-2023



Job earners averaging more than \$640 weekly, 2003

Region	Total	Urban	Rural	Commuting	Rural center	Open country
Idaho	35%	37%	28%	26%	31%	29%
Northern	32%	32%	33%	--	27%	34%
North central	37%	40%	23%	--	--	23%
Southwestern	38%	40%	24%	23%	25%	23%
South central	29%	28%	30%	26%	33%	20%
Southeastern	33%	36%	30%	26%	--	37%
Eastern	33%	34%	29%	31%	--	27%

Green = highest share by county classification

Red = lowest share by county classification

Job earners averaging more than \$1,080 weekly, 2023

Region	Total	Urban	Rural	Commuting	Rural center	Open country
Idaho	40%	41%	39%	32%	38%	45%
Northern	38%	40%	33%	--	35%	32%
North central	38%	40%	29%	--	--	29%
Southwestern	43%	45%	30%	28%	32%	31%
South central	35%	30%	38%	37%	40%	30%
Southeastern	32%	30%	33%	31%	--	38%
Eastern	43%	34%	58%	34%	--	66%

Green = highest share by county classification

Red = lowest share by county classification

Idaho's top agricultural commodities

- **National commodity rankings**

- More than 185 commodities.
- Top national producer of potatoes, barley, peppermint, trout and alfalfa hay.

