

Idaho's Leisure and Hospitality Employment

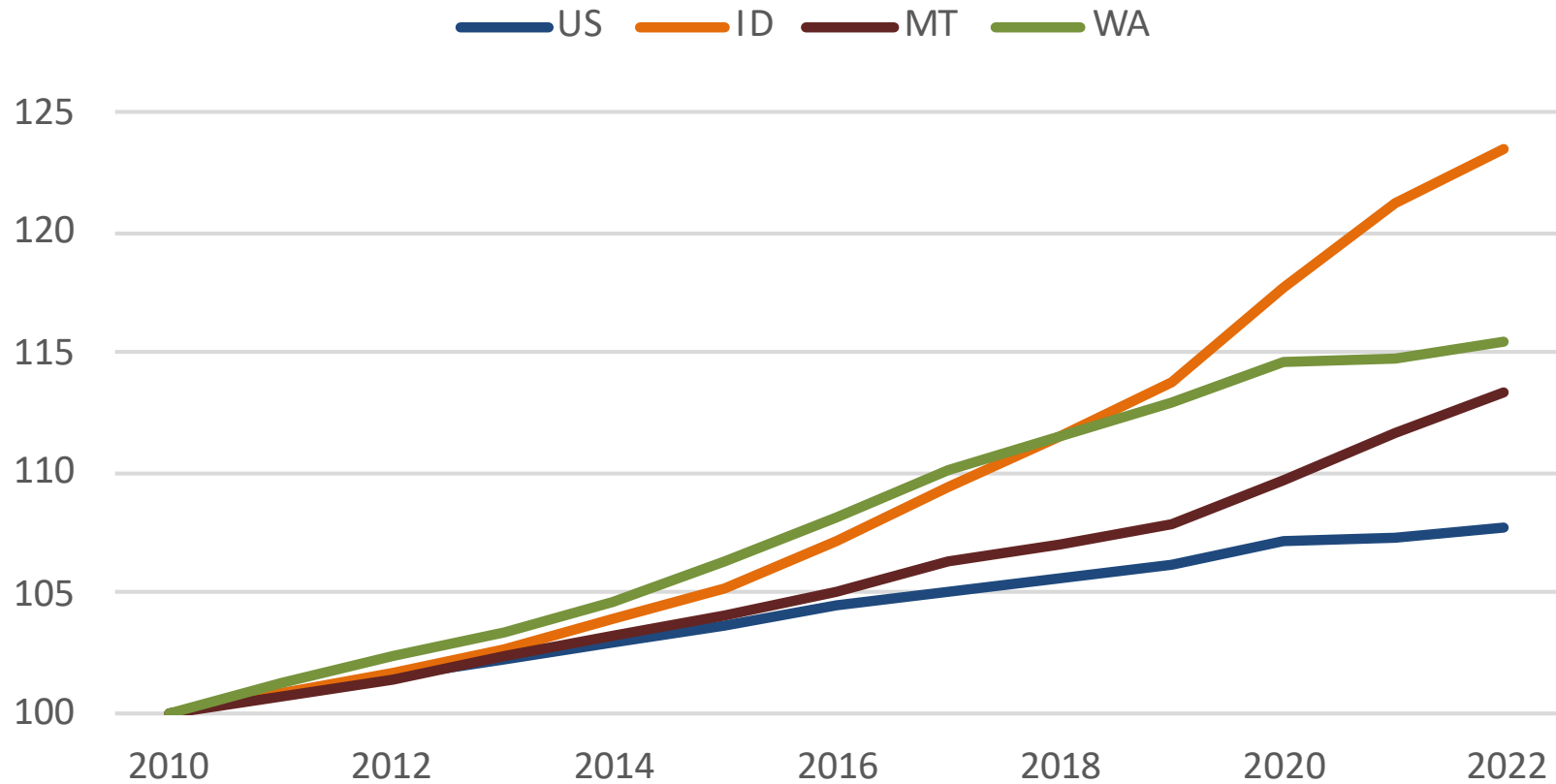


Lisa Grigg, Regional Labor Economist
October 2023

IDAHO
DEPT. OF LABOR

Idaho's Explosive Population Growth

Population Growth Estimates, Indexed to 2010



Source: US Census, Population Growth Estimates 2010-2022

**Idaho's
Population
Growth Ranking**

**2011-2015
#11**

**2016-2020
#1**

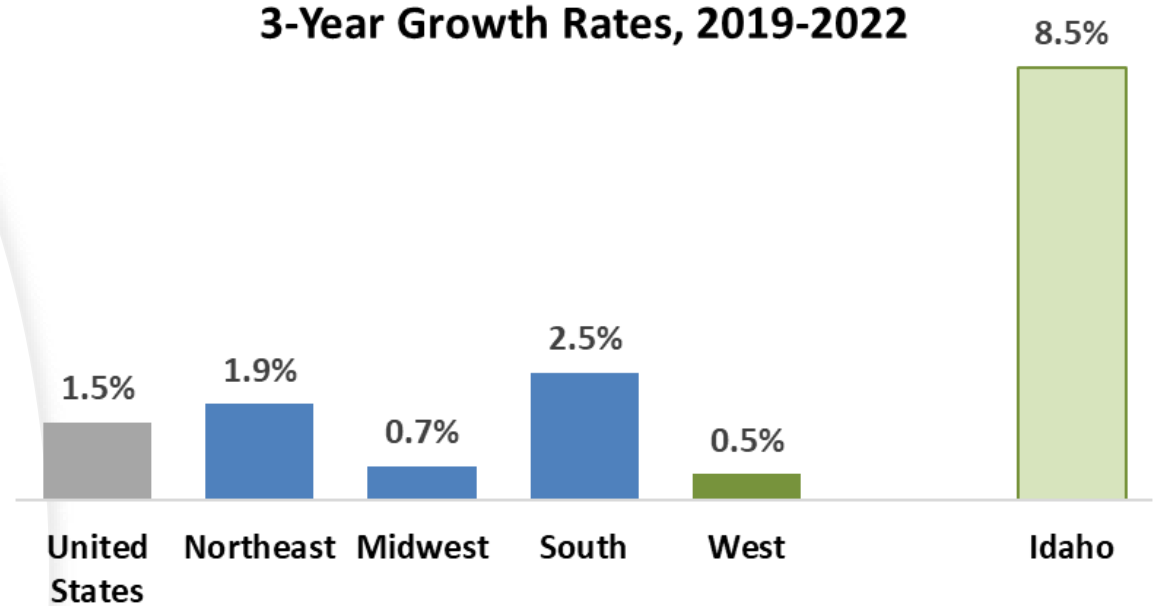
**2021-2022
#1**

**2010-2022
#1**

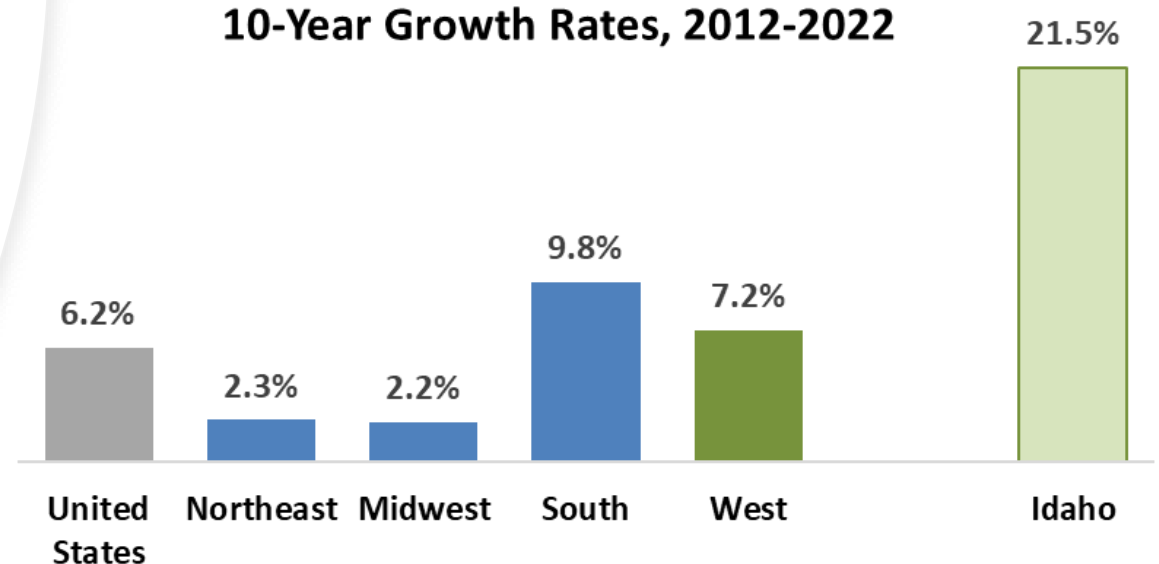
Population Growth Comparison

Idaho vs National and Regional Trends

3-Year Growth Rates, 2019-2022



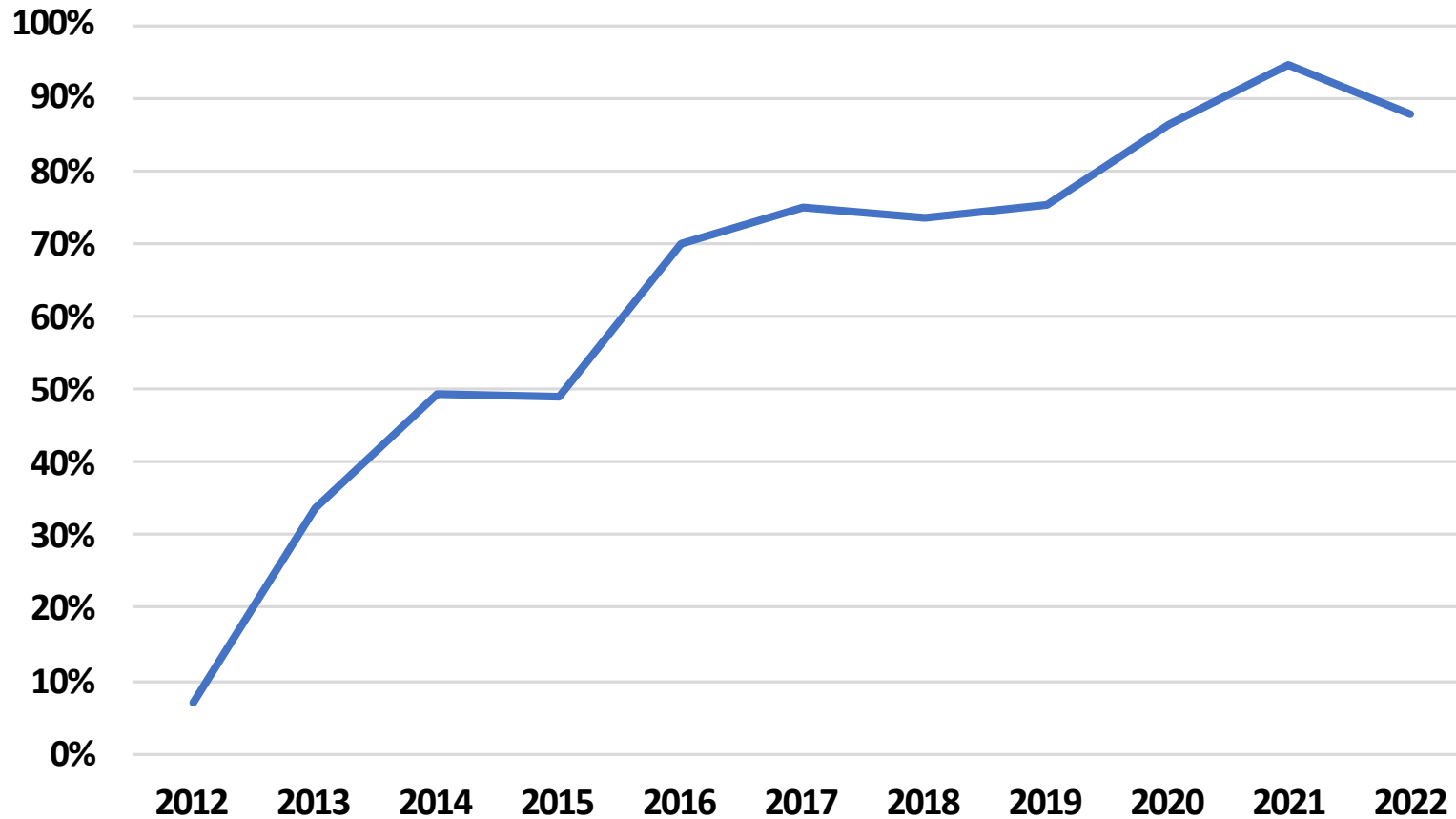
10-Year Growth Rates, 2012-2022



Source: US Census, Population Growth Estimates 2010-2022

Components of Idaho's Population Growth

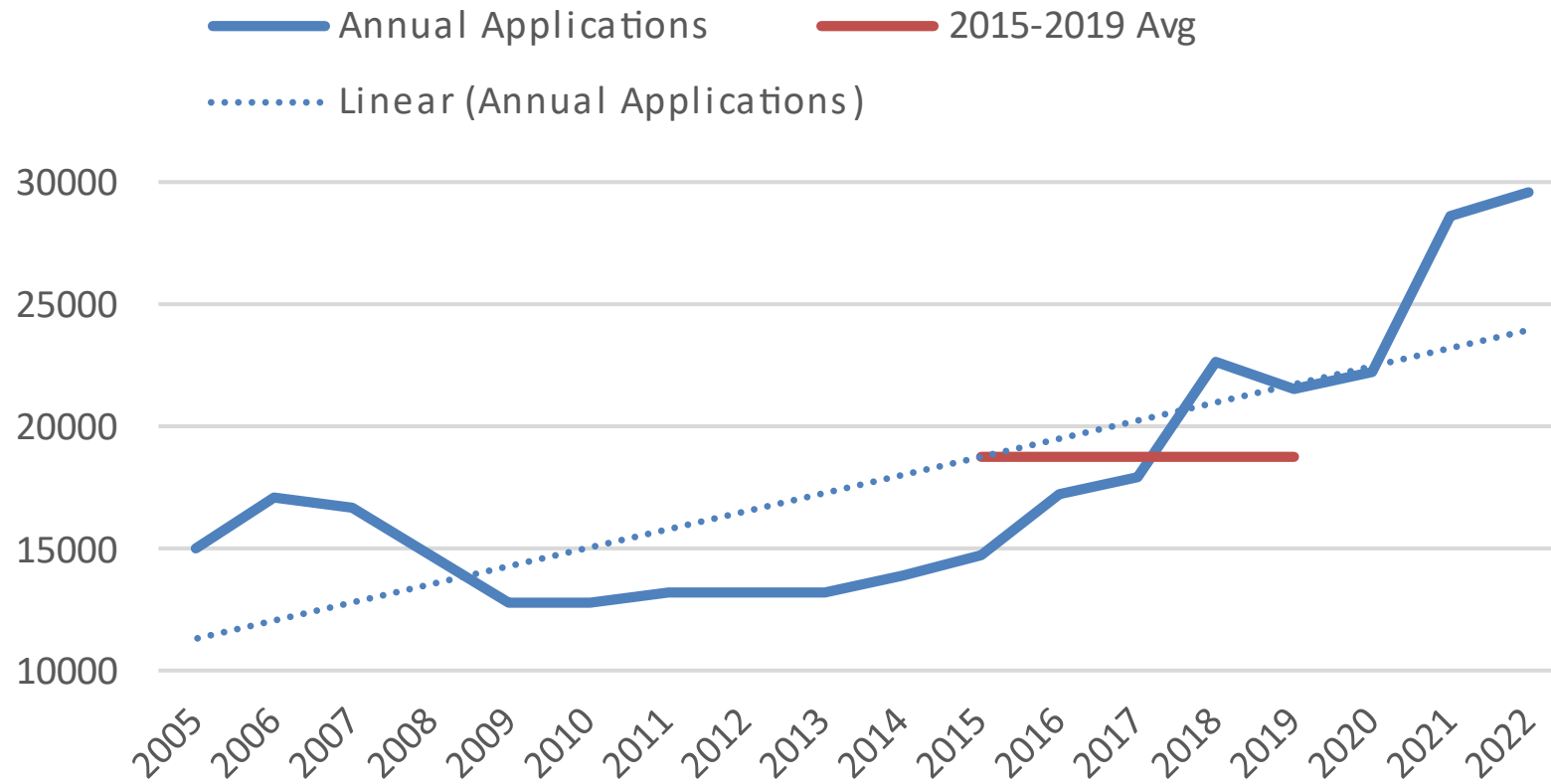
Net Migration Share of Population Growth



