Washington State Employment Estimates and Forecasts for Transportation Investment Planning

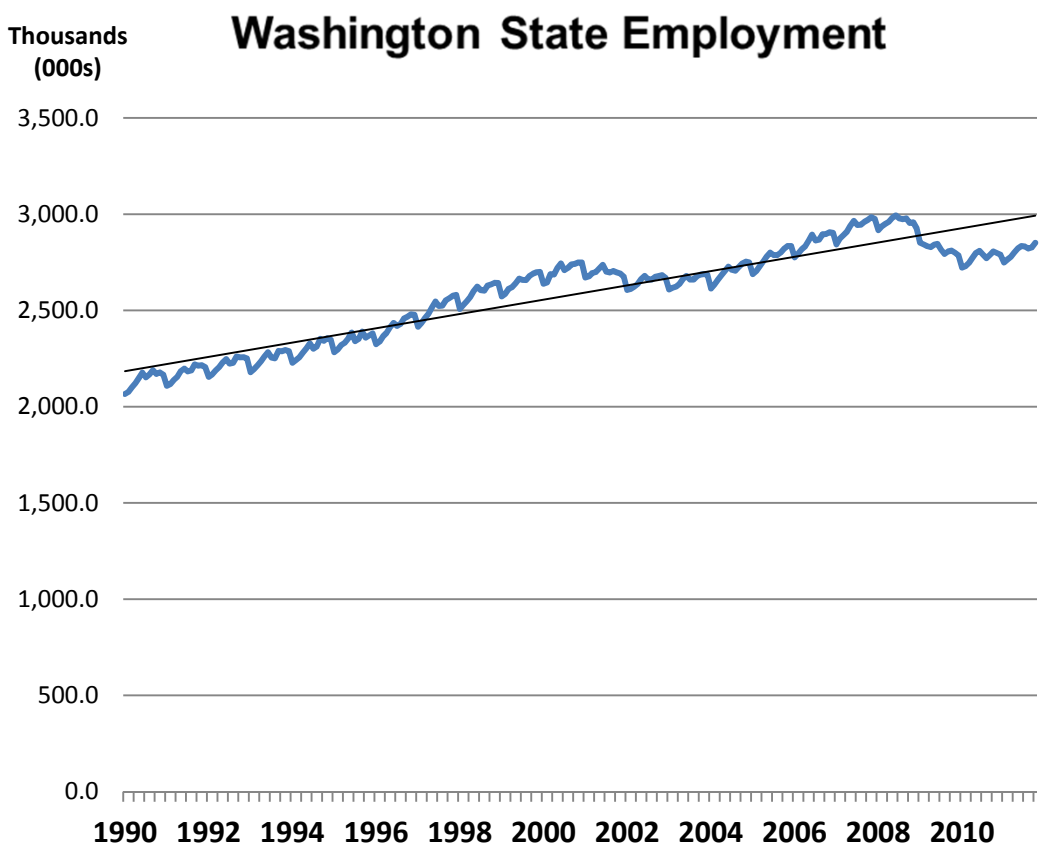
Washington Transportation Commission
March 21, 2012

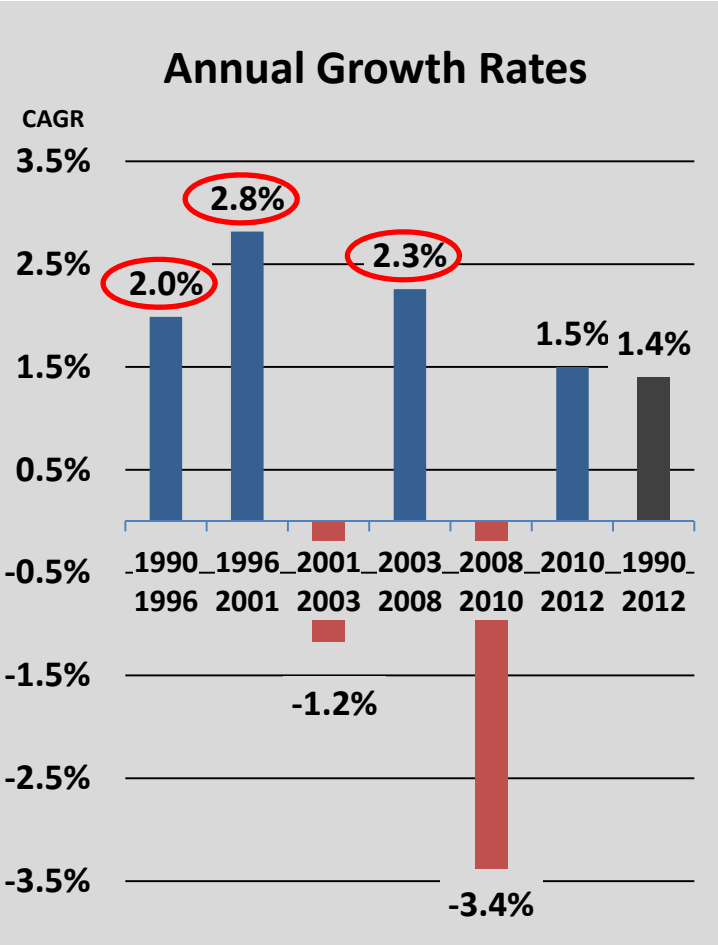
Chris Mefford, President & CEO
Community Attributes
Seattle, Washington

