

Washington State Employment Estimates and Forecasts for Transportation Investment Planning

Washington Transportation Commission
January 18, 2012

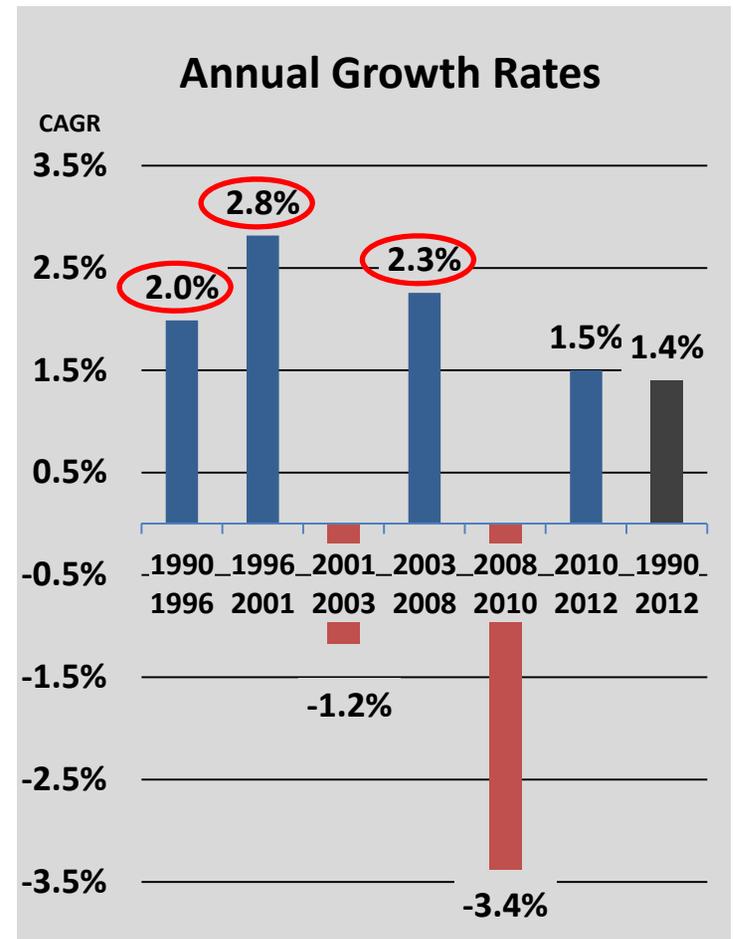
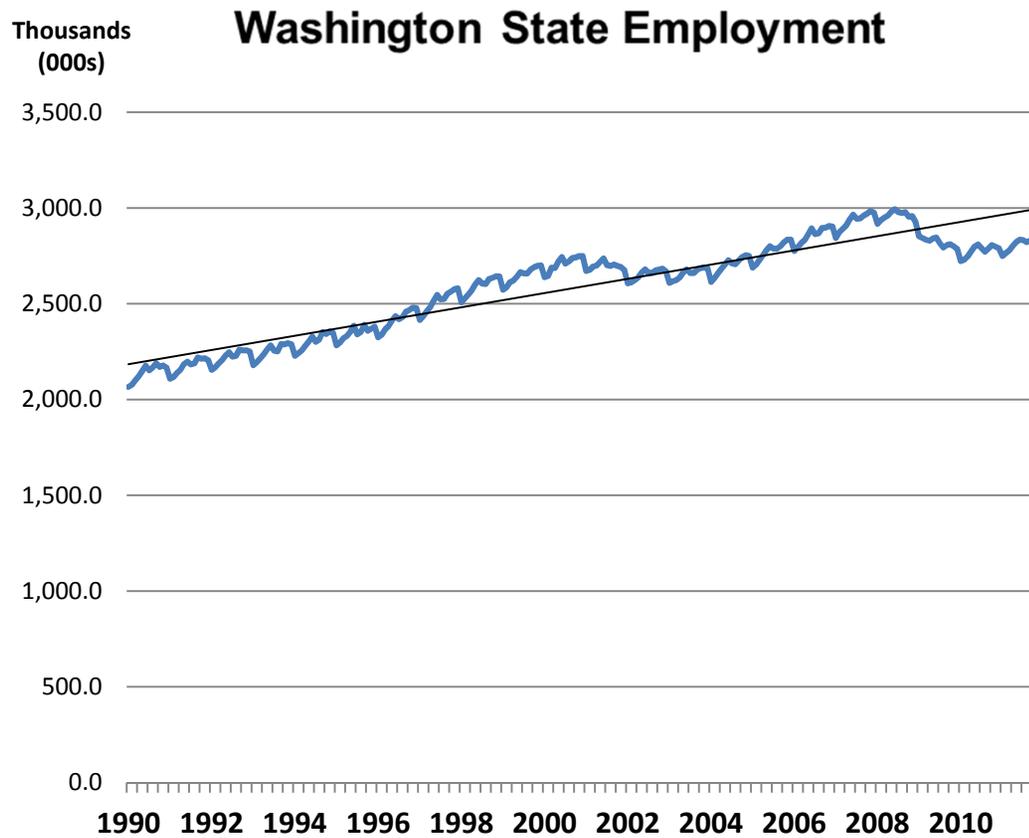
Chris Mefford, President & CEO
Community Attributes Int'l
Seattle, Washington



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Context: Statewide Employment Trends and Outlook	Data charts
Regional Economic Drivers, Industry Employment and Transportation Needs	Discussion, Data charts
County Growth and County Sectors	Data, maps
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Statewide Employment, 1990 to 2011



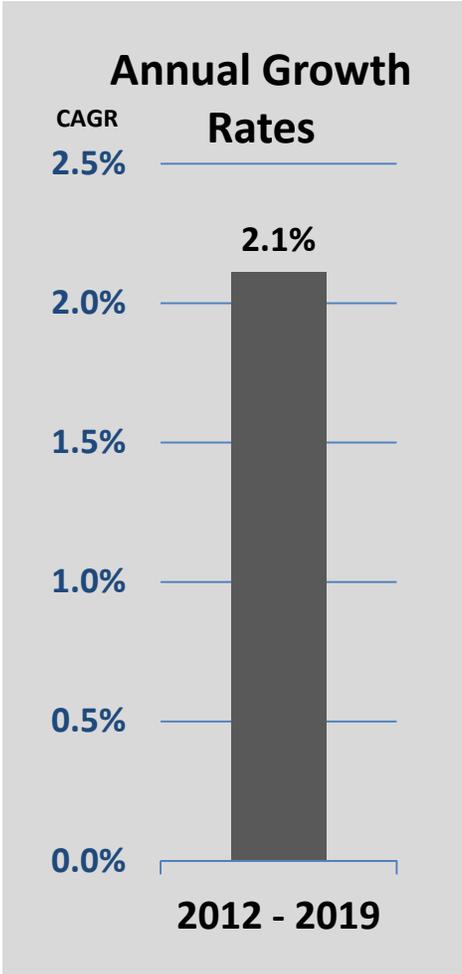
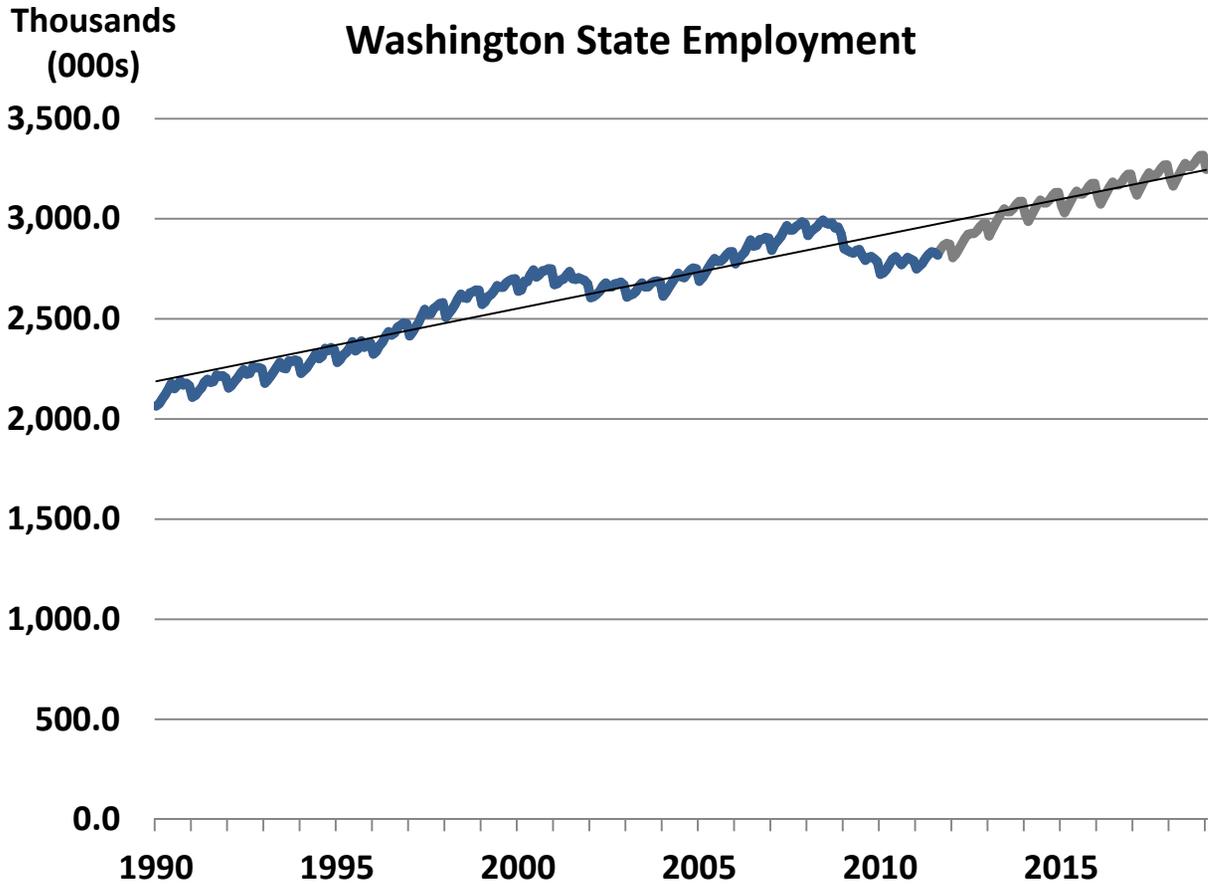
Source: Washington State Employment Security Dept.; U.S. Bureau of Labor Statistics, CAI, Nov. 2011

Non-Farm Employment

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Statewide Employment, 1990 to 2019



Source: Washington State Employment Security Dept.