Source: US Census

Accelerating New Business Formations

Idaho Annual Business Formation Statistics



2015-2019 Annual Average: 18k

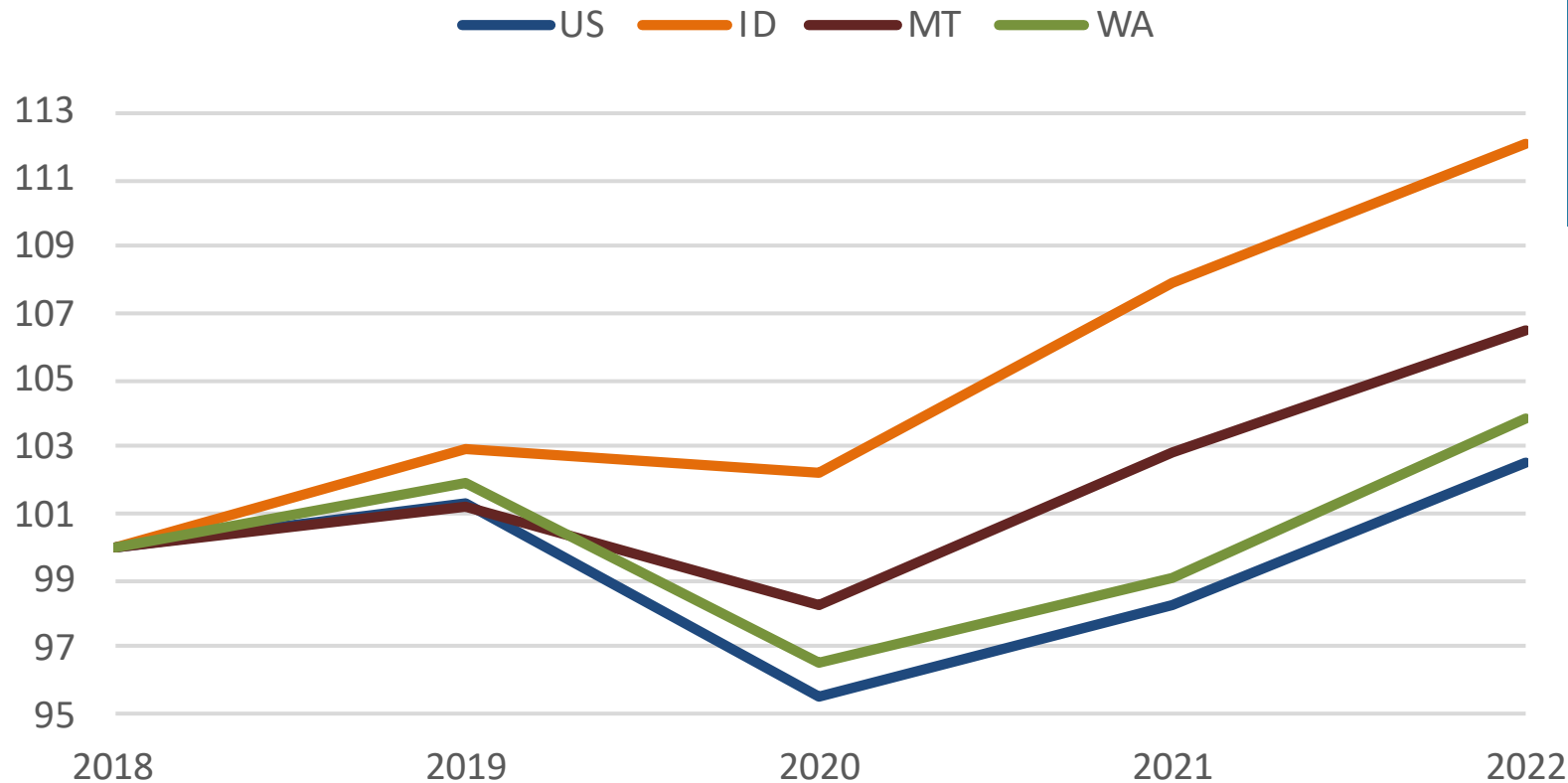
2015: 14.8k
2019: 21.6k

2020: 22.2k
2021: 28.6k
2022: 29.7k

Source: US Census Business Formation Statistics, 2004-2023

Average Annual Nonfarm Employment, 2018-2022

Annual Employment Index, 2018=100



Nonfarm Employment
Aug 2023 vs Feb 2020:

US +2.7%
Idaho +10.6%

Employment Recovery Rate, in months,
to exceed Feb 2020 seasonally adjusted
employment levels

Region	# Months	Month Reached
US	28	Jun 2022
Idaho	10	Dec 2020

Source: St. Louis FRED

Idaho's Distribution of Population Growth 2019-2022

Region #	Region Name	% 2019 Population	% Statewide Growth, 2019-2022
1	Northern	14%	18%
2	North Central	6%	3%
3	Southwestern	46%	46%
4	South Central	11%	8%
5	Southeastern	10%	5%
6	Eastern	13%	20%



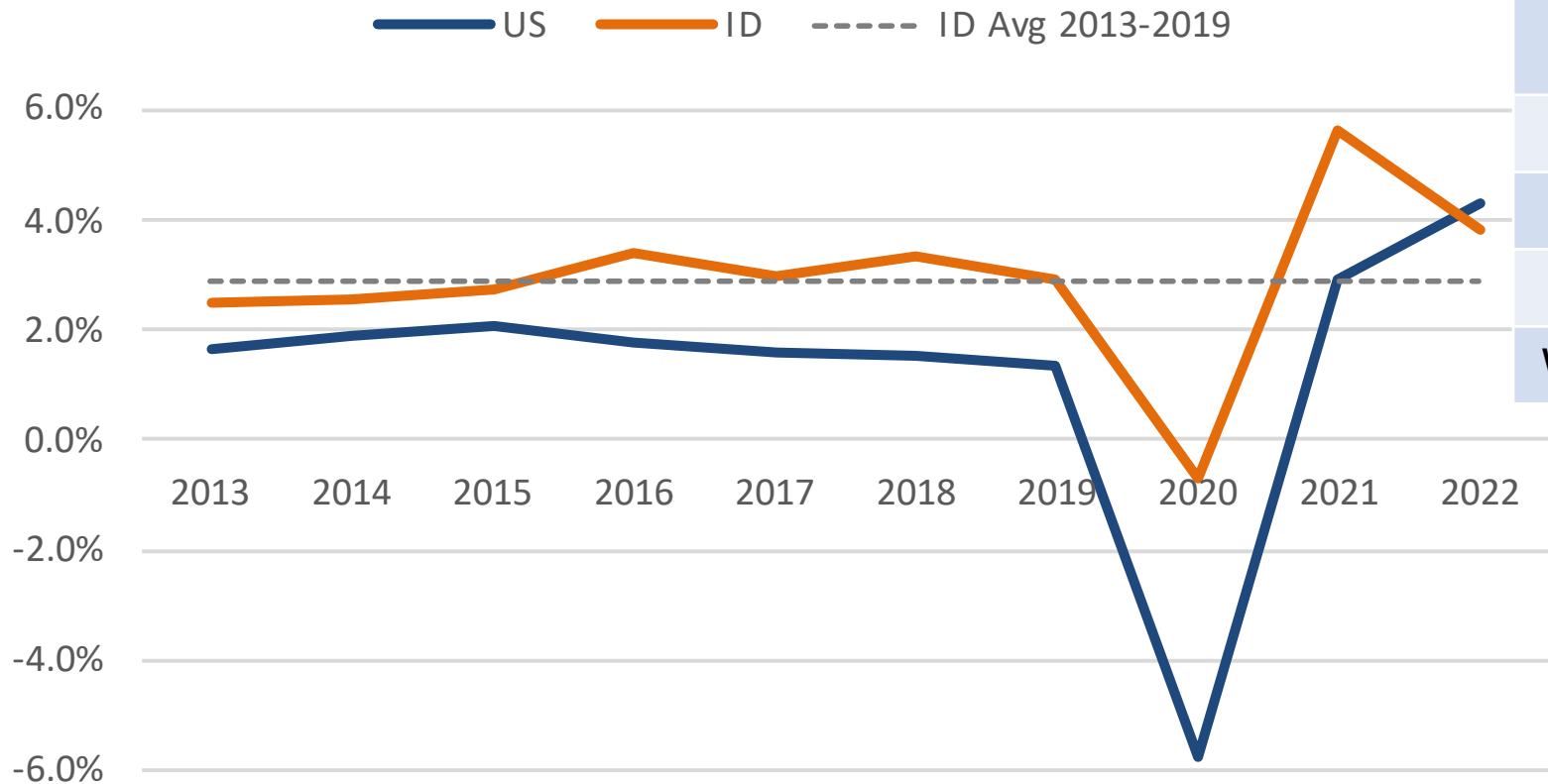
Source: US Census, Population Growth Estimates 2019-2022

From 2019-2022, Idaho led the nation in:

#1 Population Growth	+8.5%
#1 Employment Growth	+9.1%
#2 Home Price Appreciation	+61%
#4 Avg Weekly Wage Growth	+23%

Annual Change in Employment, 2013-2022

Annual Employment Growth, 2013 - 2022

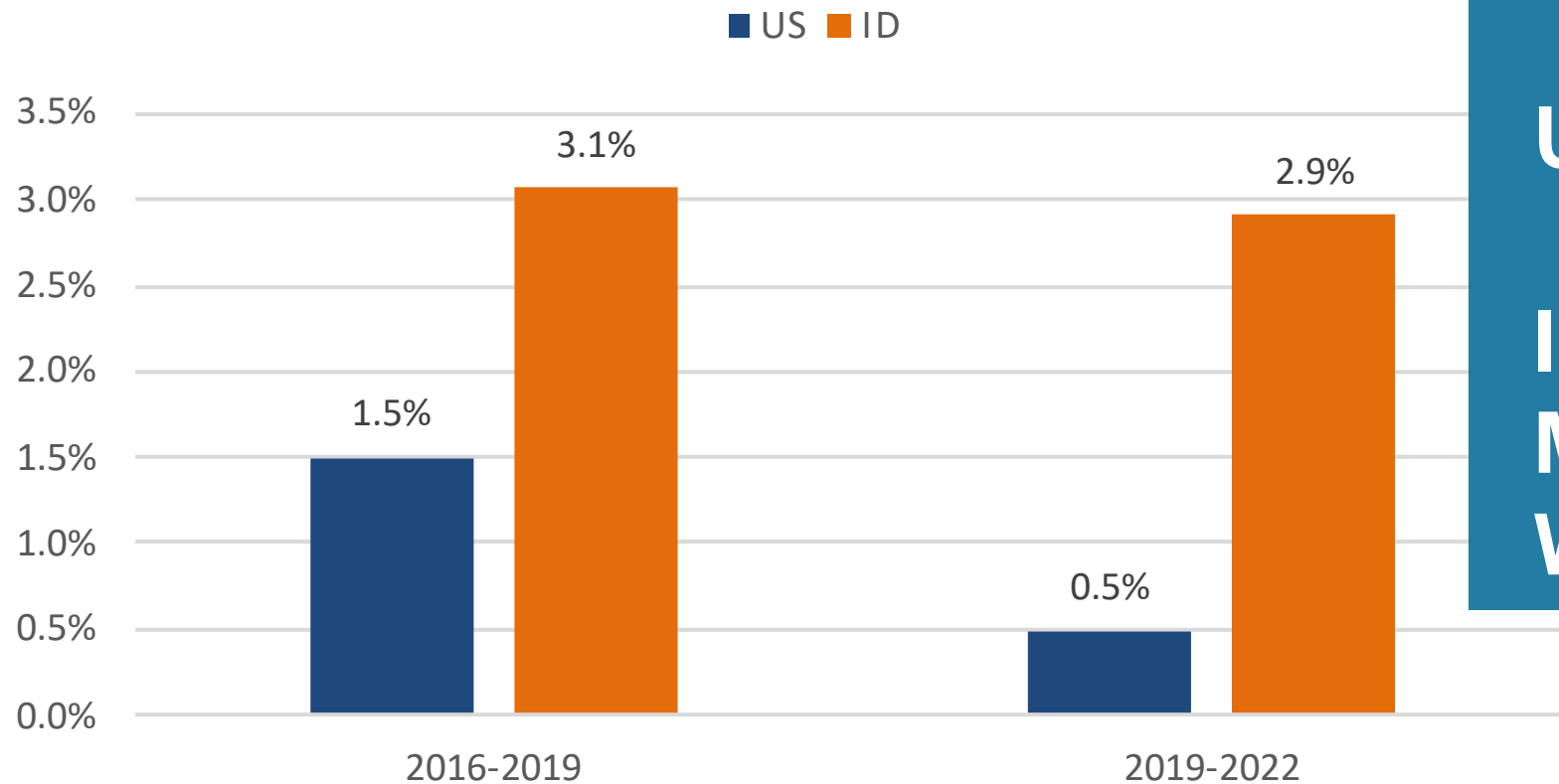


Annual Employment Growth by Period		
Region	2013-2019	2019-2022
US	1.7%	0.5%
Idaho	2.9%	2.9%
Montana	1.4%	1.8%
Washington	2.5%	0.7%