First: Potatoes, barley, peppermint, trout and alfalfa hay

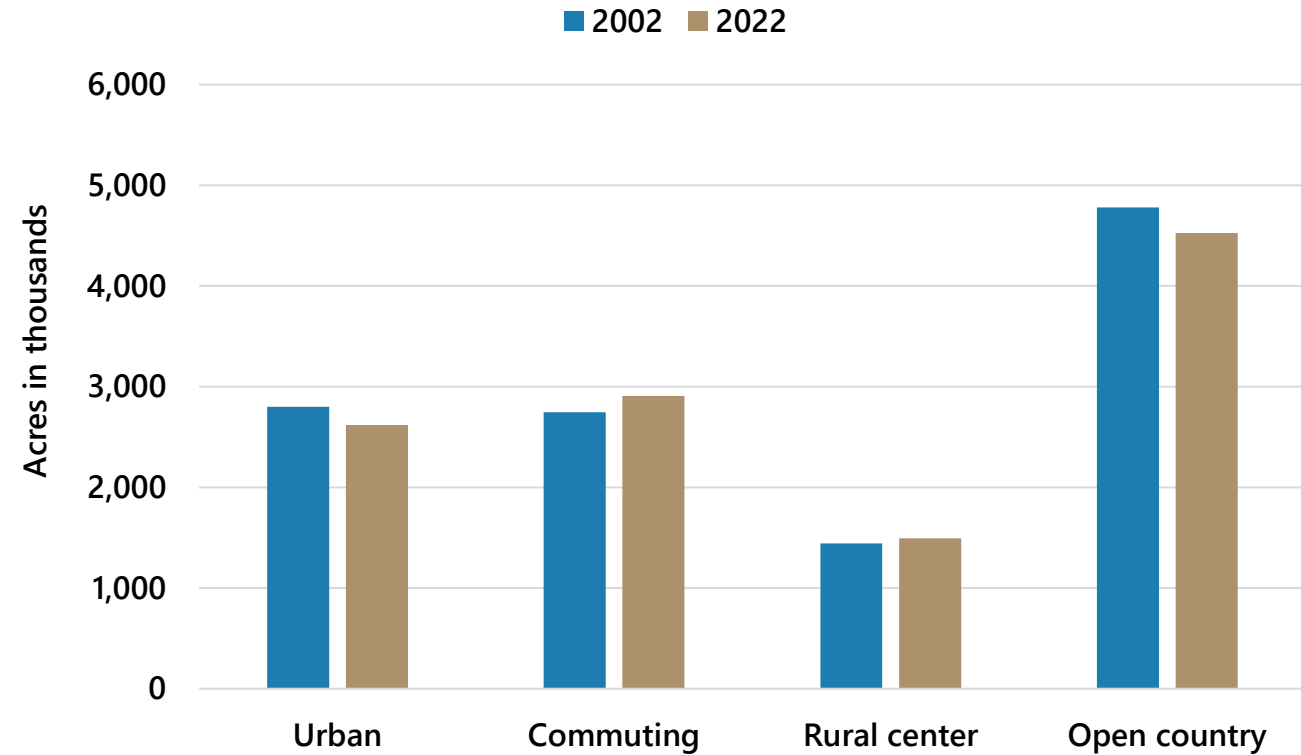
Second: Sugar beets and hops

Third: Milk and cheese

Fourth: Onions, spring wheat and lentils

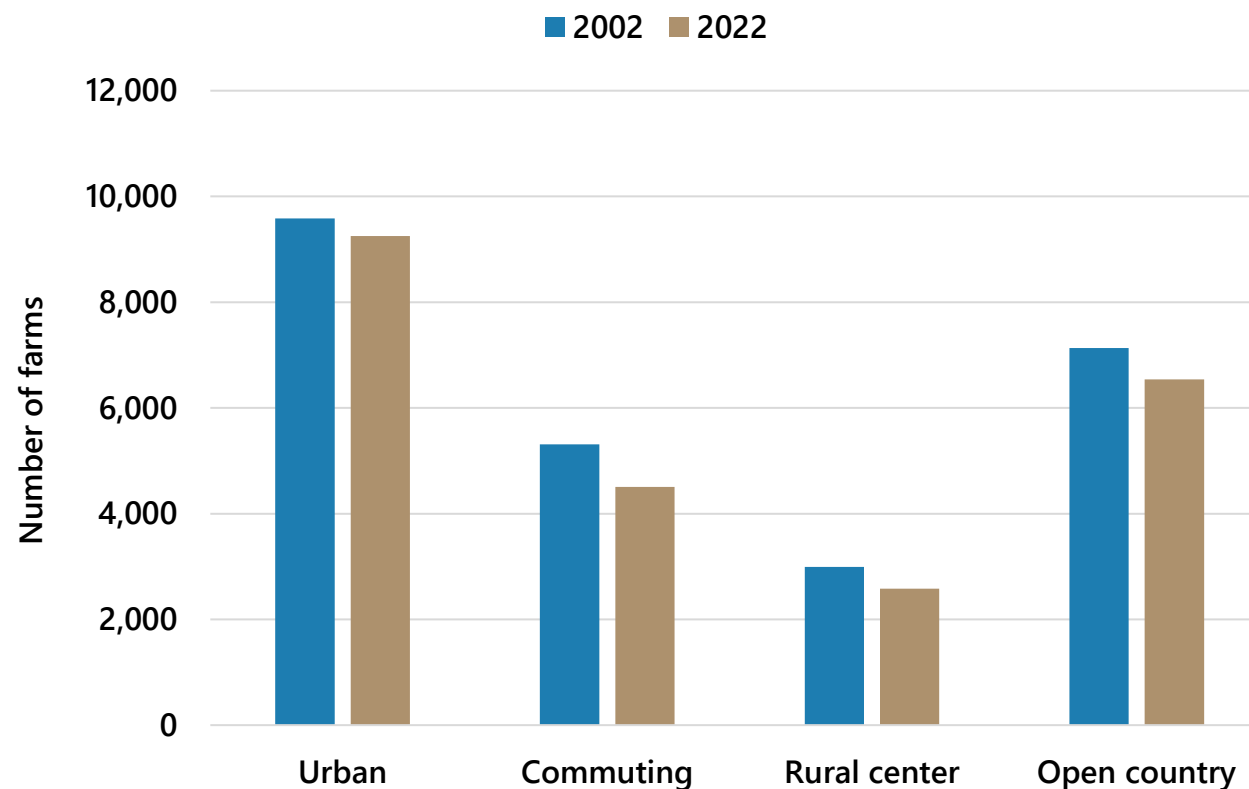
Agricultural acres by urban/rural

- Losses between 2002-2022
 - 2022 total acres = 11.6 million
 - Acres lost: 219,000 or 1.9% decline.



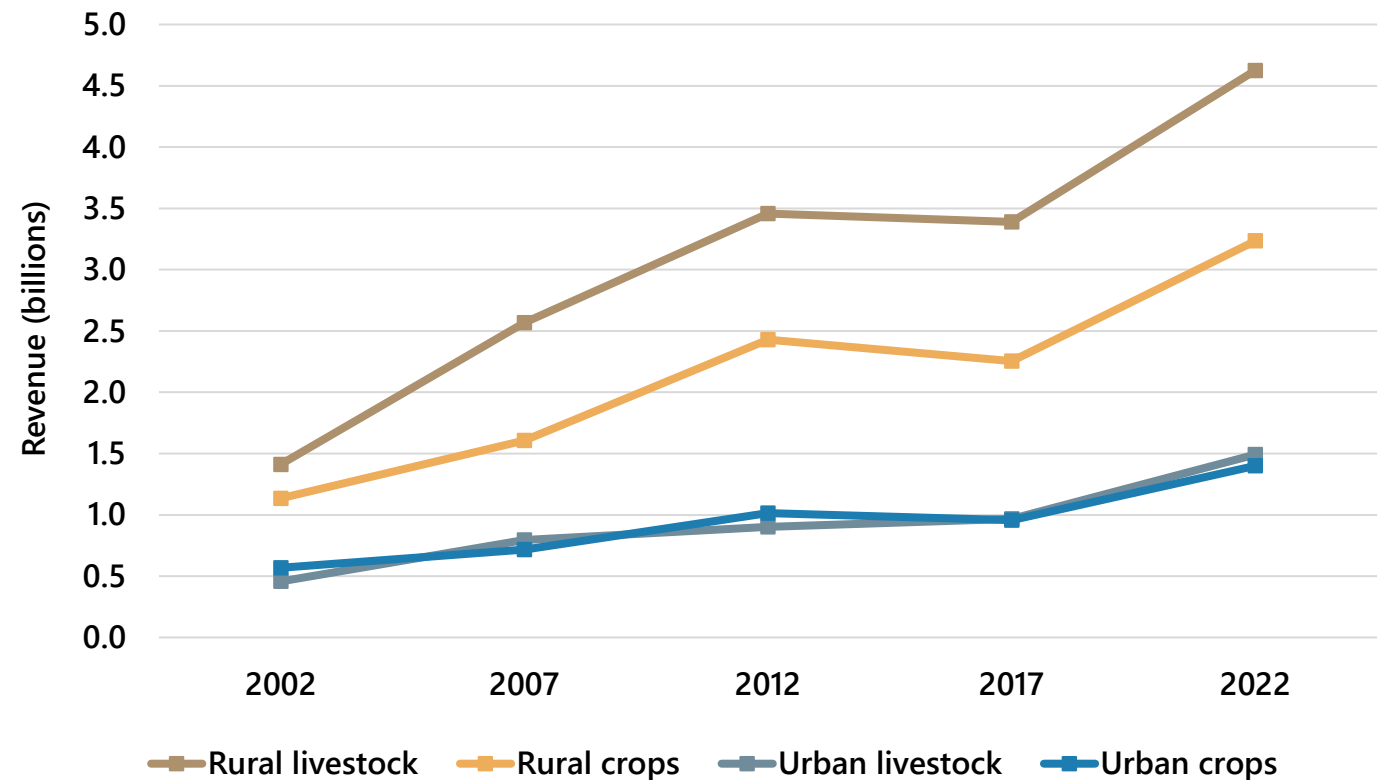
Agricultural farms by urban/rural

- **Losses between 2002-2022**
 - 2022 total farms = 23,000 (approx.)
 - Farms lost: 2,100 or 8.6% decline.
- **Results**
 - Average farm size increased by 35 acres to 505, or 7.4%.
 - Revenue increased 179%.