Non-Farm Employment

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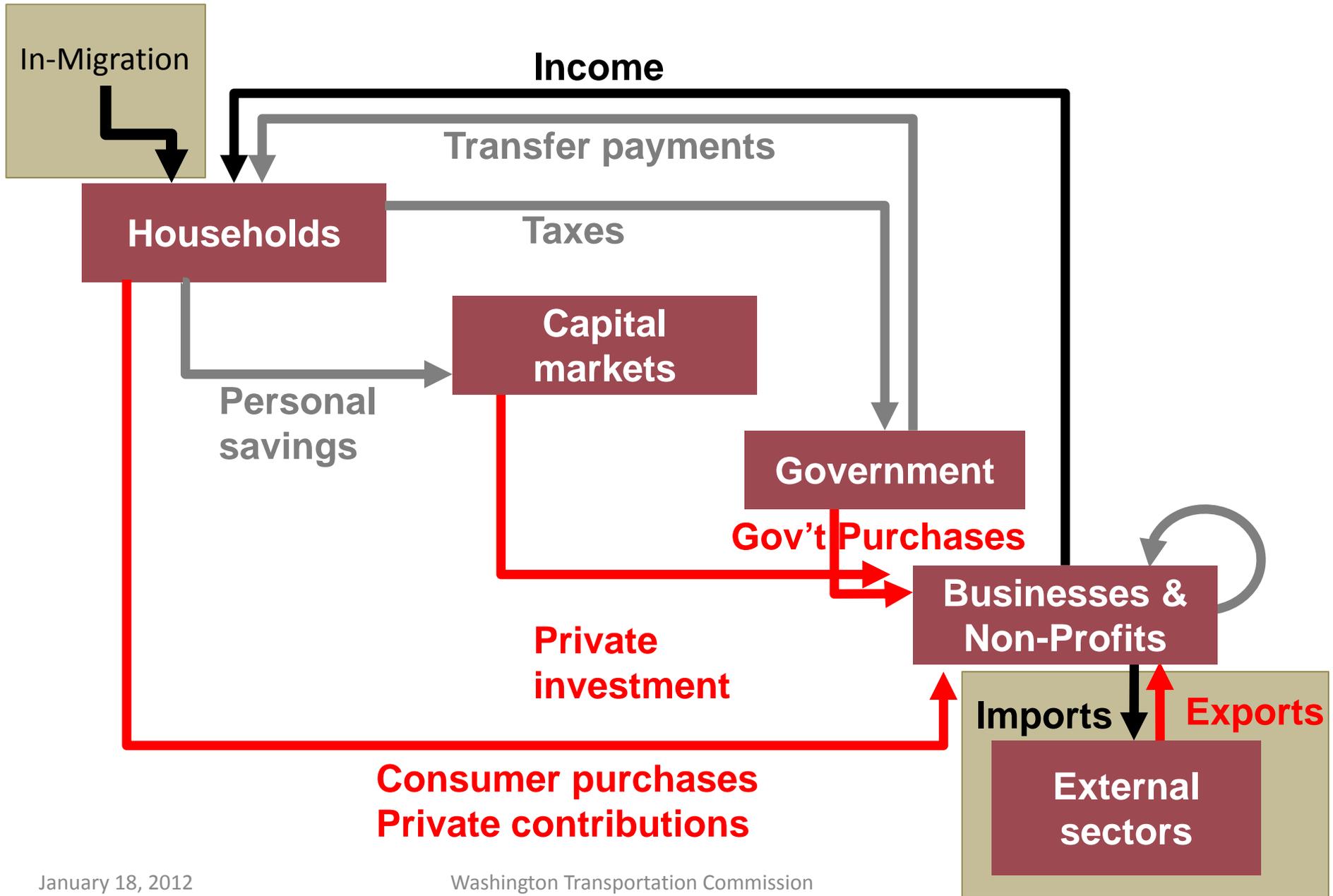
Context: Statewide Employment Trends and Outlook	Data charts
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Regional Economic Drivers, Industry Employment and Transportation Needs	Discussion, Data charts
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County Growth and County Sectors	Data, maps
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Conclusions	Conclusions
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Regional Economy Circular Flow



Where transportation investments can make a difference

Imports, Exports and Intra-regional Distribution	Workers, Talent, Families
Transport / Transmission / Delivery Speed	Quality of Life (Access & Mobility)
Access to Skilled Labor and Talent	Cost of Living (Access & Mobility)
Energy and Fuel	Energy and Fuel

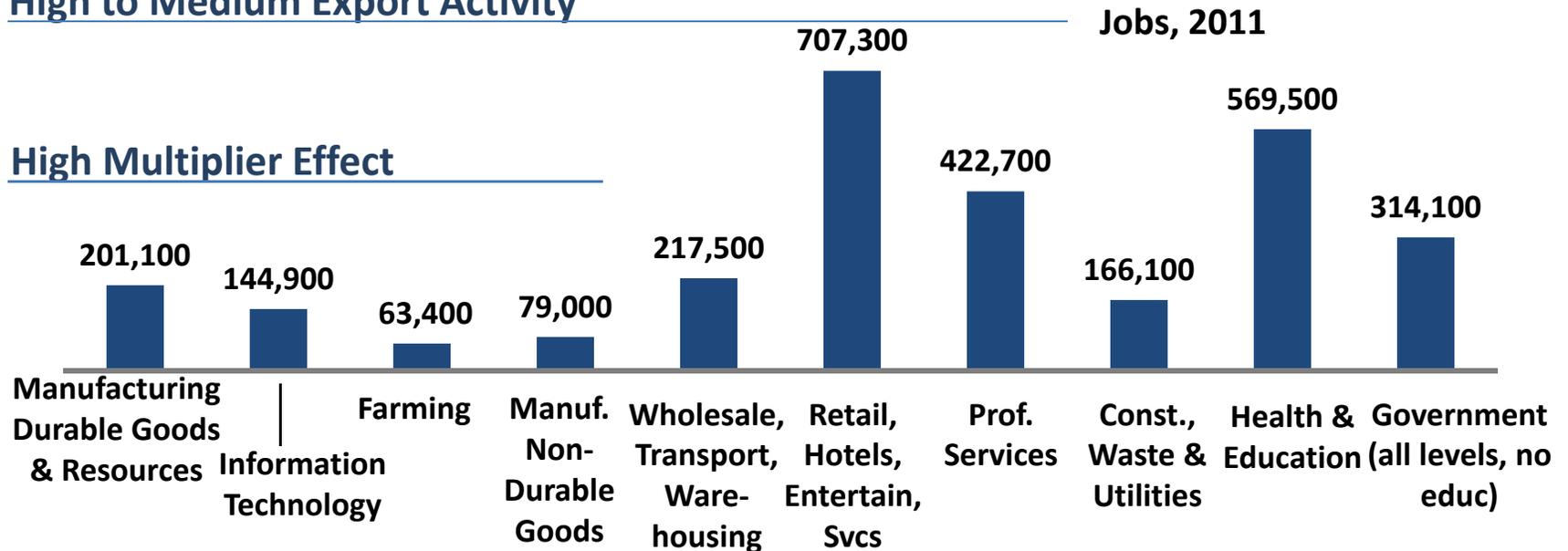
Employment data must be re-grouped to align with investment choices

Nonfarm Employment in Washington State							
Not Seasonally Adjusted/*Updated with ***QCEW Data: March 2011							
**NAICS Industry Title	Prelim Aug-11	Revised Jul-11	Revised Aug-10	Revised Jul-10	Change		
					Jul-11 Aug-11	Aug-10 Aug-11	Jul-10 Aug-10
Total Nonfarm ¹	2,822,200	2,835,200	2,775,700	2,794,300	-13,000	46,500	-18,600
Total Private	2,313,700	2,308,400	2,260,600	2,258,900	5,300	53,100	1,700
Goods Producing	430,000	422,900	416,800	415,000	7,100	13,200	1,800
Mining and Logging	6,400	6,300	6,300	6,300	100	100	0
Construction	149,900	146,900	149,000	147,400	3,000	900	1,600
Manufacturing	273,700	269,700	261,500	261,300	4,000	12,200	200
Durable Goods	194,700	193,700	185,100	185,400	1,000	9,600	-300
Aerospace Product and Parts Mfg.	88,000	87,400	80,500	80,700	600	7,500	-200
Nondurable Goods	79,000	76,000	76,400	75,900	3,000	2,600	500
Food Manufacturing	37,400	34,300	35,500	34,900	3,100	1,900	600
Service Providing	2,392,200	2,412,300	2,358,900	2,379,300	-20,100	33,300	-20,400
Trade, Transportation, and Utilities	532,500	534,400	519,900	520,000	-1,900	12,600	-100
Wholesale Trade	124,300	126,300	121,400	121,700	-2,000	2,900	-300
Retail Trade	315,000	314,200	309,200	308,600	800	5,800	600
Motor Vehicle and Parts Dealers	37,300	38,000	36,400	36,300	-700	900	100