Source: St. Louis FRED

Annual Change in Employment, 2016-2022

Average Annual Employment Growth



2020 Annual Employment:

US -5.8%

ID -0.7%

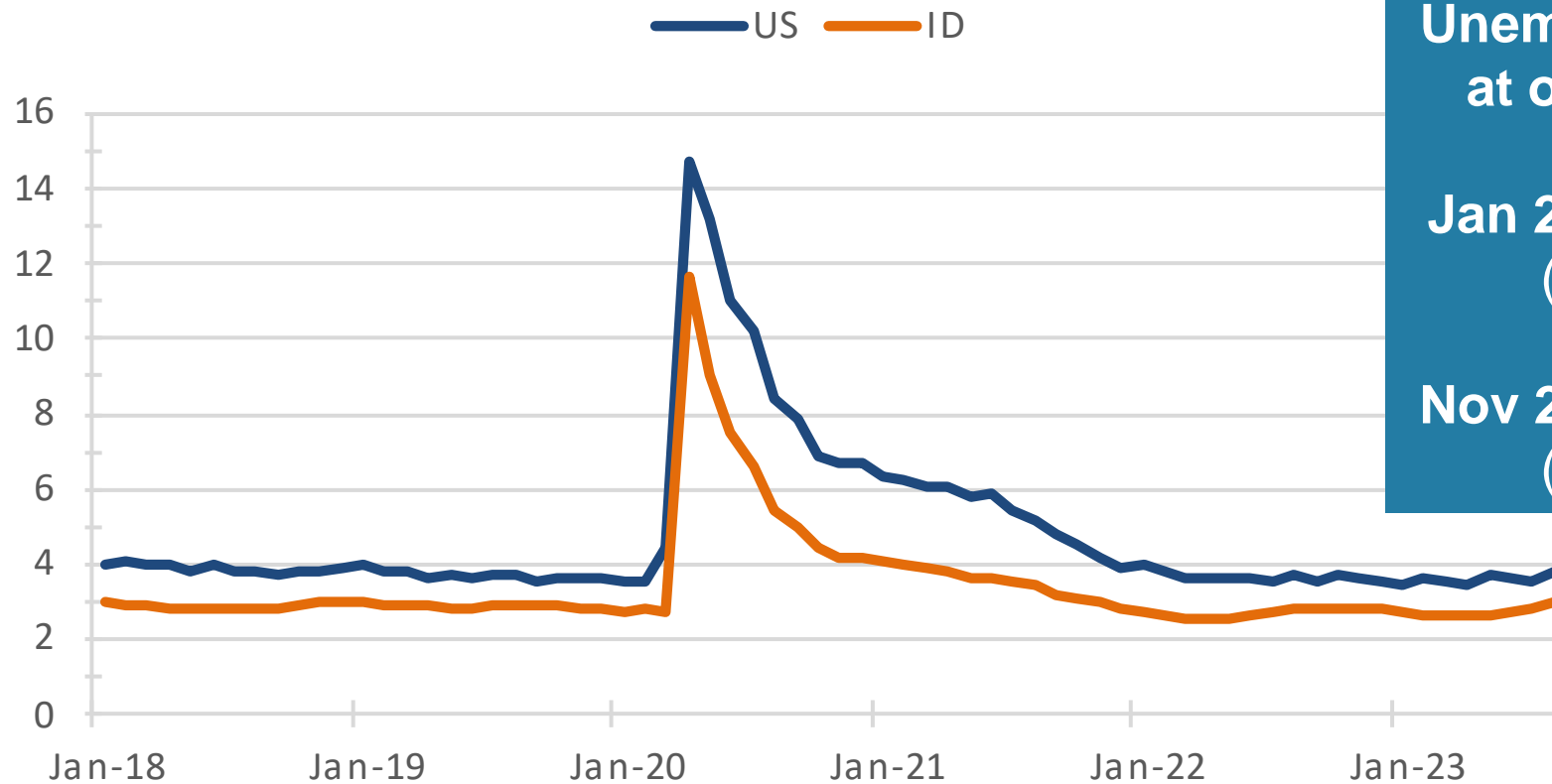
MT -2.9%

WA -5.3%

Source: St. Louis FRED

Consistent Low Unemployment Rates

Unemployment Rate in %, Seasonally Adj



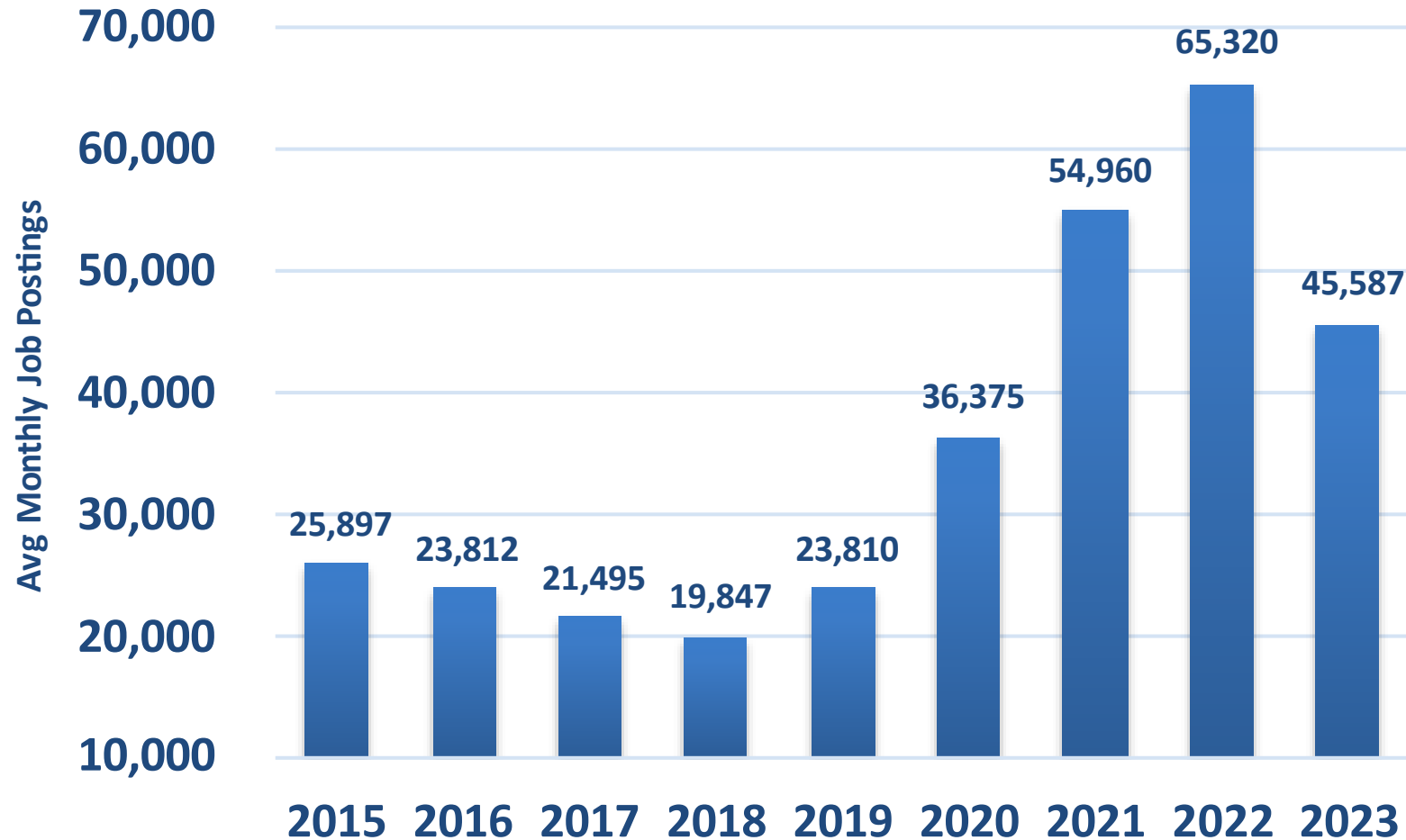
Unemployment rates at or below 3.0%:

Jan 2018 – Mar 2020
(27 months)

Nov 2021 – Aug 2023
(22 months)

Source: St. Louis FRED

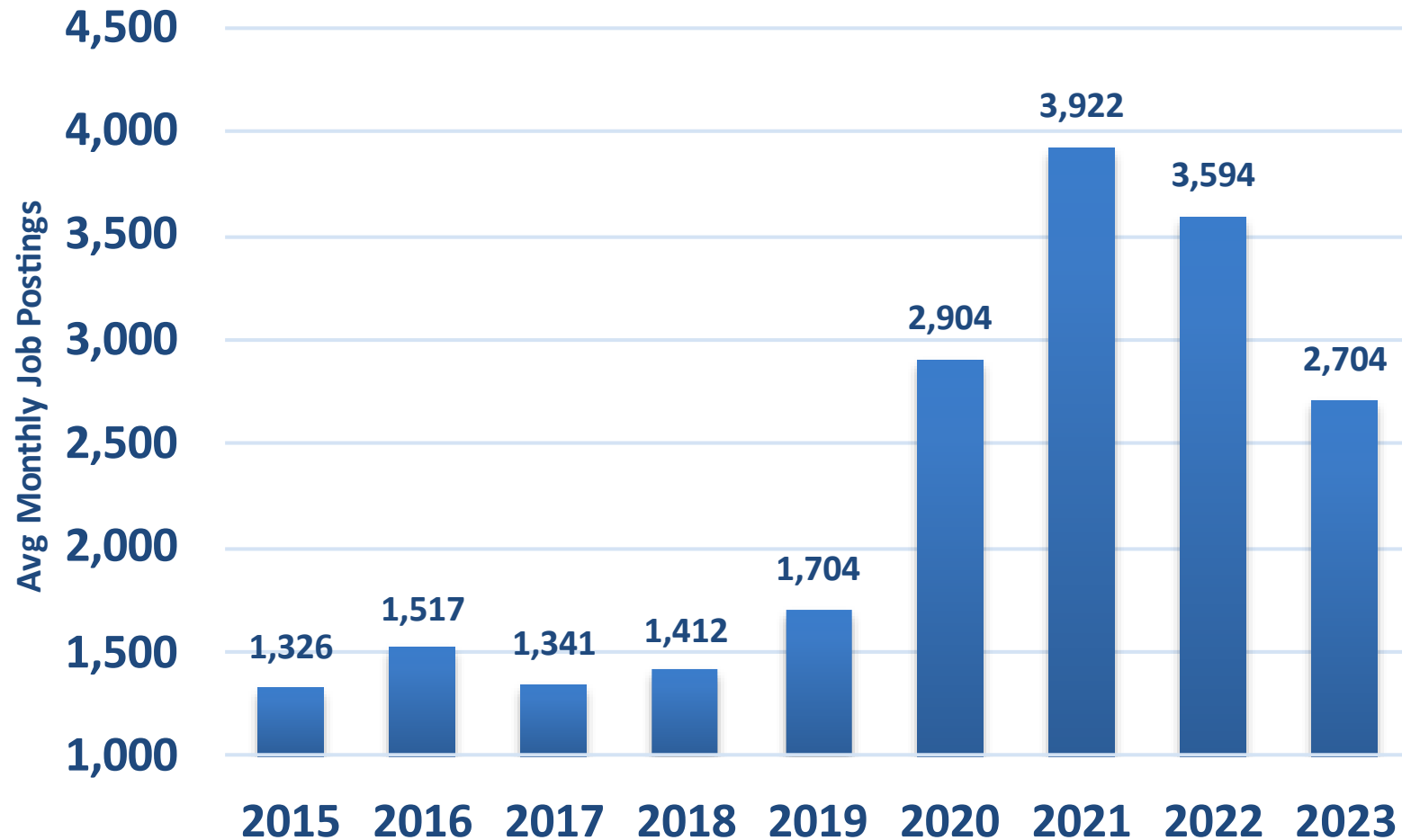
Idaho Monthly Job Postings, 2018-2023



Source: The Conference Board, Help Wanted Online Index

ID Leisure & Hospitality Job Postings

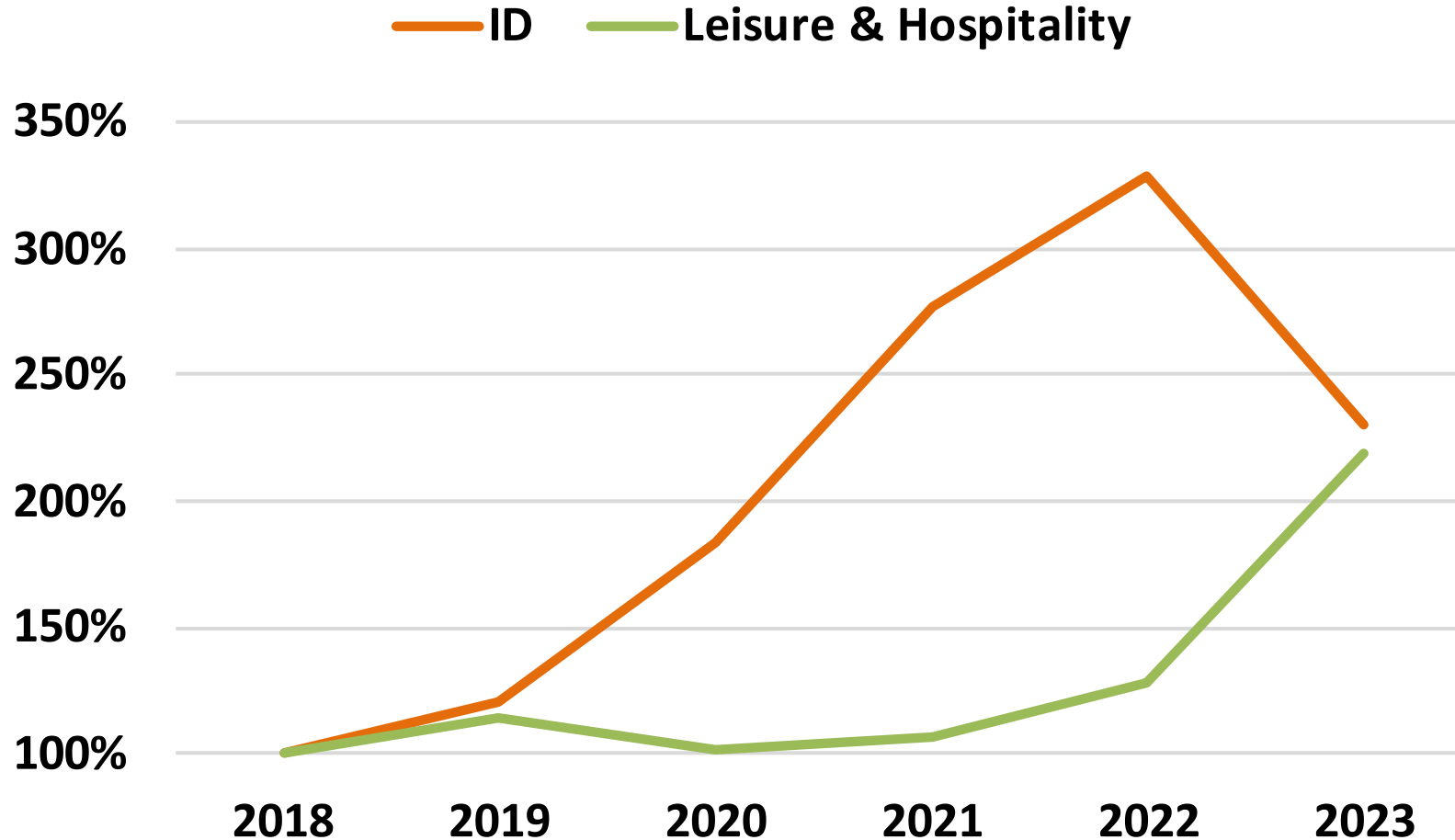
Monthly Average, 2018-2023



Source: Lightcast

ID Leisure & Hospitality Job Postings

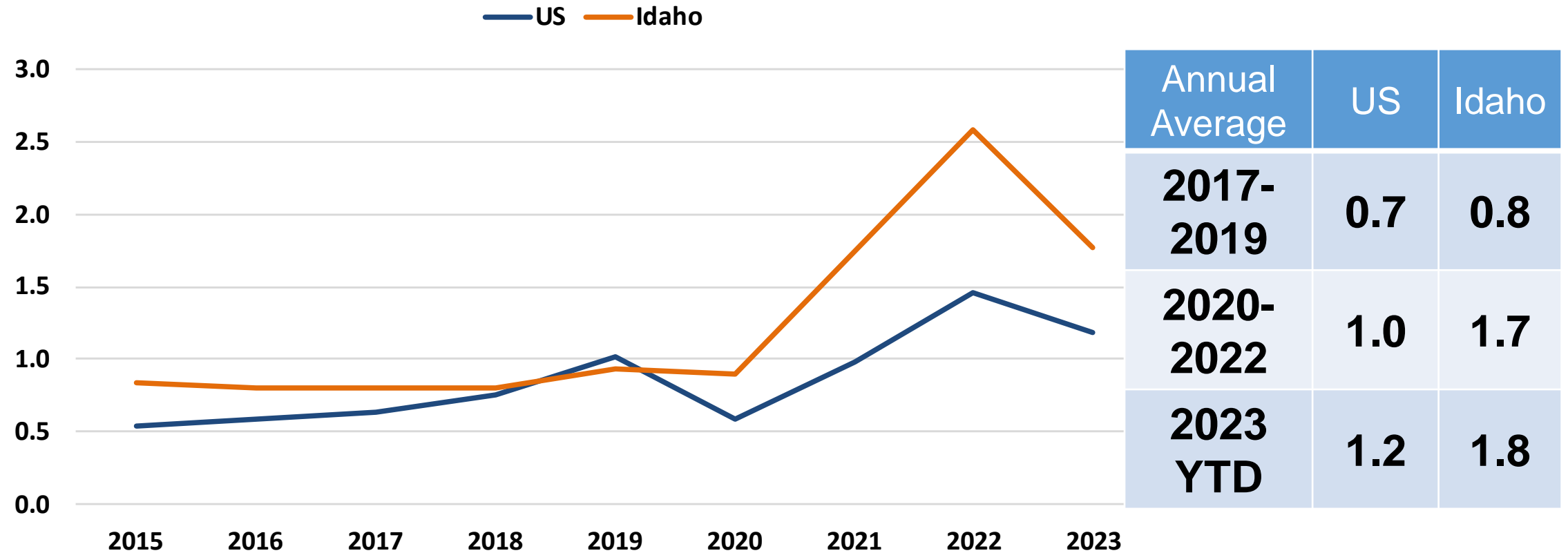
Monthly Average, Indexed to 2018 (2018=100)