Contents

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
Conclusions	Conclusions

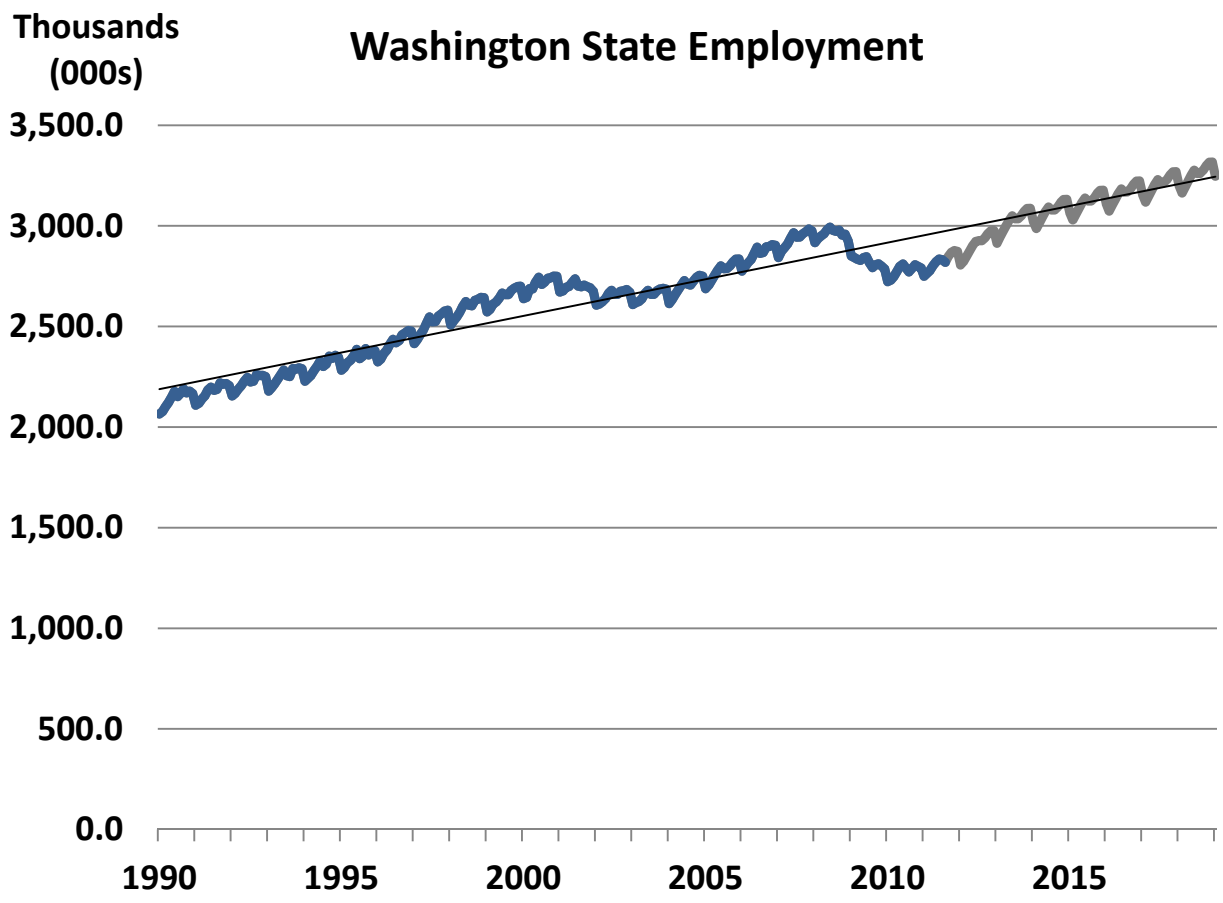
Statewide Employment,1990 to 2011

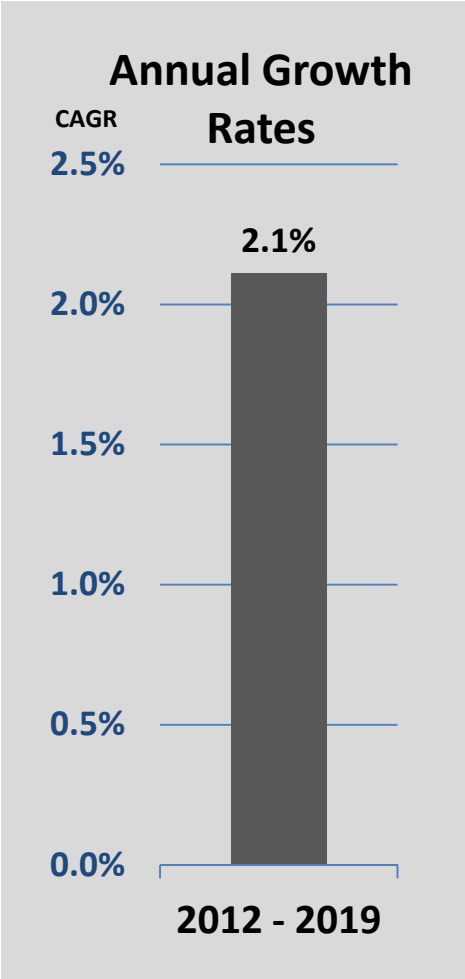




Source: Washington State Employment Security Dept.; U.S. Bureau of Labor Statistics, CAI, Nov. 2011
Non-Farm Employment

Statewide Employment, 1990 to 2019





Source: Washington State Employment Security Dept.
Non-Farm Employment

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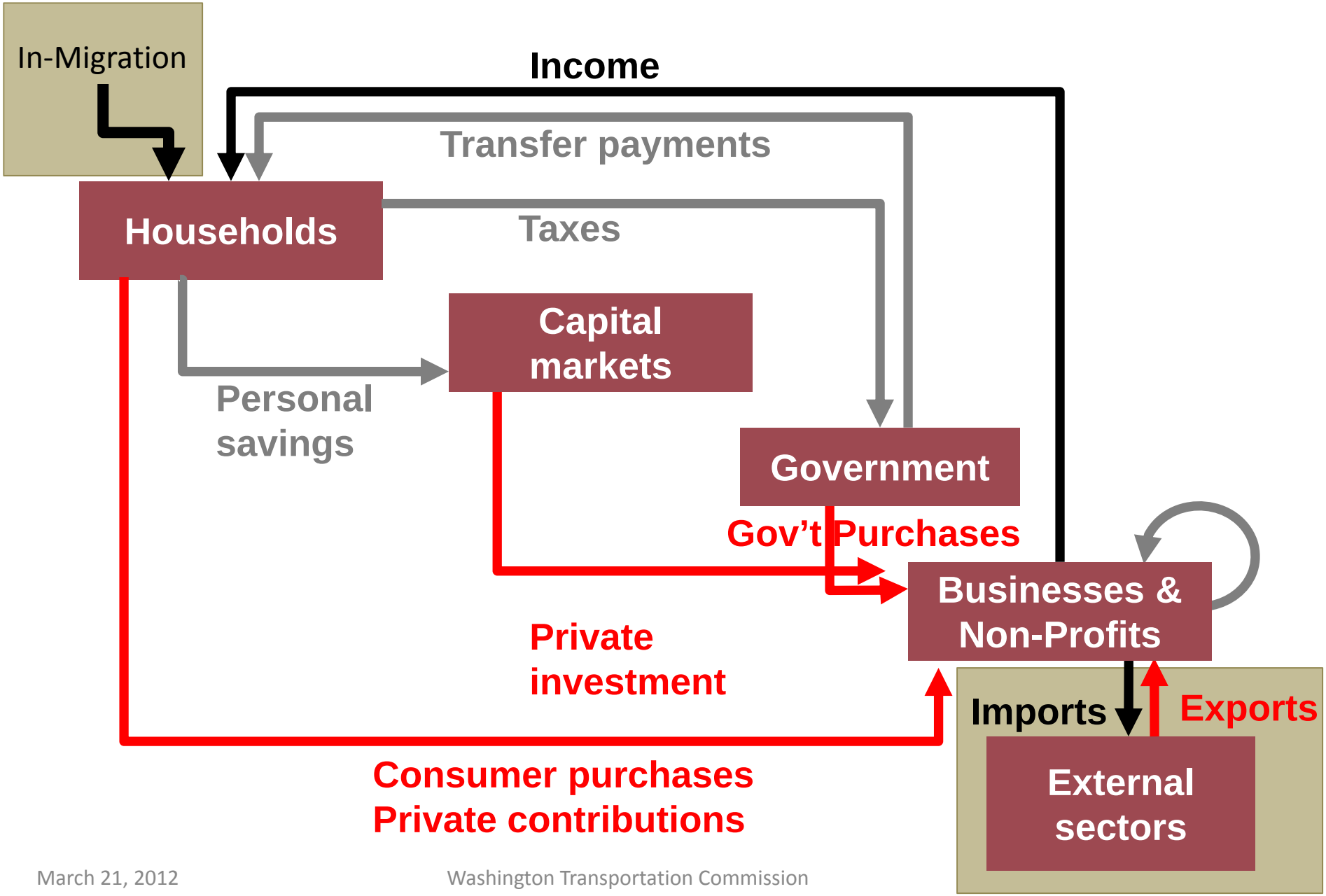
Regional Economy Circular Flow



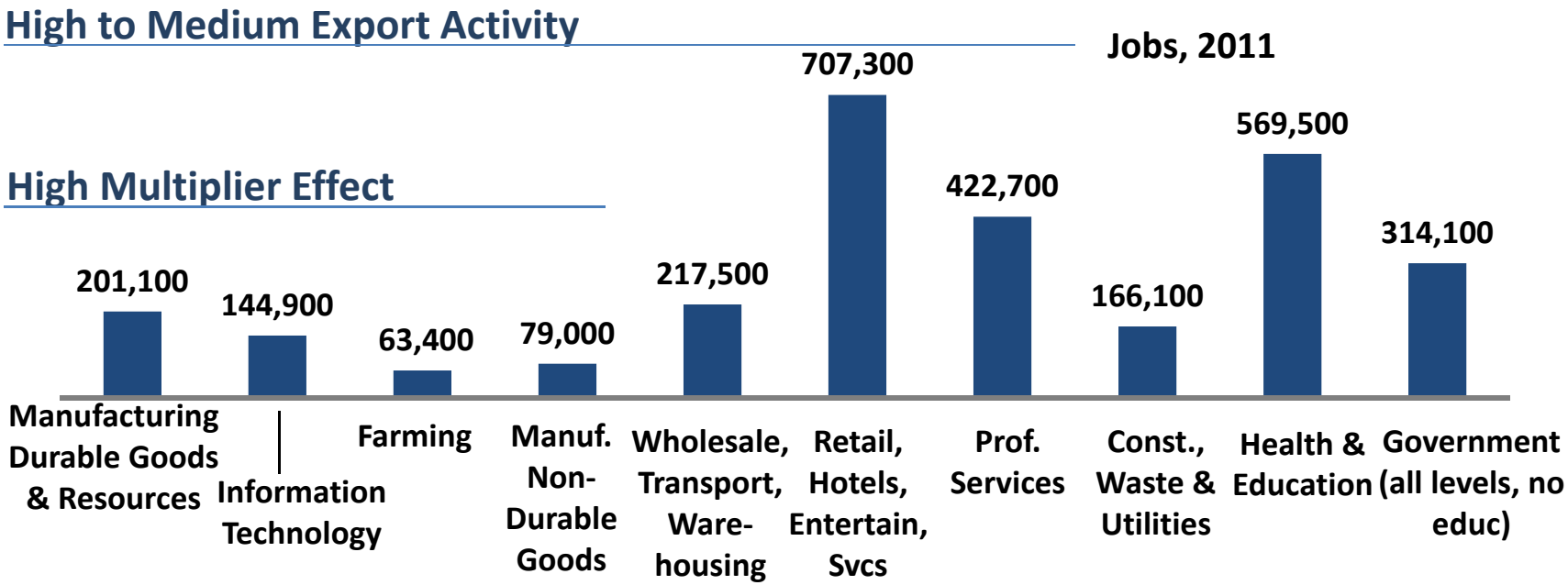
Where transportation investments can make a difference

Imports, Exports and Intraregional 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

