

Payette County Comprehensive Plan Update (2021)

SOCIO-ECONOMIC SECTIONS

Table of Contents

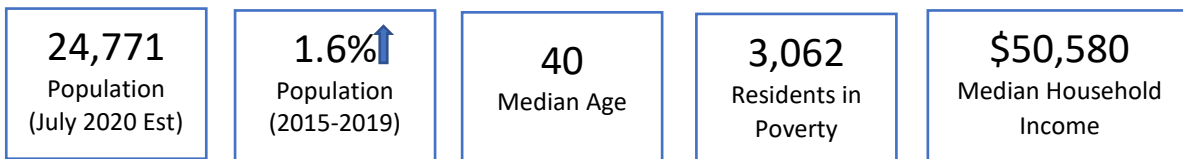
Population.....	2
Migration	6
Educational Attainment.....	7
Poverty.....	8
Housing	13
Agriculture	16
Economic Development.....	26

Population

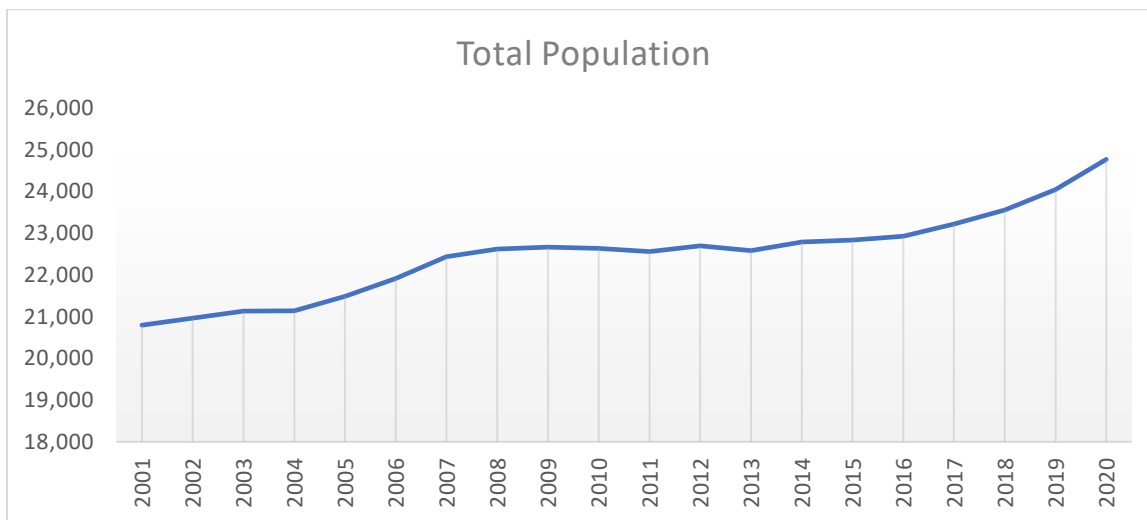
Introduction

The demographics of a region shape the size and composition of the labor force and its overall economy, and vice versa. Stagnant population growth can weaken its economic base and create skill shortages. The patterns described in this section directly impact labor force trends, particularly labor force participation.

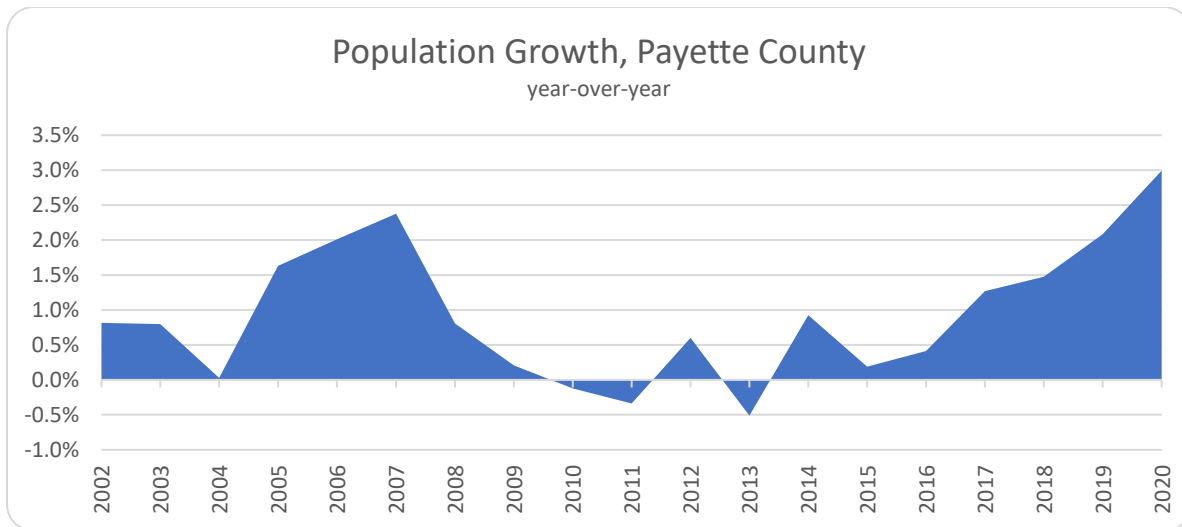
Overview



Payette County is home to nearly 25,000 people, nearly 2,150 more people than a decade ago. Most of the growth occurred over the past five years, adding over 1,900 people since 2015. Payette County’s population has been clipping along at a healthy rate—over 8% from 2015 to 2019, or at an annual rate of 1.6%.



Source: U.S. Census, ACS 5-Year Estimates (2020 is from July 2020 Census Estimates)



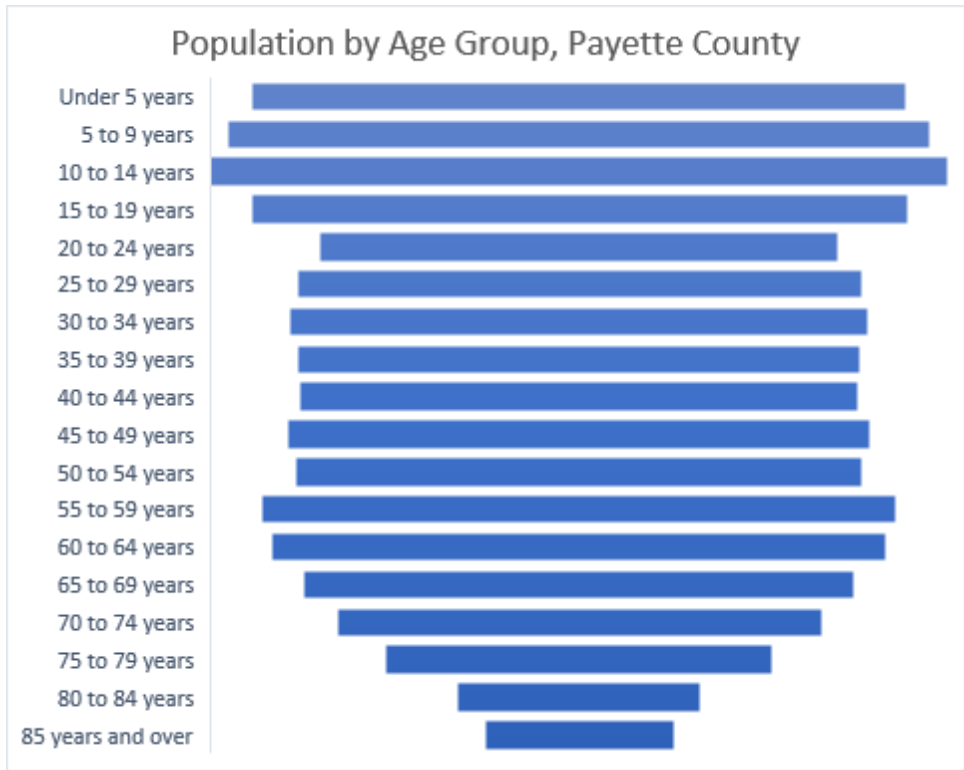
Source: U.S. Census, ACS 5-Year Estimates (2020 is from July 2020 Census Estimates)

The rural areas around the County experienced the most population growth, adding over 1,100 residents in the past five years. July 2020 estimates were not yet released for cities as of the timing of this report. Therefore, 2019 numbers were used—the latest year of data available.

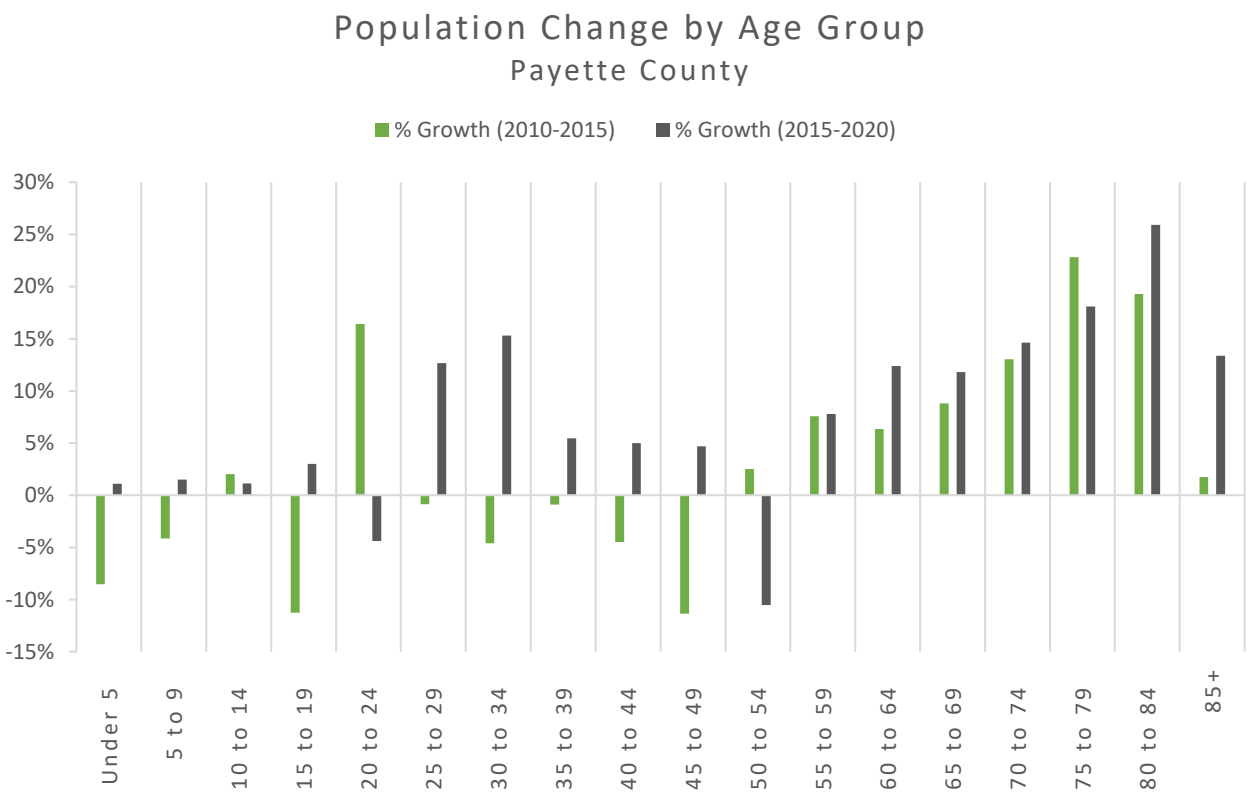
Population by Area	2014	2019	% Change
Payette County	22,754	23,951	5%
Fruitland	4,761	5,264	11%
New Plymouth	1,943	1,493	-23%
Payette (City of)	7,447	7,487	1%
Balance of County	8,603	9,707	13%

Source: U.S. Census, ACS 5-Year Estimates

The age cohorts contributing most to this growth were 30- to 34-year-olds and 60+. The influx of retirees to the area have pushed the median age of Payette County residents to 40 years, above the state and nation—36 and 38 years, respectively. The gains in each cohort far outweigh the losses seen in the 20 to 24 years and 50-to-54-year age cohorts.