Source: Lightcast

Unprecedented Tight Labor Market

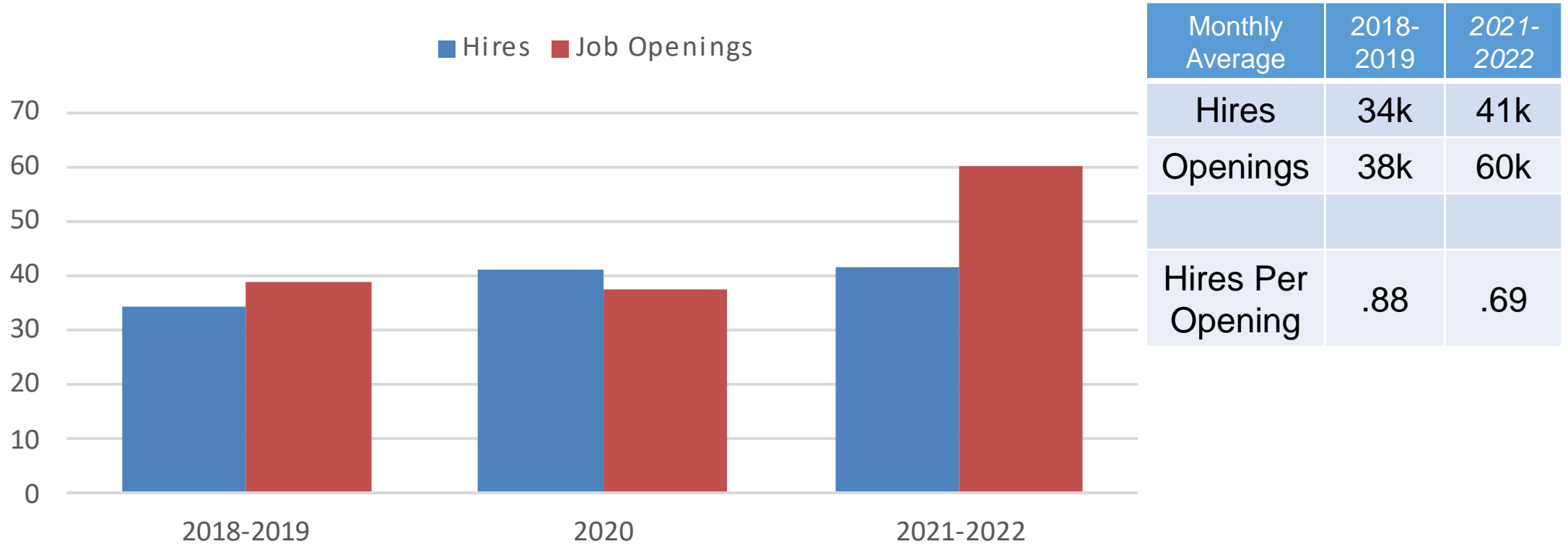
Job Posting Per Unemployed Person



Source: Conference Board Help Wanted Index

Hiring and Job Opening Trends, 2018-2022

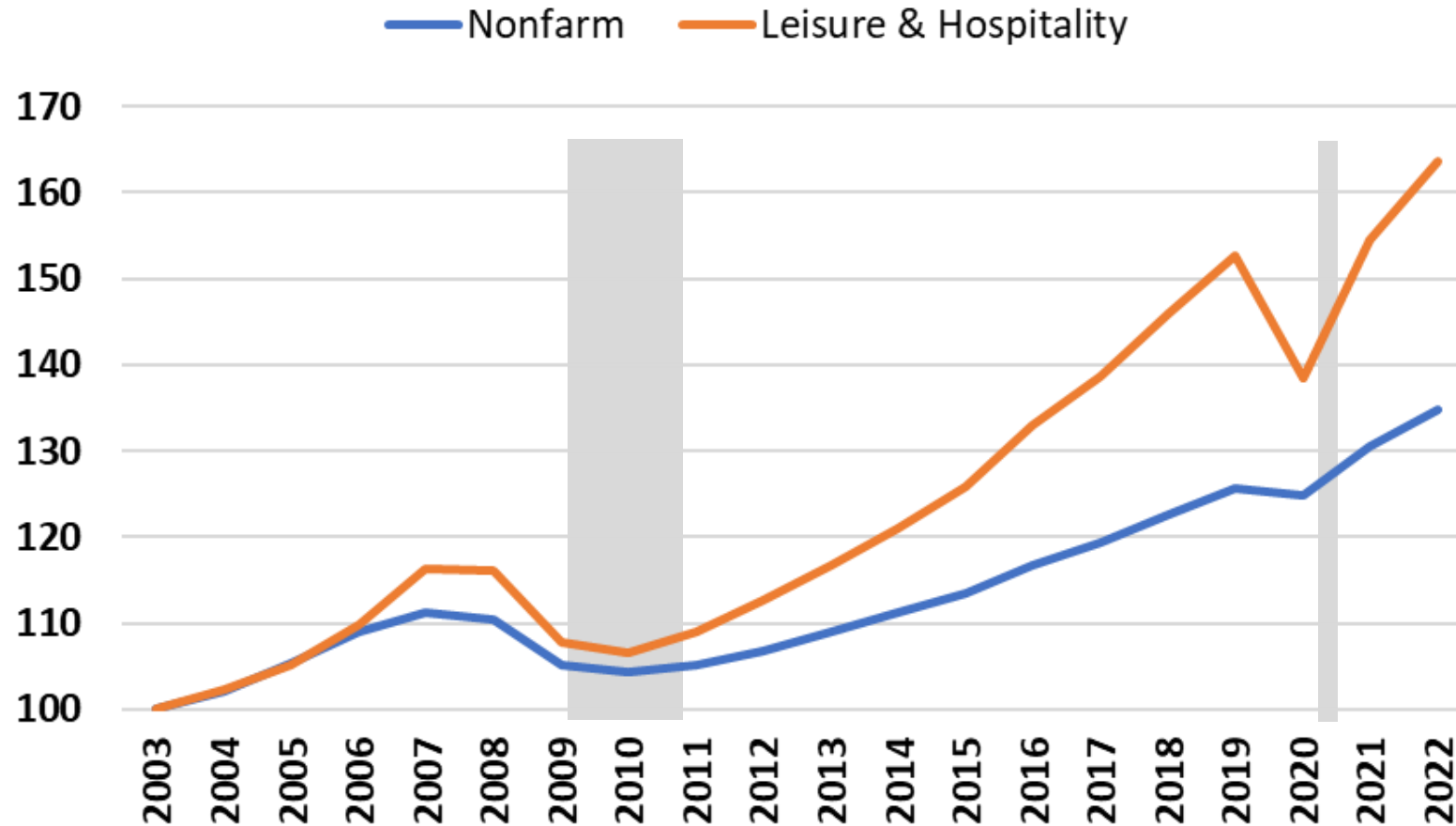
Idaho Monthly Hires vs Monthly Job Openings
(in 000's)



Source: Bureau of Labor Statistics, JOLTS

Idaho Employment Trends

Indexed to 2003 (2003=100)



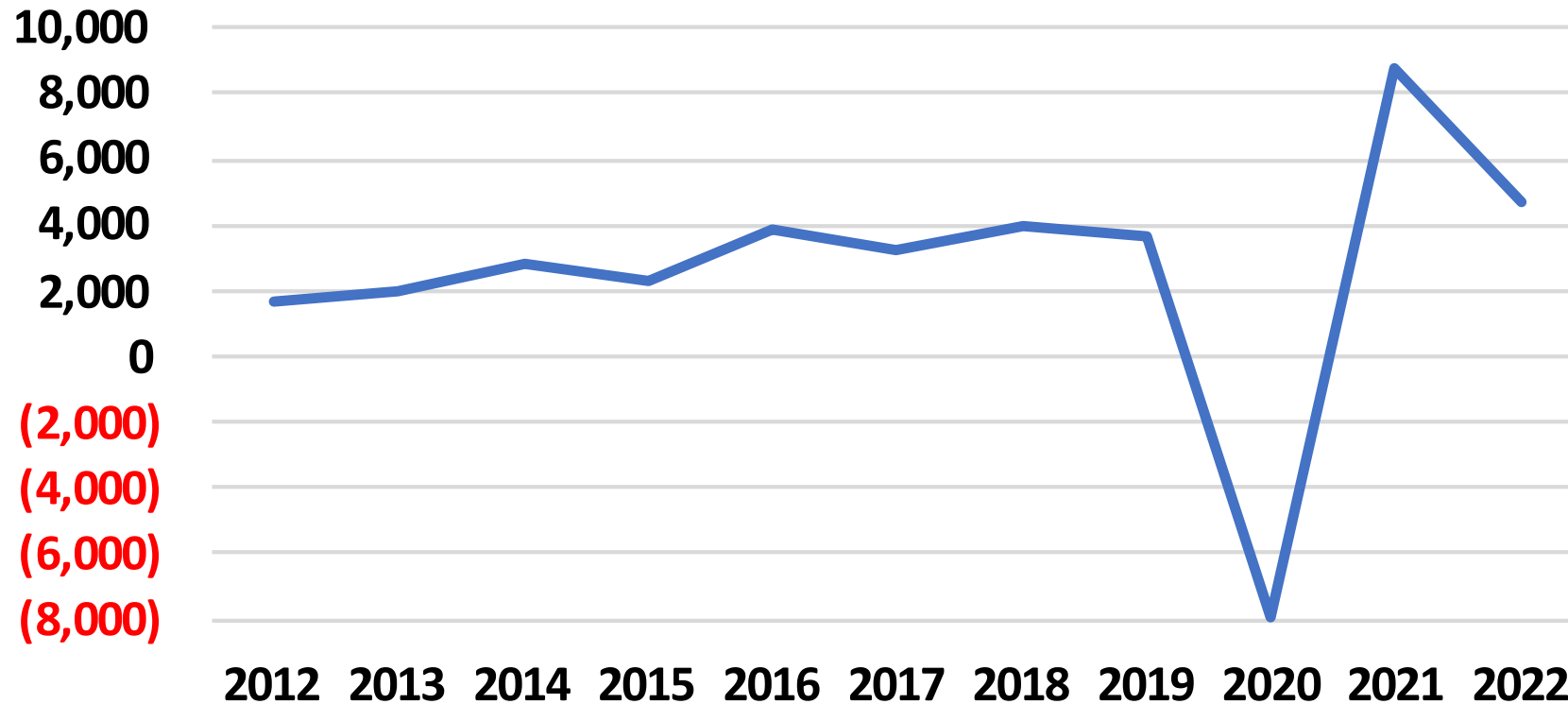
Source: Bureau of Labor Statistics

Average Annual Job Growth

2003-2022	Total Nonfarm	+1.6%
	Leisure & Hosp	+2.7%
2011-2019	Total Nonfarm	+2.1%
	Leisure & Hosp	+4.1%
2020	Total Nonfarm	-0.6%
	Leisure & Hosp	-9.4%
2021-2022	Total Nonfarm	+3.9%
	Leisure & Hosp	+8.8%