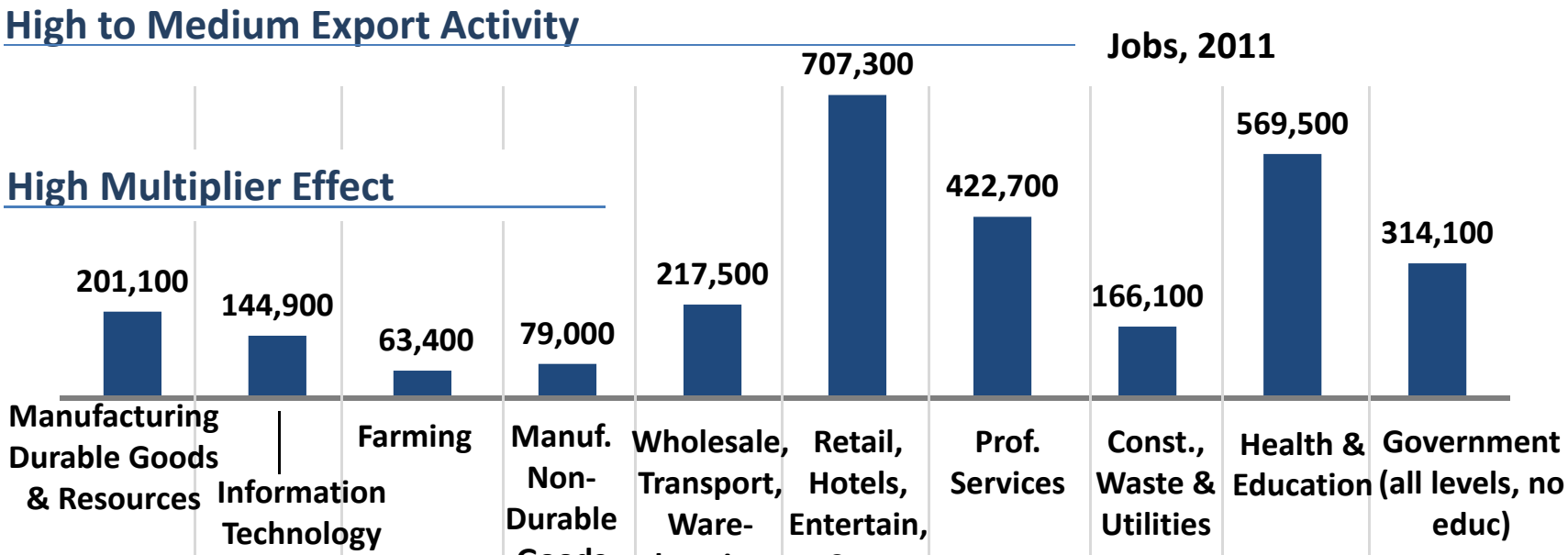
Nonfarm Employment in Washington State							
Not Seasonally Adjusted/*Updated with ***QCEW Data: March 2011							
					Change		
	Prelim	Revised	Revised	Revised	Jul-11	Aug-10	Jul-10
**NAICS Industry Title	Aug-11	Jul-11	Aug-10	Jul-10	Aug-11	Aug-11	Aug-10
Total Nonfarm [1]	2,822,200	2,835,200	2,775,700	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



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



Mobility Needs	Manufacturing Durable Goods & Resources	Information Technology	Farming	Manuf. Non-Durable Goods	Wholesale, Transport, Ware-housing	Retail, Hotels, Entertain, Svcs	Prof. Services	Const., Waste & Utilities	Health & Education	Government (all levels, no educ)
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	Transportation Needs: Access for Labor	Transportation Needs: Out-of-State Freight Infra-structure	Transportation Needs: 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

		Top Ranking Mobility Needs		
Sector	**Exports and Examples**	**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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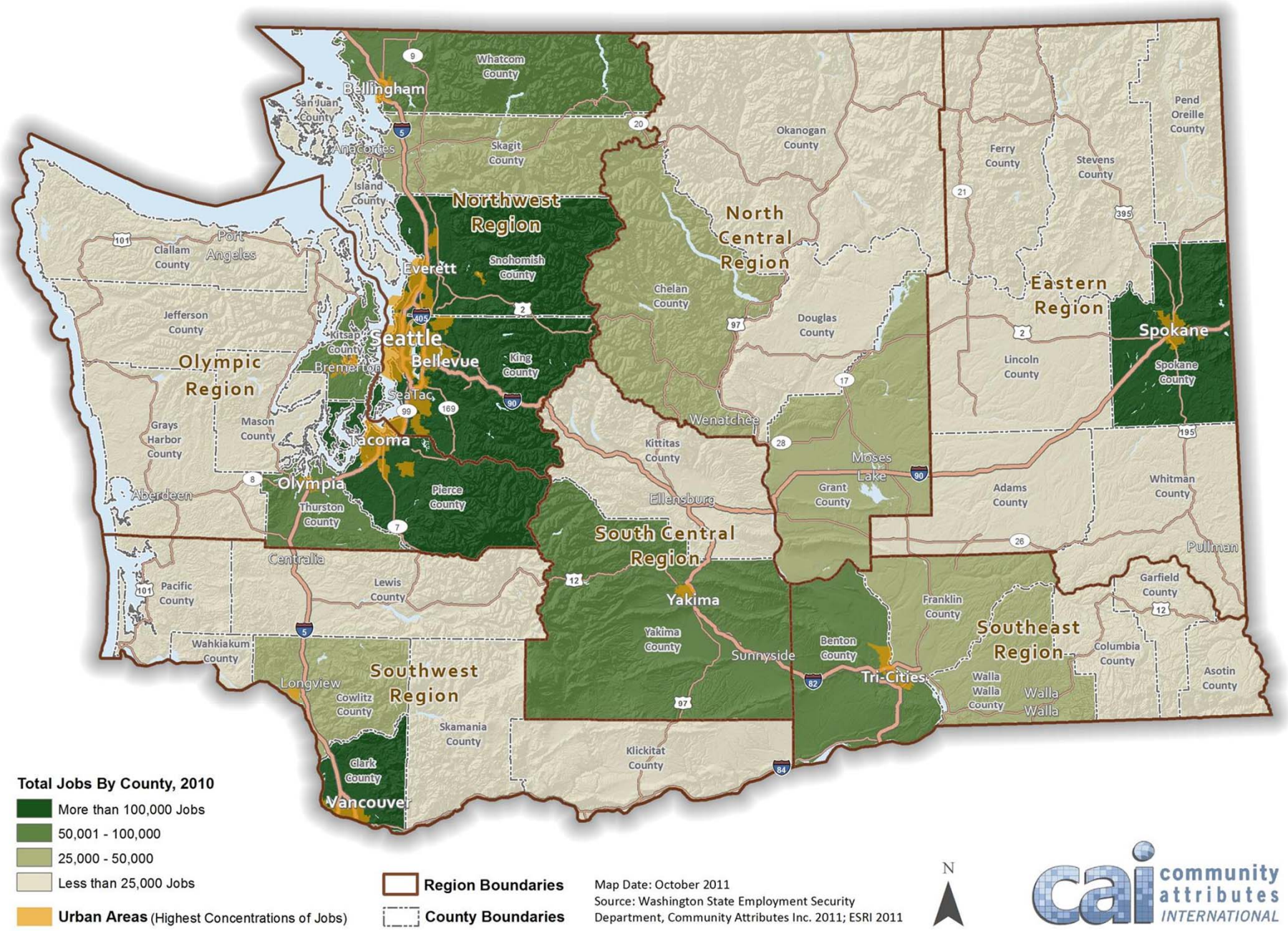
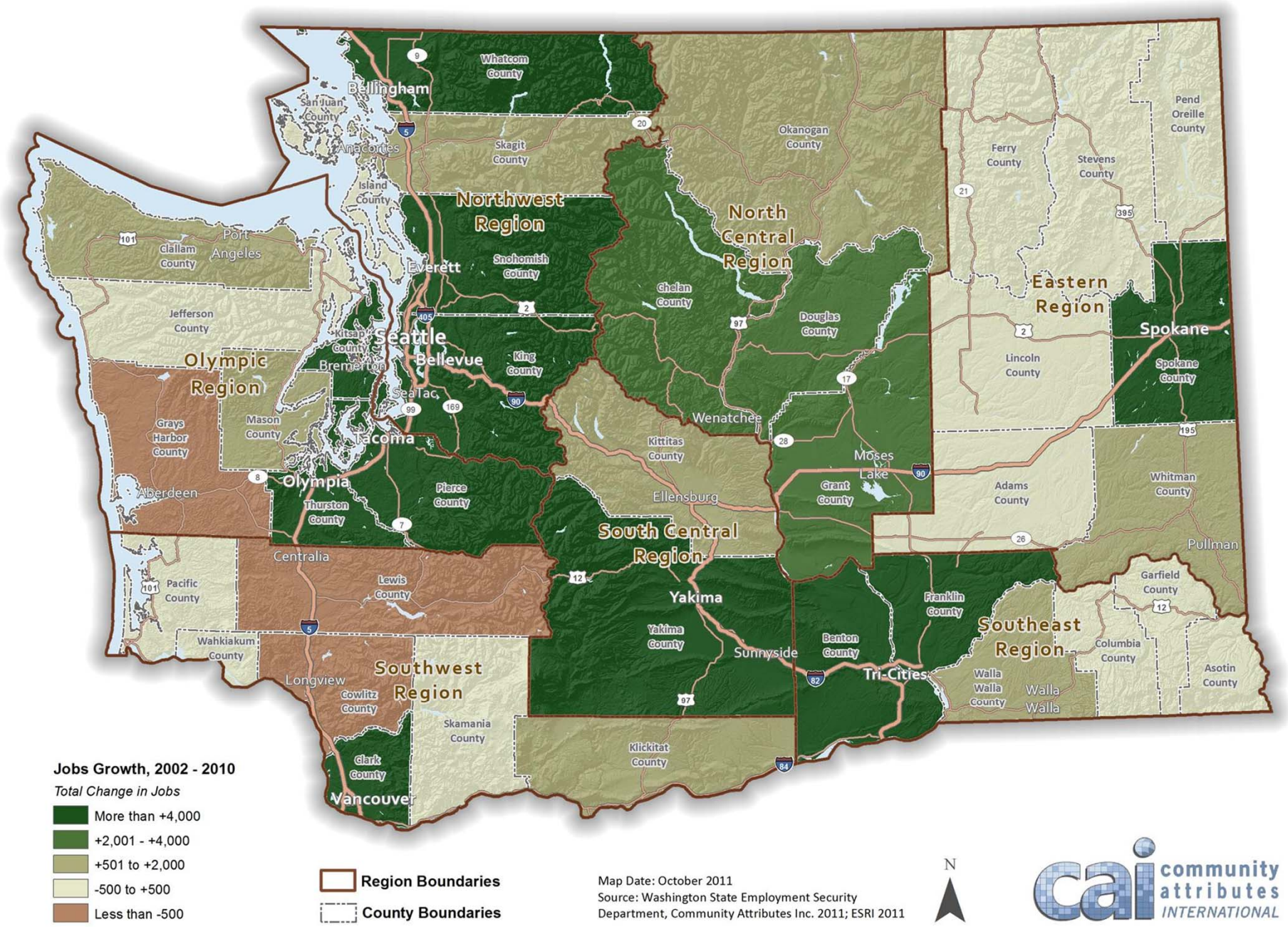
Geographic economic impact considerations