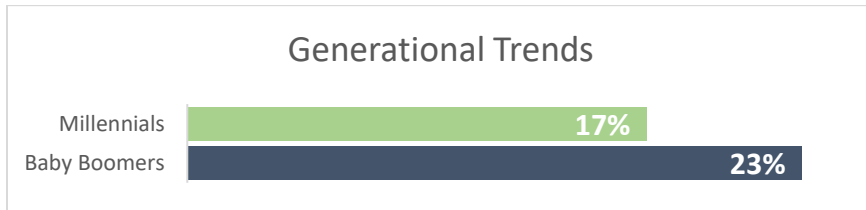


Source: U.S. Census, ACS 5-Year Estimates, 2019



Source: U.S. Census, ACS 5-Year Estimates

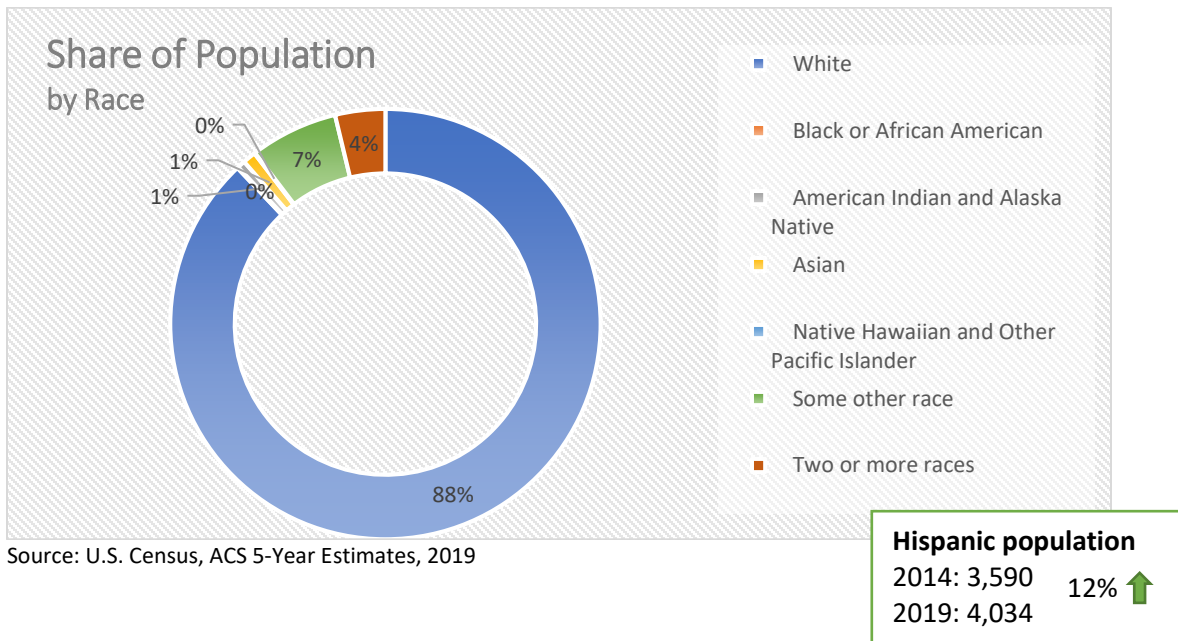
The two largest generations living today are the millennials and baby boomers. Millennials (ages 23-38 in 2019) number 4,204 in Payette County, surpassed by the 5,624 baby boomers (ages 55-73). The largest increase in population is foreseen in the 60+ age groups. With the large number of aging baby boomers, it is not surprising to see such a drastic jump in retirees. This is a national trend. However, baby boomers comprise approximately 22% of the nation's population and millennials 21%, whereas, Payette County lacks in attracting the millennial population—as shown in the graph below.



Source: U.S. Census, ACS 5-Year Estimates, 2019

Diversity in an area can be a driving factor in helping businesses appeal to larger markets and customer preferences. The variety of backgrounds and experiences that can be found in diverse employee groups often brings more creativity into the workplace. Many local economies have economic development efforts that seek to attract a diverse population base in efforts to increase local entrepreneurship and grow local creative endeavors, such as in the arts.

Racial diversity is low in Payette County with only 12% of the total population are non-white. However, the area is more diverse than five years ago when 93% of the population was white, compared to 88% in 2019. There are more Hispanic people moving to the area as well, increasing 12% during the same time period.



Source: U.S. Census, ACS 5-Year Estimates, 2019

Migration

Top counties Payette County residents are moving to

Malheur County, OR
 Canyon County, ID
 Carroll County, MO
 Washington County, ID
 Ada County, ID

Top counties people are moving from into Payette County

Pawnee County, KS
 Stanislaus County, CA
 Los Angeles County, CA
 Clark County, WA
 Pinal County, AZ

Movers from a different state:

1,251

Movers to a different state:

835

Movers from a different county, same state:

633

Movers to a different county, same state:

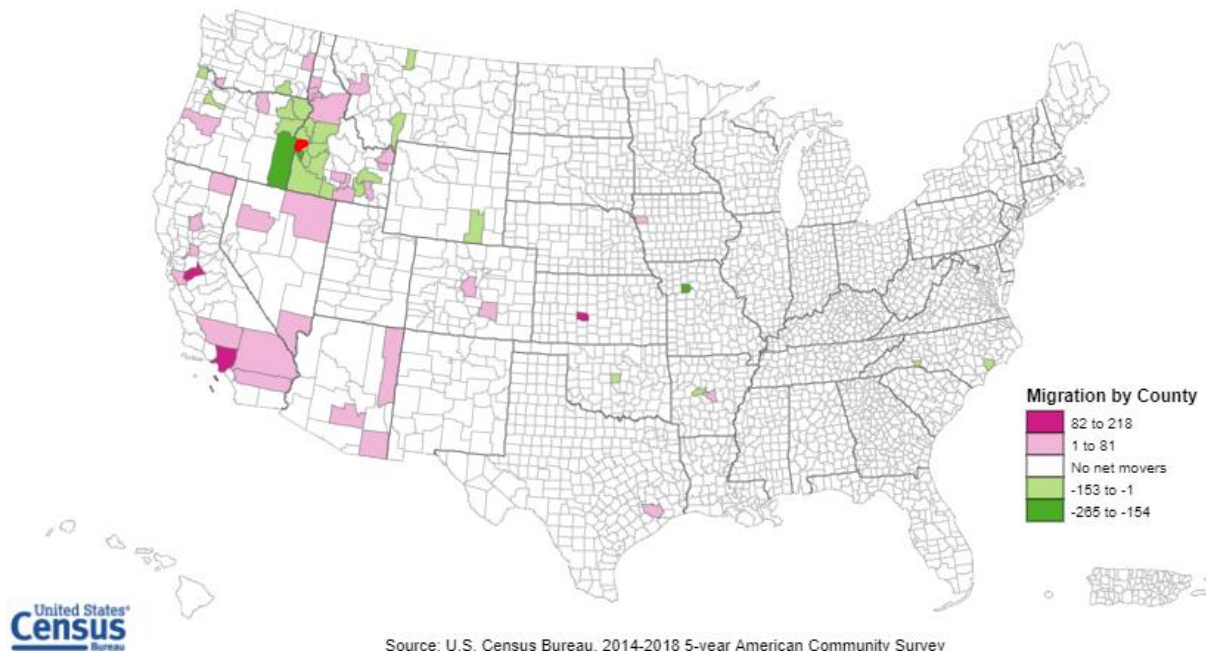
1,002

Movers from abroad:

67

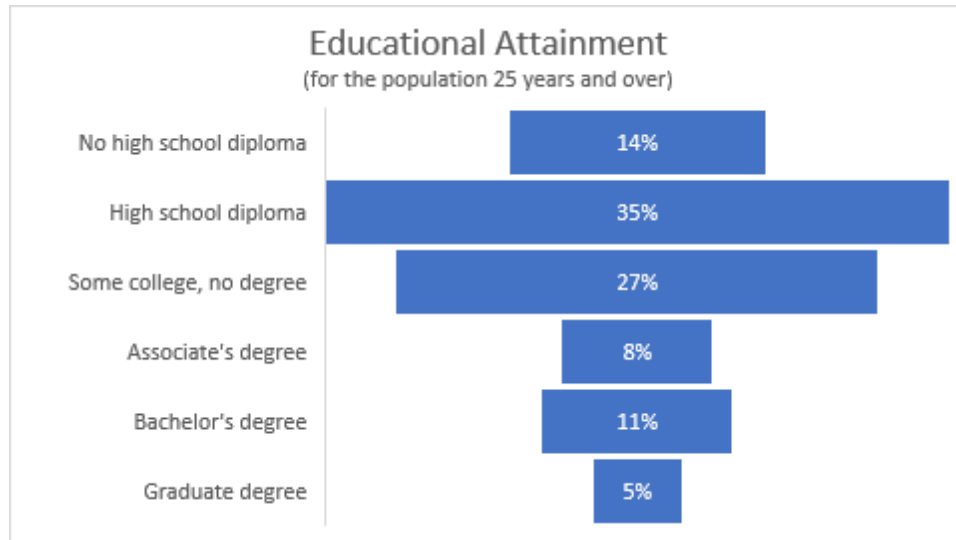


Total Net Migration Flows for Payette County, Idaho

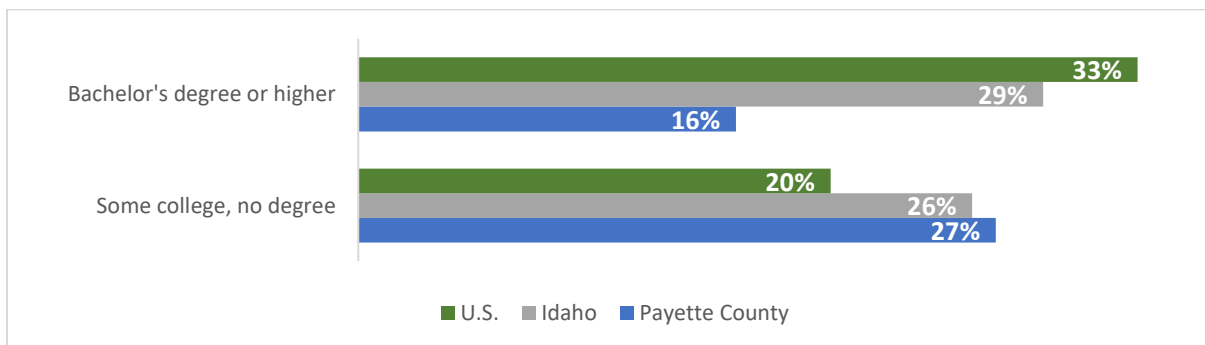


Educational Attainment

Long-term changes in educational attainment cause structural change in the economy. However, there has not been much of an increase in educational attainment over the past decade in Payette County. The share of people holding a graduate degree and higher has increased one percentage point in the past five years. Roughly half the 25 years and over population in Payette County have a high school education or less. The share of bachelor's degree holders and higher has remained at 15-16% the past several years, whereas, it has jumped four percentage points in Idaho and the U.S.—to 29% and 33%, respectively. However, the large share of some college, no degree in Payette County indicates a skilled workforce. The total share is 7 percentage points higher than the nation and barely above the state.



Source: U.S. Census, ACS 5-Year Estimates, 2019



Source: U.S. Census American Community Survey, 5-year Estimate

Poverty

Household income considers incomes of all people age 15 and over occupying the same housing unit. Income levels in Payette County are 16% lower than the state and 20% lower than the nation.

Poverty rates are one measure used to gauge the health of regional economies because it is felt that as the economy grows, so do employment and income growth. Using federal poverty guidelines, 13.4% of residents in Payette County are living in poverty. The rate has significantly dropped in the past five years from 18.5% in 2014.

However, poverty in Payette County remains higher than the state, 11.2%, and the U.S., 10.5%.

Poverty is especially hurtful to children as they can be more impacted by hazardous or unhealthy living conditions, poor educational opportunities, and other risks. These risk factors may impact physical or emotional development, which may further reduce the acquisition of skills required for a career and a steady income.

One in six persons under the age of 18 in Payette County is living in poverty—the same rate as the state and lower than the U.S (18.5%).

Median Household Income

\$50,580

Payette County

\$60,100

Idaho

\$62,840

U.S.

Poverty

13.4%

Payette County

11.2%

Idaho

10.5%

U.S.

Share of Age Group Below Poverty	
All Ages	13.4%
Under 18	16.4%
65+	10.3%

% below poverty		
2014	18.5%	
2019	13.4%	-5.1%

Source: U.S. Census American Community Survey, 5-year Estimate

	Number below poverty	% below poverty
White alone	2516	12.5
Black or African American alone	0	0
American Indian and Alaska Native alone	61	44.2
Asian alone	50	21.9
Native Hawaiian and Other Pacific Islander alone	0	0
Some other race alone	277	18.1
Two or more races	158	19.8
Hispanic or Latino origin (of any race)	593	15.2

Source: U.S. Census American Community Survey, 5-year Estimate

Conclusion

1.5%	4,850	2,103
Projected Average Annual Population Growth	Estimated New Residents	Estimated New Housing Units
(Projected for 2020-2030)		