Washington Jobs, Grouped by Economic Impact

High to Medium Export Activity

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

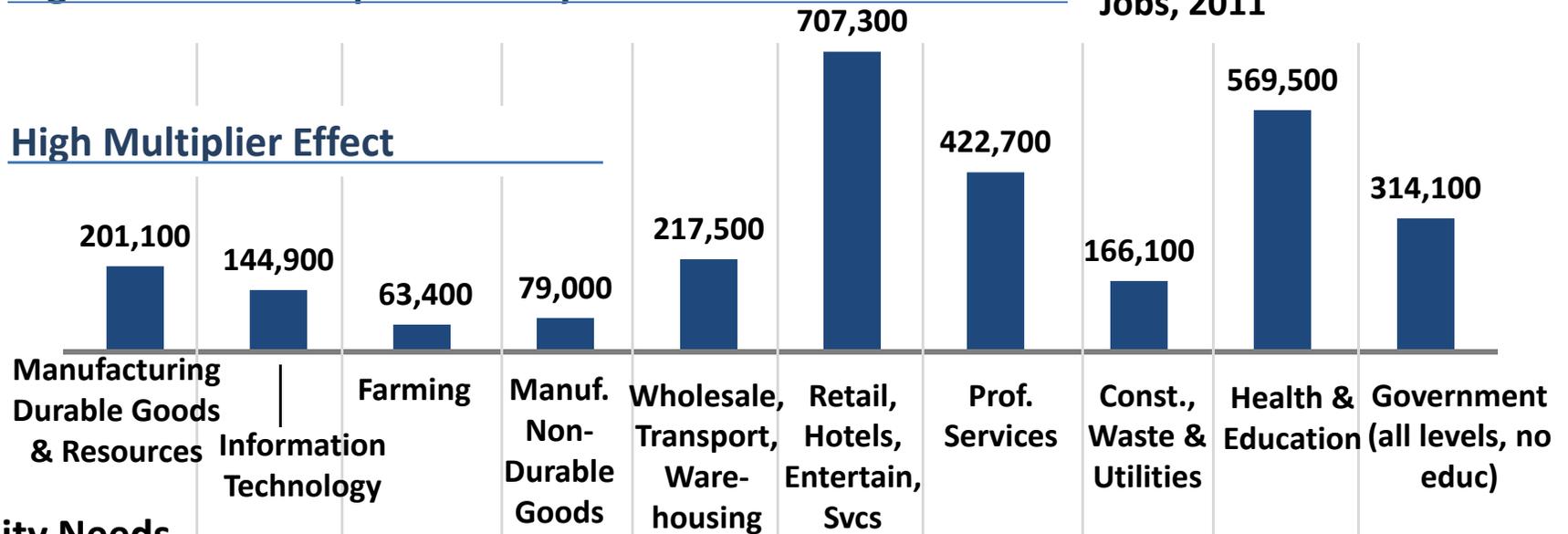
Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

Washington Jobs, Grouped by Economic Impact

High to Medium Export Activity

Jobs, 2011

High Multiplier Effect



Mobility Needs

Intra-Region Mobility for Labor & Freight	X	X	X	X	X	X	X	X	X	X
Access for Labor	X	X		X	X	X	X	X	X	X
Out of State Freight Mobility Infrastructure	X		X	X	X					
Business / Tourism Travel		X				X	X			

Industries grouped by common needs, ranked for economic impact

Industries	Washington Jobs (2.9 Million)	High Export Activity	High Multiplier Effect	Transportation Needs			
				Intra-region mobility, freight and labor	Access for Labor	Out-of-State Freight Infra-structure	Business / Tourism Travel
Production of Durable Goods & Resources	201,100	High	High	X	X	X	
Information Technology	144,900	High	High	X	X		X
Farming	63,400	High	High	X		X	
Production of Non-Durable Goods	79,000	Med-High	High	X	X	X	
Wholesale, Transport, Warehousing	217,500	High		X	X	X	
Consumer Services, Hospitality, Retail	707,300	Med		X	X		X
Professional Services	422,700	Med		X	X		X
Construction, Waste & Utilities	166,100			X	X		
Health & Education	569,500			X	X		
Government (all levels, no educ)	314,100			X	X		

Department of Commerce

Key Industries for Washington State

- | | |
|-----------------------------------|---|
| • Aerospace | • Information and communication technology |
| • Clean energy | • Manufacturing |
| • Forest products | • Marine technology |
| • Global health and life sciences | • Value-added agriculture and food processing |
| | • Tourism |

Washington State Export Industries

Sector	Exports and Examples	Top Ranking Mobility Needs		
		Freight	Commuter	Int'l Travel
Aerospace	Planes, parts, expertise	X	X	X
I.T.	Virtual products, on-line commerce		X	X
Durable goods manufacturing	Smaller products, supplies	X	X	
Food and perishables	Apples, Fruit, Hops, Wine, much more	X	X	
Professional services	Design expertise, CleanTech, innovation		X	X
Research & Education	Expertise, collaboration		X	X

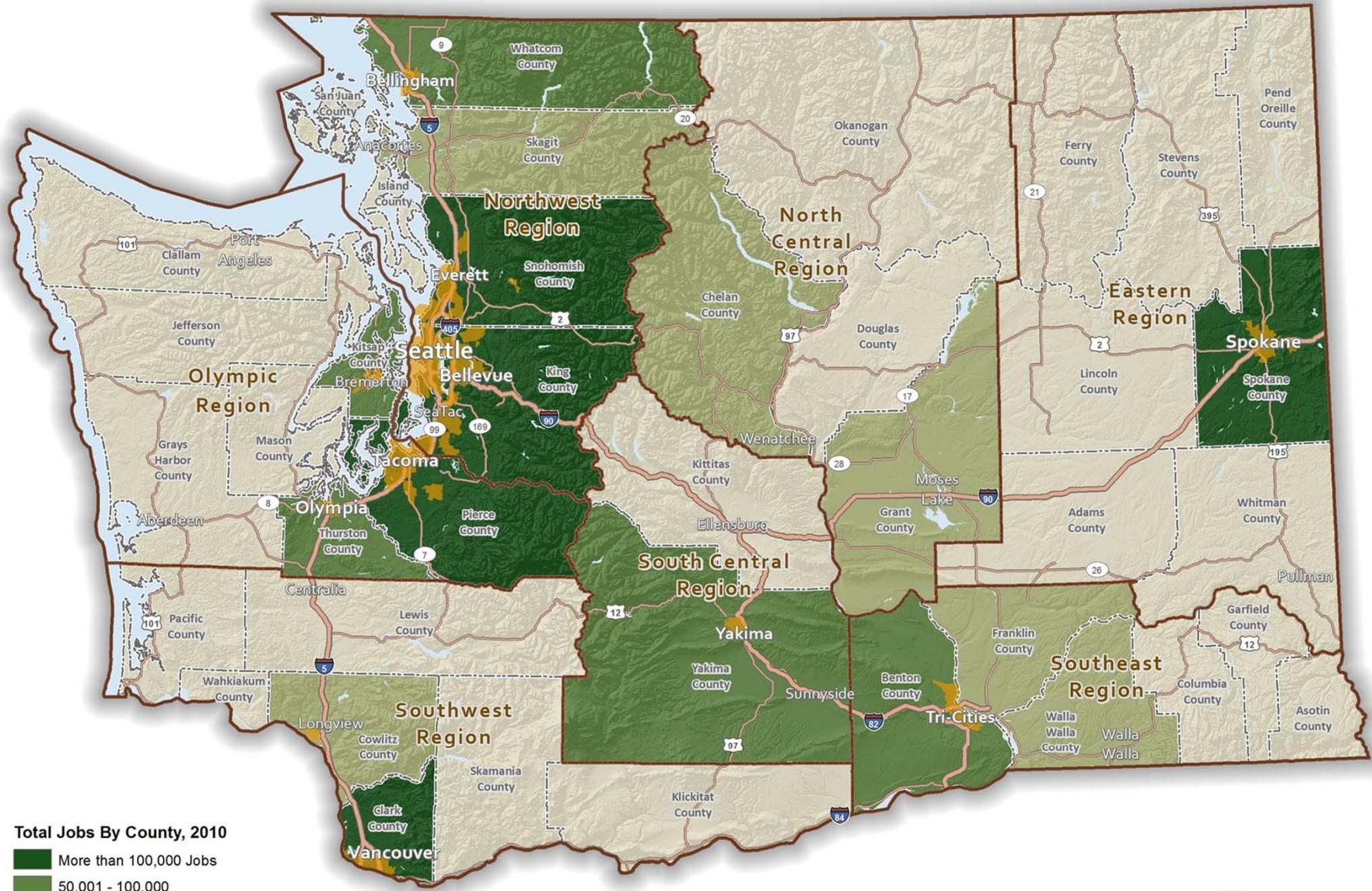
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Geographic economic impact considerations

1. Regional economies do not fit neatly into governmental jurisdictions
2. Specific industries have relatively and significantly different impacts among counties and cities
3. Similar transportation investments may be more critical to some industries, more critical to some regions
4. Some investments may enable growth, others may help prevent economic deterioration ... and shades of gray in between
5. Some investments may be significant by themselves, others may be part of system and their impacts may be less distinct