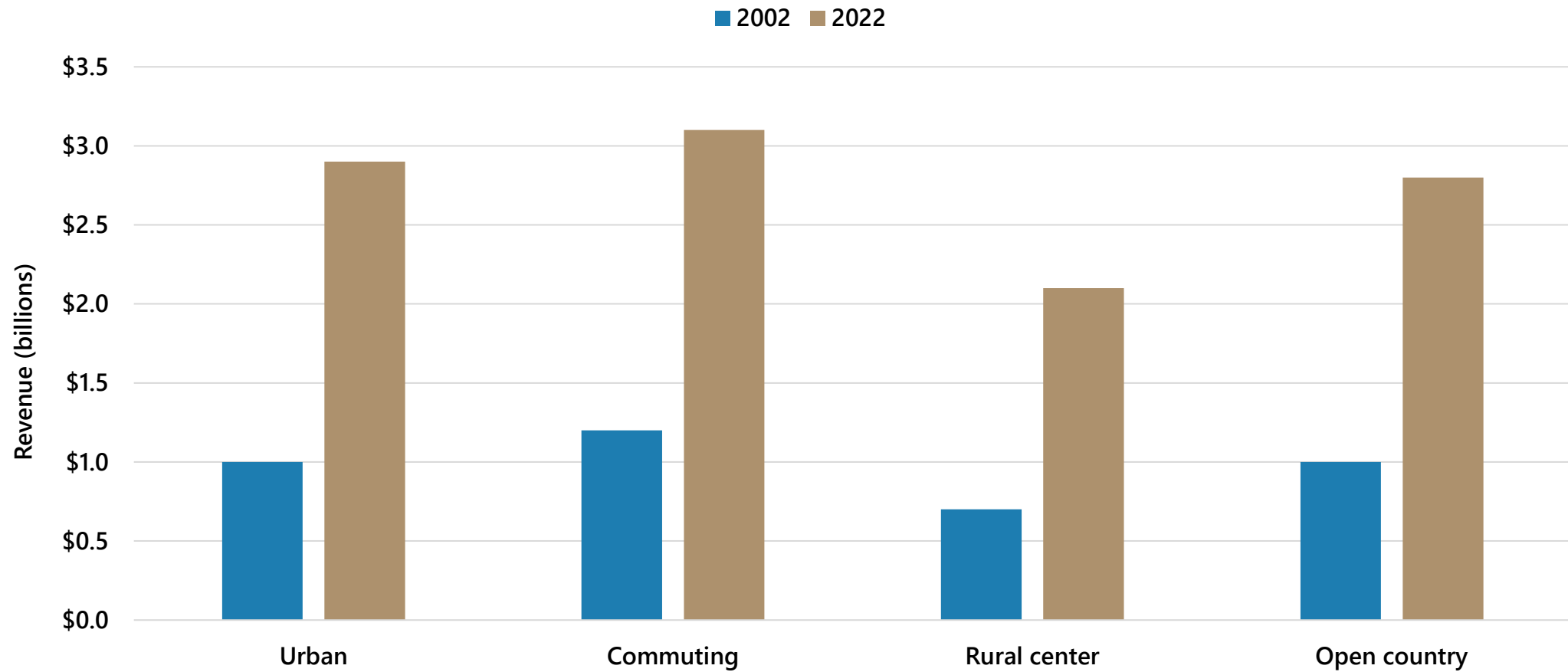


Farm revenue, 2022

- Dominated by cattle and milk at a combined \$6 billion.
- Potatoes in third place at \$1 billion.
- County ranking:
 - **First: Cassia, south central**
 - Rural center: 1.2 billion
 - **Second: Twin Falls, south central**
 - Urban: \$1.1 billion
 - **Third: Gooding, south central**
 - Open country: \$1.1 billion
 - **Fourth: Jerome, south central**
 - Commuting: \$900 million
 - **Fifth: Canyon, southwestern**
 - Urban: \$800 million