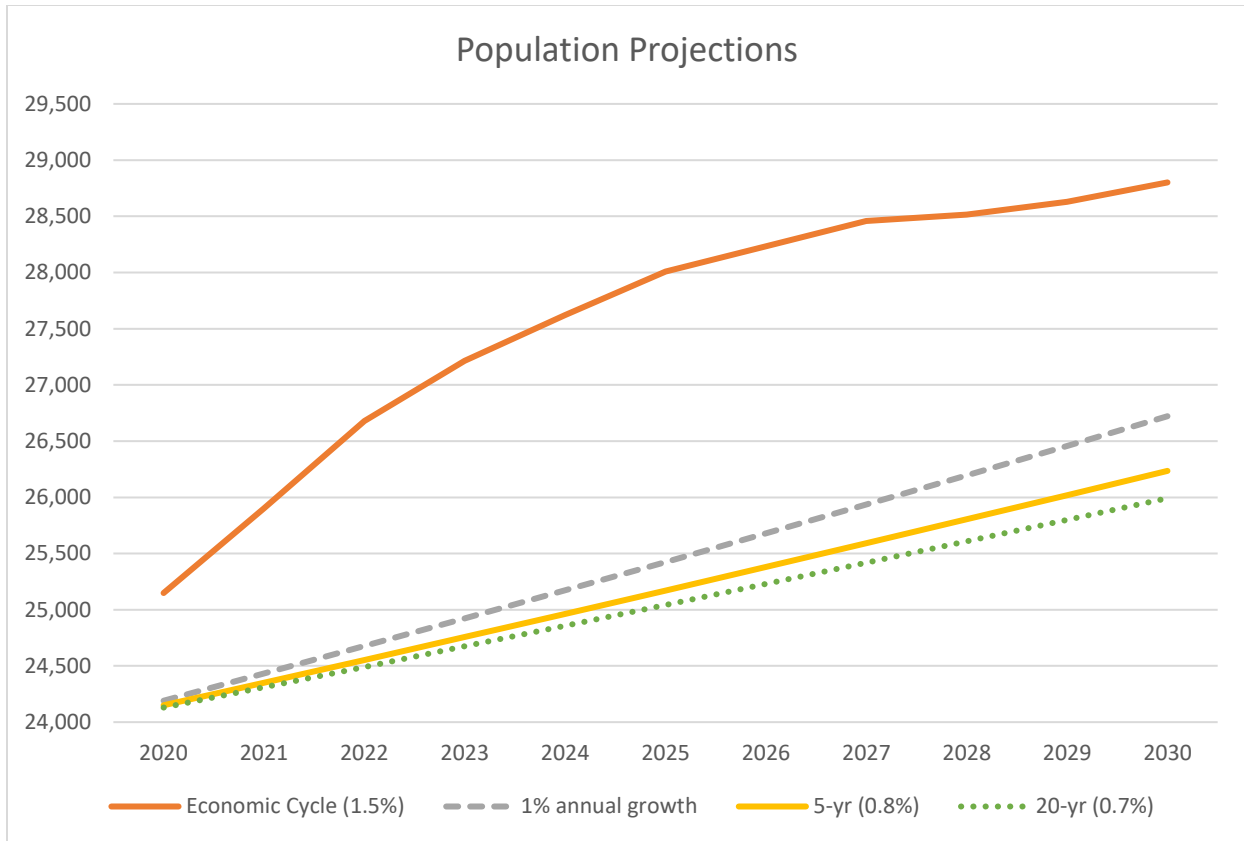
From 2009 to 2019, Payette County added 1,286 people. Nearly 62% of that growth occurred within the cities of Fruitland, New Plymouth, and Payette (City Impact Areas) with Fruitland seeing the most growth and balance of the County. This trend continues as indicated from most recent building permit data trends (see table below).

New Construction Building Permits: Residential (2018-2020)

Geographic Area	Total Building Permits	% of total permits
Payette County	227	39%
Fruitland	211	37%
Payette	114	20%
New Plymouth	26	4%
Total:	578	100%

Source: Cities of Fruitland, Payette, and New Plymouth; Payette County; author's calculations

Projections were analyzed several different ways in order to provide policy makers and planners with the best understanding for potential growth. The following growth scenarios were analyzed. All growth projections are based on historical average annual growth trends.



Source: Cities of Fruitland, Payette, and New Plymouth; Payette County; author's calculations

- **20-yr:** the 20-year trend indicates a 0.7% average annual growth rate. This is the most statistically significant projection (strongest). This projection results in an additional 2,041 people in Payette County by 2030.
- **5-yr:** the shortest trend year shows an average annual growth rate of 0.8%. This projection results in an additional 2,284 people in Payette County by 2030.
- **1% annual growth:** this projection shows what population growth would look like if Payette County grew at an annual rate of 1% over the next 10 years, which has not consistently occurred over the past. This projection results in an additional 2,770 people in Payette County by 2030.
- **Economic Cycle:** this projection uses random annual growth rates indicative of most recent development patterns coupled with past years and previous economic cycles. Over the 10-year period, this projection averages an annual growth rate of 1.5%. However, growth is front-loaded (3-5% and then tapers in latter years) rather than later which is more indicative of what has been occurring in Payette County in more recent years. This projection results in an additional 4,850 people, 2,103 additional housing units in Payette County by 2030.

For comparison, Ada and Canyon counties have averaged 2% annual growth over the past ten years.

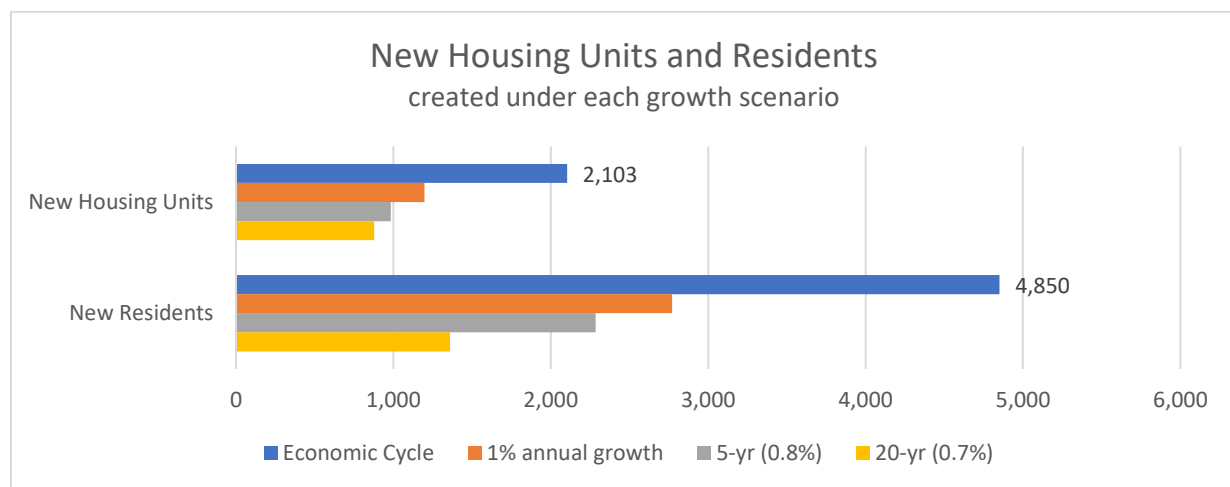
For planning purposes, it is preferred to consider the most aggressive scenario in order to manage growth responsibly. Therefore, the Economic Cycle growth scenario was used based on more recent growth trends. It is understood that the extraordinary growth the region is experiencing may be an anomaly, however, it portrays a more realistic representation.

Based on this Economic Cycle scenario, an additional 4,850 residents can be expected with an additional 2,103 housing units in Payette County by 2030. Although it would be preferred to keep growth constrained to the City Impact Areas, based on existing building permit data, the distribution would be spanned across the different jurisdictional areas as indicated in the table below. Again, the distribution of projections are for planning purposes only.

Projected New Residents and Housing Units based on New Construction Building Permits

Geographic Area	Total Building Permits	Projected New Residents from Existing Building Permits (2018-2020)	Projected New Residents based on Projected Population Growth by 2030 (using existing building permit allocation)	Projected New Housing Units based on Projected Housing Unit Growth by 2030 (using existing building permit allocation)	% of total permits
Payette County	227	554	1,905	826	39%
Fruitland	211	515	1,771	768	37%
Payette	114	278	957	415	20%
New Plymouth	26	63	218	95	4%
Total:	578	1,410	4,850	2,103	100%

Source: Cities of Fruitland, Payette, and New Plymouth; Payette County; author's calculations



Source: author's calculations based on Census data and current trends

Table 1. Age Group Characteristics

Demographic	% Share (2020)	% Share (2030)	Numeric Change (2020-2030)	Total % Change (2020-2030)
Under 5 years	7%	7%	181	11%
5 to 9 years	7%	7%	157	9%
10 to 14 years	8%	7%	-49	-3%
15 to 19 years	7%	7%	71	4%
20 to 24 years	5%	6%	344	27%
25 to 29 years	6%	6%	184	13%
30 to 34 years	6%	6%	-18	-1%
35 to 39 years	6%	6%	42	3%
40 to 44 years	6%	6%	85	6%
45 to 49 years	6%	6%	123	9%
50 to 54 years	6%	6%	75	5%
55 to 59 years	6%	6%	-114	-7%
60 to 64 years	6%	6%	-80	-5%
65 to 69 years	6%	5%	-161	-12%
70 to 74 years	5%	5%	-6	-1%
75 to 79 years	4%	5%	200	21%
80 to 84 years	2%	3%	185	31%
85 years +	2%	3%	186	40%

Source: Emsi, Idaho Department of Labor

Positive growth is projected in age groups 20 to 24 and 75+

A loss in population in age groups 10 to 14 and 55 to 69. Although, the latter age group are not considered prime income earners but typically are settled and have accumulated income wealth. This income is redistributed and spent throughout the Payette County economy.

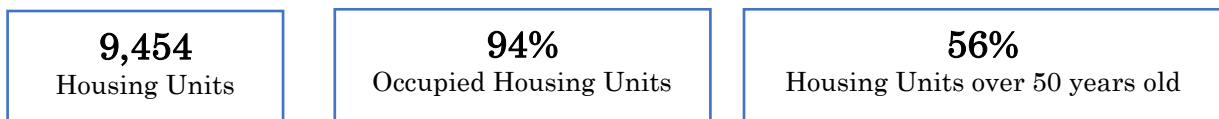
Housing

Introduction

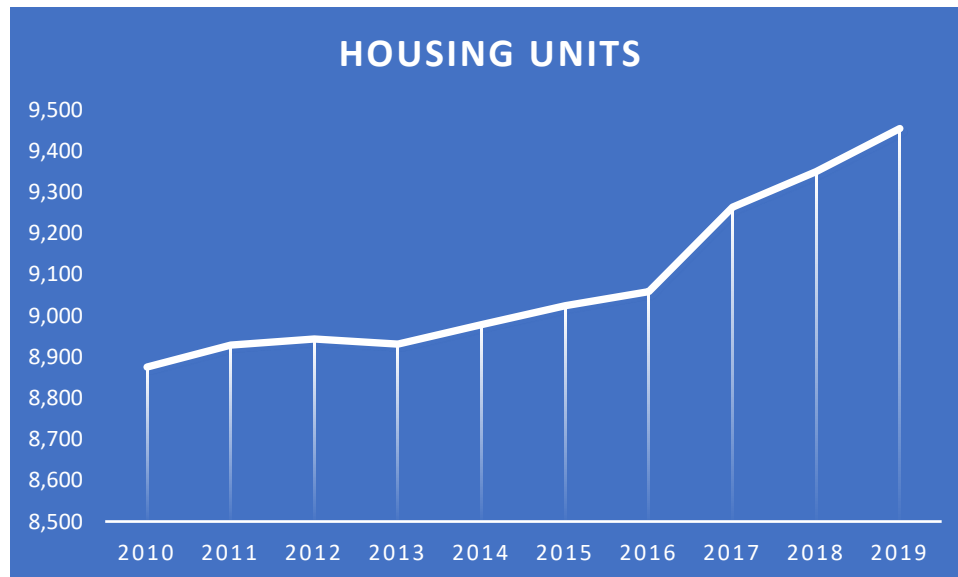
According to Federal Housing Finance Agency data, Idaho has had the highest annual home price appreciation in the U.S. since the third quarter of 2019. This is a result of the large number of people migrating to the State. Payette County is no different. The median sales price of a home in Payette County rose nearly 24% from February 2020 to February 2021, according to data from Redfin. This upward trend has priced many Idahoans out of the market, exacerbating the rental market as well. According to HousingIdaho.org, a significant number of Idaho counties have had a rental vacancy rate consistently below 1% since 2015, which limits housing choices for full-time workers earning less than \$20 an hour, seniors and others on fixed incomes.

Continuous population growth in and around Payette County will further the need for additional housing inventory and more diverse housing types. Within the city impact areas in Payette County, the City of Fruitland has seen the most growth.

Overview



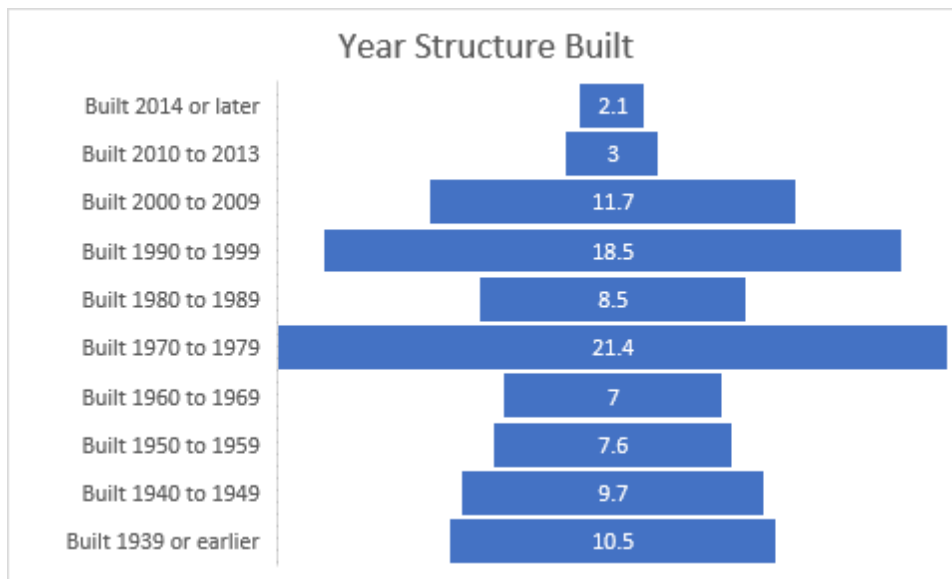
The number of housing units have been trending upward in Payette County. The share of single-housing unit housing, representing 76% of total units, is the same as the state average. Multi-unit housing is below the state average, 9% in Payette County compared to 15% statewide. The share of mobile homes is significantly higher in Payette County (13%) than the state (8%) and nation (6%).