Jobs by County, All Jobs, 2010



Total Jobs By County, 2010

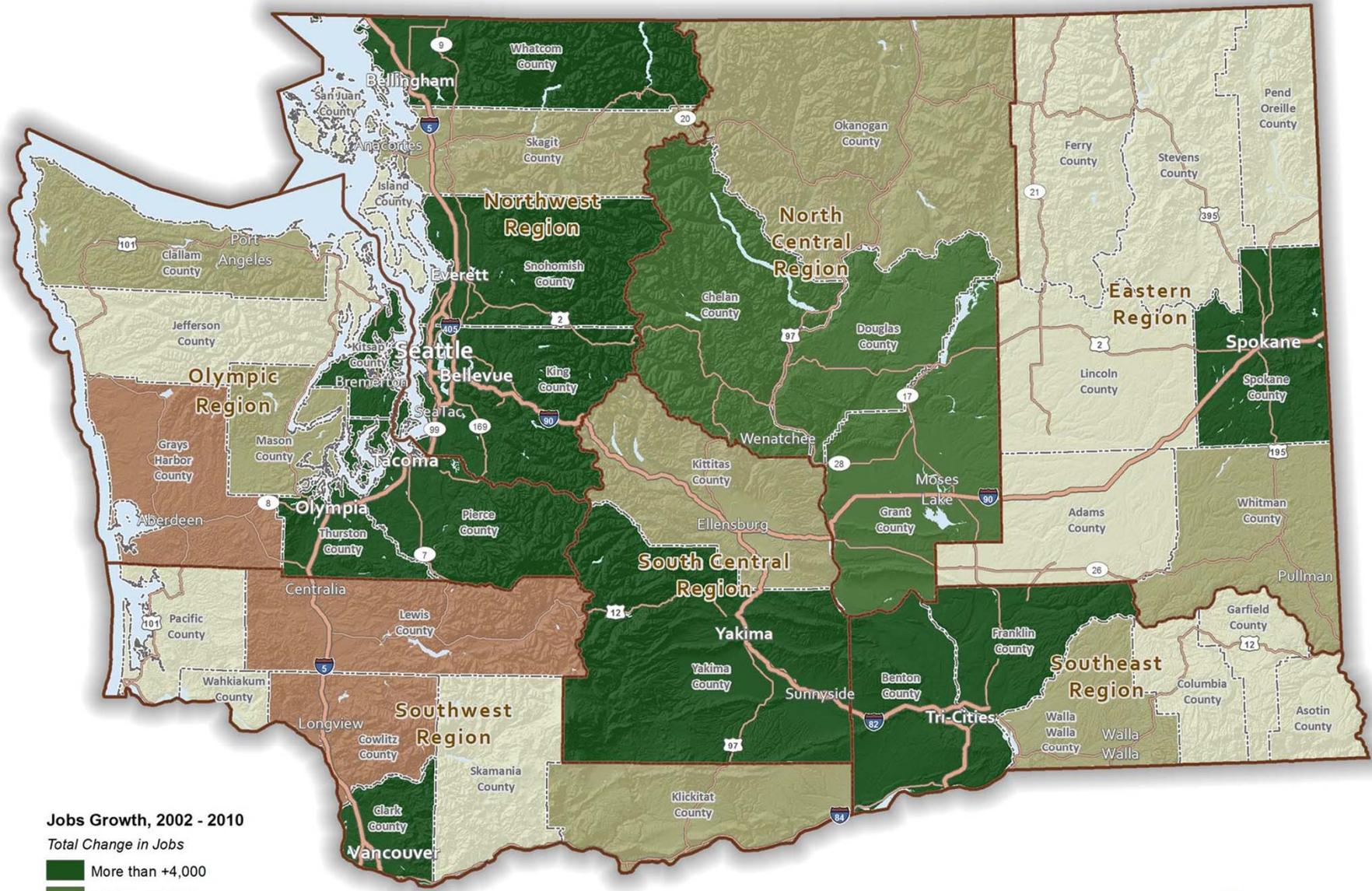
- More than 100,000 Jobs
- 50,001 - 100,000
- 25,000 - 50,000
- Less than 25,000 Jobs
- Urban Areas** (Highest Concentrations of Jobs)

- Region Boundaries**
- County Boundaries**

Map Date: October 2011
 Source: Washington State Employment Security Department, Community Attributes Inc. 2011; ESRI 2011



Jobs Growth Change by County, All Jobs, 2002 - 2010



Jobs Growth, 2002 - 2010
 Total Change in Jobs

- More than +4,000
- +2,001 - +4,000
- +501 to +2,000
- 500 to +500
- Less than -500

Region Boundaries
 County Boundaries

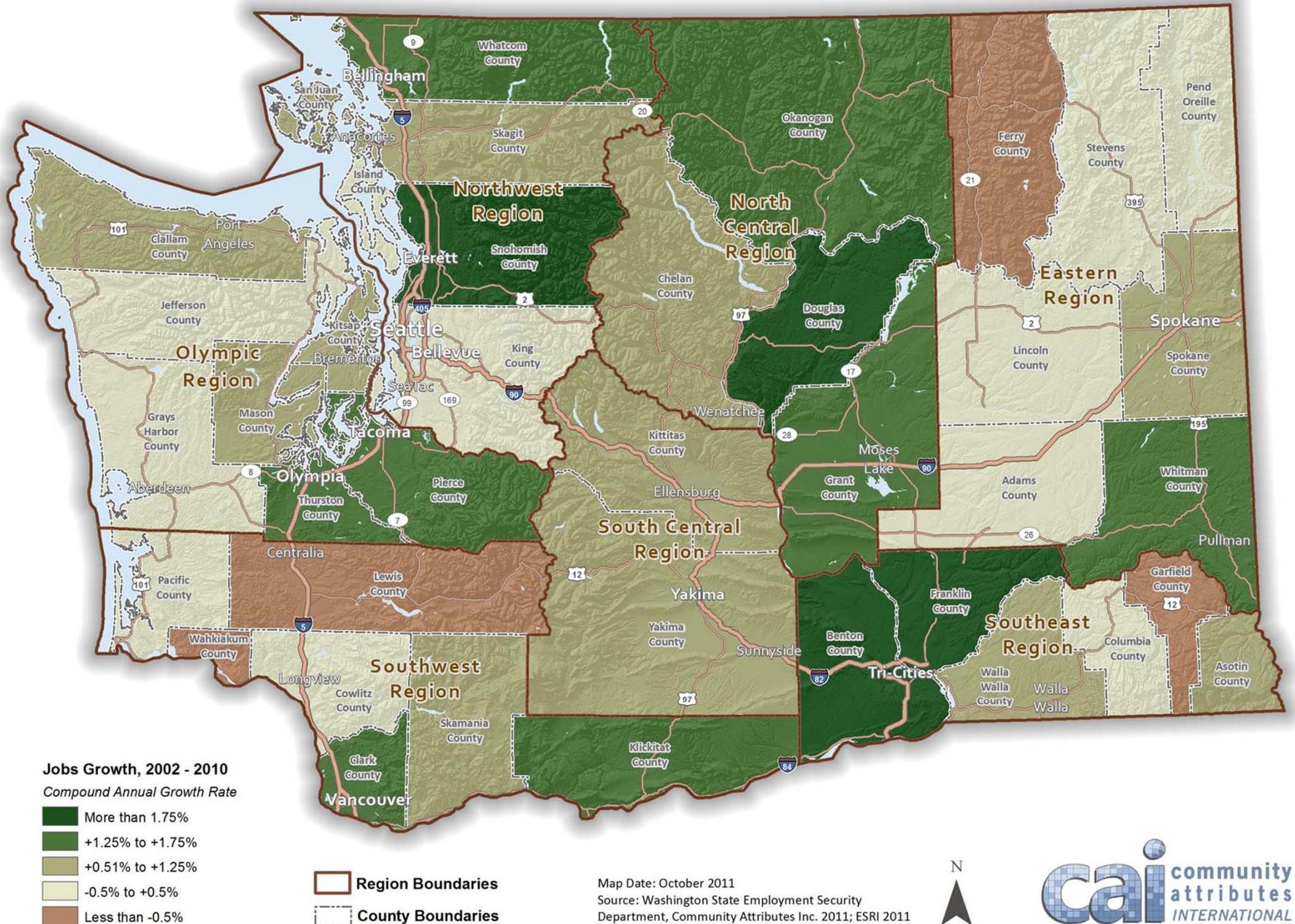
Map Date: October 2011
 Source: Washington State Employment Security Department, Community Attributes Inc. 2011; ESRI 2011



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Jobs Growth Rates by County, All Jobs, 2002 - 2010



Forecasted Job Growth, All Jobs, 2011 - 2019



Forecasted Job Growth, 2011 - 2019

Total Change in Jobs

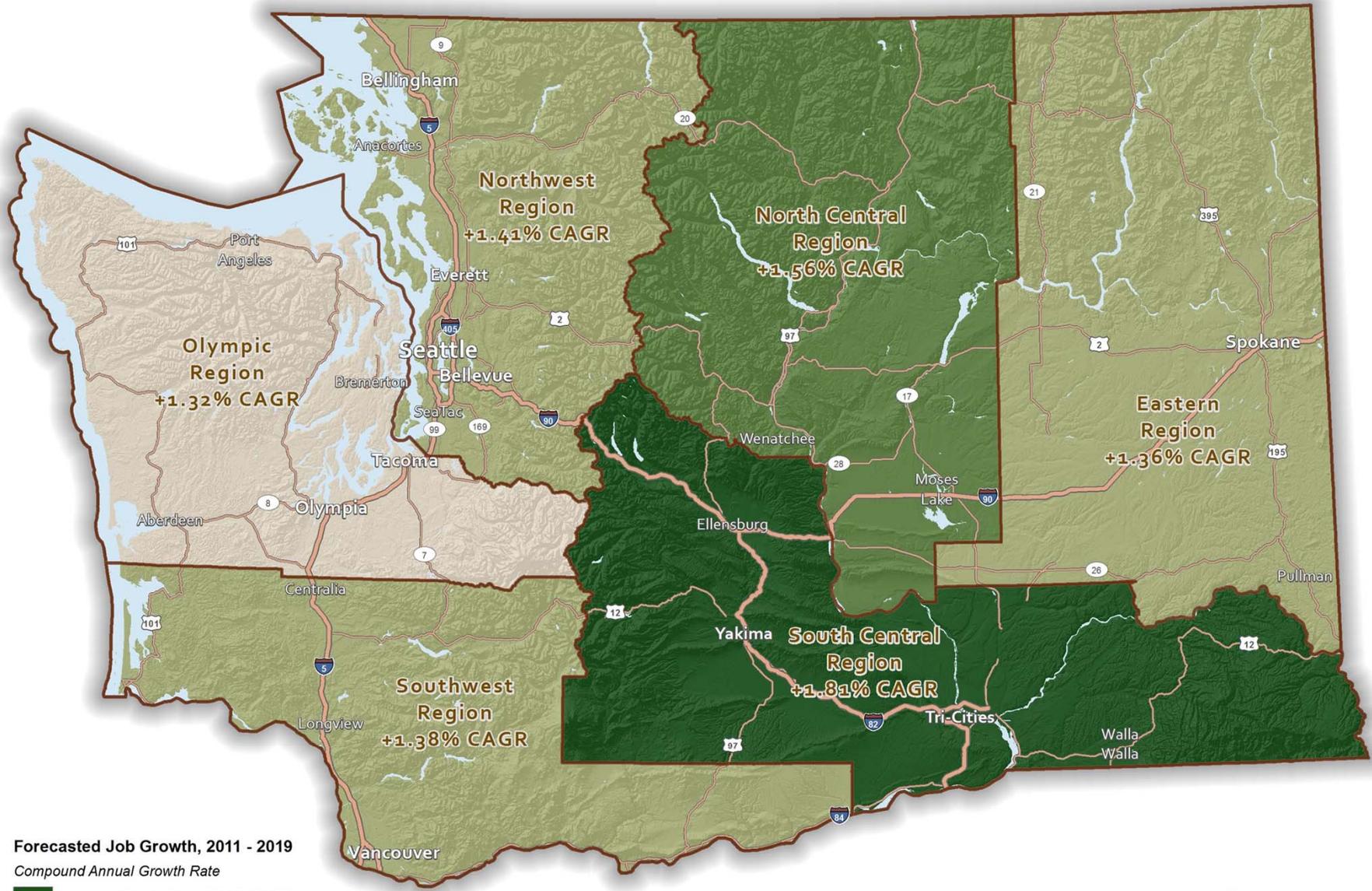
- Increase Greater than 35,000
- 25,001 - 35,000
- 15,000 - 25,000
- Increase Less than 15,000