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

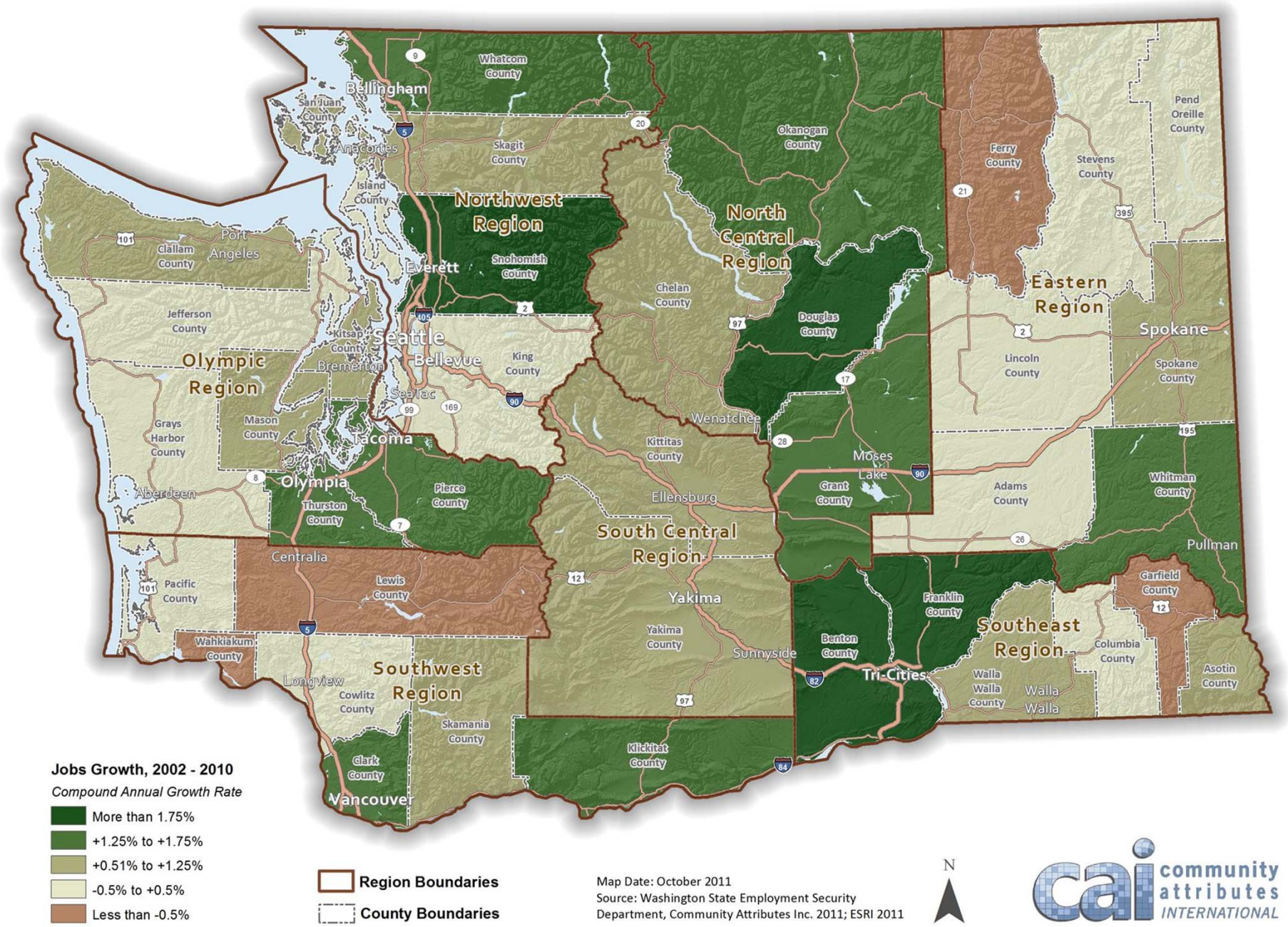
Jobs by County, All Jobs, 2010



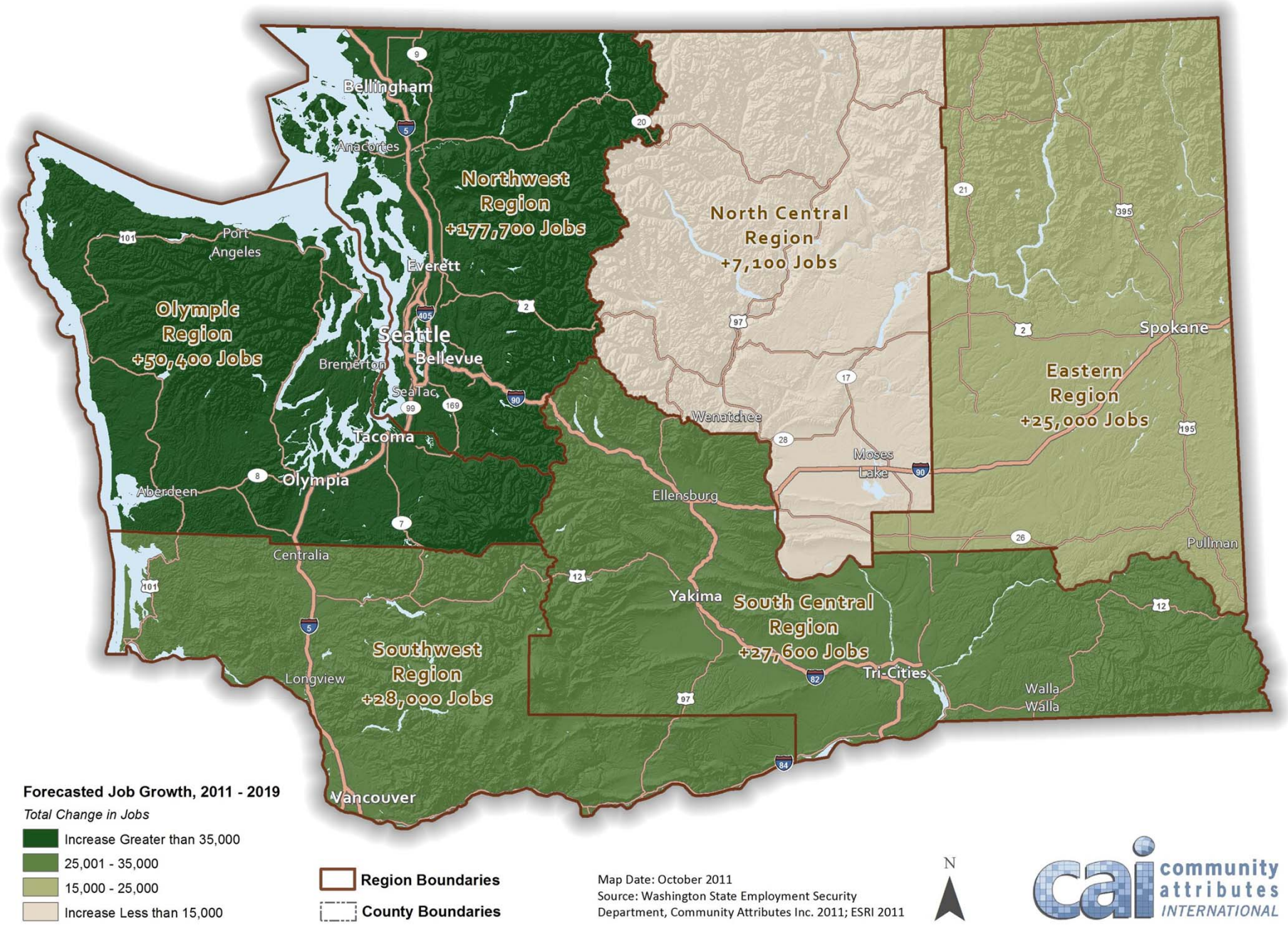
Jobs Growth Change by County, All Jobs, 2002 - 2010