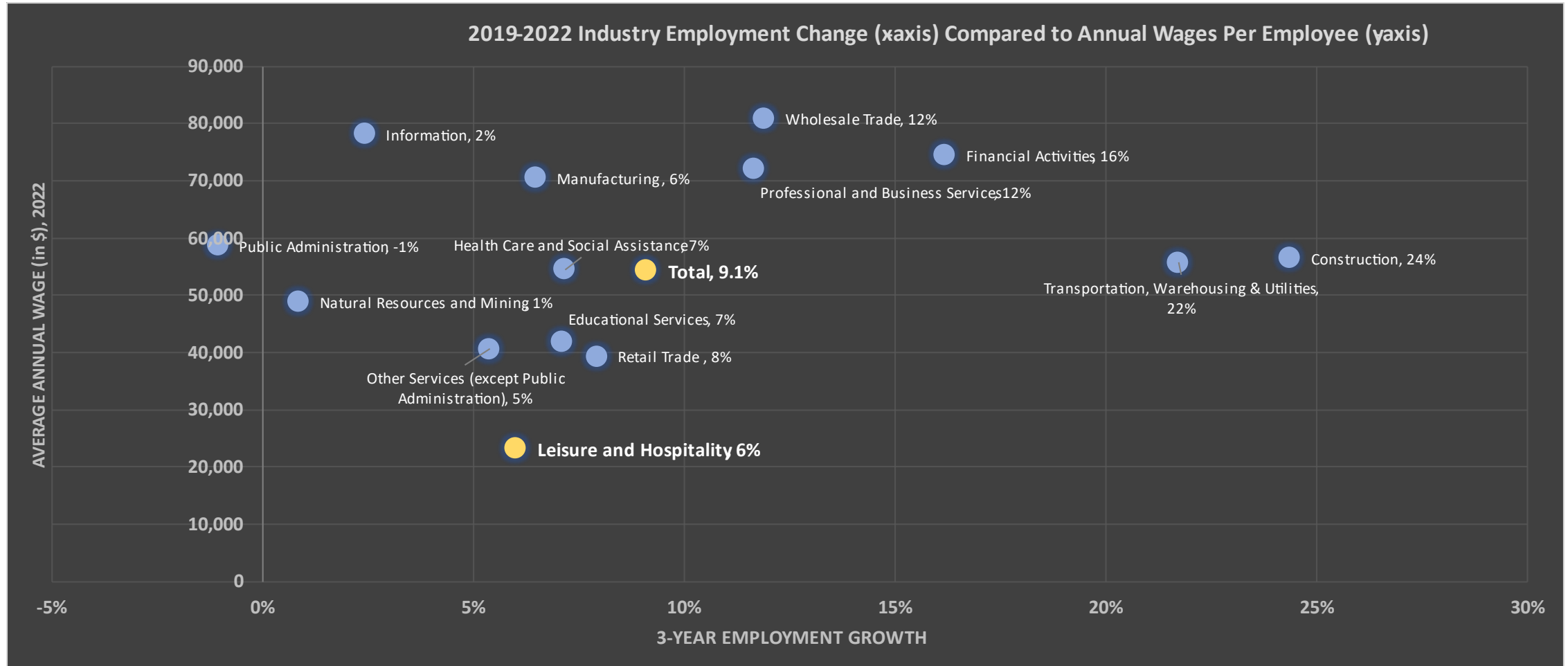
Leisure and Hospitality Employment

Idaho Leisure and Hospitality Annual Job Growth, 2012 -2022



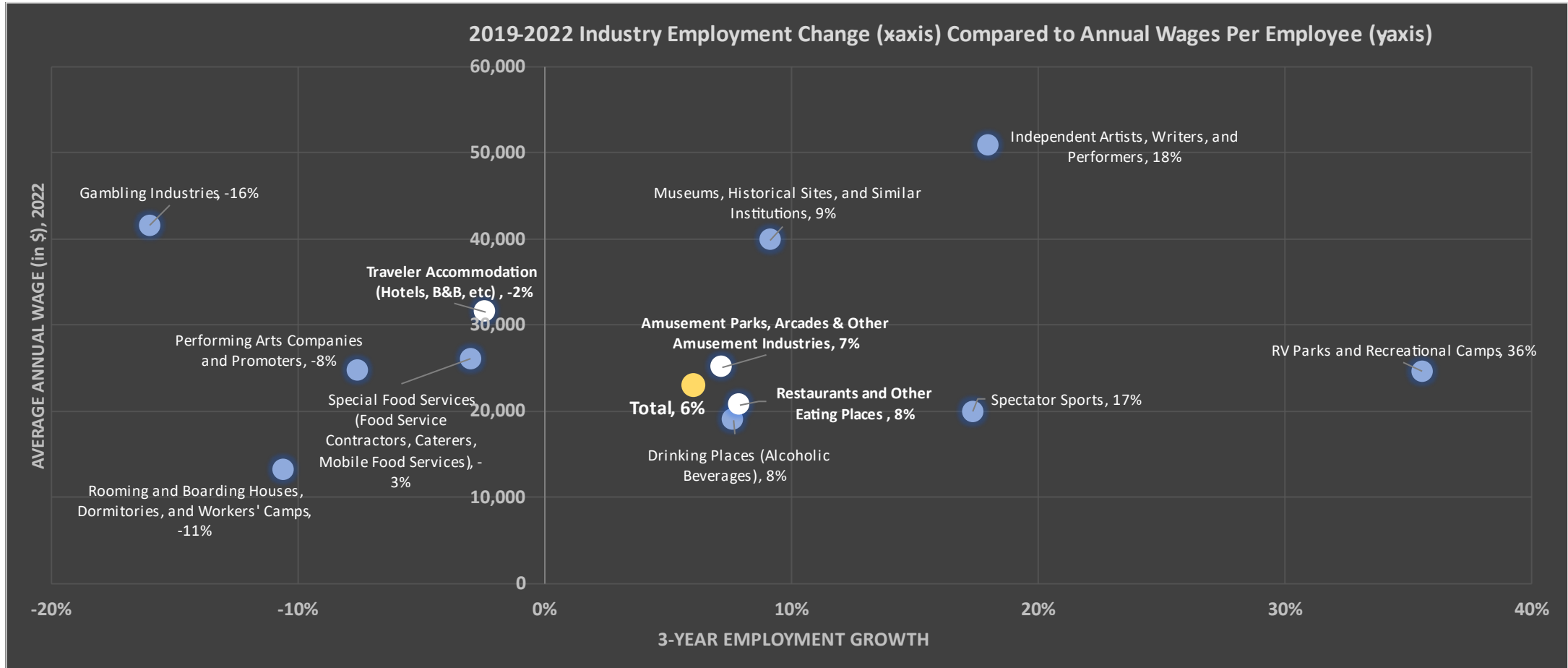
Source: Bureau of Labor Statistics

2019-2022 Employment Growth by Industry



Source: Idaho Department of Labor, QCEW

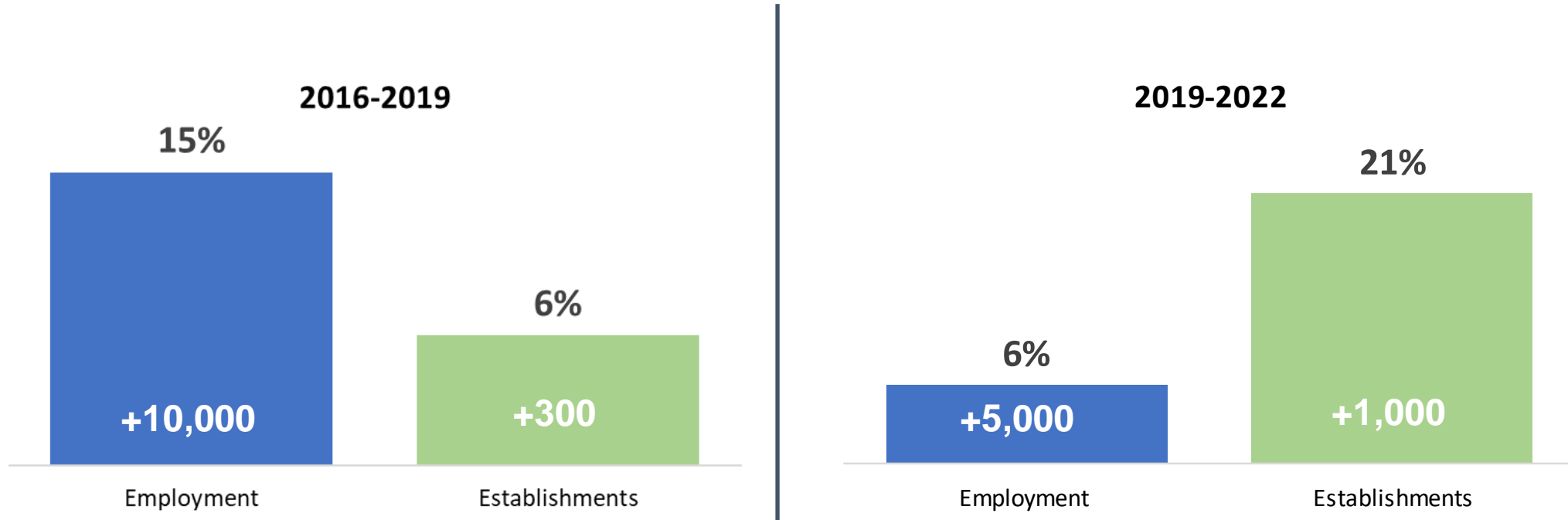
2019-2022 Leisure Hospitality Change in Employment vs Annual Wages



Source: Idaho Department of Labor, QCEW

Leisure and Hospitality, 3-Year Growth

Total Change



Source: Bureau of Labor Statistics, QCEW

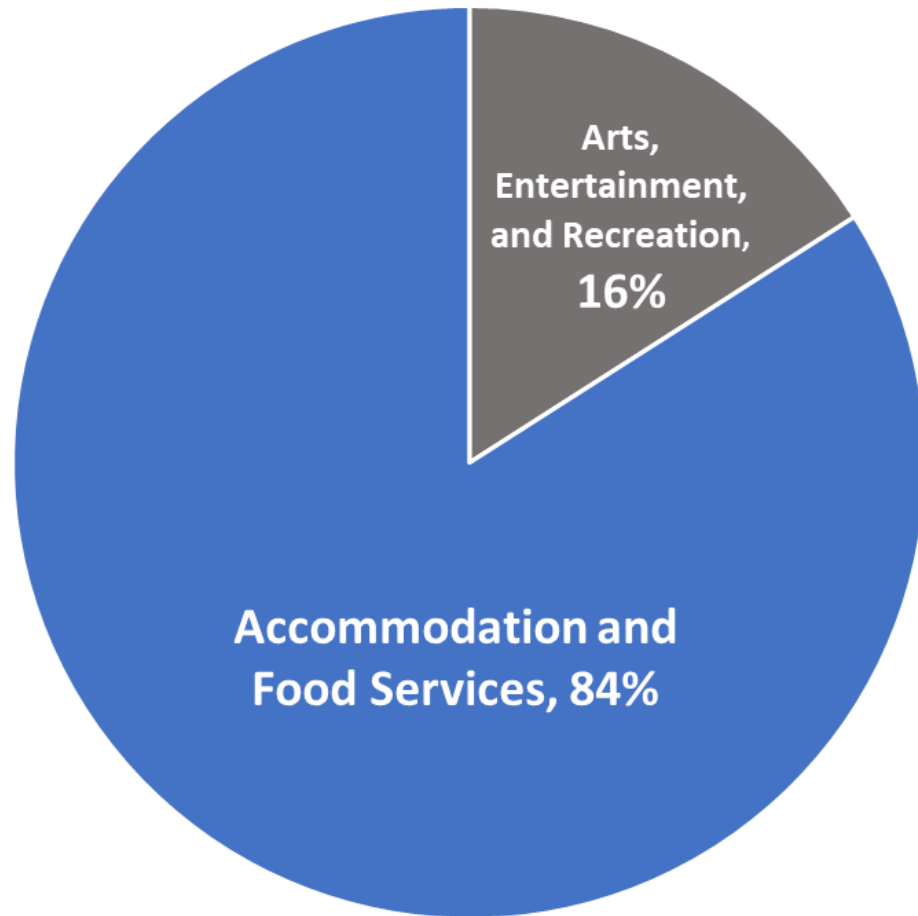
Leisure and Hospitality Job Growth by Region 2019-2022

Region #	Region Name	% 2019 Employment	2019-2022 Job Growth	% of Total Statewide Growth, 2019-2022
1	Northern	16%	6%	16%
2	North Central	6%	-4%	-4%
3	Southwestern	46%	6%	44%
4	South Central	12%	4%	8%
5	Southeastern	8%	7%	8%
6	Eastern	12%	13%	26%

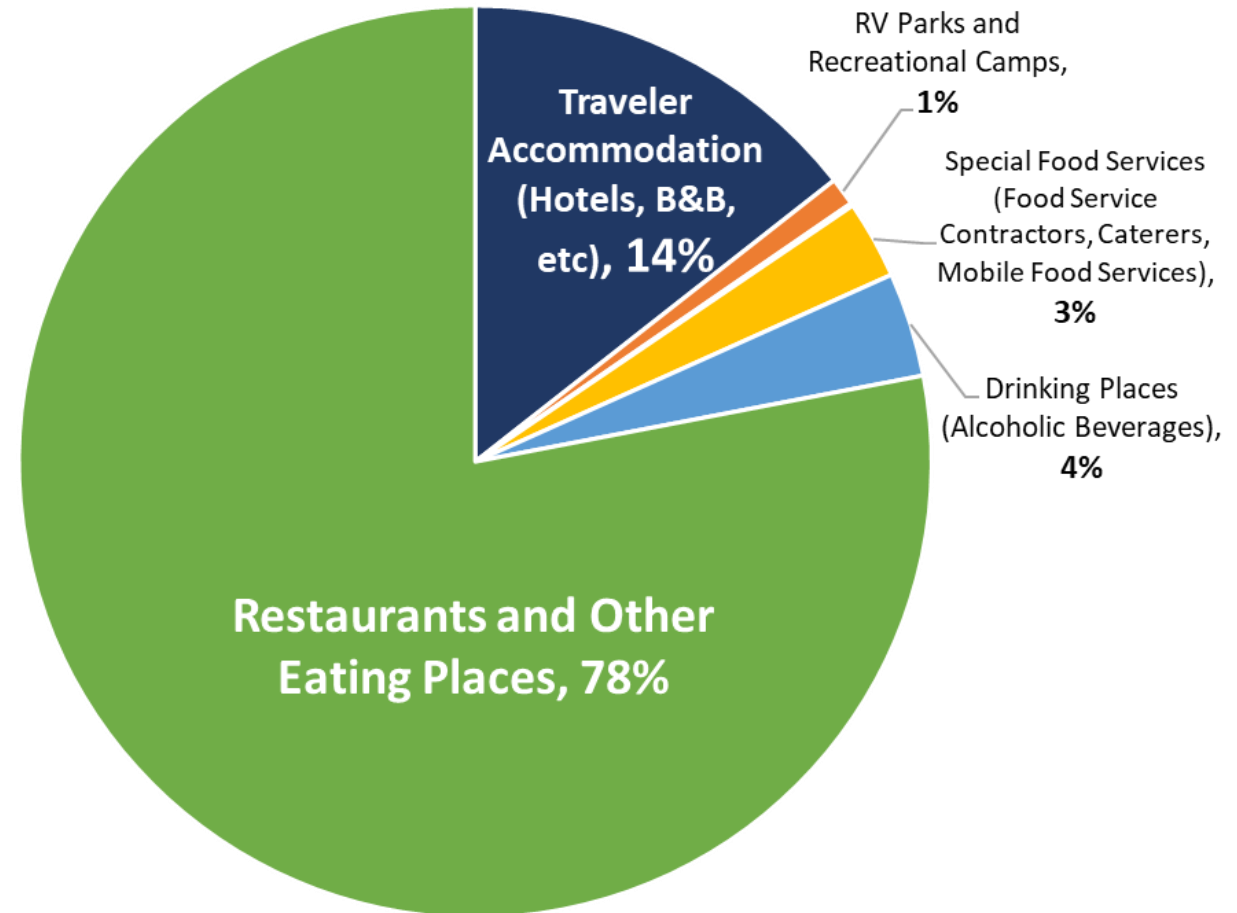


Employment by Sub-Industry

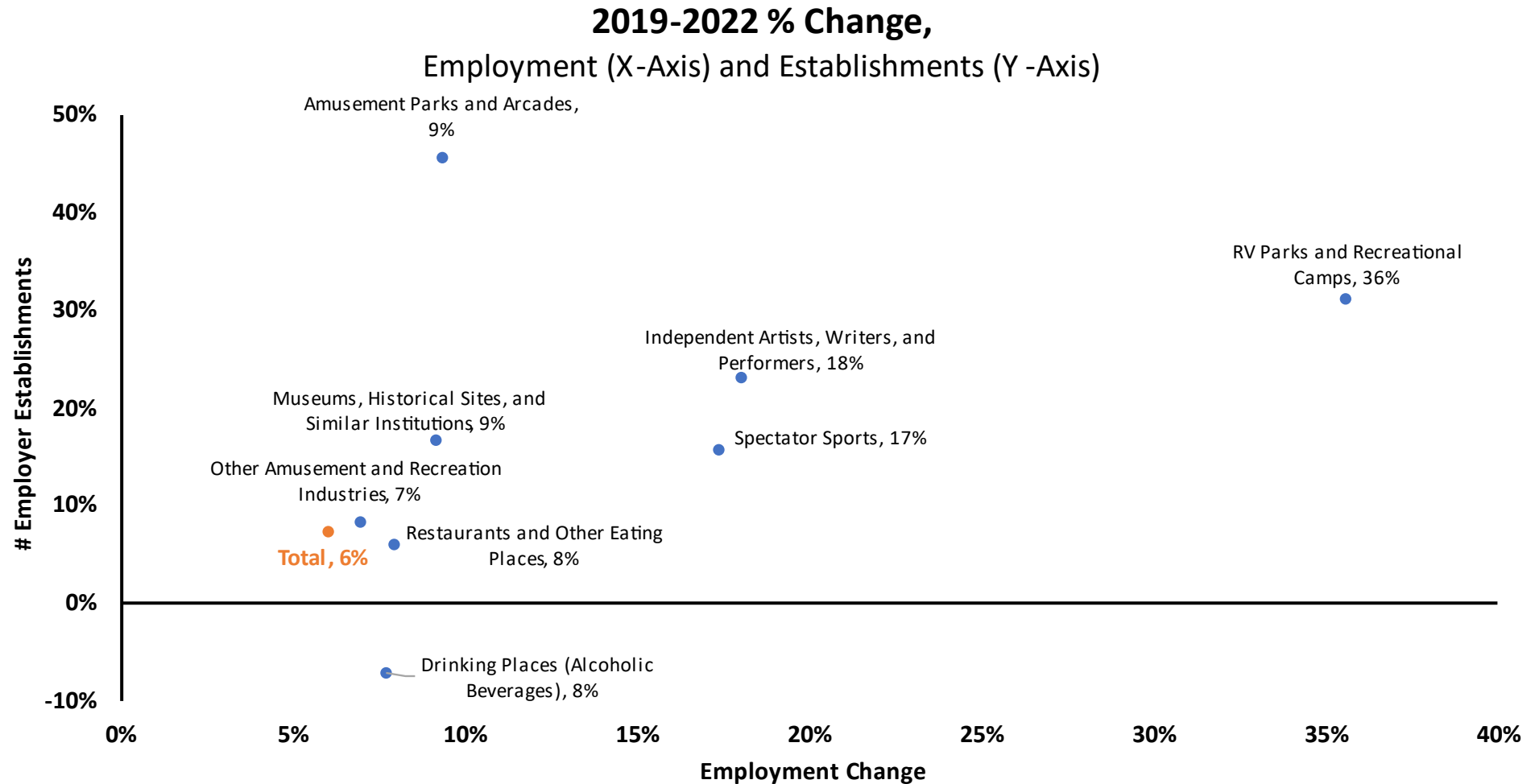
Leisure & Hospitality



Accommodation & Food Services



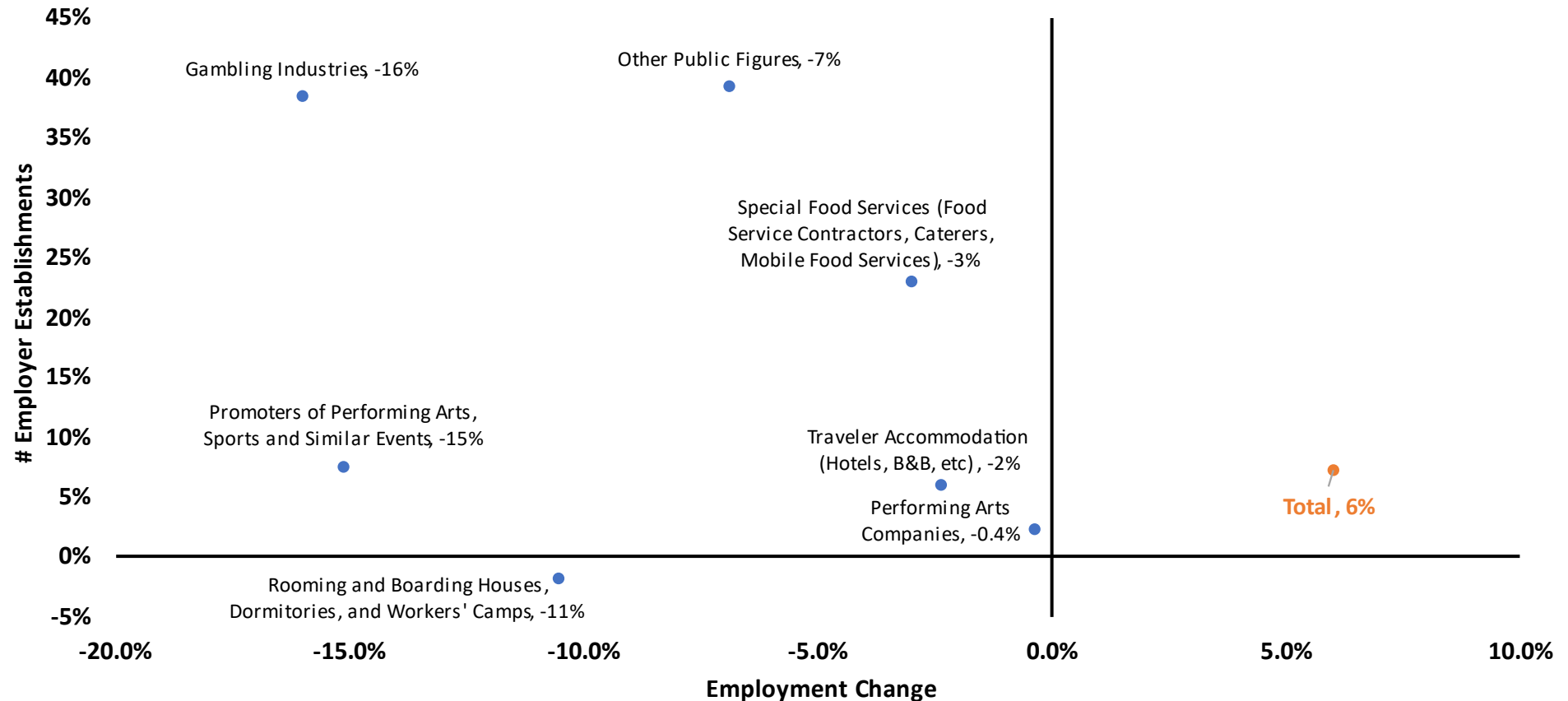
Sub-Industry Employment Growth, 2019-2022