- Region Boundaries
- County Boundaries

Map Date: October 2011
 Source: Washington State Employment Security
 Department, Community Attributes Inc. 2011; ESRI 2011



Forecasted Job Growth Rates, All Jobs, 2011 - 2019



Forecasted Job Growth, 2011 - 2019
 Compound Annual Growth Rate

- Increase Greater than 1.60% CAGR
- 1.46% - 1.60%
- 1.35% - 1.45%
- Increase Less than 1.35% CAGR

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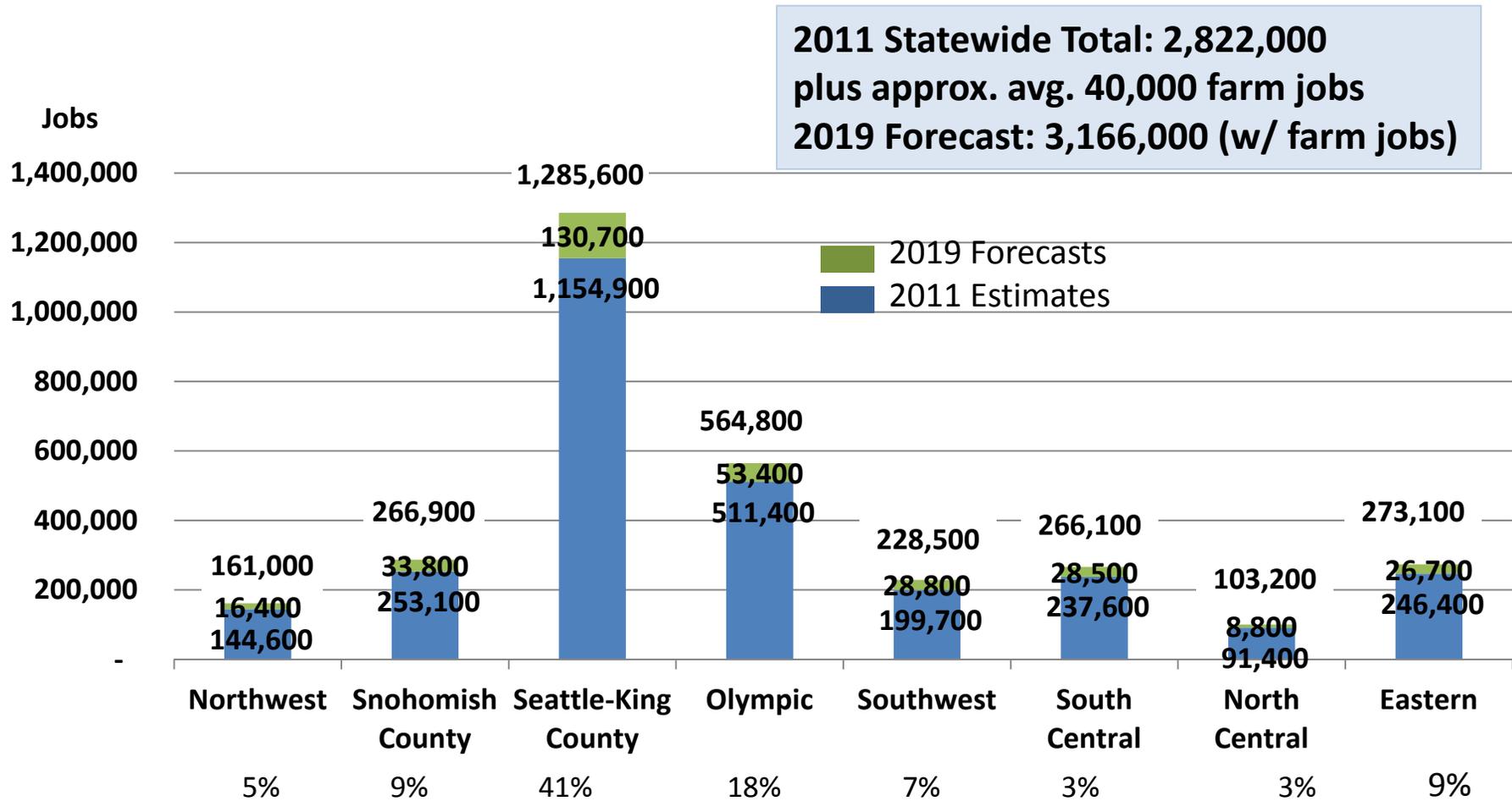
Region Boundaries

County Boundaries

Map Date: October 2011
 Source: Washington State Employment Security Department, Community Attributes Inc. 2011; ESRI 2011



Jobs by Region in Washington, August 2011



Source: Washington Employment Security Department, Community Attributes

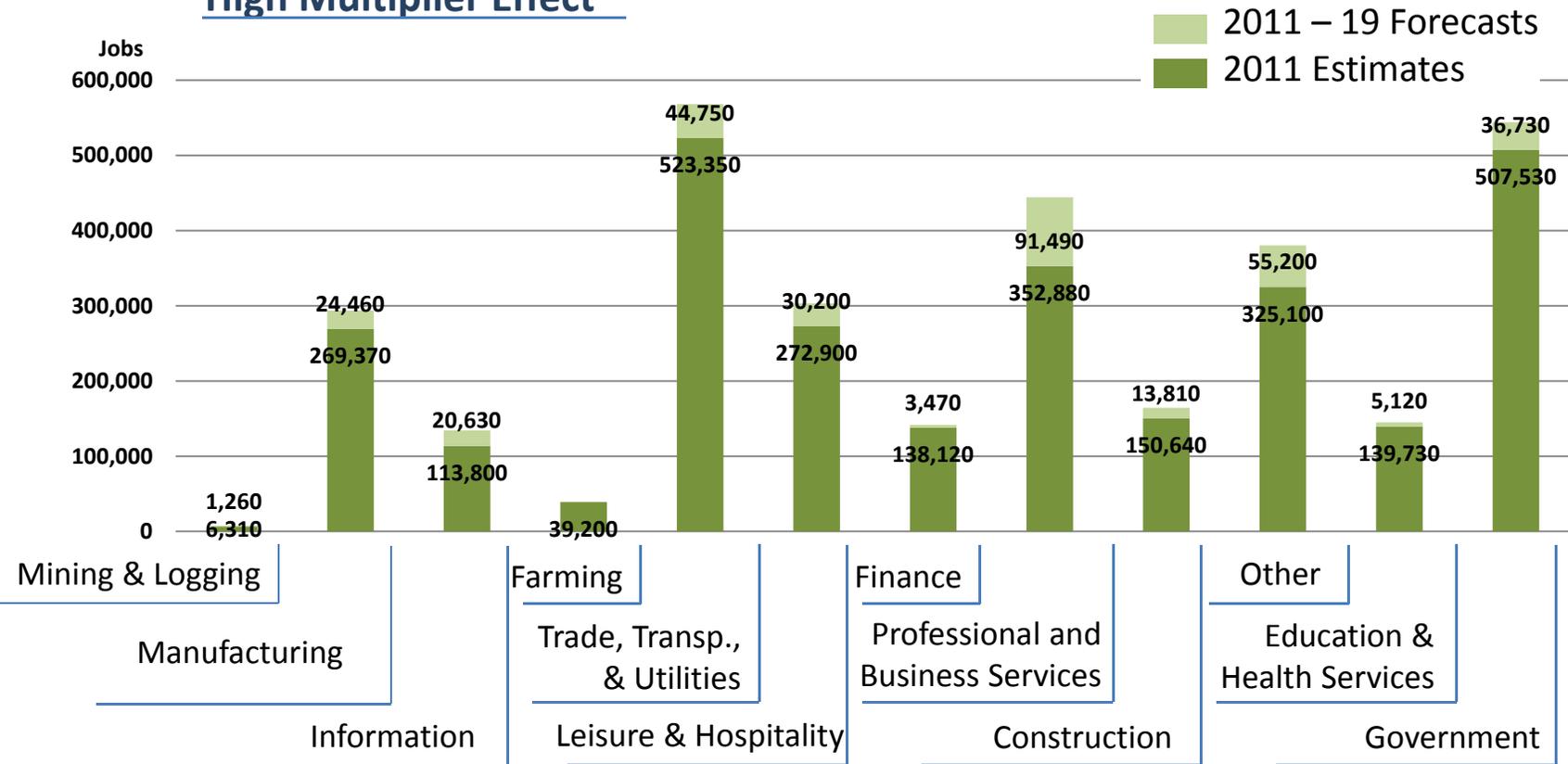
Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

Statewide Jobs by Industry and Forecasts

High to Medium Export Activity

144,600 jobs in 2011
161,000 jobs in 2019

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.