Agricultural revenue by urban/rural

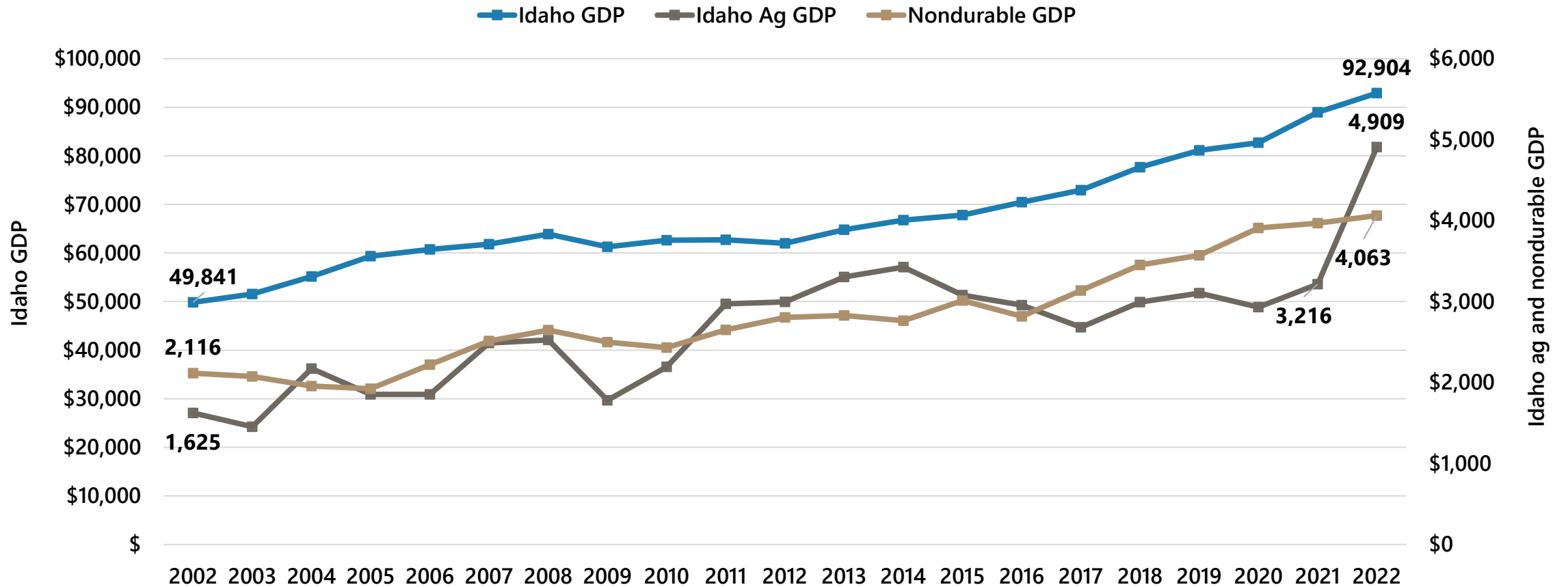


Source: Census of Agriculture, 2002 and 2022

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Idaho gross domestic product



Source: Bureau of Economic Analysis

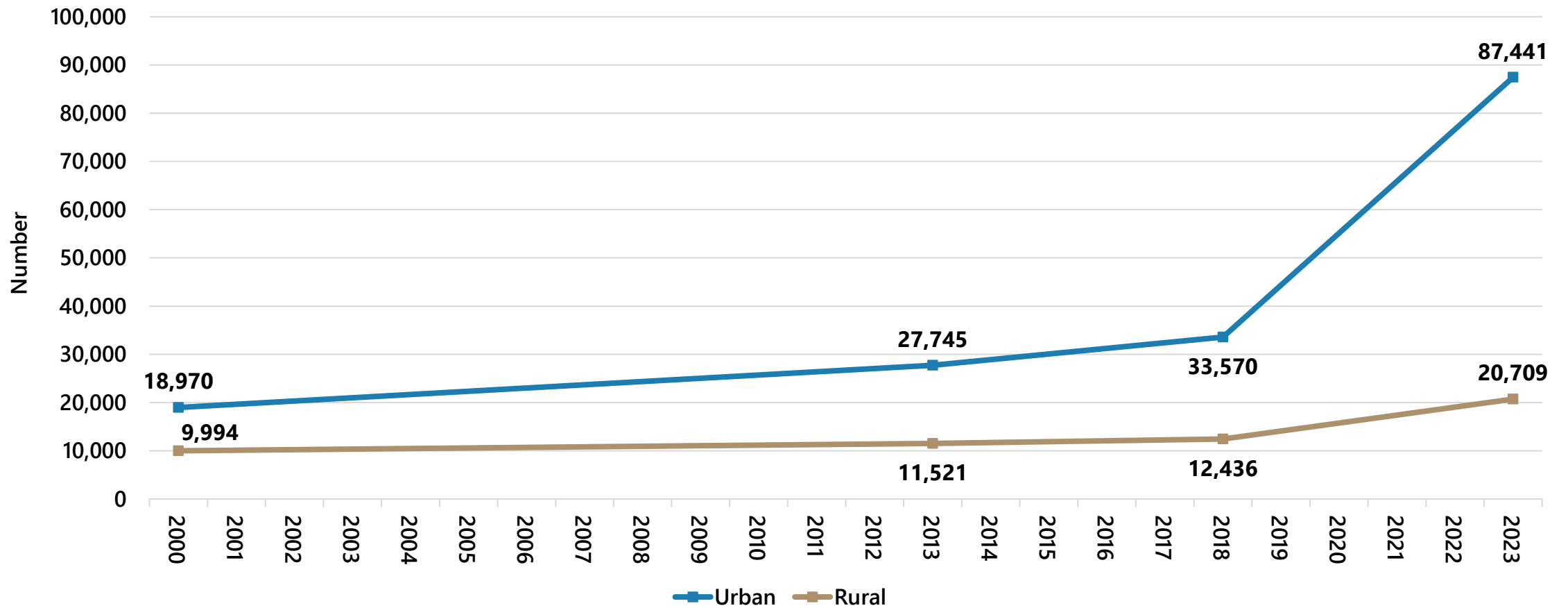
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Trivia/poll 2

Please respond in Zoom.