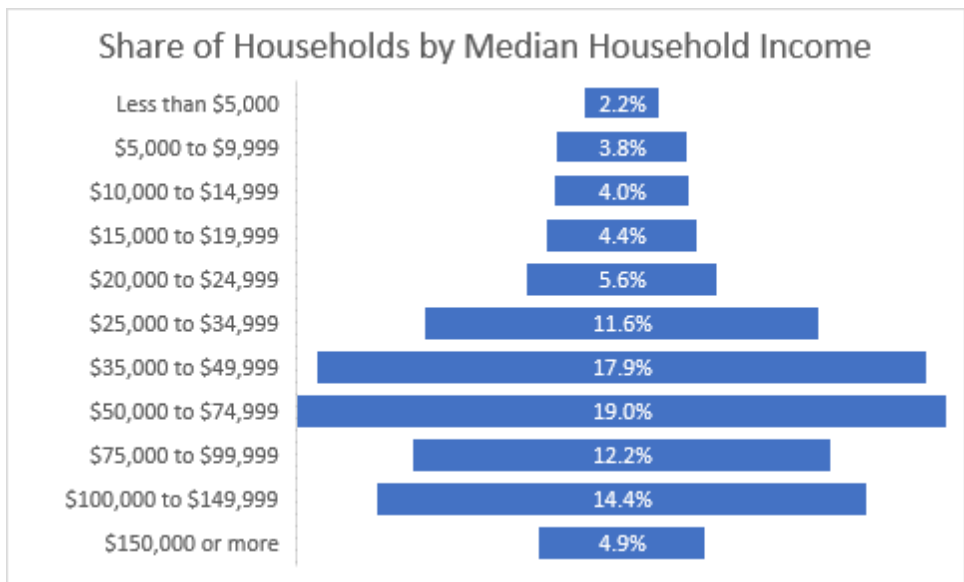
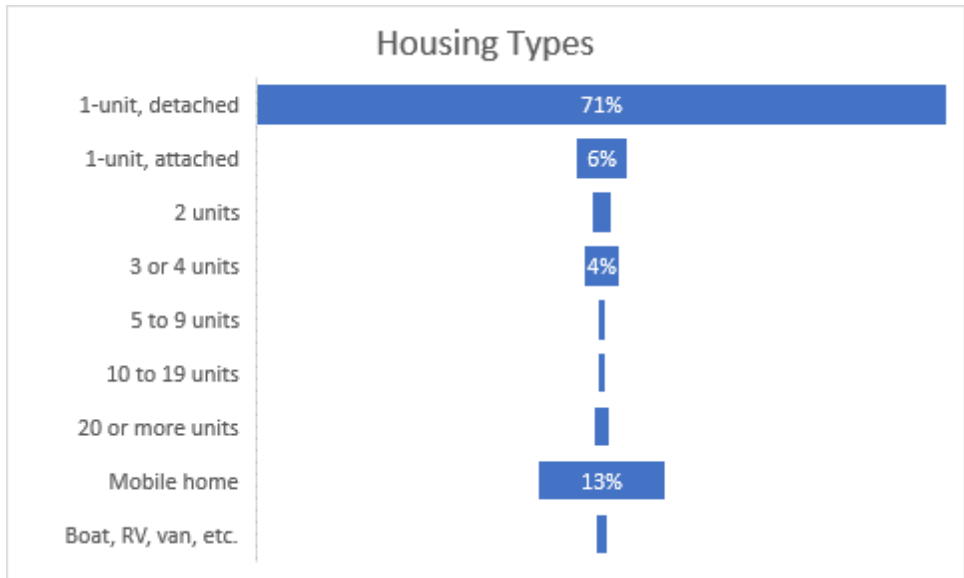


Total housing units	9,454
Occupied	94%
Owner-occupied	73%
Renter-occupied	27%
Vacant	6%

Building Permits	2018	2019	2020	Total
Payette County	77	62	88	227
Fruitland	34	73	104	211
Payette	42	19	53	114
New Plymouth	13	7	6	26
Total:	166	161	251	578

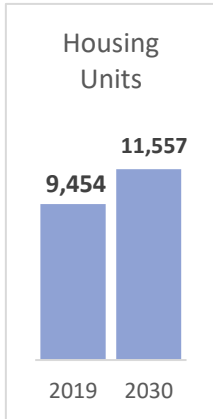
Roughly 50% of all units were built 50 or more years ago. According to the data, however, the area does not appear to suffer from an aging housing stock. There may be some efforts toward renovating older homes and for rental purposes. Keeping up with demand should be established.





Conclusion

The three main housing indicators—population, households, and housing units—have been trending upward over the past five or more years. With all indicators projected to increase over the next ten years, we can expect the trend to continue the upward momentum. An estimated 2,103 additional housing units can be expected as a result of 4,850 new residents by 2030.



Agriculture

Introduction

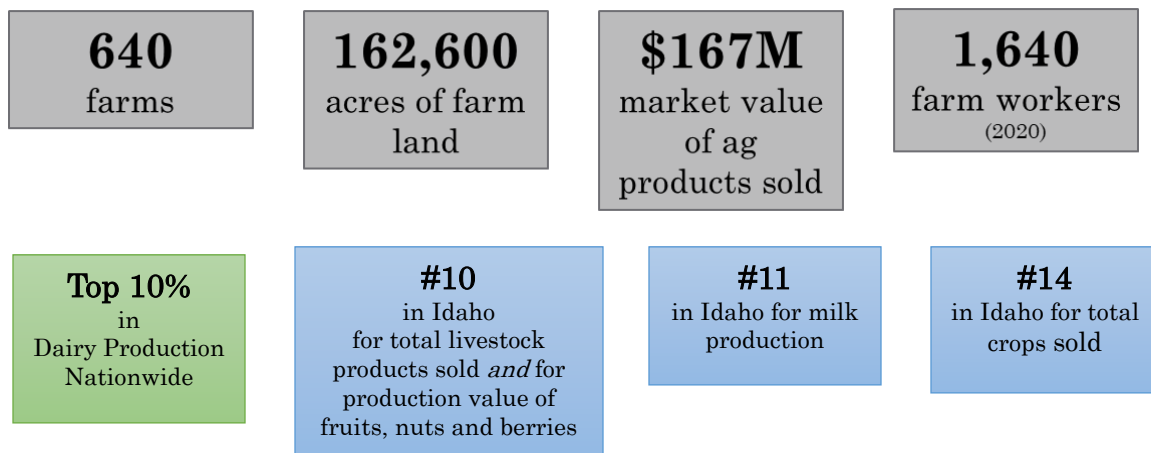
Payette County and the surrounding region has built its economy around the successes of agricultural production. Like much of the rest of rural America in the developing west, the region grew crops to utilize the natural resources around them and grow their local economy. However, in a world of changing eating preferences—driven largely by consumption desires in variety, health, and convenience—numerous new subsector opportunities have emerged. This fast-changing industry requires central location with a well-developed transportation infrastructure, a low cost of doing business, and the availability of agricultural products for food processing.

This analysis relies on a variety of sources, including U.S. Department of Agriculture’s (USDA) Census of Agriculture and Idaho Department of Labor’s Farm Employment Estimates. Both sources were used because they are the most consistently updated sources. Therefore, they can be replicated for benchmarking purposes.

The Census of Agriculture, taken only once every five years, looks at land use and ownership, operator characteristics, production practices, income and expenditures. For farmers and ranchers, the Census of Agriculture is their voice, their future, and their opportunity. For comparison, this analysis illustrates the last two Census of Agriculture years, 2012 and 2017, the most current. The next Census of Agriculture is 2022 and data will take up to two years following to be completely published for public consumption. Consequently, the data in this analysis is the most recent data available. The data and analysis are intended to provide agricultural trends in the Payette County economy to guide policy and should not be used for business or investment purposes.

All numbers summarized in the analysis are from 2017, unless otherwise noted.

Overview



Payette County plays an integral role in the state's agricultural economy. Payette County farmers are among some of the top dairy producers in the country and are some of the largest contributors in products sold for total livestock products and fruits, nuts and berries in Idaho.

Payette County encompasses 640 farms comprising 162,600 acres, averaging 254 acres per farm. While there are approximately 15 less farming operations in the County, the size of the remaining farms has grown, on average. Data from the 2017 USDA Census of Agriculture indicate an overall decline in the agricultural market since the last survey conducted in 2012. Market valuation of products sold is down 29% and net farm income dropped 33% over the five-year period. Government subsidies increased by 38% due to a new federal program, the Market Facilitation Program. This program provides assistance to farmers and ranchers with commodities directly impacted by unjustified foreign retaliatory tariffs, resulting in the loss of traditional export markets. Assistance is available for agricultural producers of non-specialty crops, dairy, hogs, and specialty crops.

Cash rent expense per acre of irrigated cropland:

2019: \$183.00
2020: \$193.00



Total and Per Farm Overview (2012-2017)

	2012	2017	% Change
Total farms			
Number of farms	655	640	-2.3%
Land in farms (acres)	157,090	162,622	3.5%
Average size in farm (acres)	240	254	5.8%
<hr/>			
Market value of products sold	\$236,243,000	\$167,400,000	-29.1%
Government payments	\$652,000	\$900,000	38.0%
Farm-related income	\$5,111,000	\$5,201,000	1.8%
Total farm production expenses	\$202,752,000	\$147,226,000	-27.4%
Net cash farm income	\$39,255,000	\$26,275,000	-33.1%
<hr/>			
Per farm average			
Market value of products sold	\$360,677	\$261,562	-27.5%
Government payments (average per farm receiving)	\$4,967	\$11,682	135.2%
Farm-related income	\$26,620	\$25,749	-3.3%
Total farm production expenses	\$309,545	\$230,041	-25.7%
Net cash farm income	\$59,931	\$41,054	-31.5%

Source: USDA

2%
of Idaho's total agricultural sales

Share of Sales by Type (%)

Crops **30**
Livestock, poultry, and products **70**

Land in Farms by Type (%)

Cropland **35**
Pastureland **61**
Woodland **1**
Other **3**

Irrigated acres: 59,150
(36% of land in farms)

Land Use Practices (% of farms)

No till **4**
Reduced till **4**
Intensive till **18**
Cover crop **3**

The farm size has shifted as the number of small farms (<10 acres) and the number of large farms (>500 acres) have both increased, whereas, the number of mid-size farms has declined—losing 60 mid-range farms.

Farms by Size	2012		2017		Change (2012-2017)	
	Number	Percent Total	Number	Percent Total	Number	Percentage Points
1 to 9 acres	169	25.8%	213	33.3%	44	7.5%
10 to 49 acres	262	40.0%	237	37.0%	-25	-3.0%
50 to 179 acres	129	19.7%	94	14.7%	-35	-5.0%
180 to 499 acres	52	7.9%	46	7.2%	-6	-0.8%
500 to 999 acres	24	3.7%	30	4.7%	6	1.0%
1,000+ acres	19	2.9%	20	3.1%	1	0.2%

Source: USDA

Farms by Value of Sales	2012		2017		Change (2012-2017)	
	Number	Percent Total	Number	Percent Total	Number	Percentage Points
Less than \$2,500	213	32.5%	235	36.7%	22	4.2%
\$2,500 to \$4,999	61	9.3%	91	14.2%	30	4.9%
\$5,000 to \$9,999	97	14.8%	62	9.7%	-35	-5.1%
\$10,000 to \$24,999	84	12.8%	92	14.4%	8	1.6%
\$25,000 to \$49,999	53	8.1%	30	4.7%	-23	-3.4%
\$50,000 to \$99,999	36	5.5%	17	2.7%	-19	-2.8%
\$100,000 or more	111	16.9%	113	17.7%	2	0.7%

Source: USDA

The number of acres for wheat for grain jumped 46% from 2012 to 2017, adding over 2,200 acres, while adding five farms. The increase is attributed to an influx in farming winter wheat. The acres dedicated to vegetables, including potatoes, also increased substantially during the same time period.

Cattle inventory and cattle for sale dropped by 40,200 acres, resulting in the number of cattle and calves sold to drop 47% from 85,464 in 2012 to 45,245 in 2017—coinciding with the 37% drop in market value of such products sold. This also caused the acreage for corn for silage and greenchop to drop.