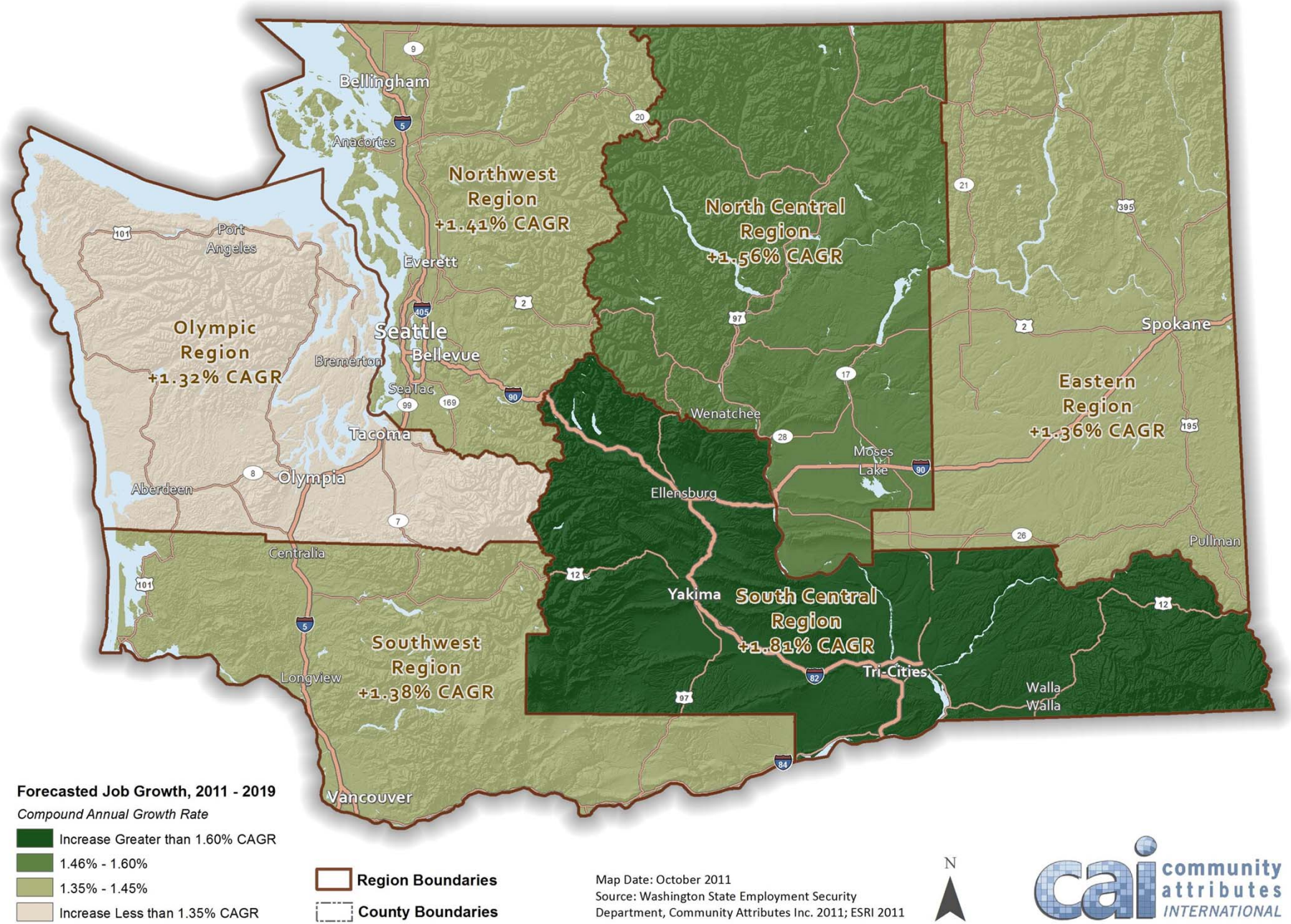
Jobs Growth Rates by County, All Jobs, 2002 - 2010



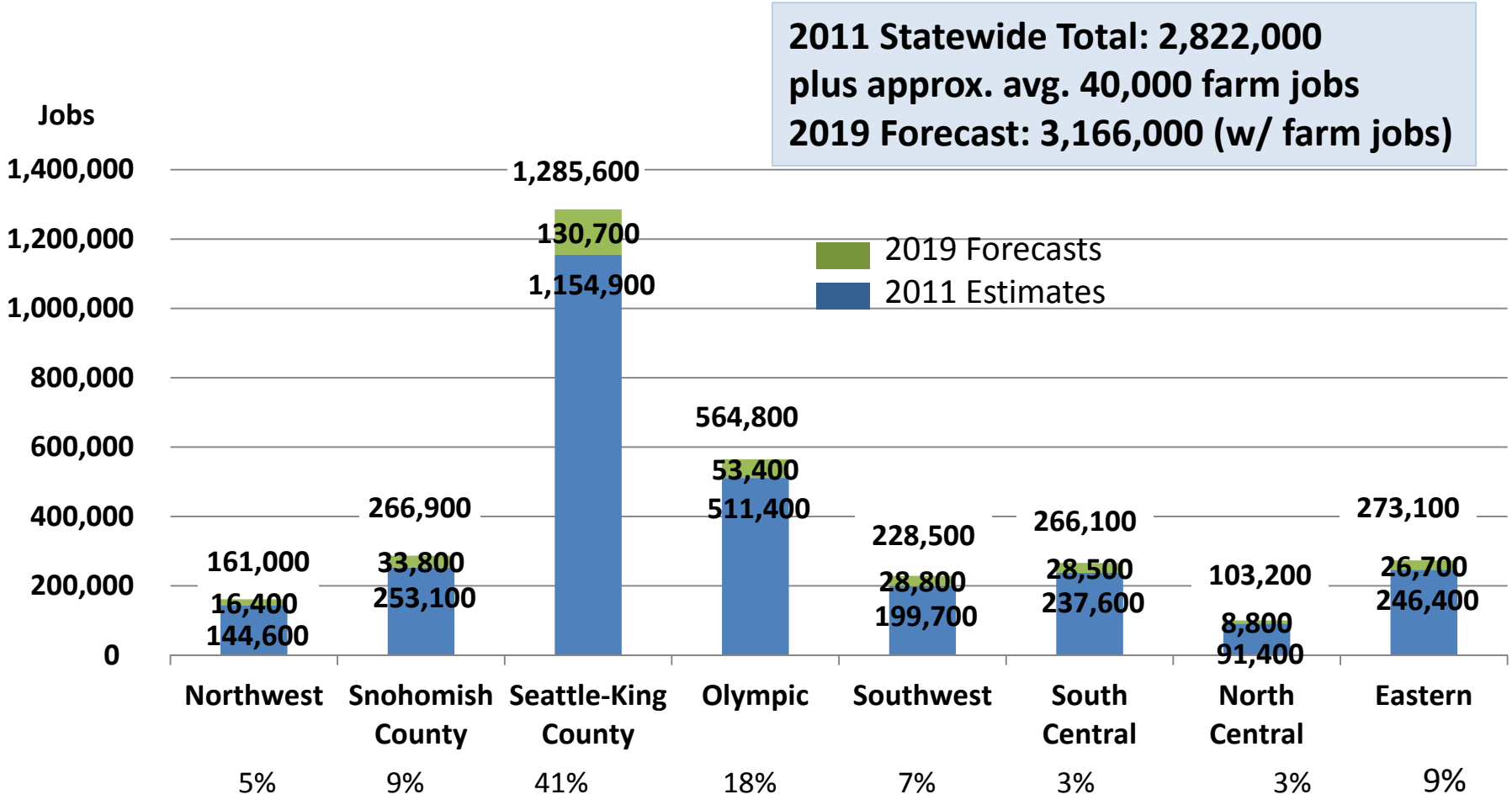
Forecasted Job Growth, All Jobs, 2011 - 2019