Number of Idahoans working from home

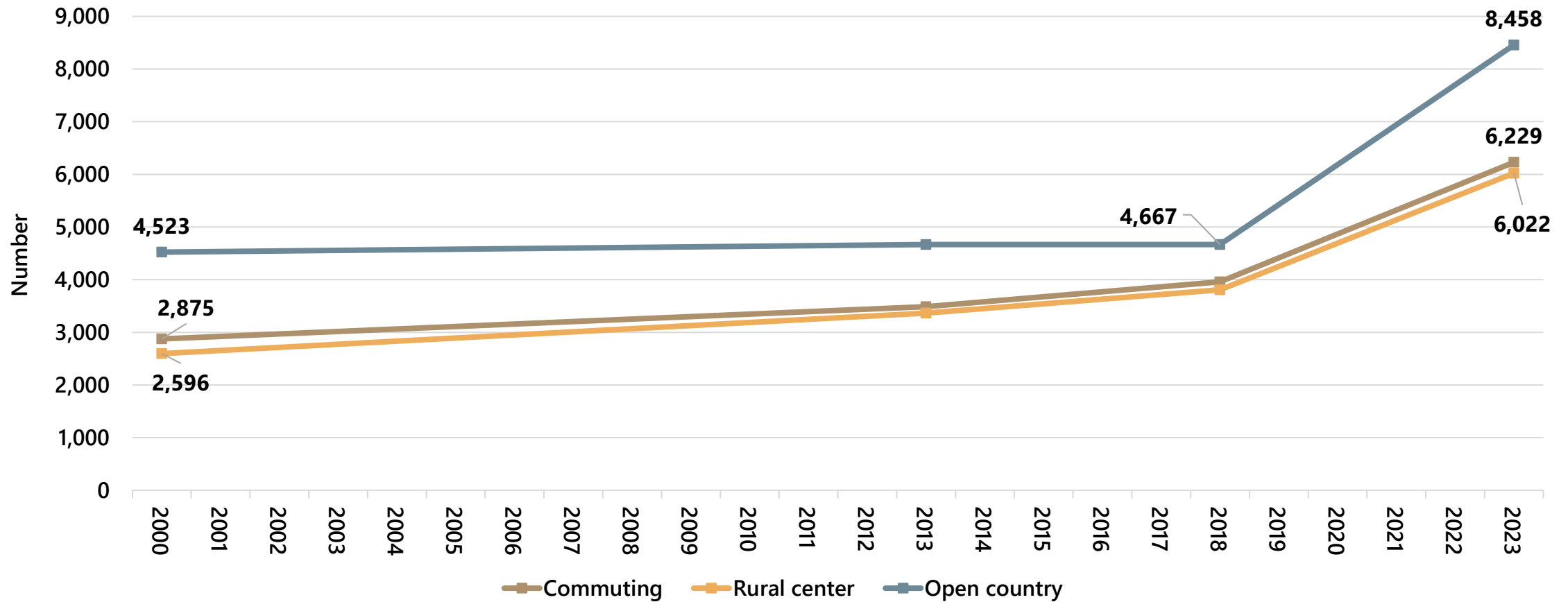


Source: Census table B99087; Census Decennial 2000, table P030

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Number of Idahoans working from home

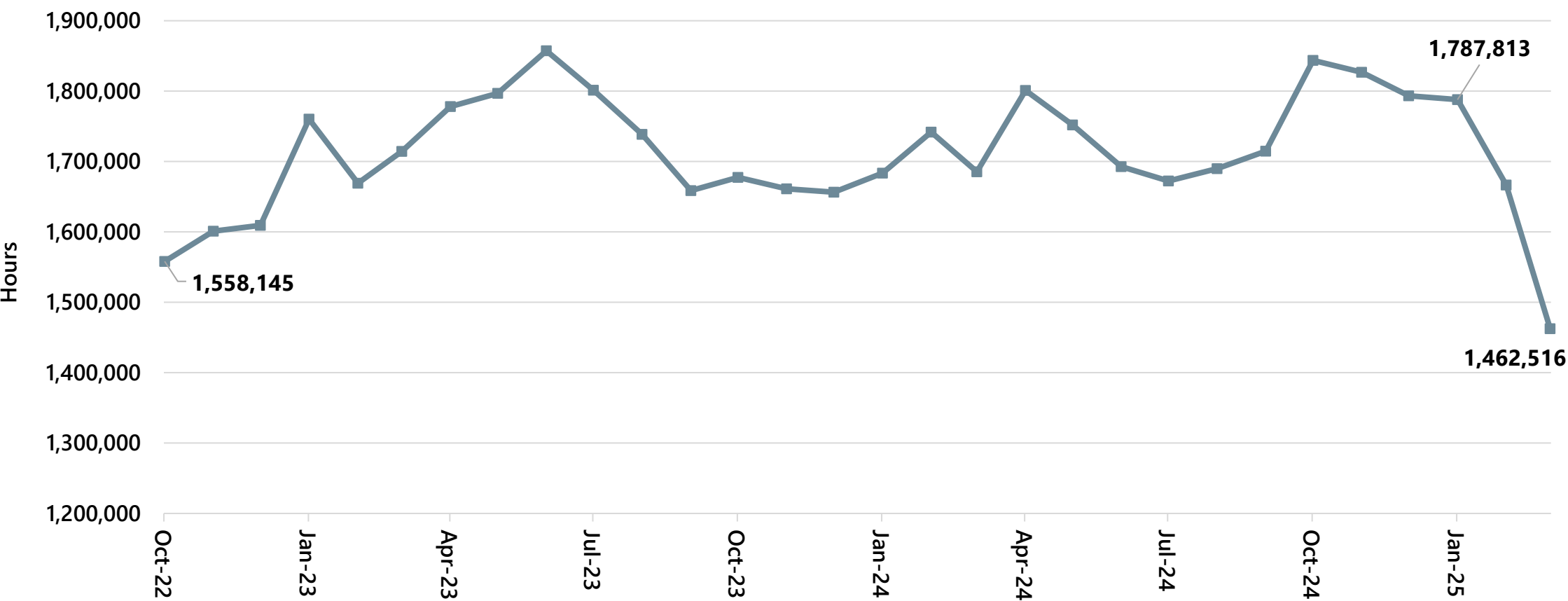


Source: Census table B99087; Census Decennial 2000, table P030

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Idaho total weekly work from home hours