Farms by Crop Type	2012		2017		Numeric Change (2012-2017)	
	Farms	Acres	Farms	Acres	Farms	Acres
Corn for grain	58	7,446	46	5,782	-12	-1,664
Corn for silage and greenchop	68	7,147	48	6,064	-20	-1,083
Wheat for grain, all	64	4,813	69	7,047	5	2,234
Durum wheat for grain	---	---	3	42	---	---
Other spring wheat for grain	9	472	10	686	1	214
Winter wheat for grain	60	4,341	63	6,319	3	1,978
Oats for grain	---	---	---	---	---	---
Barley for grain	9	178	2	(D)	-7	---
Dry edible beans, excluding limas	19	1,800	11	1,121	-8	-679
Forage - land used for all hay and all haylage, grass silage, and greenchop	318	18,607	305	18,941	-13	334
Sugarbeets for sugar	16	1,739	20	2,729	4	990
Vegetables harvested for sale	25	3,186	28	4,778	3	1,592
Potatoes	8	1,921	16	3,619	8	1,698
Land in orchards	30	945	20	574	-10	-371

Source: USDA

Livestock, poultry, and products	2012		2017		Numeric Change (2012-2017)	
	Farms	Number	Farms	Number	Farms	Number
Cattle and calves inventory*	306	64,345	293	57,364	-13	-6,981
Beef cows	221	9,111	232	10,213	11	1,102
Milk cows	34	16,103	27	14,210	-7	-1,893
Cattle and calves sold	249	85,464	265	45,245	16	-40,219
Hogs and pigs inventory	30	416	29	212	-1	-204
Hogs and pigs sold	35	571	35	1,209	0	638
Sheep and lambs inventory	30	790	33	893	3	103
Layers inventory	101	2,959	106	3,833	5	874
Broilers and other meat-type chickens sold	6	914	1	(D)	-5	---

* The Cattle Inventory surveys provide basic inventory data that describe the nation's cattle herd. The reports provide estimates of the number of breeding animals for beef and milk production as well as the number of heifers being held for breeding herd replacement. Estimates of cattle and calves being raised for meat production are also included. The number of calves born during the previous year is also measured. Therefore, the number of beef and milk cows will not add up to total cattle and calves inventory.

Source: USDA

Market Value of Agricultural Products Sold (2017)	Sales (\$1,000)	Rank in State	Counties Producing Item	Rank in U.S.	Counties Producing Item
Total	167,400	14	44	662	3,077
Crops	50,198	18	44	1,083	3,073
Grains, oilseeds, dry beans, dry peas	11,427	23	42	1,355	2,916
Tobacco	-	-	-	-	323
Cotton and cottonseed	-	-	-	-	647
Vegetables, melons, potatoes, sweet potatoes	18,660	14	41	137	2,821
Fruits, tree nuts, berries	(D)	2	37	311	2,748
Nursery, greenhouse, floriculture, sod	(D)	42	43	1,628	2,601
Cultivated Christmas trees, short rotation woody crops	-	-	14	-	1,384
Other crops and hay	17,890	14	44	140	3,040
Livestock, poultry, and products	117,202	10	44	427	3,073
Poultry and eggs	284	7	43	849	3,007
Cattle and calves	60,688	10	44	225	3,055
Milk from cows	53,508	11	35	156	1,892
Hogs and pigs	(D)	10	40	(D)	2,856
Sheep, goats, wool, mohair, milk	626	14	43	267	2,984
Horses, ponies, mules, burros, donkeys	428	10	44	494	2,970
Aquaculture	2	20	22	308	1,251
Other animals and animal products	(D)	8	42	(D)	2,878

Notes: (D) Withheld to avoid disclosing data for individual operations.
Source: USDA

Agricultural Workers

Many of the employment estimates available today are focused on estimating employment of nonfarm payrolls. The Farm Employment Estimates are a data set provided by the Idaho Department of Labor to help provide an employment picture for those who are interested in farm employment. The data set provides the estimate of operators, unpaid family workers and hired workers at a statewide level as well as county level.

Due to the difficulty in estimating farm employment on a monthly basis, IDOL staff utilize data from a variety of sources that include the U.S.

Department of Agriculture’s Census of Agriculture, U.S. Census Bureau and the Idaho Department of Labor’s Quarterly Census of Employment and Wages (QCEW) data.

Payette is the 9th largest farm employing county in the state, comprising 3% of the state’s total farm employment. Farm employment has consistently increased over the past five years and spiked in 2020, averaging 1,642 farm workers for the year.

179 operations with workers
 1,642 farm workers
 433 operators
 52 certified H2A workers
 423 migrant seasonal farm workers (MSFW)
 \$698/week pay (seasonal)
 #9 in farm employment (of Idaho’s 44 counties)

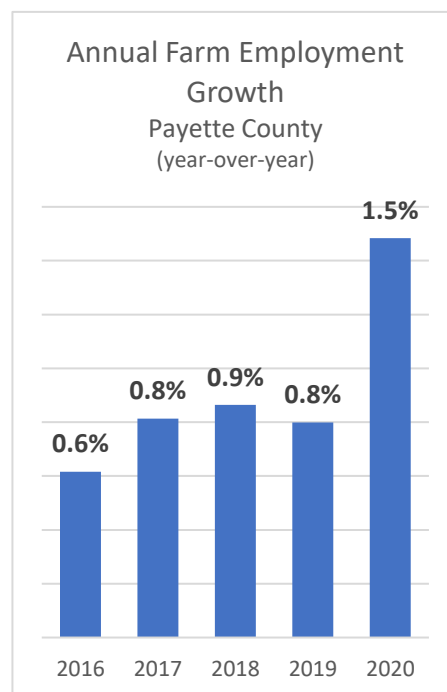
Source: Idaho Department of Labor

Figure 1. Annual Farm Employment by County, Southwest Idaho counties

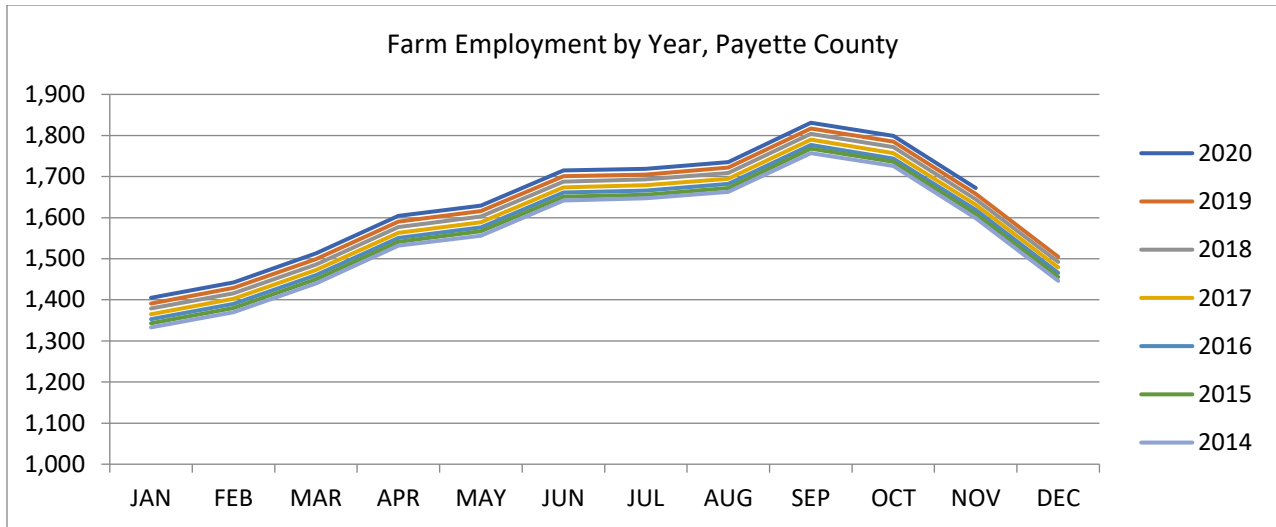
REGION	2016	2017	2018	2019	2020
ADA	2,155	2,185	2,213	2,243	2,287
ADAMS	237	236	235	234	233
BOISE	148	153	158	163	169
CANYON	5,464	5,489	5,513	5,538	5,645
ELMORE	941	940	942	948	963
GEM	1,004	1,006	1,009	1,011	1,017
OWYHEE	1,671	1,592	1,626	1,563	1,599
PAYETTE	1,579	1,592	1,605	1,618	1,642
VALLEY	145	142	141	139	138
WASHINGTON	869	875	882	888	899
SOUTHWESTERN	14,212	14,207	14,323	14,345	14,592

Note: 2020 is estimated through November. December and annual data are not available at this time.

Source: Idaho Department of Labor



Source: Idaho Department of Labor



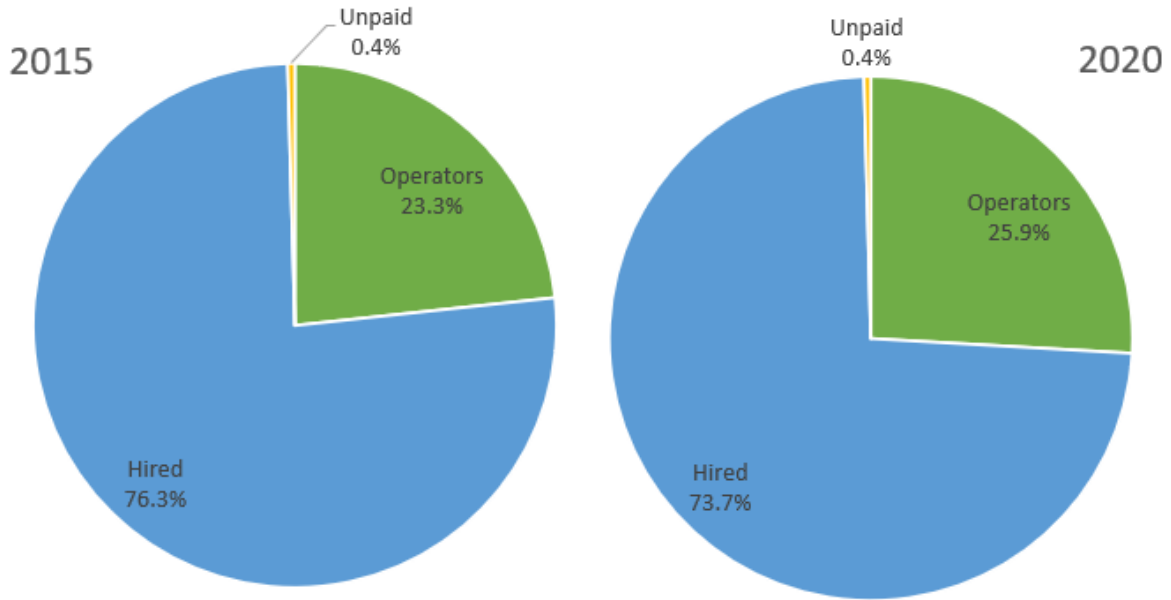
Source: Idaho Department of Labor

--2020 EMPLOYMENT--				
TOP 5 COUNTIES BY EMPLOYMENT				
COUNTY	AVG EMPL	12-MONTH (bar chart)		2019 TO 2020 AVG EMP CHANGE
CANYON	5,645			↑ 1.93%
BINGHAM	3,554			↑ 2.52%
JEROME	3,408			↑ 2.86%
TWIN FALLS	3,278			↑ 0.54%
CASSIA	2,925			↑ 1.01%
BOTTOM 5 COUNTIES BY EMPLOYMENT				
COUNTY	AVG EMPL	12-MONTH (bar chart)		2019 TO 2020 AVG EMP CHANGE
CLEARWATER	195			↓ -0.02%
CLARK	180			↑ 0.88%
BOISE	169			↑ 3.47%
VALLEY	138			↓ -0.67%
SHOSHONE	15			↑ 1.86%

Source: Idaho Department of Labor

There were 1,672 people working on farms in Payette County in November 2020. Of those, nearly 74% were hired workers, another 26% operators, and roughly a few unpaid family members.

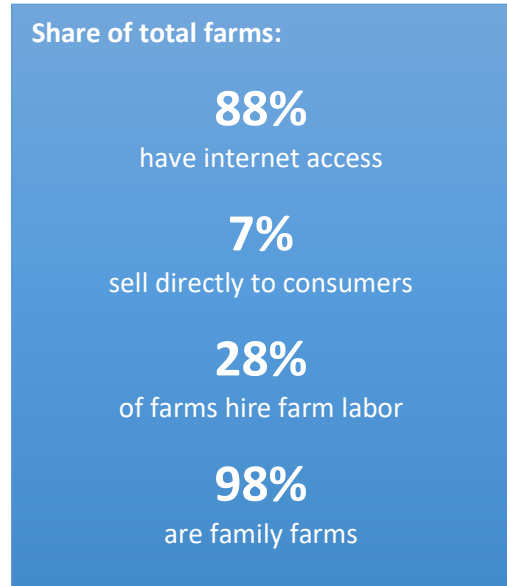
Figure 2. Farm Operations by Type, Payette County (2015-2020)



The term producer designates a person who is involved in making decisions for the farm operation. Producers are synonymous with operators in USDA terms. Decisions may include decisions about such things as planting, harvesting, livestock management, and marketing. The producer may be the owner, a member of the owner’s household, a hired manager, a tenant, a renter, or a sharecropper. If a person rents land to others or has land worked on shares by others, he/she is considered the producer only of the land which is retained for his/her own operation. The census collected information on the total number of male producers, the total number of female producers, and demographic information for up to four producers per farm. There are 1,152 producers in Payette County. Of that, 40% are women and 29% are over the age of 65. There are a large number of new or novice farmers—28% of all producers.