Forecasted Job Growth Rates, All Jobs, 2011 - 2019



Jobs by Region in Washington, August 2011



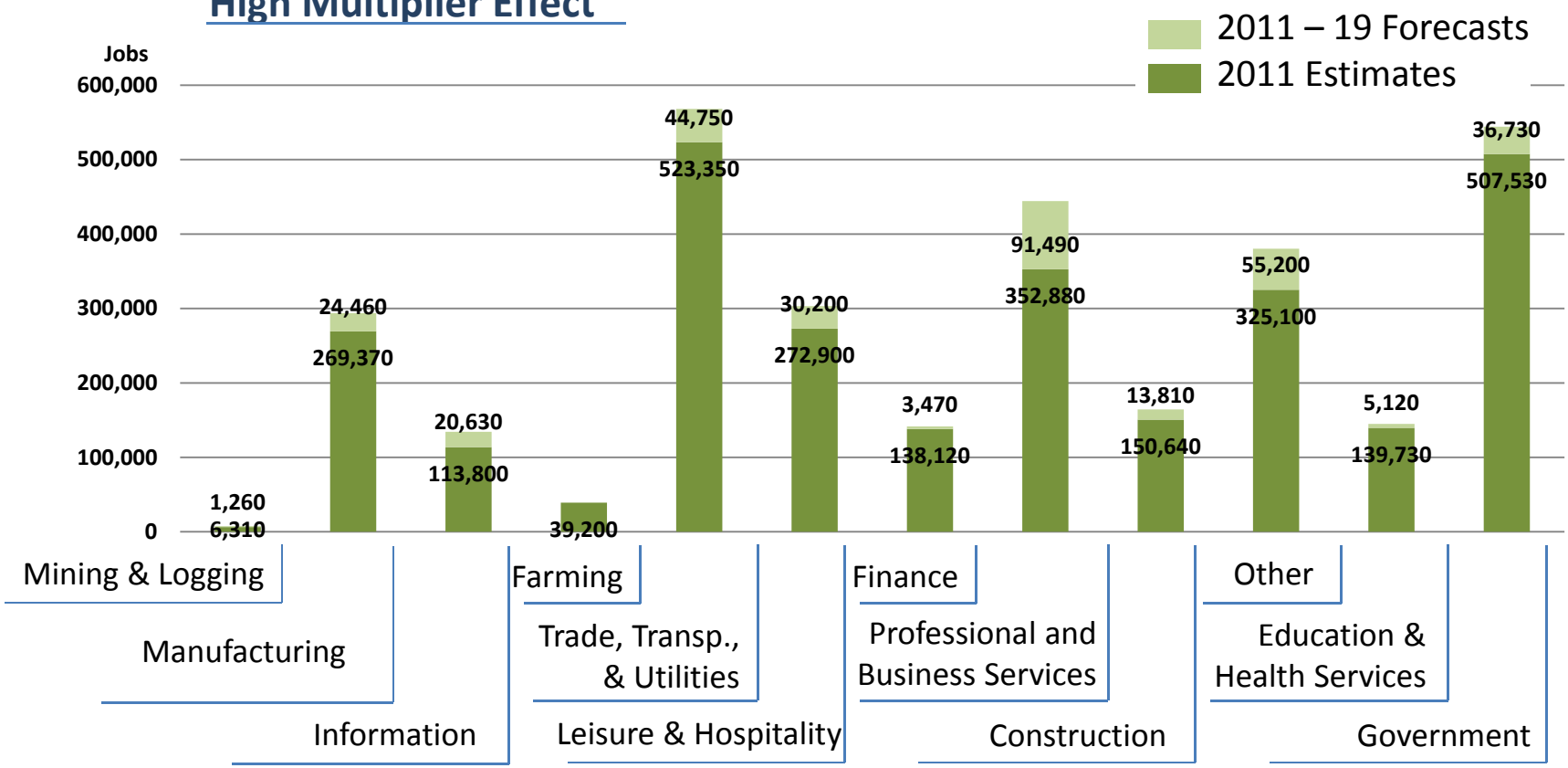
Source: Washington Employment Security Department, Community Attributes
Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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.

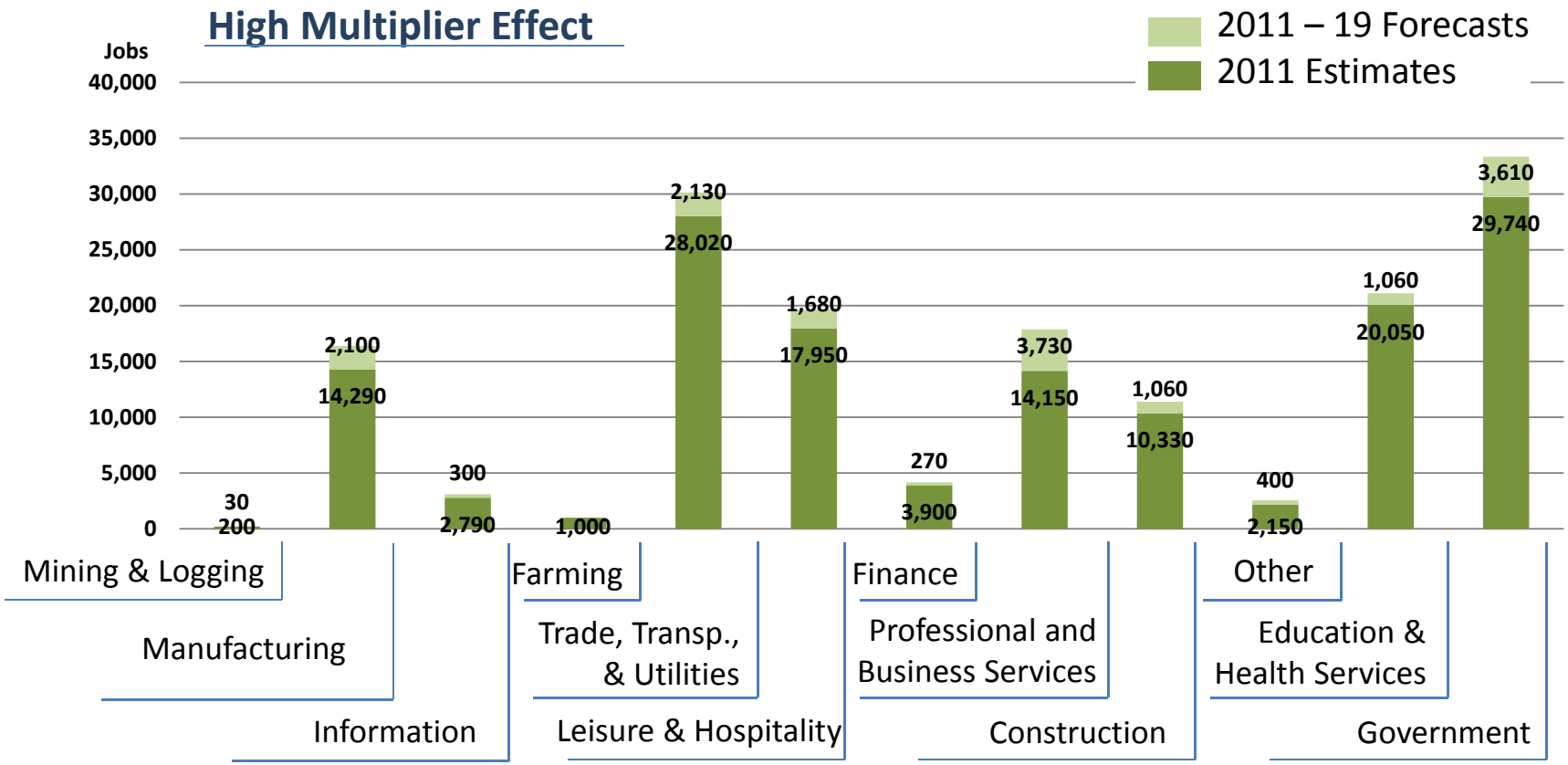
Northwest Region
Whatcom County 77,754 Jobs
San Juan County 5,181 Jobs
Skagit County 45,505 Jobs
Island County 14,856 Jobs
Snohomish County 238,965 Jobs
King County 1,116,535 Jobs
Blaine
Sumas
Lynden
Ferndale
Deming
Bellingham
Friday Harbor
Anacortes
Mount Vernon
Lyman
Concrete
Rockport
Conway
Oak Harbor
Coupeville
Stanwood
Camano
Marysville
Verlot
Langley
Everett
Mill Creek
Monroe
Gold Bar
Shoreline
Duvall
Skykomish
Redmond
Carnation
Seattle
Bellevue
Issaquah
Renton
Vashon
Black Diamond
Auburn
Enumclaw
9
20
5
2
405
90
169
99