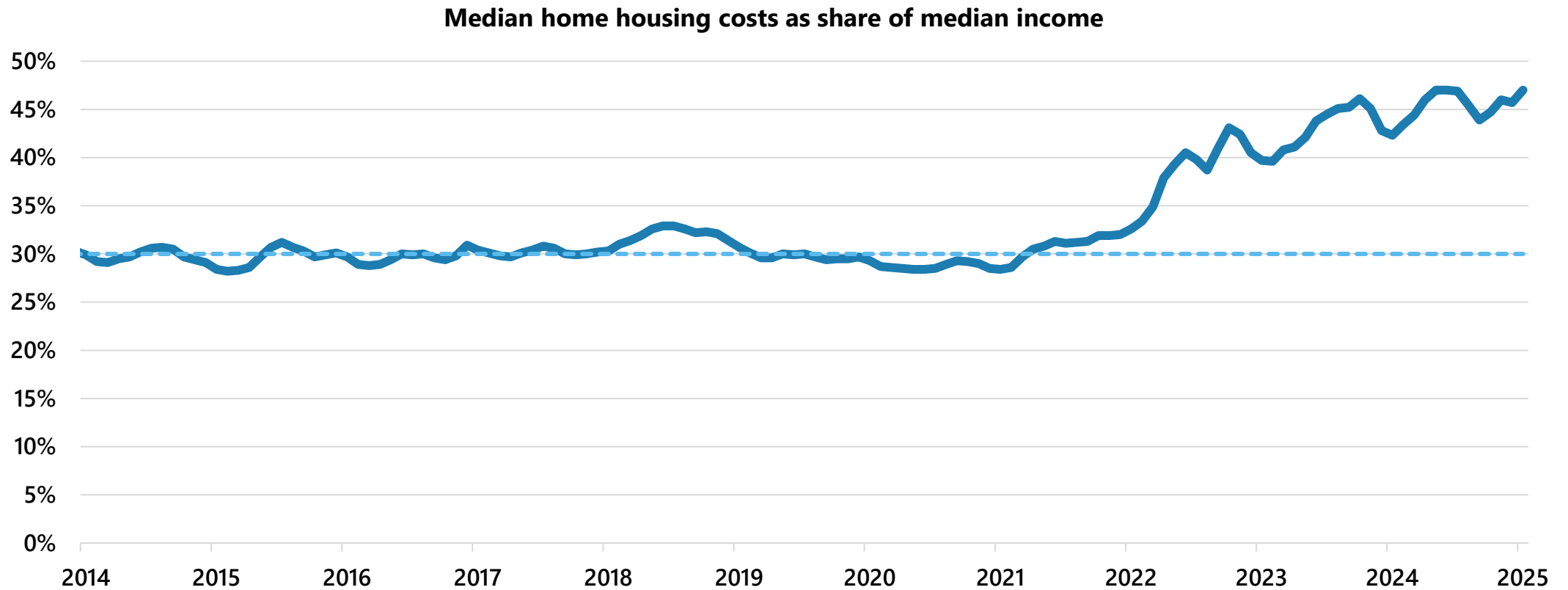
Source: IPUMS CPS telework data



Trivia/poll 3

Please respond in Zoom.

Housing affordability

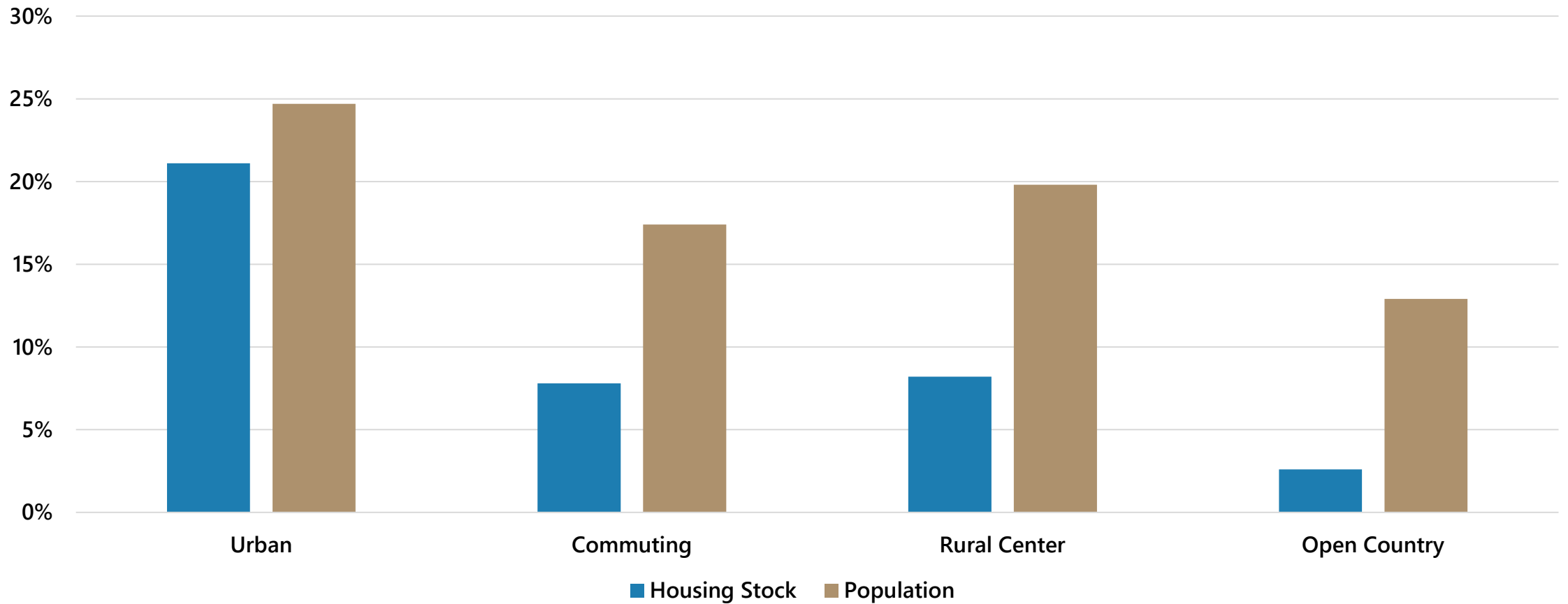


Source: Federal Reserve Bank of Atlanta Housing Affordability Tracker

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Net growth in housing stock, 2013-2023