Farm Characteristics, Payette County

Total Producers	1,152
Sex	
Male	694
Female	458
Age	
<35	96
35 – 64	722
65 and older	334
Race	
American Indian/Alaska Native	3
Asian	10
Black or African American	-
Native Hawaiian/Pacific Islander	-
White	1,124
More than one race	15
Other characteristics	
Hispanic, Latino, Spanish origin	33
With military service	134
New and beginning farmers	317



Source: USDA and Idaho Department of Labor

Migrant Seasonal Farm Workers

423 MSFW at peak
September peak month for MSFWs
30% of all hired workers during peak MSFW

The National Farmworker Jobs Program (NFJP) is a nationally directed program created by Congress in response to the chronic seasonal unemployment and underemployment experienced by migrant and seasonal farmworkers (MSFWs).

The NFJP provides funding to help migrant and seasonal farmworkers and their families achieve economic self-sufficiency by offering supportive services to them while they work in agriculture or by helping them to acquire new skills for jobs offering better pay.

2020 (JAN-NOV)		
Top 5 Counties: Most MSFW		
016	STATEWIDE	18,147
011	BINGHAM	2,594
027	CANYON	2,448
031	CASSIA	1,136
077	POWER	1,096
065	MADISON	1,094
Top 5 Counties: Highest Percent of MSFW		
016	STATEWIDE	38
043	FREMONT	66
065	MADISON	66
081	TETON	66
011	BINGHAM	61
077	POWER	61

Source: Idaho Department of Labor

There were 423 migrant seasonal farm workers in Payette County in 2020 at the peak in September. Approximately 30% of all hired workers during the peak season were migrant seasonal farm workers.

Conclusion

This analysis is intended to illustrate the role and importance of agriculture in the Payette County economy and insightful trends to support policy.

The number of farms in Payette County has declined by 15—from 655 in 2012 to 640 in 2017. The farm size has shifted as the number of small farms (<10 acres) and the number of large farms (>500 acres) have both increased, whereas, the number of mid-size farms has declined. The total number of acres being farmed has actually increased by 3.5% since 2012.

Similar to past years, the presence of small, family farming continues to be a staple around Payette County. This trend is similar to national trends where 96% of all U.S. farms are family-owned, according to the 2017 Census of Agriculture Farm Typology report.

Sales have boded well for these smaller farms over the past five years in the County, increasing sales revenues 4-5% from 2012 to 2017. Conversely, government payments have soared as a result of the loss of traditional export markets directly impacted by foreign tariffs and the new federal program to protect U.S. farmers against such retaliatory tariffs.

There is more demand for farm-to-table products and niche organics. The Farmer's Markets are a growing business and there are monthly deliveries of vegetables and fruits that are a subscription that have contributed to the growth in Payette County and the surrounding region.

There is increased demand for certain crops for beverages and many crops remain labor-intensive and are not fully automated. Furthermore, the wage for agricultural workers has also increased due to the lack of interest in the jobs by most job seekers. Producers are willing to pay more now than in the past as it is critical to get these perishables from field to plate.

Farm employment continues to rise and peaked in 2020, averaging 1,642 farm workers for the year. Farm employment represents 3% of the state's total industry. Idaho Department of Labor estimates farm employment through 2028 for each region across the state, however, county level data is not available. Agricultural employment in the southwest region (including Payette County) is projected to grow at an annual rate of 0.6% from 2018 to 2028, compared to the state at 0.8%. Most of the increase in employment is attributed to animal production.

Historically, in Payette County, farm employment has been clipping along at 0.9% each year. At this pace, Payette County is projected to employ roughly 1,800 farm workers by 2030—an additional 157 workers.

Payette County and the surrounding region has built its economy around the successes of agricultural production and will continue to be the backbone of the economy for years to come.

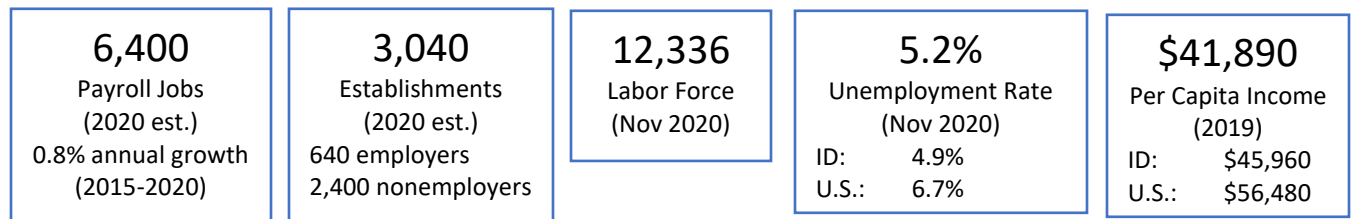
Economic Development

Introduction

Payette County is conveniently located to reach the large markets of the West, located along Interstate 84 (east-west) and US Highway 95 (north-south). The area is ideally positioned to reach major transportation corridors and markets in all directions.

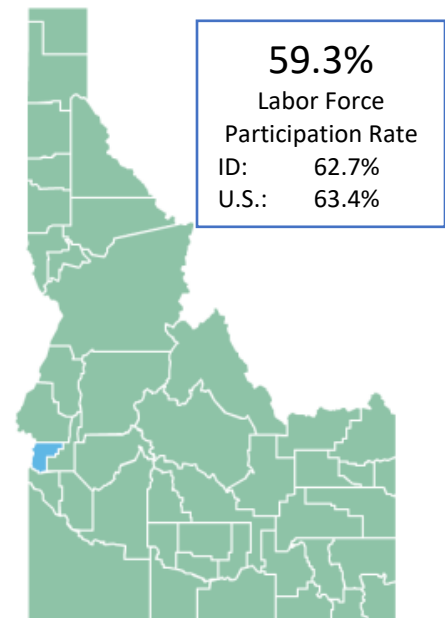
Payette County is one of the major service centers for agricultural production in the State and greater region. As a result, its proximity makes it a desirable location for companies to locate and ease of access to major metropolitan areas such as Boise, Portland, Seattle and Spokane. This region has built its economy around the successes of the agriculture industry.

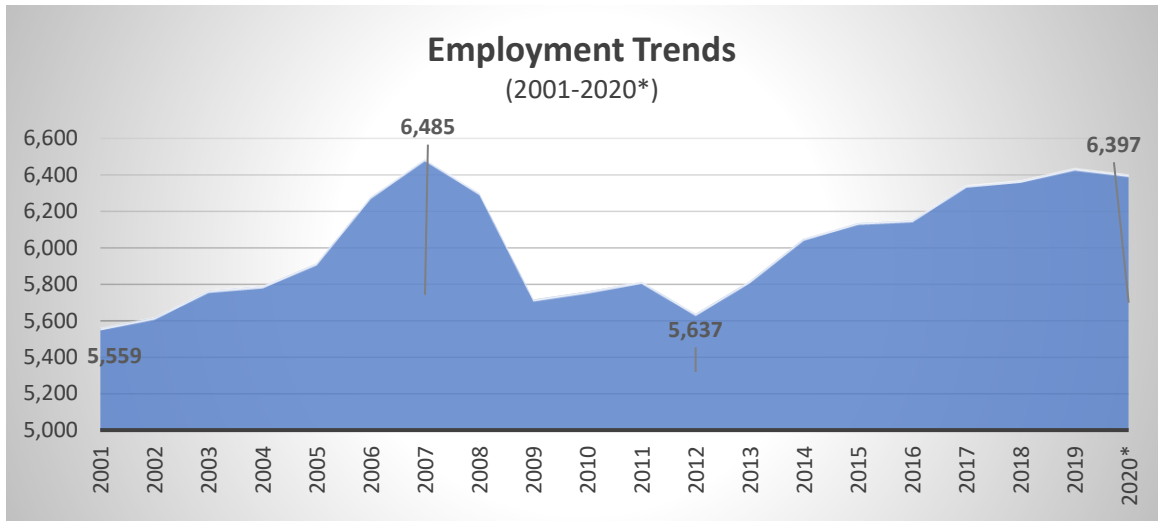
Overview



Payette County is home to nearly 3,040 establishments—79% of which are nonemployers (have no employees), or 2,400, and the remaining 21%, or 640, are employers (that have employees). The nearly 640 employer establishments employ roughly 6,400 people—48% are Payette County residents.

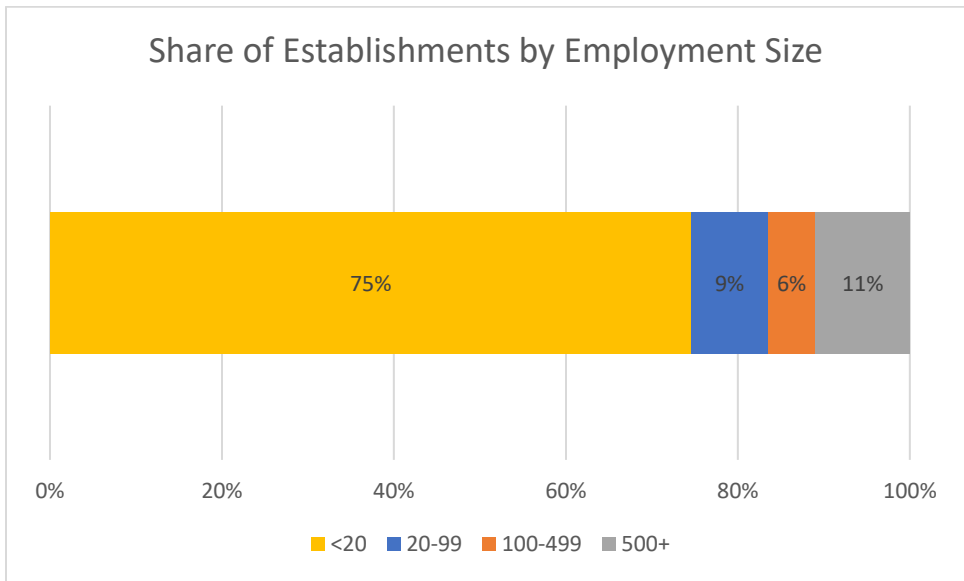
Employment peaked in Payette County at 6,485 in 2007 and experienced two troughs in 2001 (5,559) and 2012 (5,637) as the region started climbing out of the last recession. Over the past five years, 2015 to 2020, Payette County businesses added 260 people to their payrolls—growing at an annual rate of 0.8%. This growth is consistent with historical trends over the past 20 years of data and can be expected over the next 10 years.





*preliminary (Jan-Jun average employment)
Source: BLS, QCEW

Like most businesses across Idaho, majority of businesses in Payette County are small. Of the 640 employers, 75% have fewer than 20 employees and 11% have more than 500. Several large employers are in the government sector but private businesses, such as Woodgrain Millwork and Dickinson Frozen Foods, are among the largest (see table below).

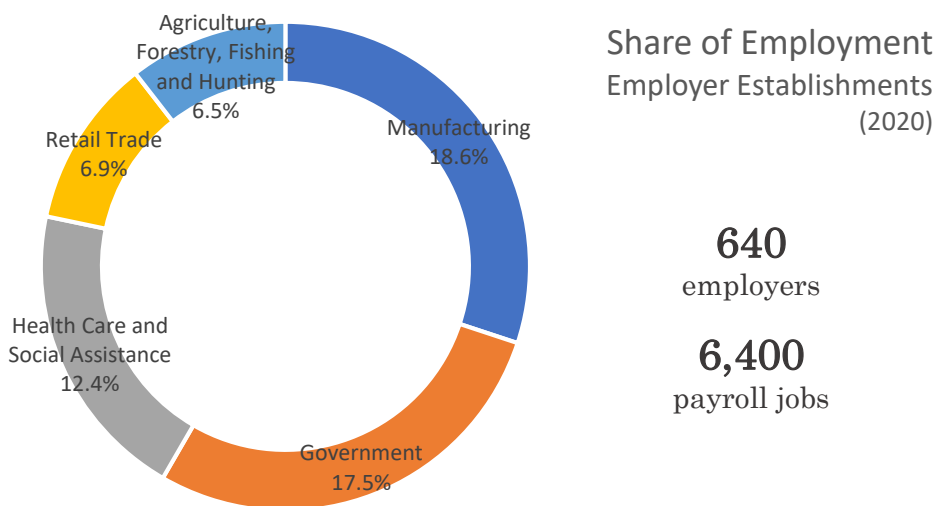


Source: BLS, QCEW

Employer	Ownership	Range
Woodgrain Millwork Inc	Private	250 - 499
Dickinson Frozen Foods Inc	Private	250 - 499
Fruitland School Dist #373	Local Gov	250 - 499
Payette School Dist #371j	Local Gov	100 - 249
American Staffing Inc	Private	100 - 249
New Plymouth School Dist #372	Local Gov	100 - 249
Payette County	Local Gov	100 - 249
Western Idaho Community Action	Private	100 - 249
St Lukes Regional Med Cntr	Private	100 - 249
Seneca Foods Corporation	Private	50 - 99