Source: Idaho Department of Labor, QCEW

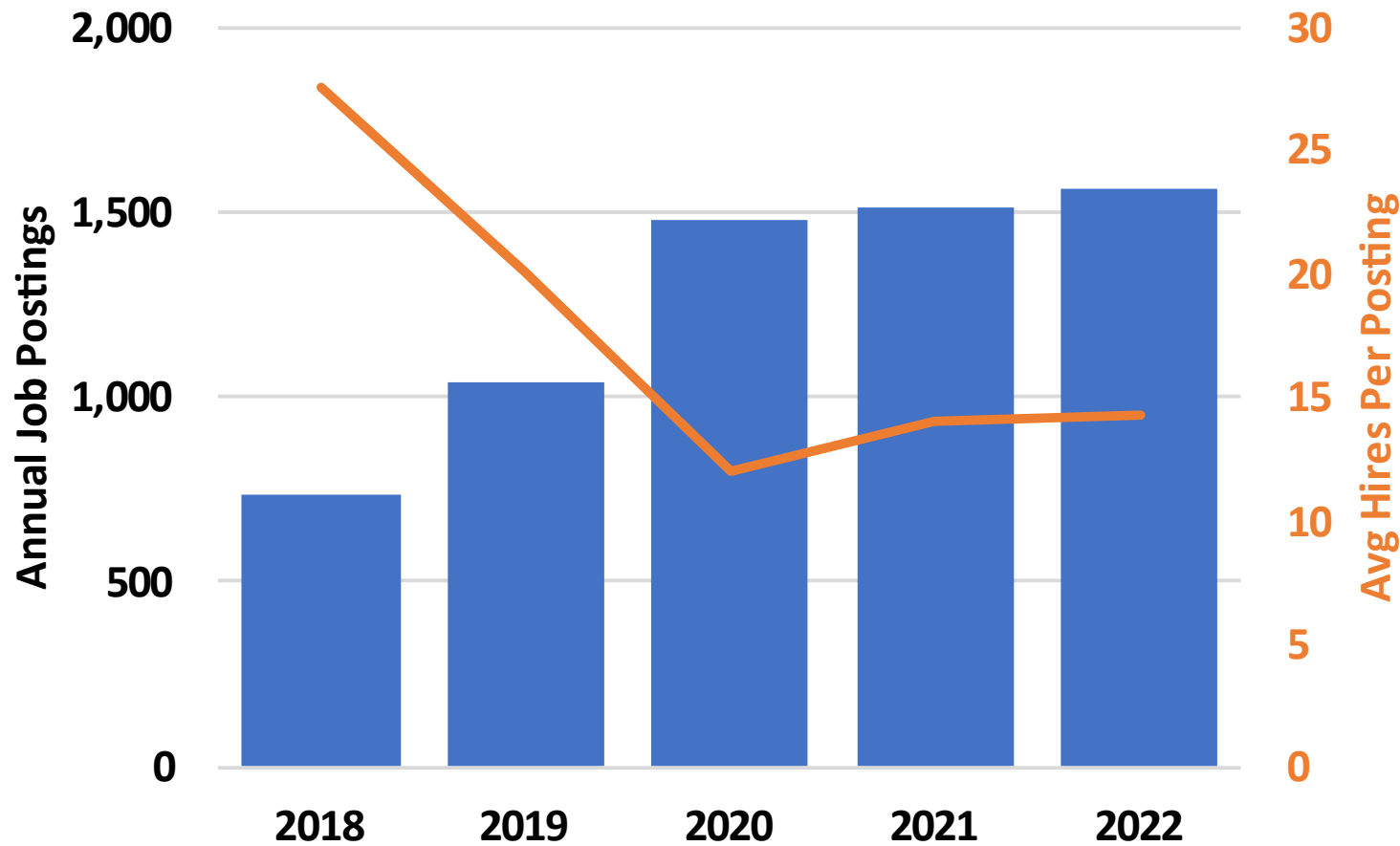
Sub-Industry Employment Declines, 2019-2022

2019-2022 % Change,
Employment (X-Axis) and Establishments (Y -Axis)



Source: Idaho Department of Labor, QCEW

Arts, Entertainment and Recreation Postings

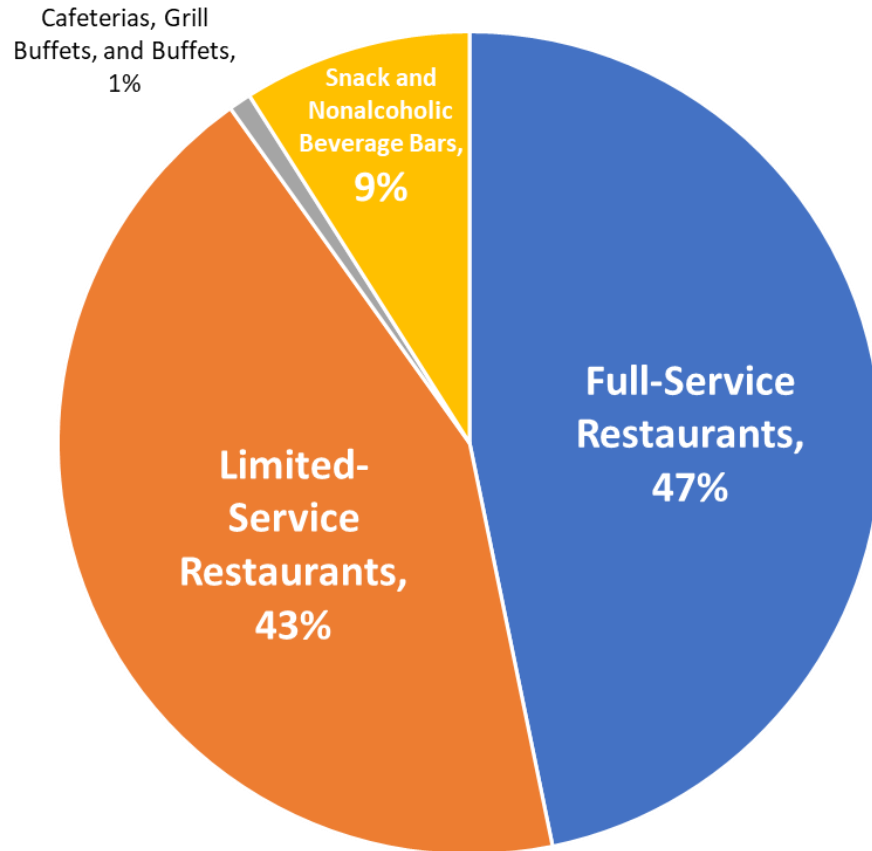


Year	Median Wages	# Employers Posting
2018	\$25.78	54
2019	\$21.02	96
2020	\$18.18	146
2021	\$17.32	162
2022	\$17.05	151
Jan-Sep 2023	\$18.77	132

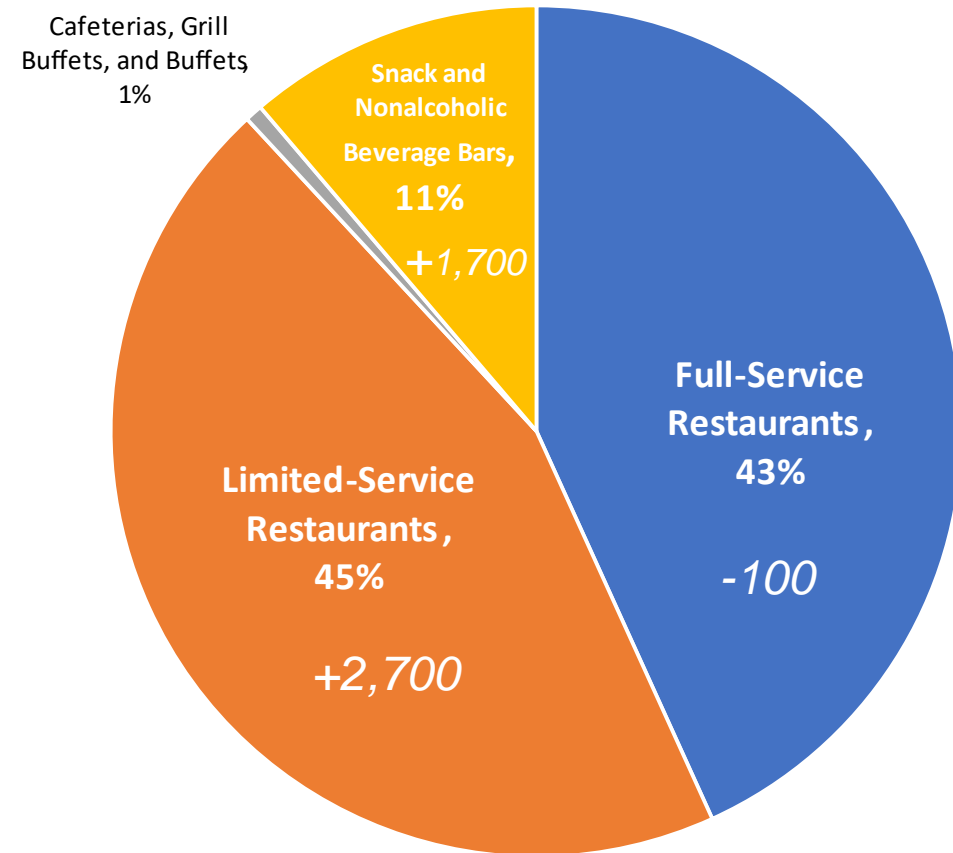
Source: Lightcast

Food Service Employment









Employment 2019 (54,000)



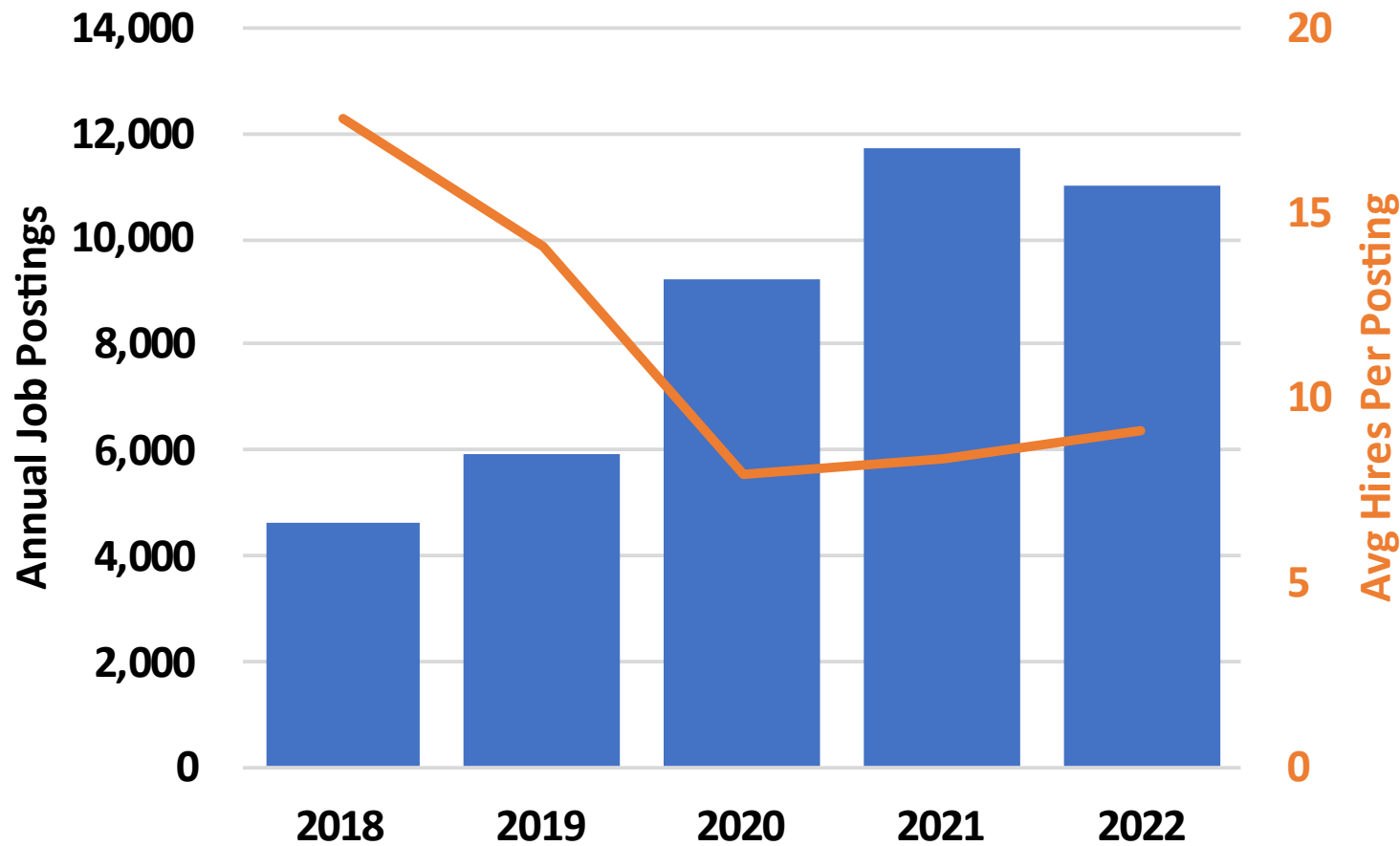
Employment 2022 (58,000)



Restaurants and Eating Places, 2019-2022

	Employment	# Establishments
Full Service Restaurants	 - 1%	 - 20
Limited Service Restaurants	 +12%	 +100
Snack and Nonalcoholic Beverage Bars	 +35%	 +100
Cafeterias, Grill Buffets, Buffets	 -19%	

Food Service Job Postings

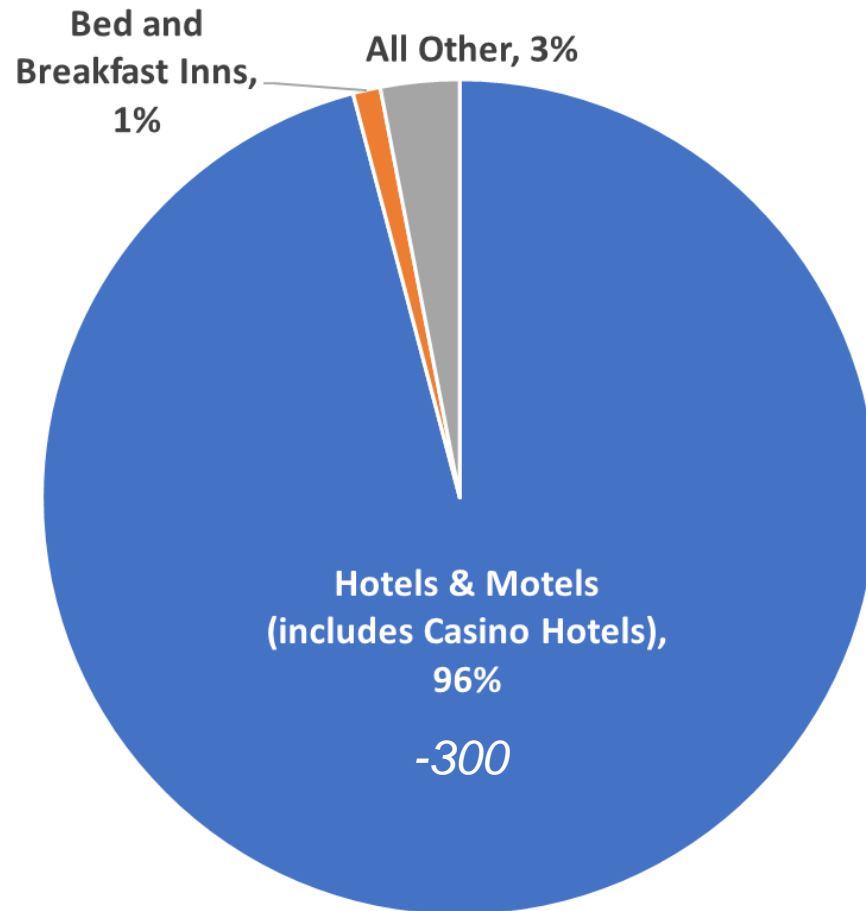


Year	Median Wages	# Employers Posting
2018	\$10.98	216
2019	\$10.98	376
2020	\$12.03	509
2021	\$13.51	570
2022	\$15.23	441
Jan-Sep 2023	\$16.06	358