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



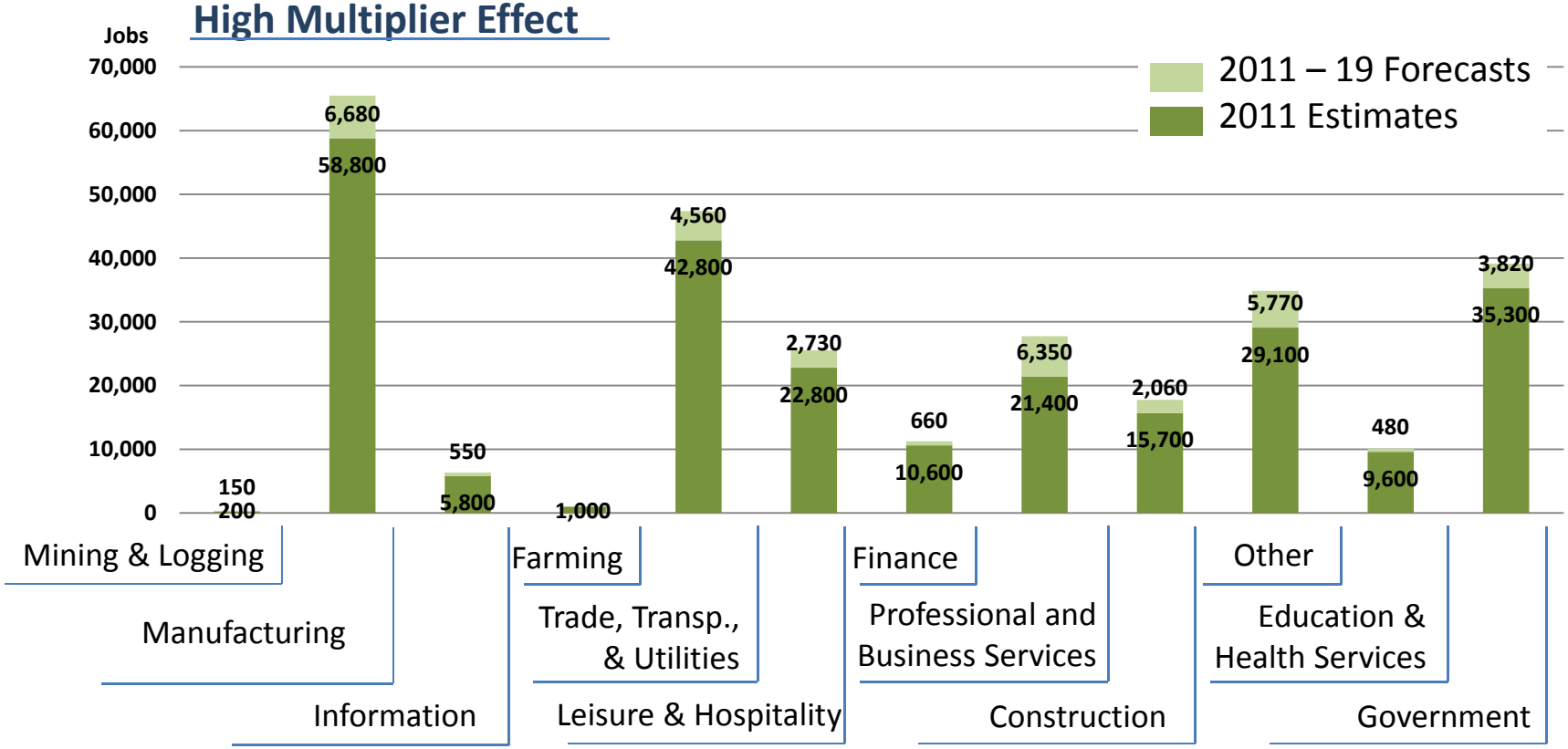
Source: Washington Employment Security Department, Community Attributes
Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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



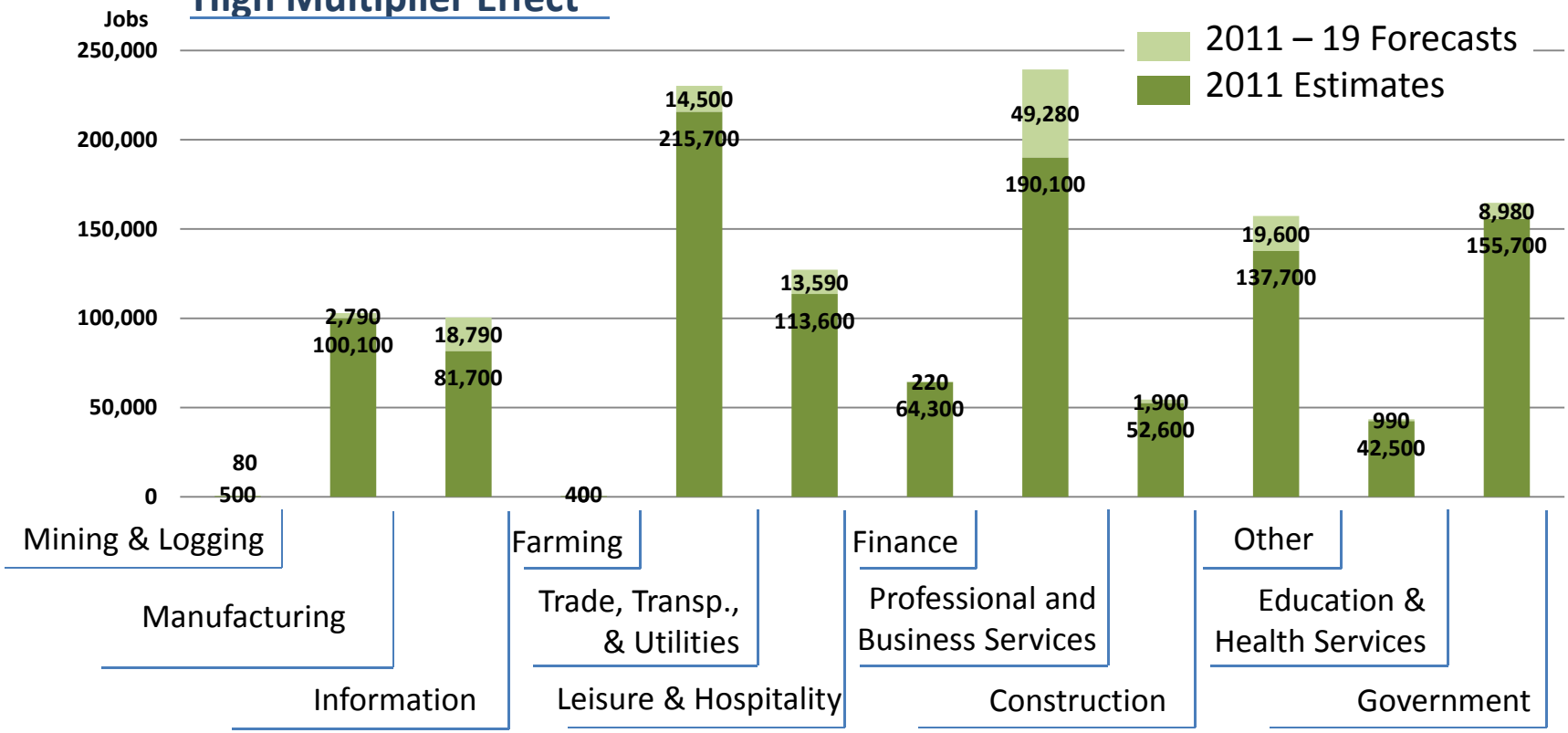
Source: Washington Employment Security Department, Community Attributes
Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

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.