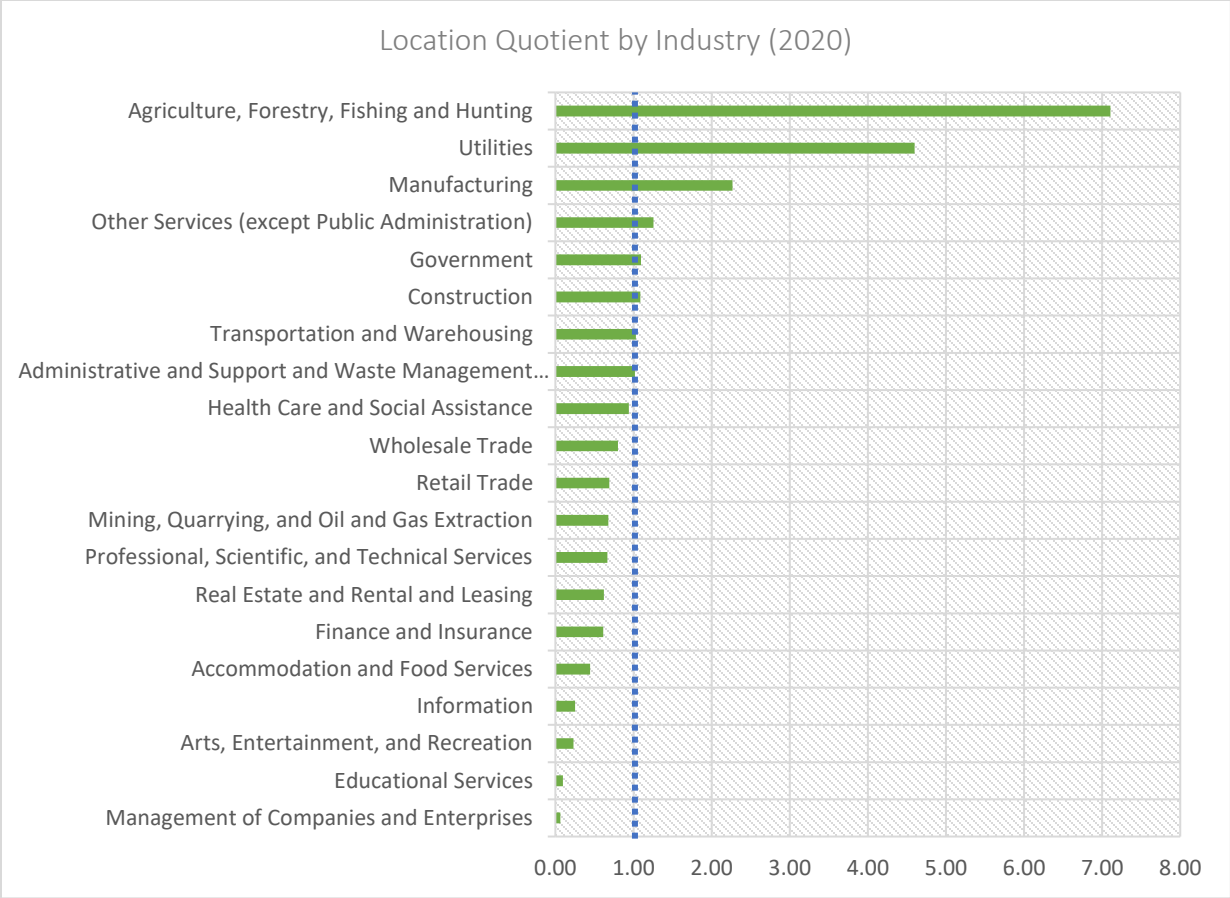
NOTE: Only employers that have given the Department permission to release employment range data are listed. Source: Idaho Department of Labor

Manufacturing is the largest employing sector in Payette County, comprising nearly 19% of total employment (1,263 jobs). Government closely follows, employing 1,188 in 2020. The composition of largest employing sectors slightly differs than other regions across the state and nation. Typically, health care is higher in its position and construction usually plays a larger part in economies. This illustrates the large role the agriculture sector plays in Payette County’s economy. Additional farm employment is captured in the agricultural section and addresses the 1,640 employed in the sector seasonally.



Source: BLS, QCEW

A location quotient, or LQ, explains how concentrated an industry is to Payette County. It identifies the industries that employ more workers in the region than the national average for that same industry. Anything above 1.0 indicates a higher concentration than the national average.

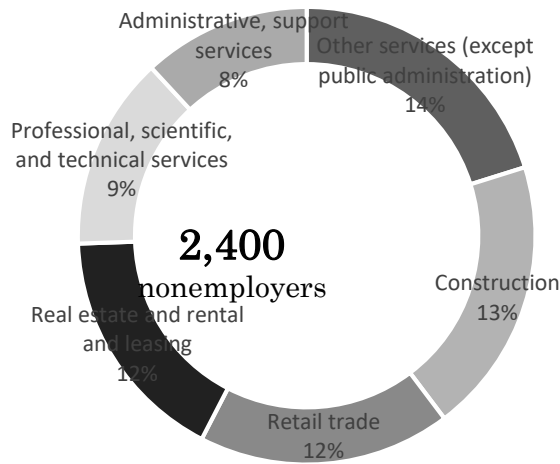


Source: Emsi, Idaho Department of Labor

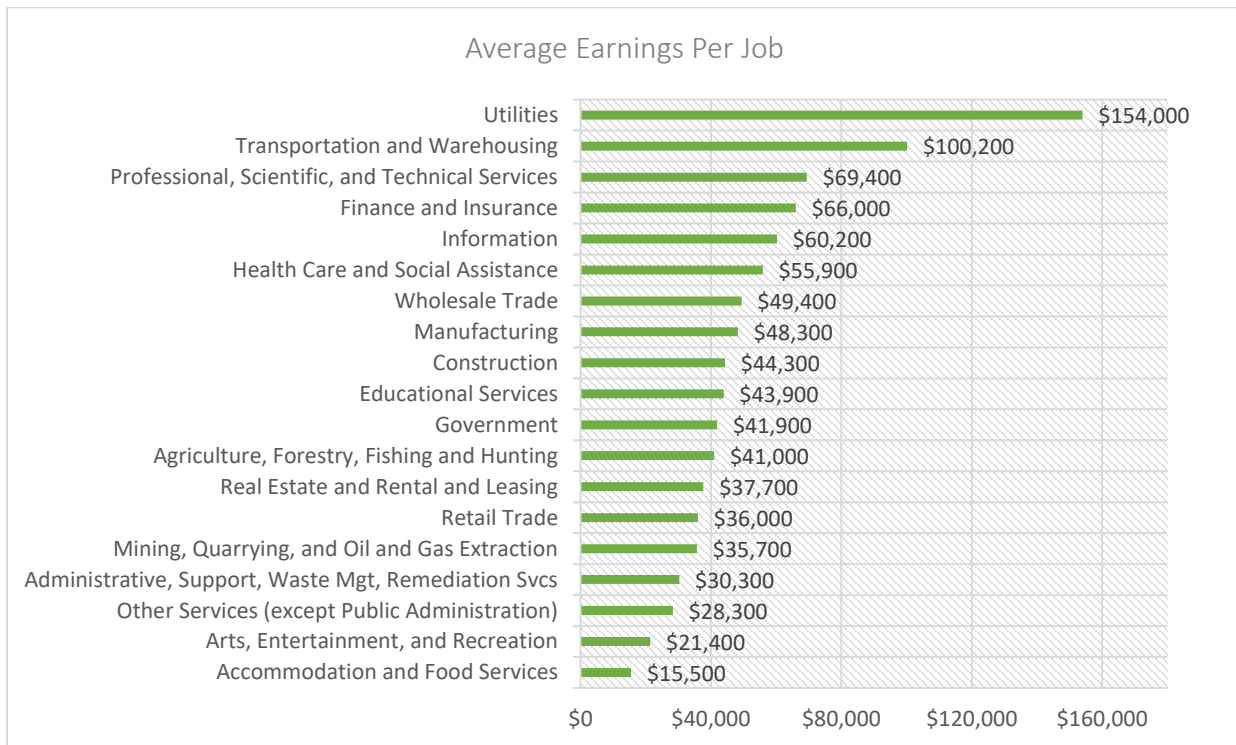
Construction does appear, however, to have a larger number of self-employed individuals, as shown in the nonemployer statistics. The largest share of nonemployers is in other services—which includes personal care services, auto repair, electronic and equipment repair, etc. Nonemployers contributed \$136M in sales and revenue to the County in 2018.

Employers in Payette County spent \$249M in payroll in 2019. The average job in the County pays \$38,700 (covered wages), with utilities offsetting the curve, averaging \$154k per employee as well as the transportation and warehousing sector paying \$100k per employee, on average.

Share of Nonemployer Establishments
by Industry
(2018)



Source: U.S. Census, Nonemployer Statistics



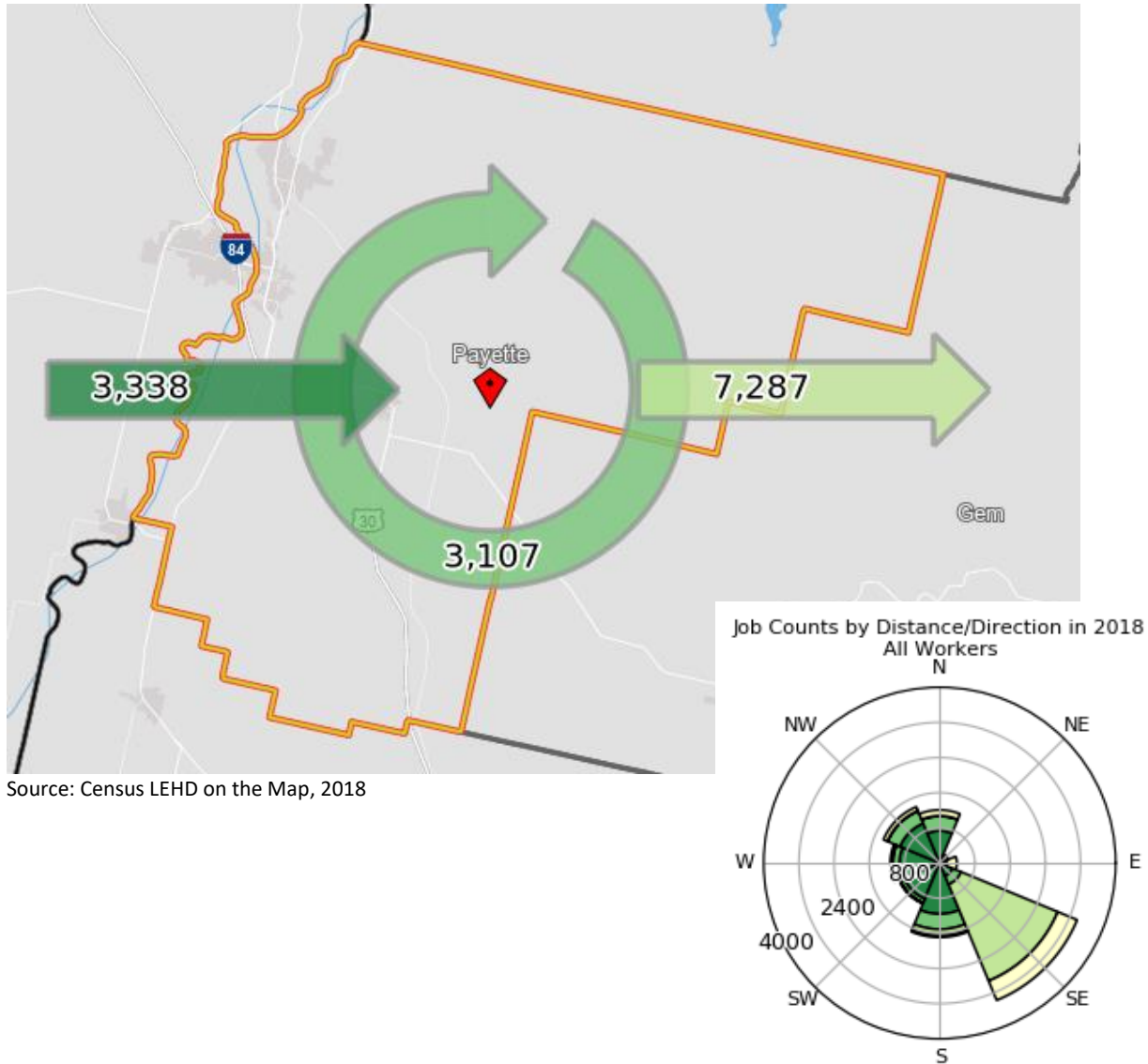
Source: BLS, QCEW

Commuting data allow economic development professionals to understand how many and which skills are leaving the area for work or vice versa. These data show the opportunities in the untapped segments of the labor pool.

According to Census' LEHD on the Map program, 70% of Payette County residents commute outside the area for work. Despite this, there is a cross-haul of workforce as many are coming into Payette County to

work as well—3,340. Nearly 52% of the jobs available in Payette County are being filled by people who live outside the County.

Figure 3. Payette County Commuting Pattern Flows



Source: Census LEHD on the Map, 2018

There is a large portion of the workforce that is willing to drive far distances for work. The table below illustrates how many residents drive within a certain distance of Payette County. Over half commute less than 10 miles to work while one quarter drive 25 to 50 miles. Over 30% of residents drive to Ontario, Oregon and Boise, Idaho each day for work. The 7,300 people leaving the County each day for work provides an opportunity to tap into a large segment of the labor pool.