Source: Demographic and housing estimates; American Community Survey

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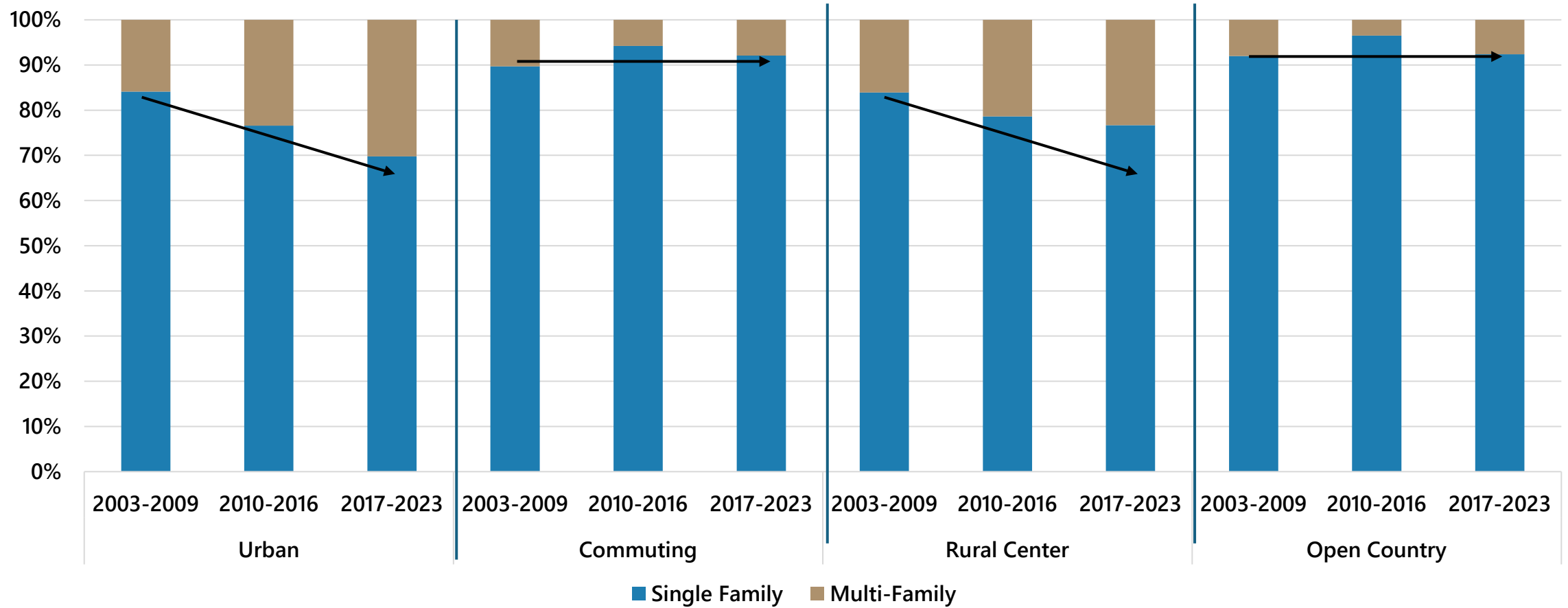
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Housing Stock Indicators

County Type	Housing Density (2013)	Housing Density (2023)	Housing Growth (2013 – 2023)	Population Growth (2013-2023)	Growth Ratio
Idaho Total	2.4	2.5	15.9%	22.3%	1.4
Urban	2.6	2.7	21.1%	24.7%	1.2
Rural Total	2.1	2.3	5.7%	16.4%	2.9
Rural Center	2.0	2.2	8.2%	19.8%	2.4
Commuting	2.5	2.8	7.8%	17.4%	2.2
Open Country	1.8	2.0	2.6%	12.9%	5.0