Source: Lightcast

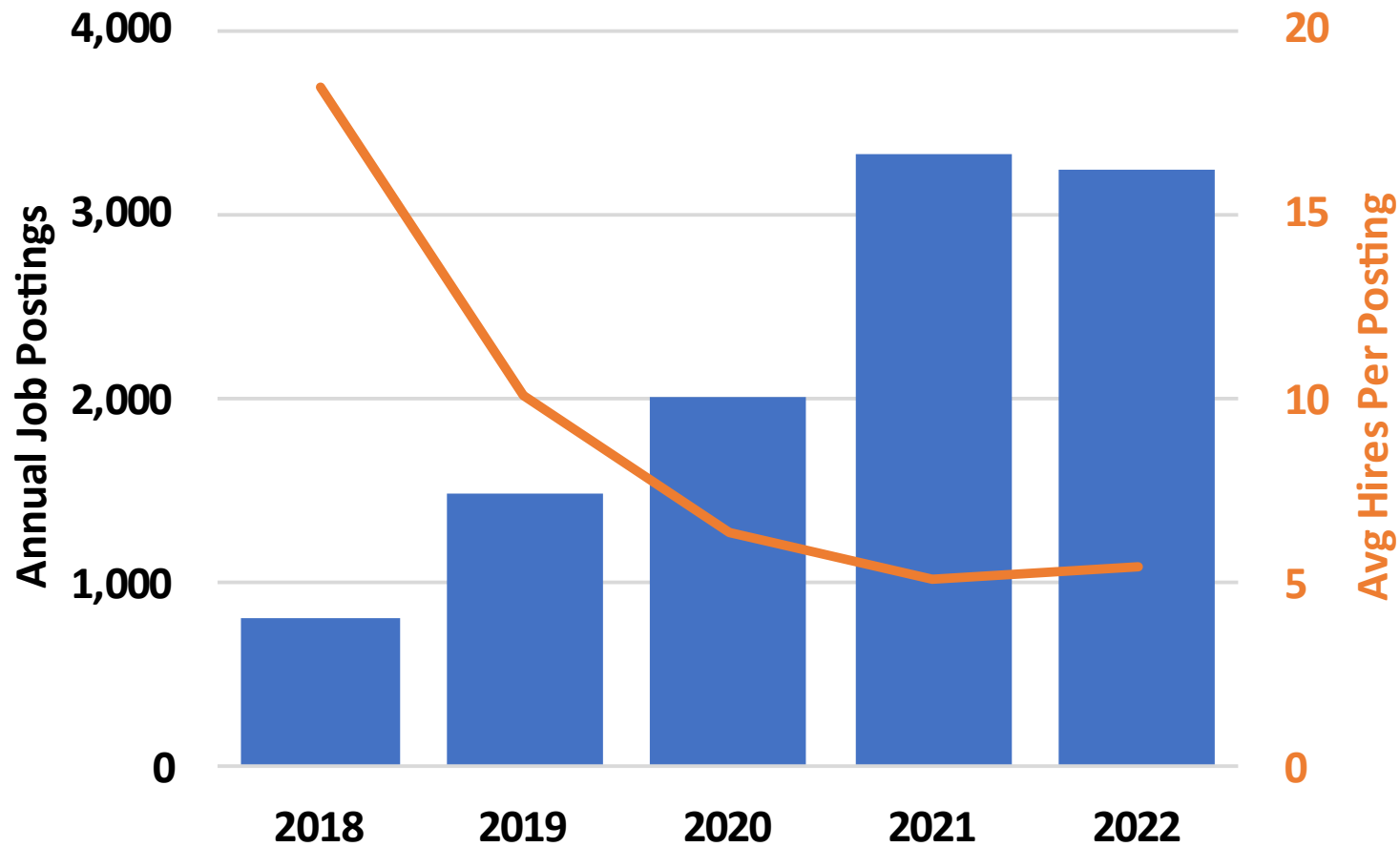
Accommodation Employment

Employment: 2019 - 11,100, 2022 – 10,800



Median Hourly Wage	2019	2022	% Change
Hotel, Motel, Resort Desk Clerks	\$10.61	\$13.61	+28%
Maids and Housekeeping Cleaners	\$10.79	\$14.44	+34%
Landscaping and Groundskeeping Workers	\$14.78	\$17.43	+18%
Parking Attendants	\$10.24	\$14.03	+37%
Shuttle Drivers and Chauffeurs	\$13.94	\$15.68	+12%
Total Accommodation	\$17.97	\$22.37	+24%

Accommodation Job Postings



Year	Median Wages	# Employers Posting
2018	\$10.98	82
2019	\$10.74	108
2020	\$10.98	115
2021	\$13.02	133
2022	\$16.09	127
Jan-Sep 2023	\$18.03	114

Source: Lightcast

Workforce Training Resources

- **Idaho Launch (Jr - high school graduates)**

Up to \$8,000 for Idaho 2024 graduates to pursue postsecondary/CTE training for ~250 in-demand careers

nextsteps.idaho.gov

- **Idaho Launch (Sr - adult training)**

Up to \$5,000 for those who live/work in Idaho to acquire specialty training (CDL, plumber/electrician, computer coding, welding, etc)

idaholaunch.com

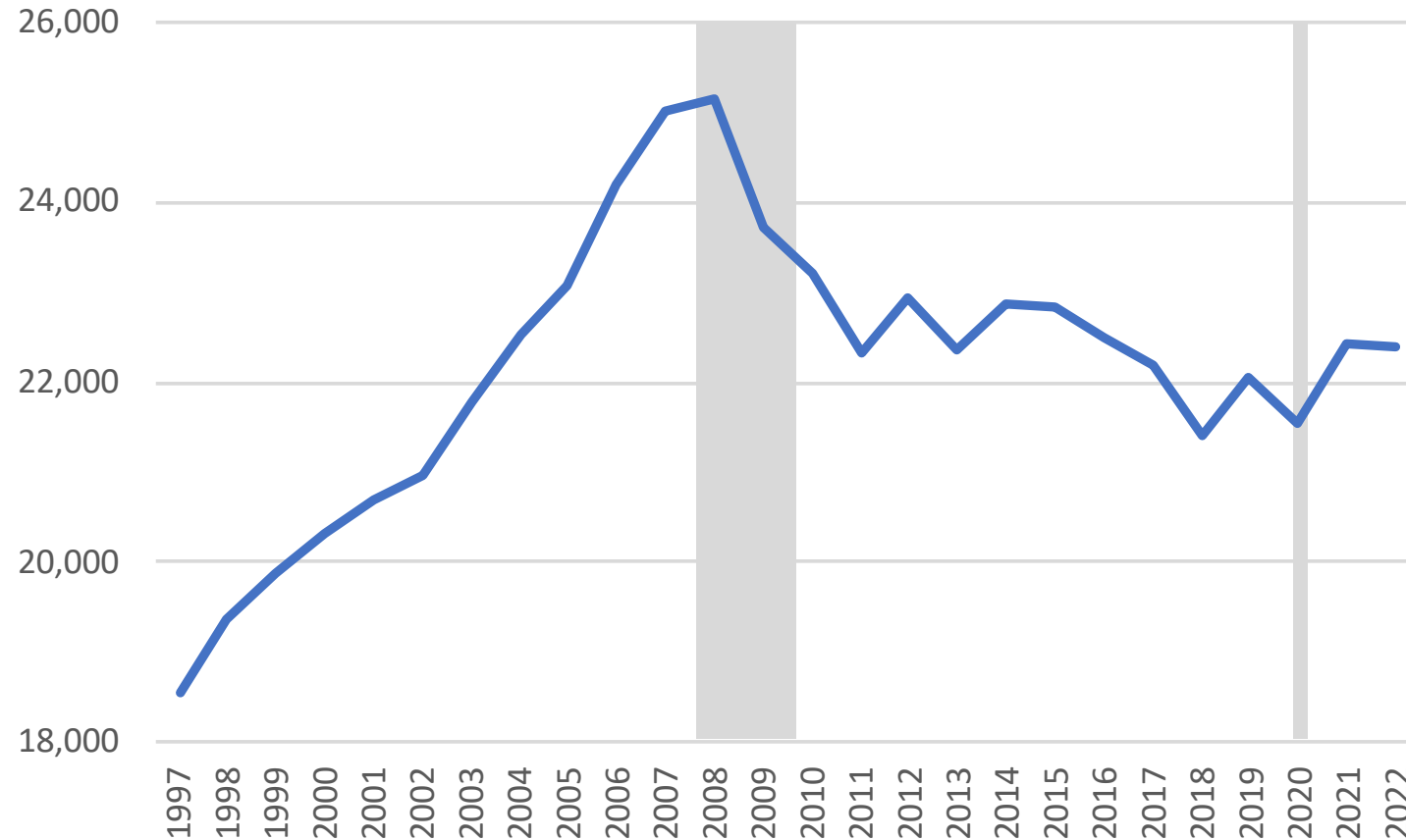
Questions?

Thank you for participating.

Contact:

Lisa.Grigg@labor.Idaho.gov

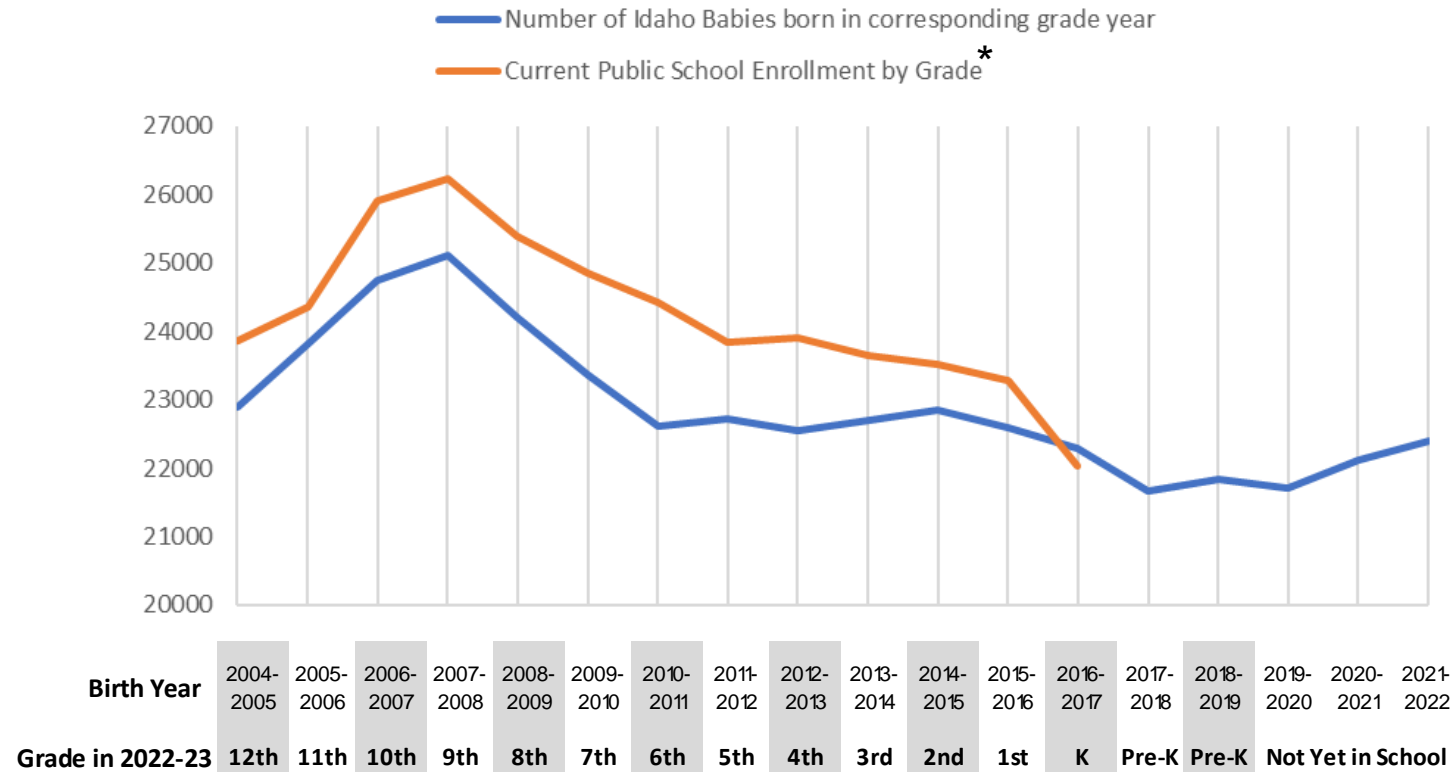
Idaho Births by Year



Source: CDC, Idaho Dept of Health and Welfare Vital Statistics

Idaho K-12 School Enrollment by Birth Year

Idaho Public School Enrollment by Grade in 2022 - 2023
Compared to Corresponding Birth Year

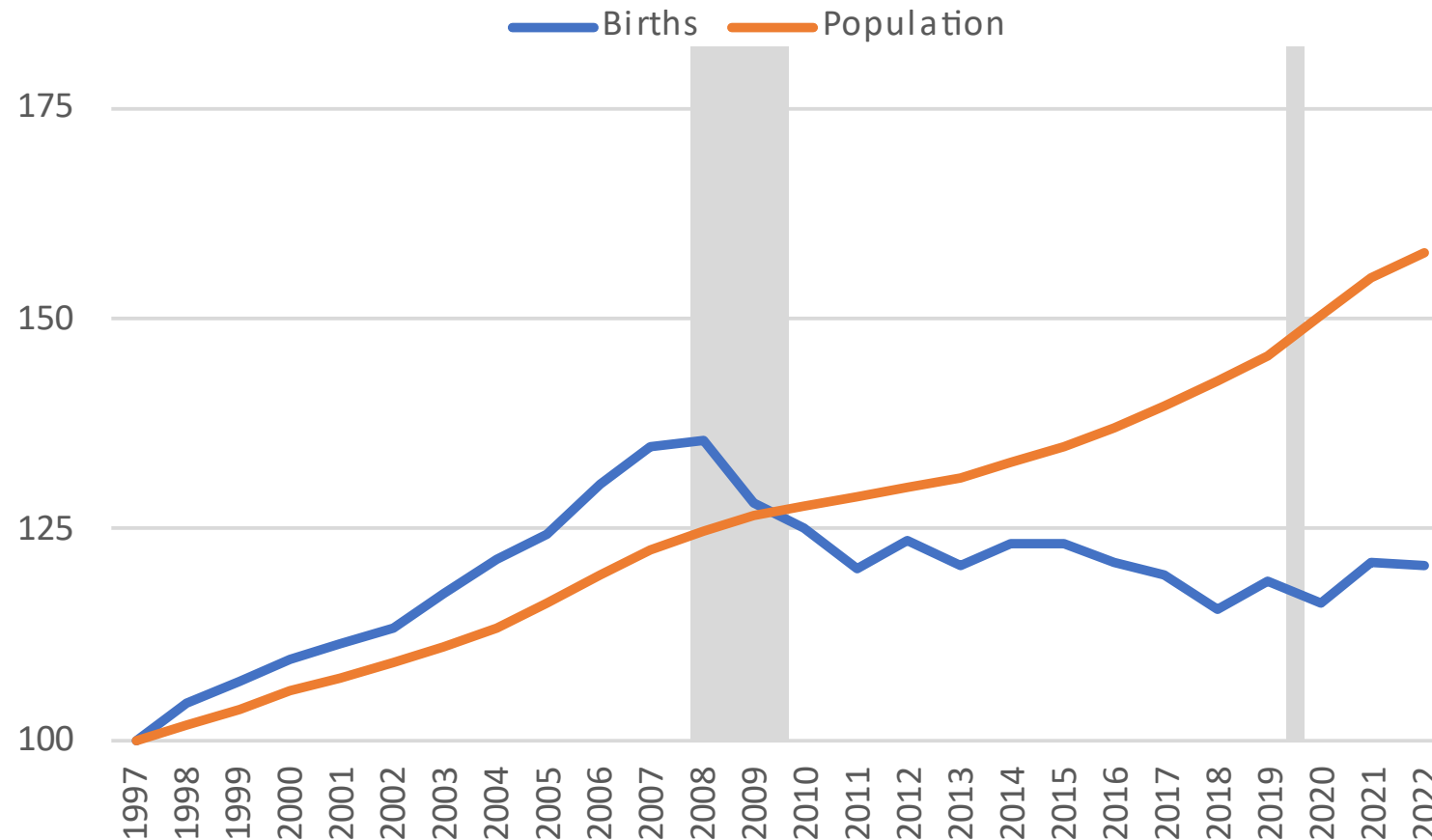


* Kindergarten is not mandatory in Idaho and total public school enrollment is likely underrepresented for this age group