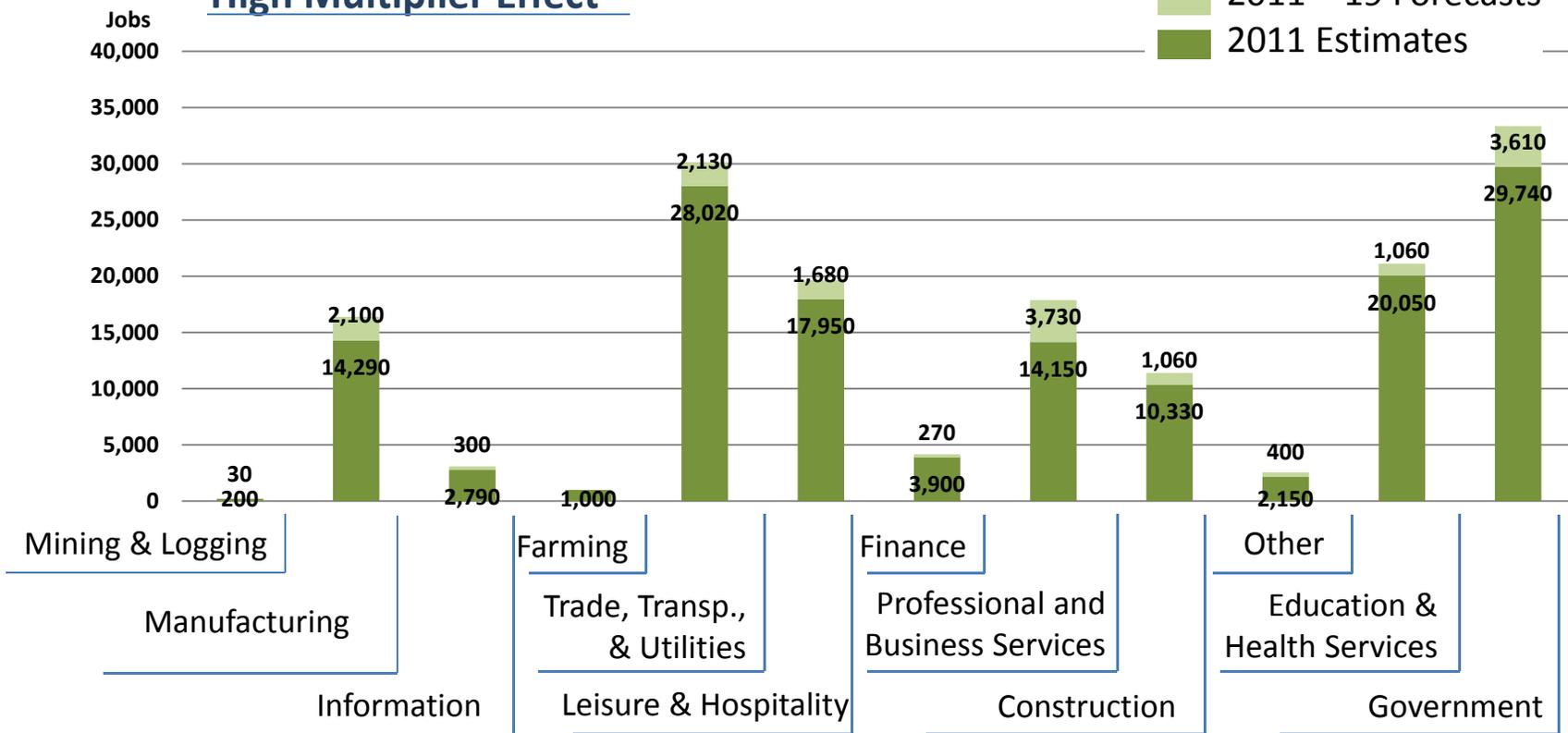
North-Northwestern Washington, Jobs by Industry and Forecasts

High to Medium Export Activity

144,600 jobs in 2011
161,000 jobs in 2019

High Multiplier Effect

2011 – 19 Forecasts
2011 Estimates



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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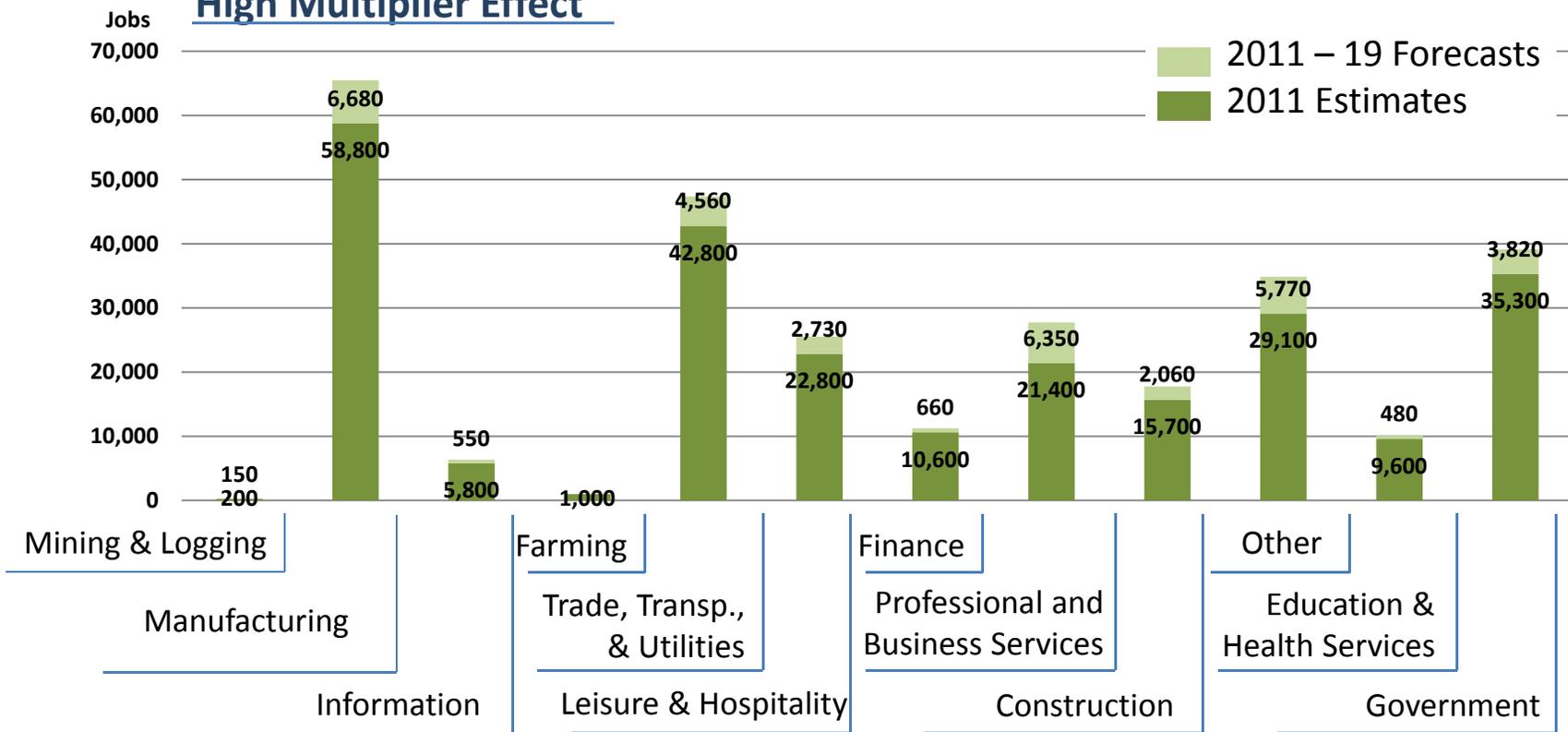
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Snohomish Washington, Jobs by Industry and Forecasts

High to Medium Export Activity

253,100 jobs in 2011
266,900 jobs in 2019

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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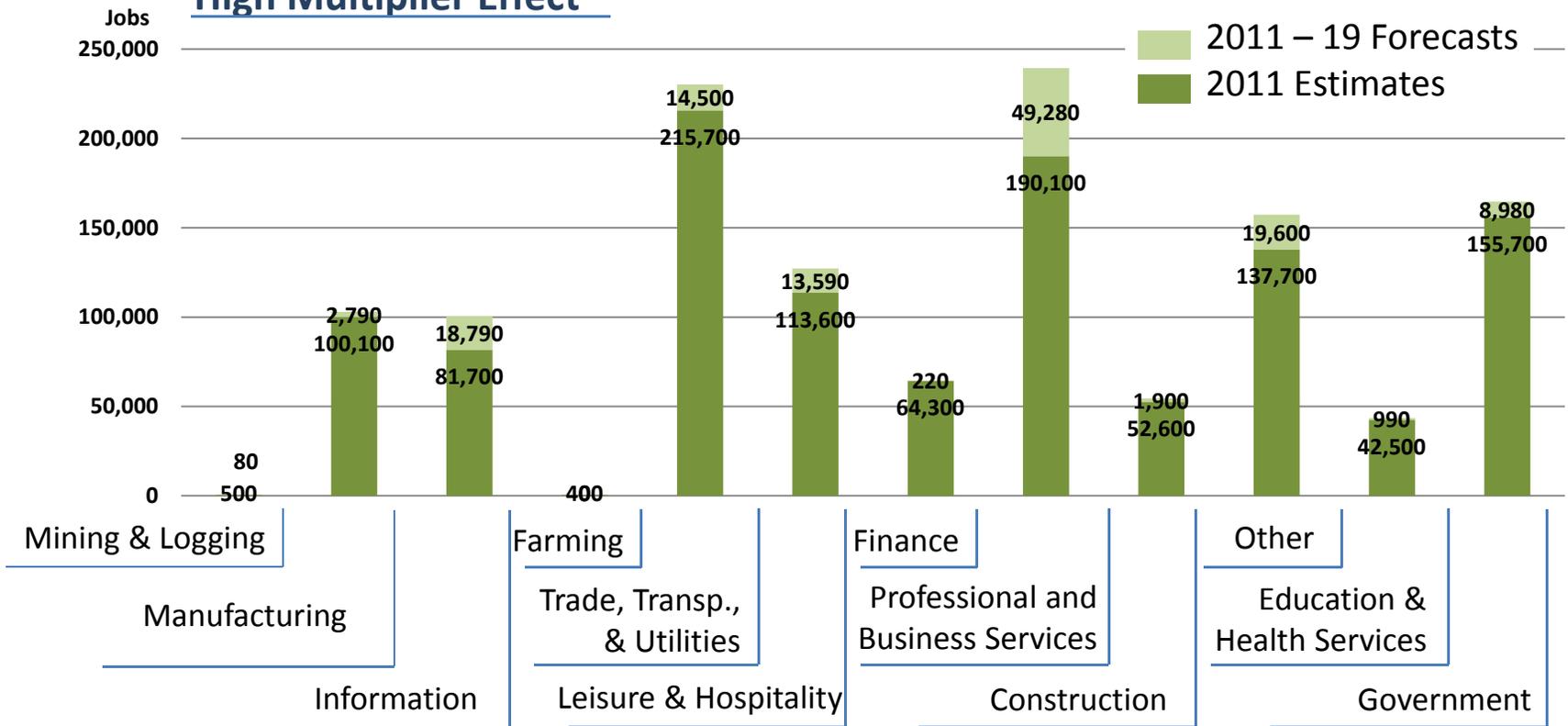
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King County, Jobs by Industry and Forecasts