Source: Demographic and housing estimates; American Community Survey

Shifting housing stock

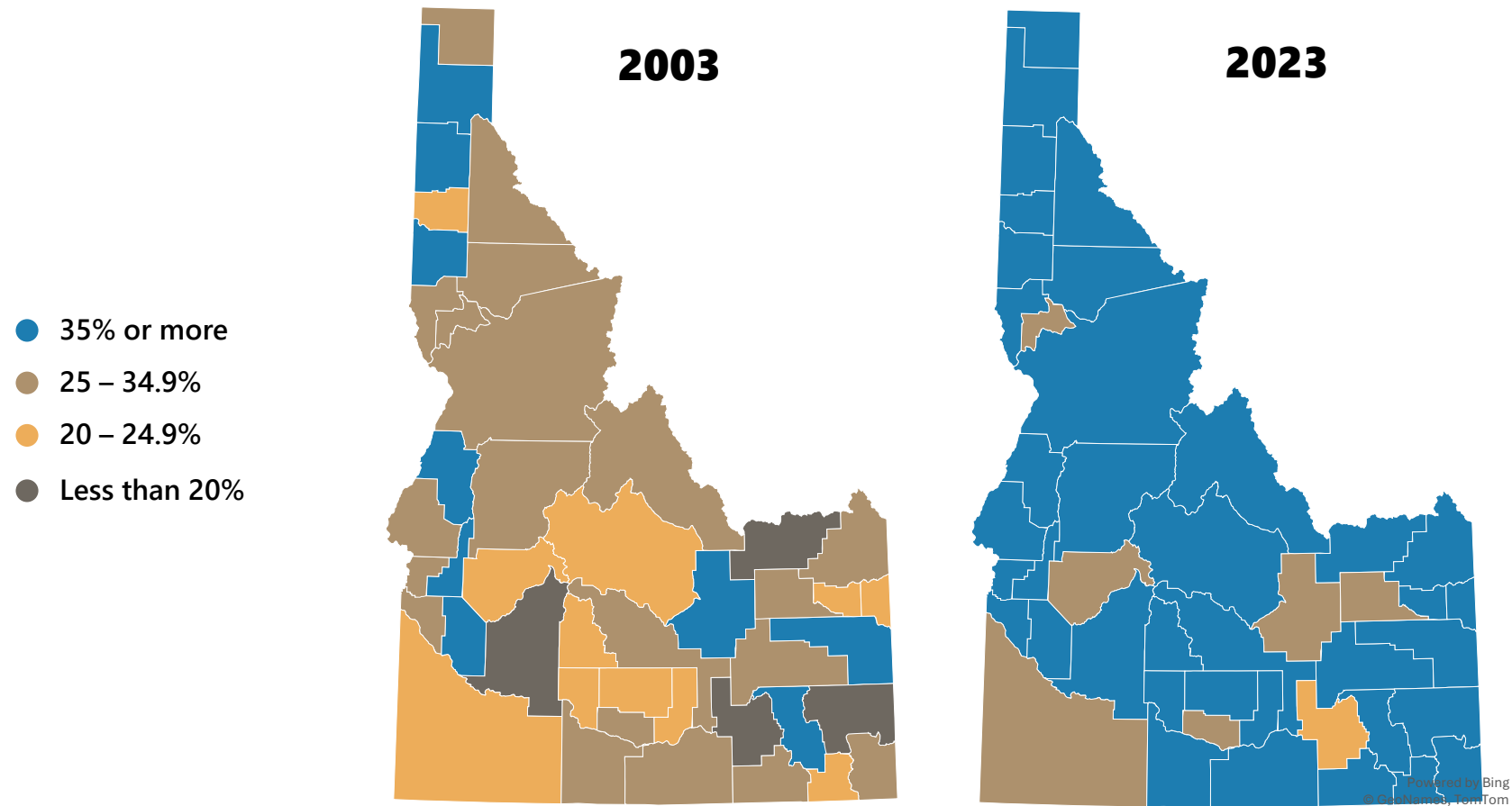


Source: U.S. Census; Building Permits Survey

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Share of renting cost burdened households



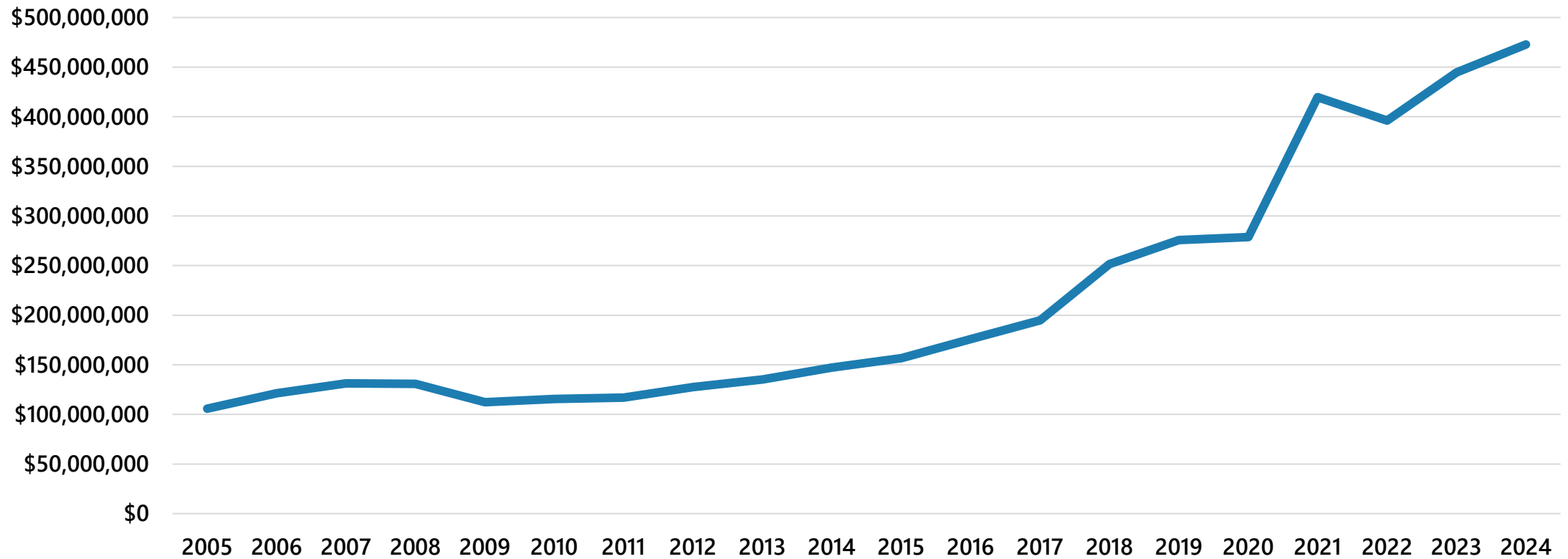
Source: U.S. Census; 2000 Decennial Census; American Community Survey, 2019-2023

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Tourism in rural Idaho

Rural lodging sales, Idaho 2005-2024



Thank you. Any questions?

Need more information? Contact

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