Source: Idaho Dept of Health and Welfare, Idaho Department of Education

Idaho Births vs Population Growth

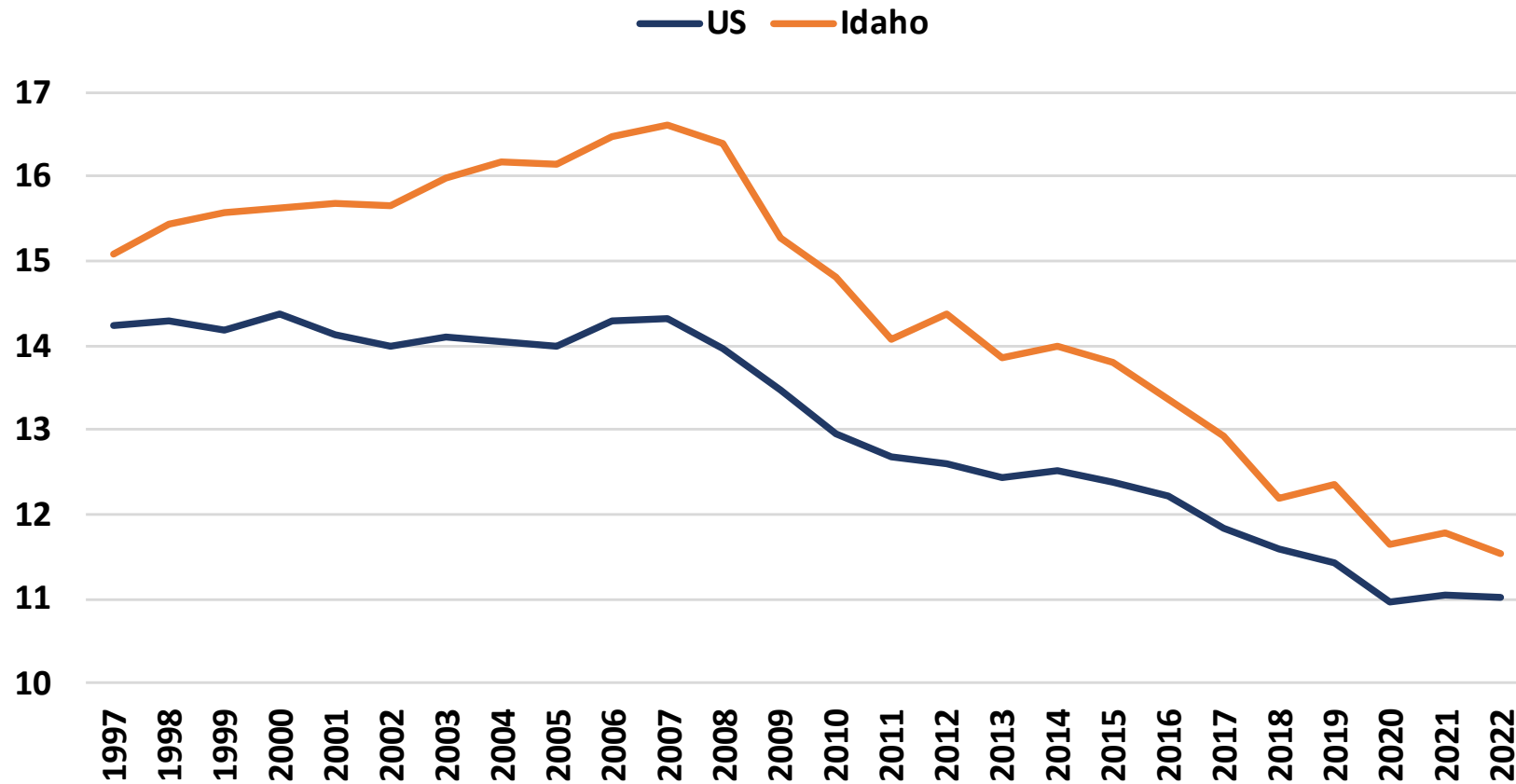
Indexed to 1997 (1997=100)



Source: CDC, Idaho Dept of Health and Welfare Vital Statistics

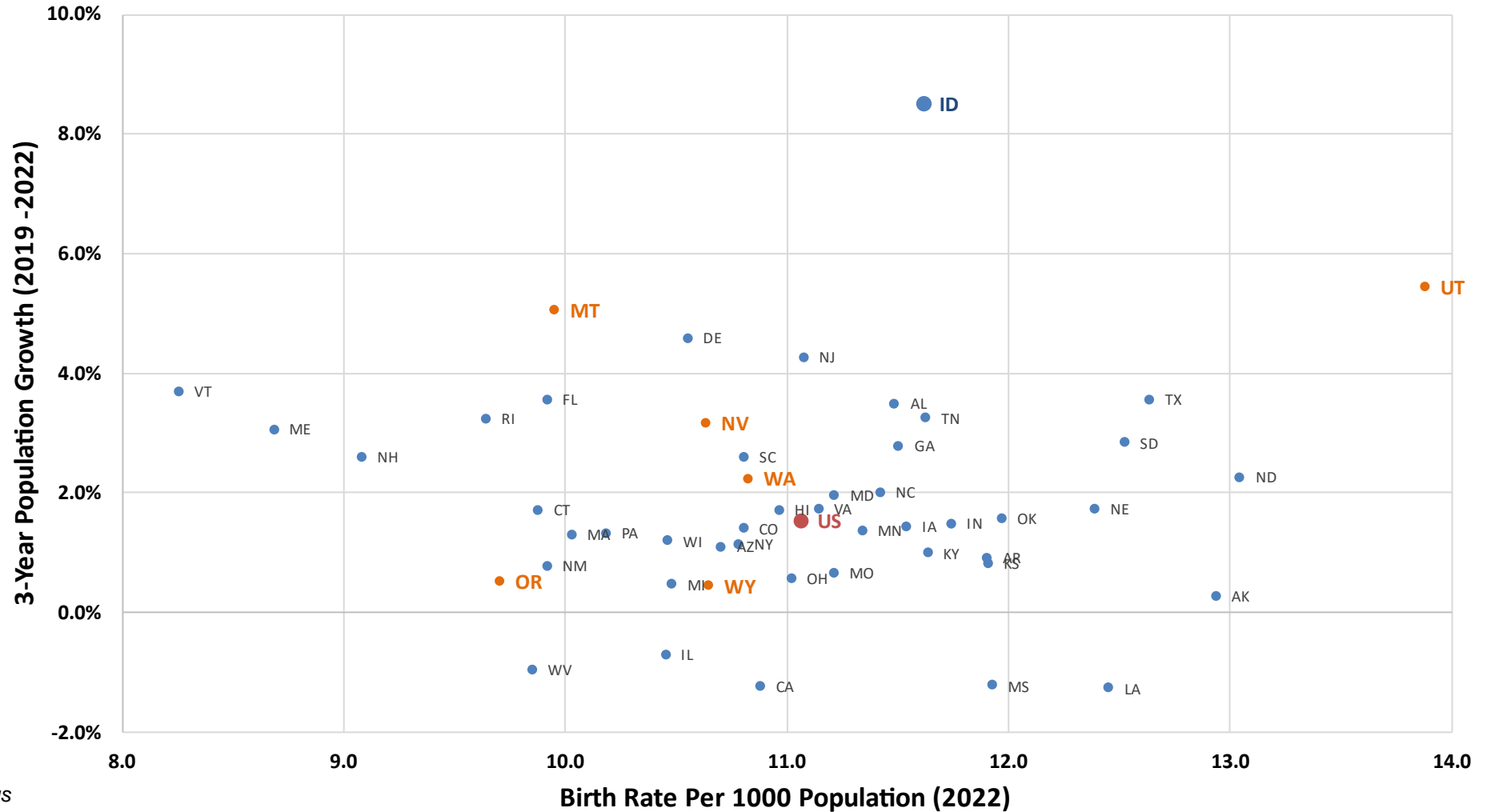
Birth Rates In Sharp Decline

Annual Birth Rates Per 1,000 Population



Source: CDC, US Census

Birth Rates (x-axis) vs Population Growth (y-axis)



Source: US Census

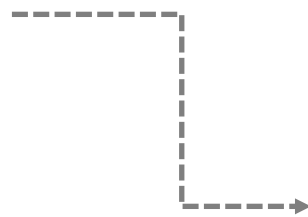
% Population Under Age 18, 2019 vs 2022

2019

Rank	State	%
1	Utah	29.0%
2	Texas	25.5%
3	Idaho	25.1%
4	Nebraska	24.6%
5	Alaska	24.6%
6	South Dakota	24.5%

2022

Rank	State	%
1	Utah	27.6%
2	Texas	24.8%
3	Nebraska	24.2%
4	South Dakota	24.1%
5	Alaska	24.1%
6	Idaho	23.9%



Source: US Census, Annual Population Estimates

Idaho Birth Rates by Region, 2007 vs 2021

Births Per 1,000 Population

Region Name	Region #	2007	2021	% Change
→ Northern	Region 1	12.2	10.2	-17%
North Central	Region 2	11.6	10.1	-13%
→ Southwestern	Region 3	16.8	11.1	-34%
South Central	Region 4	17.3	12.7	-27%
Southeastern	Region 5	17.8	13.2	-26%
→ Eastern	Region 6	21.7	14.9	-31%
Idaho Statewide		16.6	11.8	-29%
US (National)		14.3	11.0	-23%



Source: CDC, US Census

Idaho's Population Change < Age 18

2019-2022

Region #	Region Name	% 2019 Population	% Statewide Pop Growth 2019-2022	% Statewide Growth <Age 18 2019-2022	% Pop < Age 18 2019	% Pop < Age 18 2022
1	Northern	14%	18%	33%	22%	22%
2	North Central	6%	3%	6%	20%	20%
3	Southwestern	46%	46%	31%	25%	23%
4	South Central	11%	8%	7%	28%	26%
5	Southeastern	10%	5%	2%	28%	27%
6	Eastern	13%	20%	22%	29%	27%
	IDAHO		151,968	15,203	25.1%	23.9%

Source: US Census, Population Growth Estimates 2019-2022

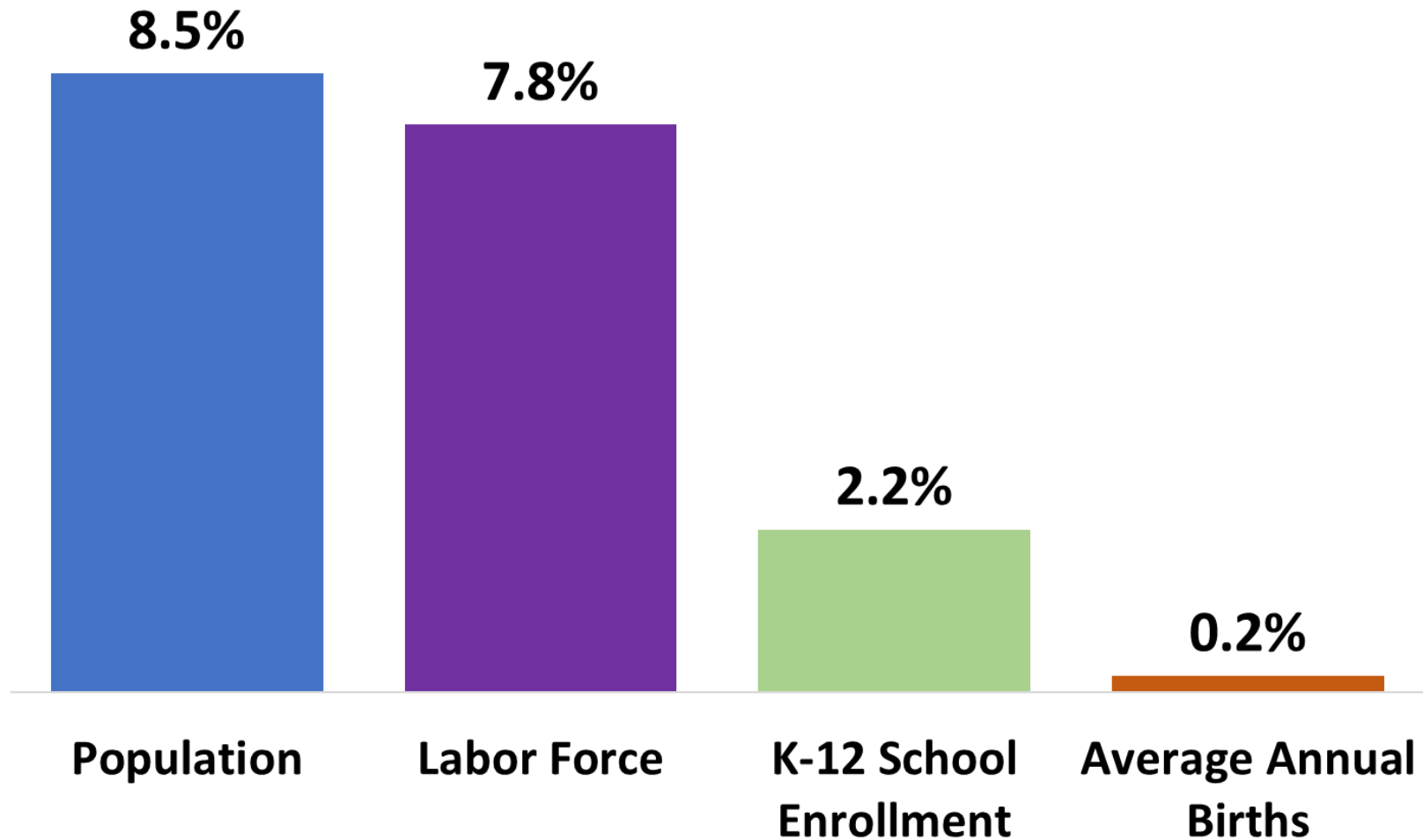
Public School Enrollment Swings

2019-2022

Region #	Region Name	# Counties in Region	# Counties where Age 0-17 population declined from 2019-2022	# Public School Districts (includes Charter Schools, excludes Virtual Learning)	# Public School Districts where Fall 2022 enrollment lower than Fall 2019	% Public School Districts where enrollment declined 2019-2022
1	Northern	5	0	18	7	39%
2	North Central	5	1	18	5	28%
3	Southwestern	10	1	64	19	30%
4	South Central	8	4	27	17	63%
5	Southeastern	7	3	18	7	39%
6	Eastern	9	3	31	10	32%
	IDAHO	44	12	176	65	37%

Source: US Census, Population Growth Estimates 2019-2022, Idaho Department of Education

2019-2022 Idaho Growth Comparison



Source: US Census, Idaho Department of Education, Idaho Department of Labor

How current birth/migration trends might affect Idaho's future labor force:

- Idaho has a very tight labor market with low unemployment at 3.0%. Many employers are struggling to hire staff at fully desired levels
- If birth rates continue to remain low, what does the next 10-20-30 years look like if net migration slows?
- Today's Students = Future Labor Force. Lower enrollments could, but don't necessarily, mean that Idaho's labor force may contract in the near future.
- Lower birth rates are occurring on a global scale. Although Idaho may be well positioned with a relatively young population statewide, some regions are likely to see school enrollment and labor force declines sooner than others.

Idaho Pre/Post Pandemic Labor Market Snapshot

Category	2019	2022	% Change
Population	1.79 mil	1.94 mil	+8.5%
Labor Force	881,891	950,523	+7.8%
Employment	856,245	925,151	+8.0%
Unemployed	25,646	25,372	-1.0%
Unemployment Rate	2.9%	2.7%	-.2%
Labor Force Participation Rate	64.5%	63.1%	-1.4%
New Job Postings	141,111	323,380	+129%