High to Medium Export Activity

1,154,900 jobs in 2011
1,285,600 jobs in 2019

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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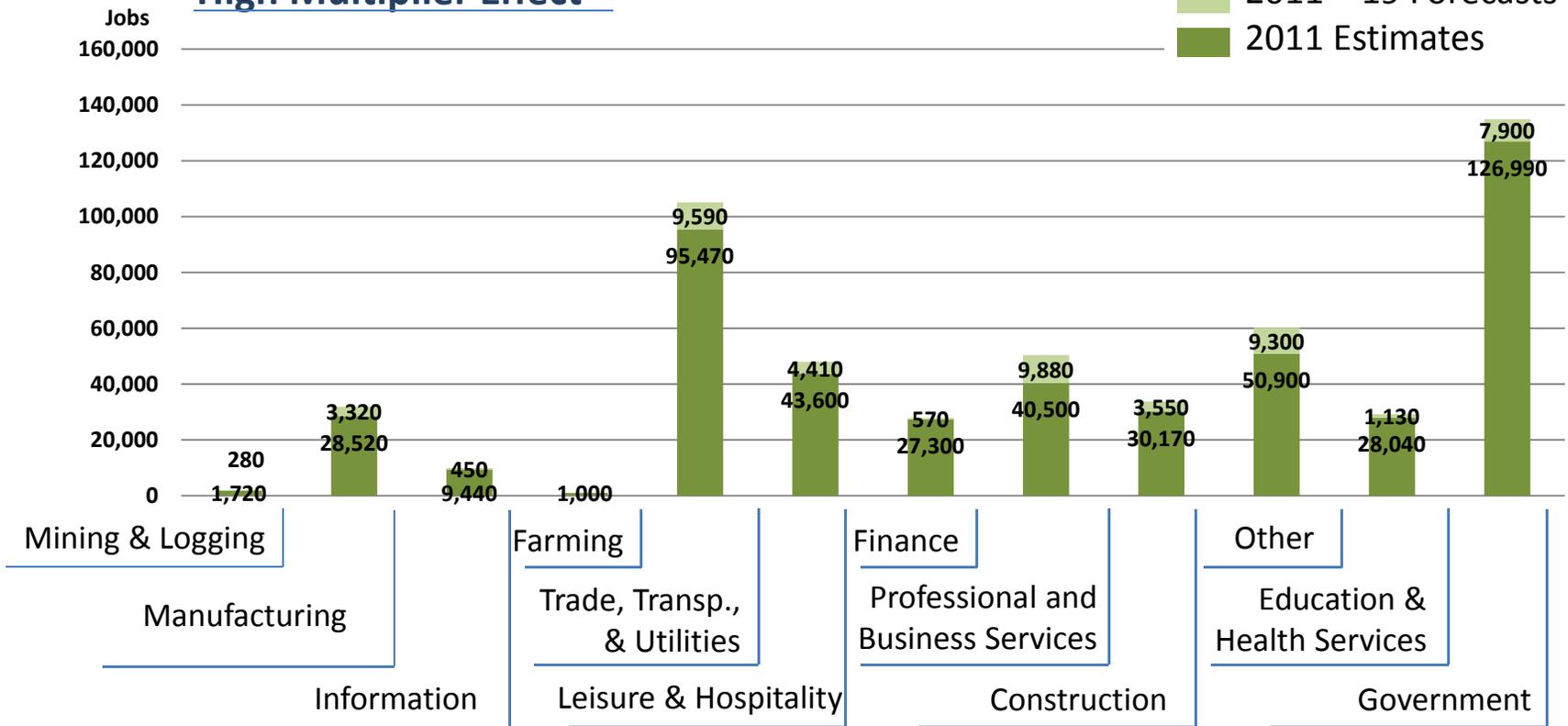
Olympic Region, Jobs by Industry and Forecasts