Table 2. Distance Residents Drive to Work, 2018

	Count	Share
Total All Jobs	10,394	100.00%
Less than 10 miles	5,237	50.40%
10 to 24 miles	1,467	14.10%
25 to 50 miles	2,567	24.70%
Greater than 50 miles	1,123	10.80%

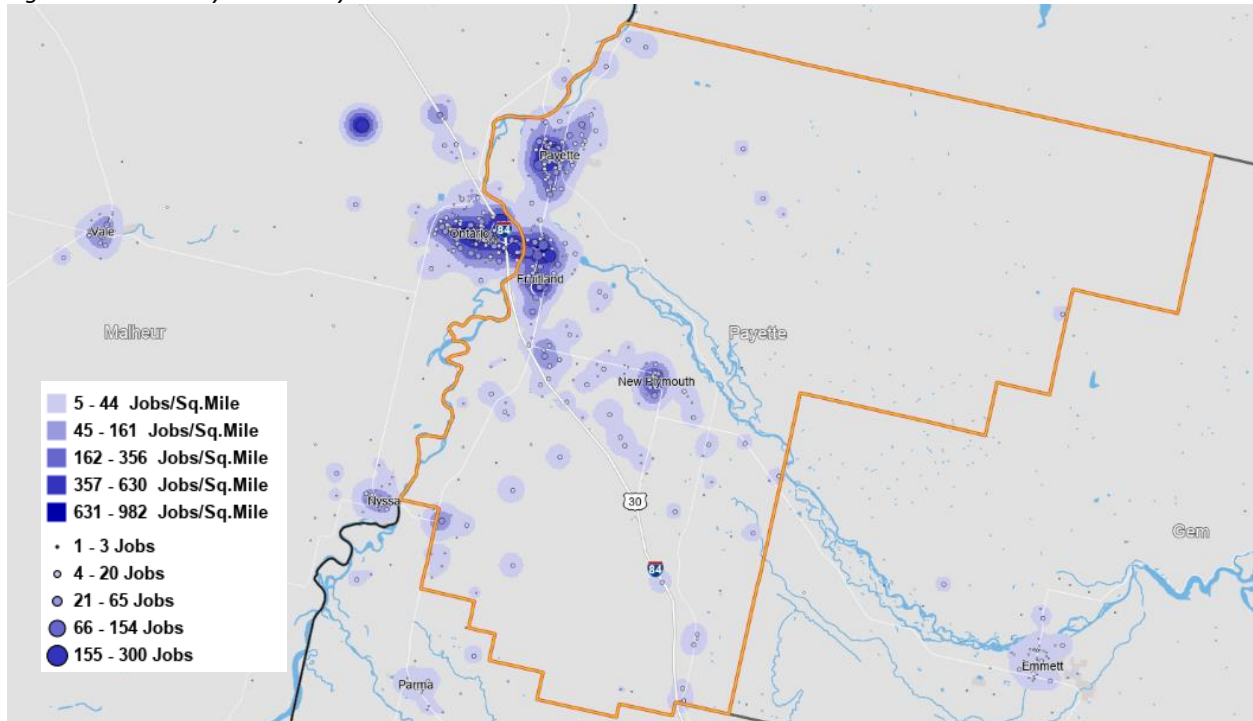
Source: Census LEHD on the Map, 2018

Table 3. Where Payette County residents work, 2018

City	Count	Share
Ontario, OR	2,127	20.5%
Boise	1,114	10.7%
Payette	1,024	9.9%
Fruitland	1,018	9.8%
Nampa	538	5.2%
Meridian	354	3.4%
Caldwell	330	3.2%
New Plymouth	263	2.5%
Weiser	184	1.8%
Twin Falls	123	1.2%
All other locations	3,319	31.9%

Source: Census LEHD on the Map, 2018

Figure 4. Where Payette County residents work



Source: Census LEHD on the Map, 2018

Per capita income is measured in terms of a family’s “money income.” Money income includes wages and salaries plus other income such as social security and unemployment benefits, to name a few. Comparatively, average earnings are the total industry earnings for a region divided by number of jobs. Hence, per capita income is a metric to illustrate a family’s buying power, whereas, average earnings is a metric used by industry and business to see a wage comparison of different areas.

Table 4. Per Capita Income (adjusted in 2019 dollars), 2014-2019

	2014	2019	2014-2019
Payette County	38,207	41,890	9.6%
Idaho	40,935	45,968	12.3%
U.S.	50,833	56,490	11.1%

Source: U.S. Bureau of Economics

Economic development efforts in Payette County and around the region are led by the Snake River Economic Development Alliance. The organization serves the counties of Payette and Washington in Idaho and Malheur County in Oregon. They recruit new businesses and assist local businesses with retention and expansion efforts. The business opportunities are diverse with a mix of well-established manufacturers, an expanding high technology sector, world-class outdoor recreational opportunities, and some of the nation’s most livable communities.

TARGET INDUSTRY SECTORS

1. Agriculture - Food and Beverage Processing
2. Rec Tech - Outdoor Recreation
3. Distribution & Transportation
4. General Manufacturing
5. Internet Based Services
6. Solar & Geothermal Renewable Energies

Infrastructure¹

The region is conveniently located to reach the large markets of the West, located along Interstate 84 (east-west) and US Highway 95 (north-south). The area is ideally positioned to reach major transportation corridors and markets in all directions.

Air service is provided by a General Aviation Regional Airport in Ontario, Oregon that is within a few minutes of travel time; two (2) general aviation public use airports, one in Payette, and another in Weiser, Idaho; and the Boise Idaho Airport with direct connections to International Flights is 50 minutes from the area.

Nation Rail Service is provided by Union Pacific. Local service is provided by the short lines of Idaho Northern & Pacific Railroad in Idaho (parent company Rio Grand Pacific), and Oregon Eastern Railroad (parent company Wyoming & Colorado Railroad).

Affordable Infrastructure & Energy Costs

¹ Source: Snake River Economic Development Alliance

The cities of Weiser, Payette, Fruitland and New Plymouth, Idaho as well as Ontario, Nyssa, and Vale, Oregon have all improved their water and sewer facilities which were all built for expansion preparing for the future.

Idaho Power provides electrical service for the region, with the exception of Weiser, Idaho. Idaho Power rates for business and industrial use is 4-6 cents kWh.

Within the Weiser, Idaho city limits, electric power rates for a large business run about 3 cents kWh, plus demand charges and minimum monthly service charge.

The NW Williams Gas Line is conveniently located throughout the area. Intermountain Gas provides delivery of natural gas to Western Idaho. Rates for small commercial and large volume sales customers range from 74.6¢ per therm to 53.3¢ per therm. The cost of large volume firm transportation starts at around 6.0¢ per therm and can be as low as 0.6¢ per therm. Cascade Gas provides delivery of natural gas to Eastern Oregon with similar rate structure.

Snake River Economic Development Alliance Properties include:

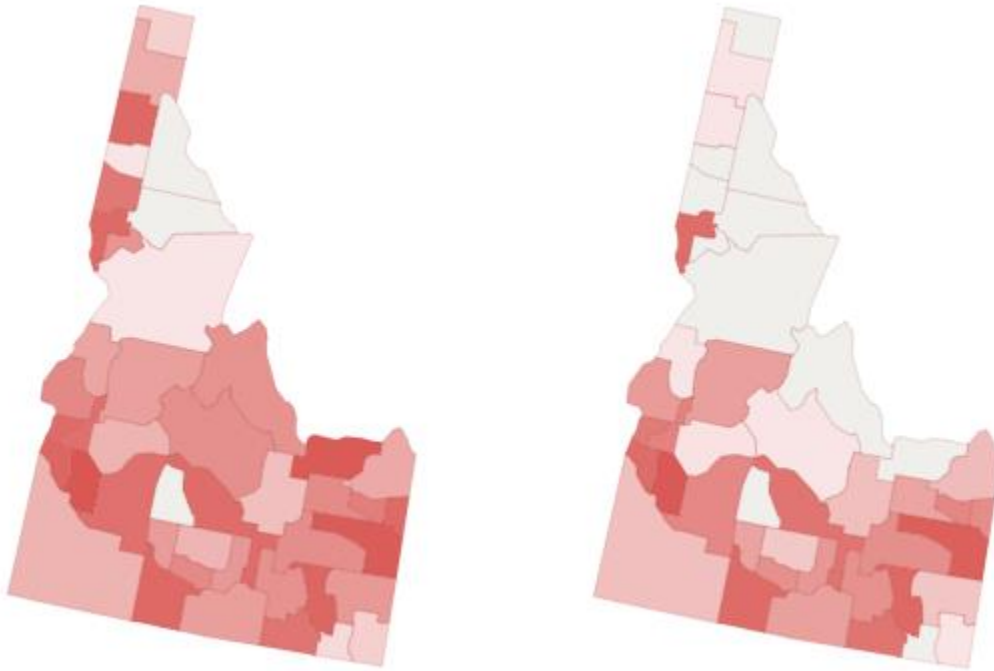
- Certified Site, 75 acres, \$20,000.00/acre, easy I-84 & US Highway 20-26 access. Ontario, Oregon
- 7,000+ Commercial space on 3 acres located right along US Highway 95 for lease or sale! Can be split. Only \$850,000! Fruitland, Idaho
- 200 acres ideal location for Data Center, distribution center or manufacturing! Ontario, Oregon
- NEW - Greenfield Site, Total 65 acres zoned light industrial. Can be split if needed. Fruitland, Idaho
- NEW - Commercial/Residential, 56+ acres of mixed density in Ontario with easy access to city services and freeway.

Idaho's government has turned its attention to improving the state's broadband infrastructure in the past decade. Since 2010, LINK Idaho has been awarded over \$4.4 million in federal grants for Idaho's Broadband Initiative. An additional \$8.2M was put toward improving broadband infrastructure projects in Idaho. Since 2011, access to a wired connection of at least 10mbps has improved from 76.8% to 89.6% of all Idaho residents.

More recently, the Idaho Broadband Grant program was created to provide funding to public organizations to purchase broadband infrastructure, equipment and services from private internet service providers. A total of nearly \$50M was distributed to Idaho communities as part of the CARES Act. The City of Payette was the only Payette County community to request and receive funding for this grant cycle.

Stable, reliable broadband infrastructure positions Idaho communities to attract business and enhance quality of life for their citizens. Over 85% of Payette County residents have access to 25 mbps of broadband coverage—the lowest requirement by the FCC. Roughly 76% have access to 1 gig with 16 providers servicing the County.

Figure 5. Broadband Coverage by County



85% of Payette County residents have access to **25 mbps** 76% of Payette County residents have access to **1 gig**

Source: U.S. Census

Conclusion

Payette County is conveniently located to reach the large markets of the West, located along Interstate 84 (east-west) and US Highway 95 (north-south). The area is ideally positioned to reach major transportation corridors and markets in all directions.

Payette County is one of the major service centers for agricultural production in the State and greater region. As a result, its proximity makes it a desirable location for companies to locate and ease of access to major metropolitan areas such as Boise, Portland, Seattle and Spokane. This region has built its economy around the successes of the agriculture industry and small firms.

The industries targeted by local economic development professionals complement the existing economic base. There are opportunities to expand the supply chain by identifying gaps for existing users.

Manufacturing, agriculture, and utilities tout higher concentrations of employment than national averages. The construction and healthcare sectors are projected to experience the highest growth over the next decade, while manufacturing is expected to decline slightly and information drastically more. Projection estimates show an additional 900 jobs over the next 10 years. The 7,300 people leaving the County each day for work can be leveraged for attracting new businesses to the area and expansion of existing businesses.

Description	2010	2020	2030
Agriculture, Forestry, Fishing and Hunting	539	442	468
Mining, Quarrying, and Oil and Gas Extraction	<10	20	24
Utilities	96	110	113
Construction	335	366	468
Manufacturing	1,110	1,263	1,227
Wholesale Trade	260	206	269
Retail Trade	405	470	544
Transportation and Warehousing	186	260	288
Information	174	31	18
Finance and Insurance	171	172	161
Real Estate and Rental and Leasing	53	64	73
Professional, Scientific, and Technical Services	183	281	416
Management of Companies and Enterprises	12	<10	<10
Administrative and Support and Waste Management	264	413	472
Educational Services	11	17	29
Health Care and Social Assistance	509	837	1,126
Arts, Entertainment, and Recreation	29	25	29
Accommodation and Food Services	236	272	305
Other Services (except Public Administration)	246	334	405
Government	1,177	1,188	1,239
All Industries	6,002	6,778	7,673

Numeric Change (2010-2020)	% Change (2010-2020)
(97)	-18%
---	---
14	15%
31	9%
153	14%
(54)	-21%
66	16%
75	40%
(142)	-82%
1	0%
11	21%
98	54%
---	---
149	56%
6	57%
328	64%
(5)	-16%
37	16%
87	35%
11	1%
776	13%

Numeric Change (2020-2030)	% Change (2020-2030)
26	6%
5	24%
3	2%
103	28%
(36)	-3%
64	31%
73	16%
28	11%
(14)	-44%
(11)	-7%
9	14%
135	48%
---	---
59	14%
12	70%
289	35%
4	17%
32	12%
71	21%
51	4%
896	13%

Source: Emsi, Idaho Department of Labor