High to Medium Export Activity

511,400 jobs in 2011
564,800 jobs in 2019

High Multiplier Effect

2011 – 19 Forecasts
2011 Estimates



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

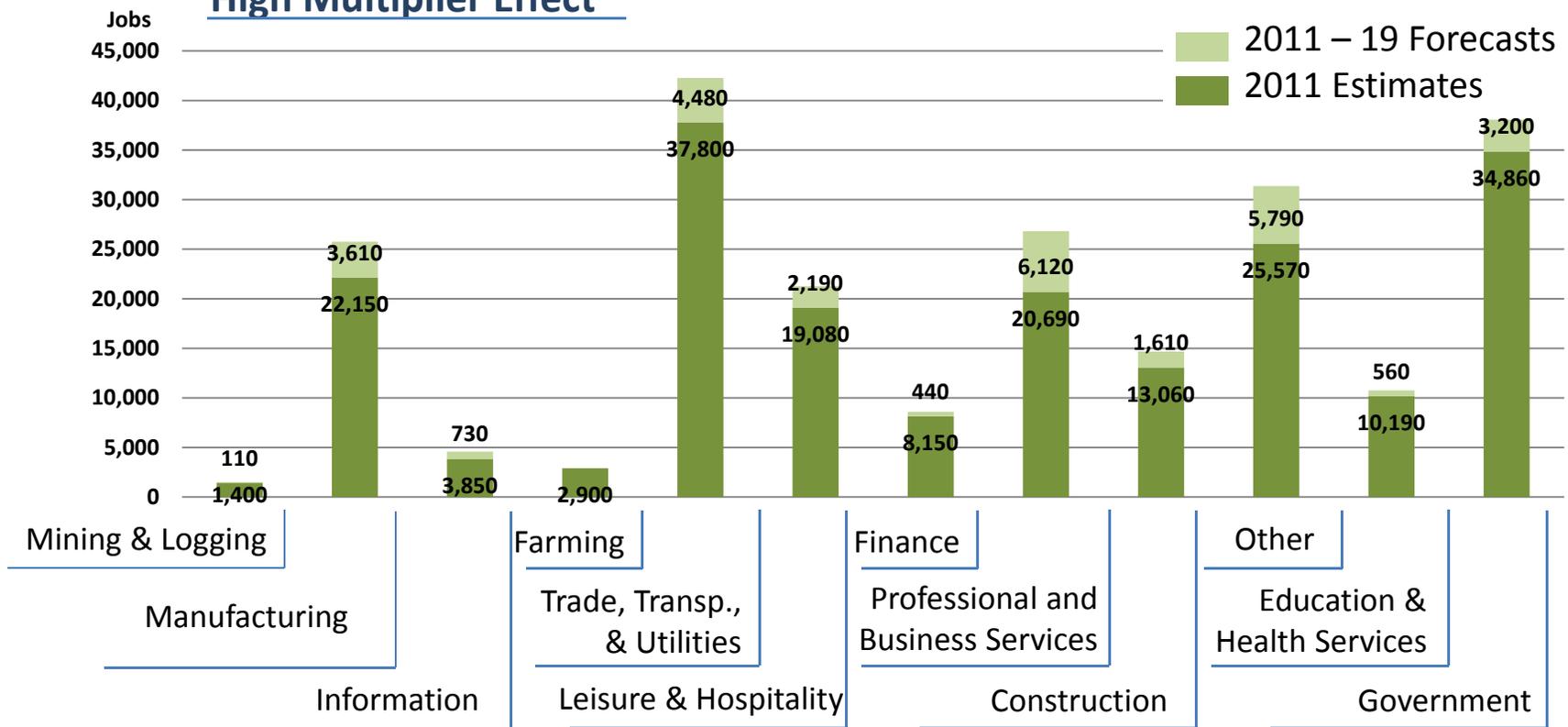


Southwestern Washington, Jobs by Industry and Forecasts

High to Medium Export Activity

199,700 jobs in 2011
228,500 jobs in 2019

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

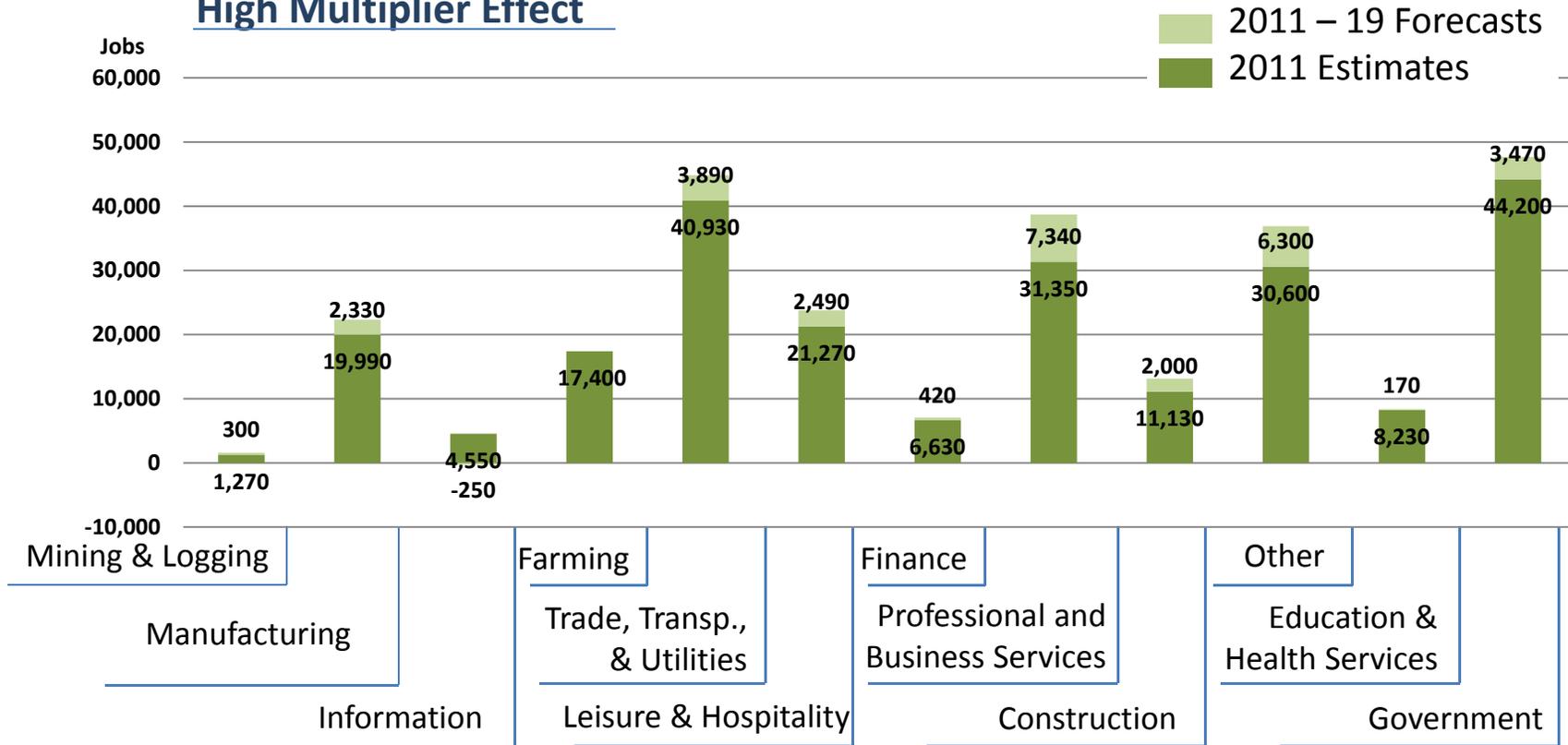


South Central Washington, Jobs by Industry and Forecasts

High to Medium Export Activity

237,600 jobs in 2011
266,000 jobs in 2019

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

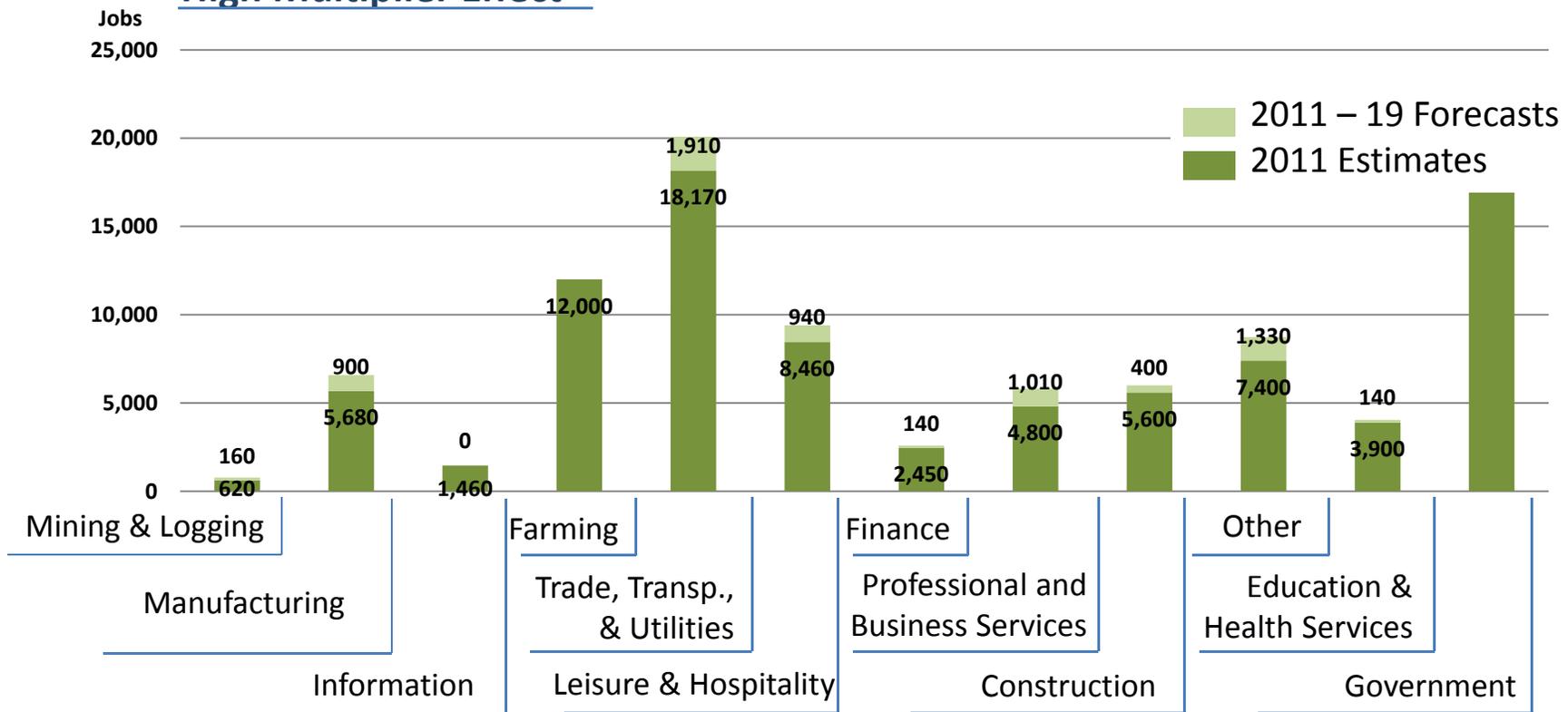


North Central Washington, Jobs by Industry and Forecasts

High to Medium Export Activity

91,400 jobs in 2011
100,100 jobs in 2019

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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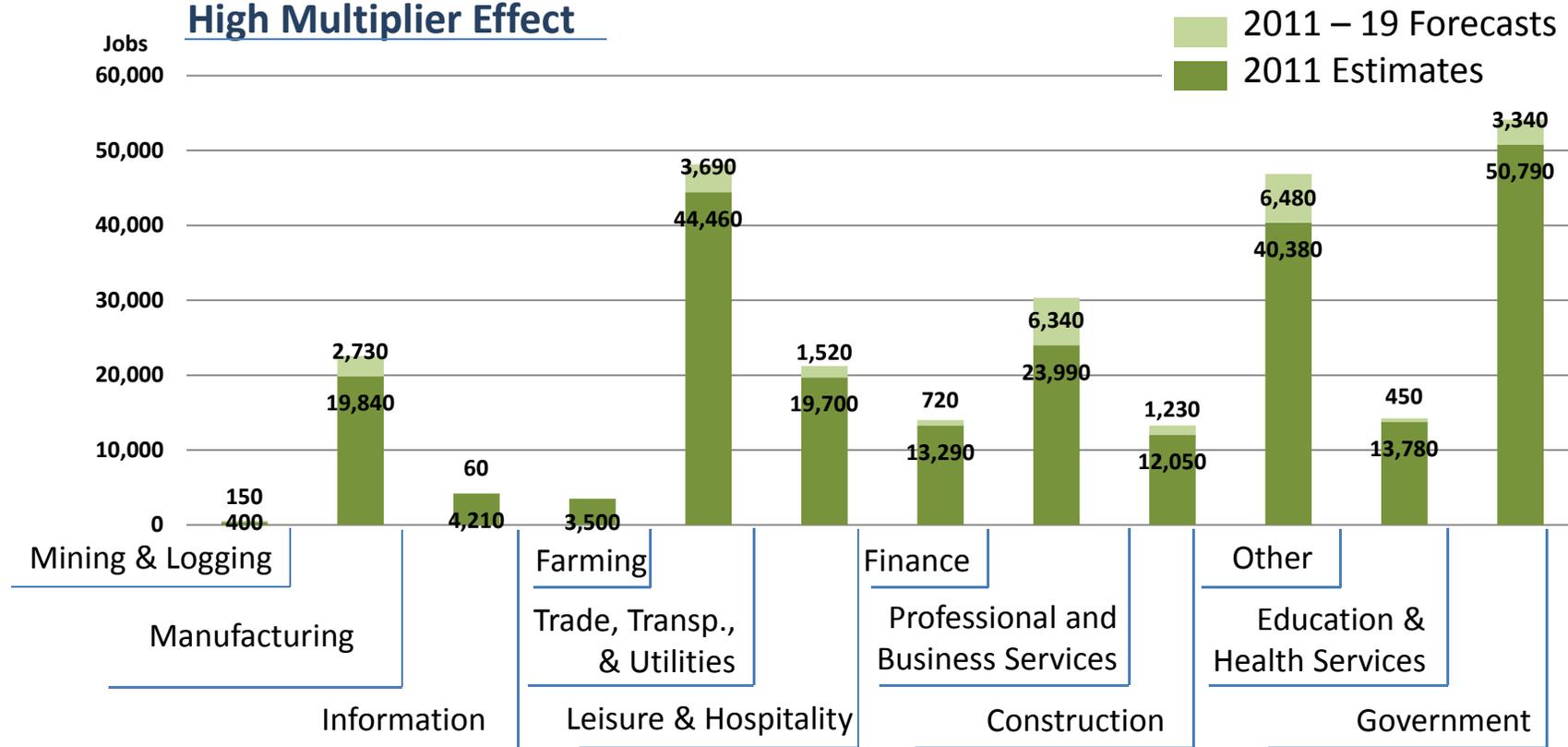


Eastern Washington, Jobs by Industry and Forecasts

High to Medium Export Activity

246,400 jobs in 2011
273,100 jobs in 2019

High Multiplier Effect



Source: Washington Employment Security Department, Community Attributes

Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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Conclusions

- Employment data must be analyzed and re-packaged to align information with decisions
- Transportation investments should
 - reduce operating costs for employers
 - reduce access cost for employees
- High impact industries have high multiplier impacts and high export value
- Jobs will increase again, and investments should support their growth, regionally and by industry
- Each region has different needs for their economy and their transportation
- Recommendation: Address consistency of data products statewide for better decision-making