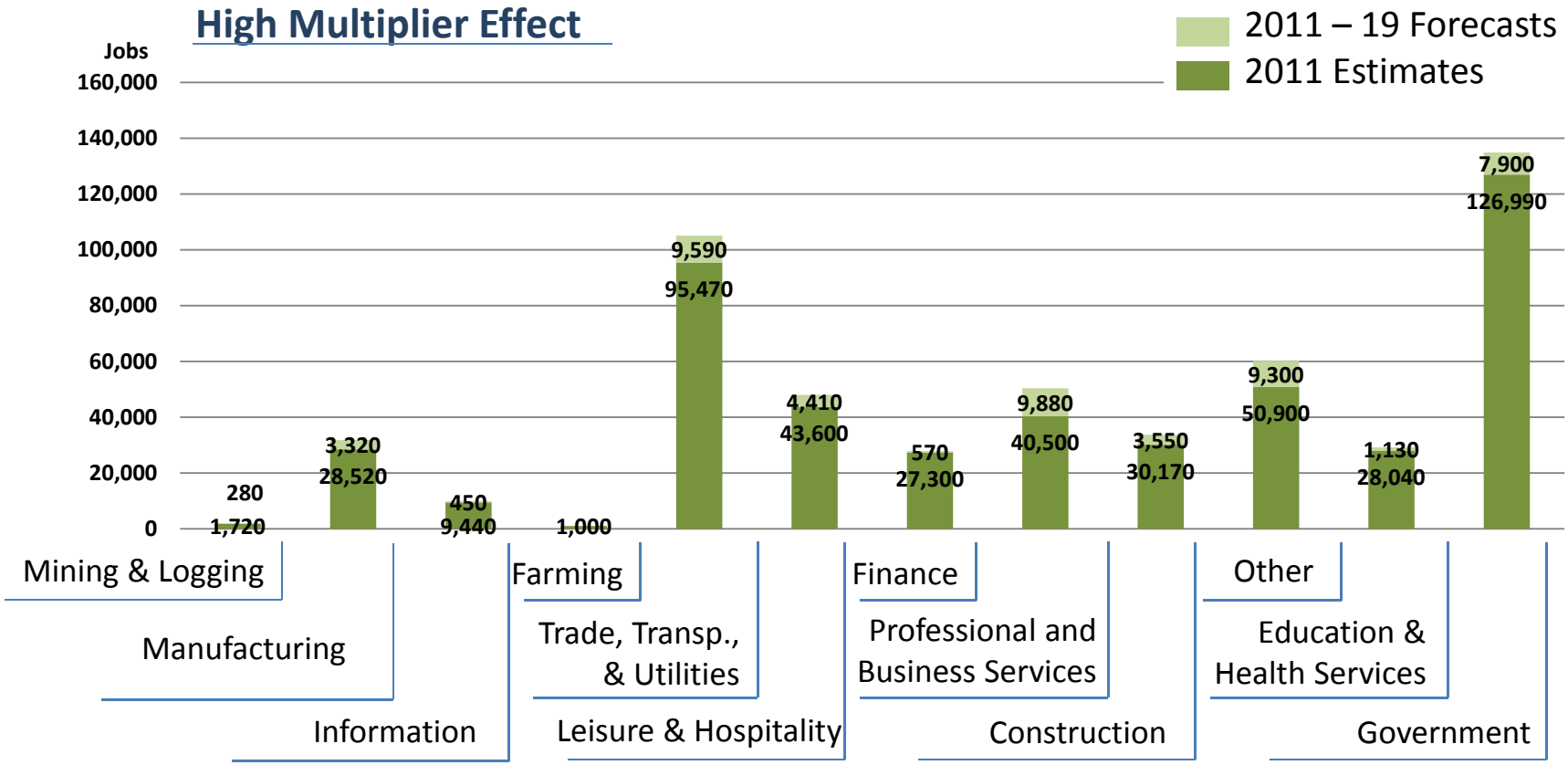
Olympic Region
Clallam County 21,895 Jobs
Jefferson County 8,005 Jobs
Grays Harbor County 22,526 Jobs
Mason County 13,433 Jobs
Kitsap County 80,911 Jobs
Thurston County 96,766 Jobs
Pierce County 266,862 Jobs
Port Angeles
Forks
Neah Bay
Port Townsend
Sequim
Blyn
Port Ludlow
Quilcene
Kingston
Poulsbo
Silverdale
Bremerton
Neilton
Taholah
Skokomish
Shelton
Gig Harbor
Ruston
Tacoma
Sumner
Buckley
Lakewood
Puyallup
Carbonado
Copalis Beach
Ocean City
Aberdeen Gardens
Ocean Shores
Aberdeen
Satsop
McCleary
Olympia
Roy
Westport
Grayland
Oakville
Tenino
Grand Mound
Eatonville
Elbe
Ashford
101
12
5

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



Source: Washington Employment Security Department, Community Attributes
Note: Data for August, with CAI estimates to overcome data limitations, draft estimates.

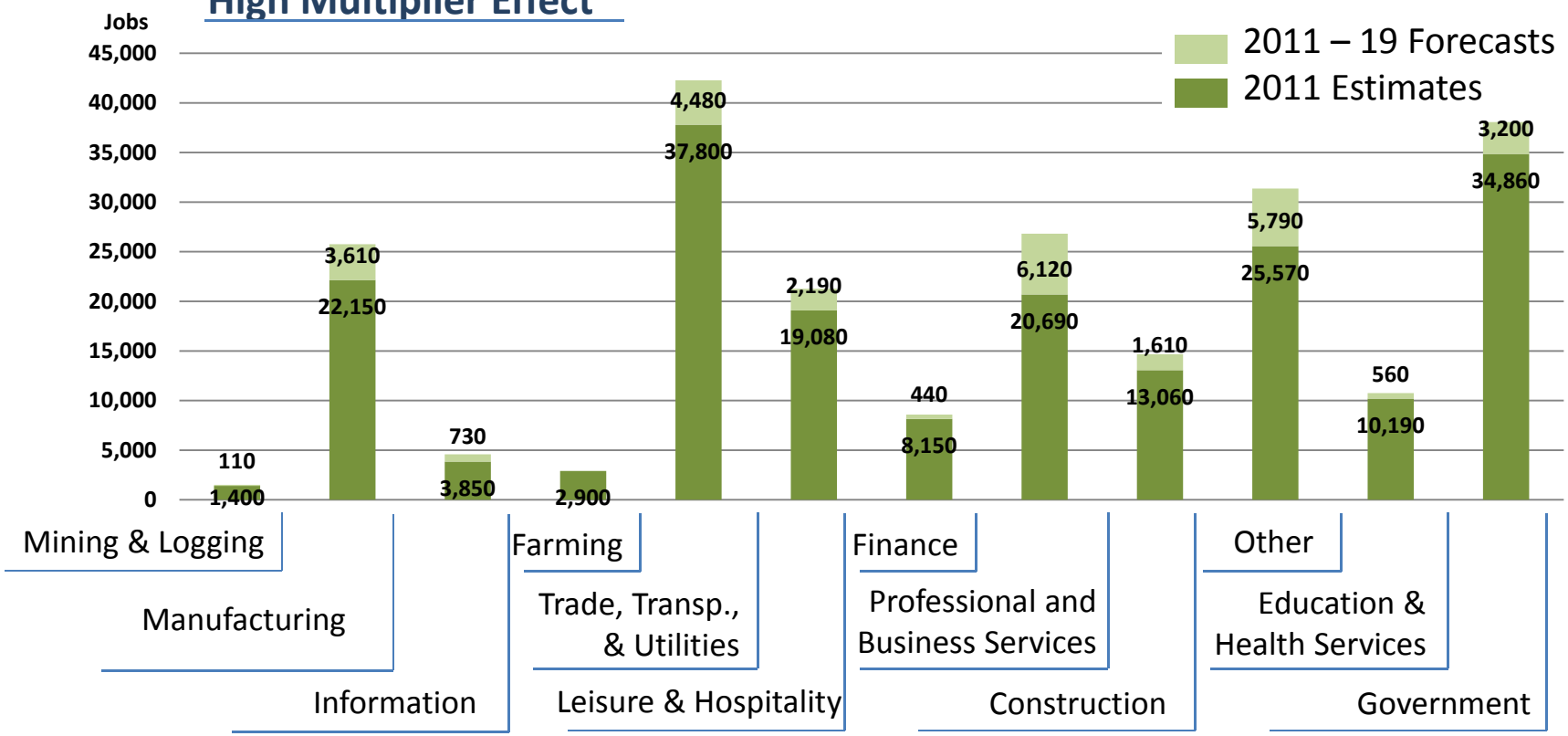
Southwest
Region
Pacific County
6,000
Jobs
Wahkiakum
County
699 Jobs
Lewis County
23,396 Jobs
Cowlitz
County
35,436 Jobs
Clark
County
126,705 Jobs
Skamania
County
2,010 Jobs
Klickitat County
6,731 Jobs
Tokeland
Raymond
Bay Center
Ocean Park
Long Beach
Nasel Ta
Chinook
Pe Ell
Centralia
Chehalis
Napavine
Elbe
Morton
Castle Rock
East Cathlamet
Longview
Kalama
Woodland
La Center
Ridgefield
Orchards
Vancouver
Camas
Trout Lake
Klickitat
White Salmon
Stevenson
Lyle
Dallesport
Wishram
Maryhill
Bickleton
Roosevelt
5
7
12
97
84

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



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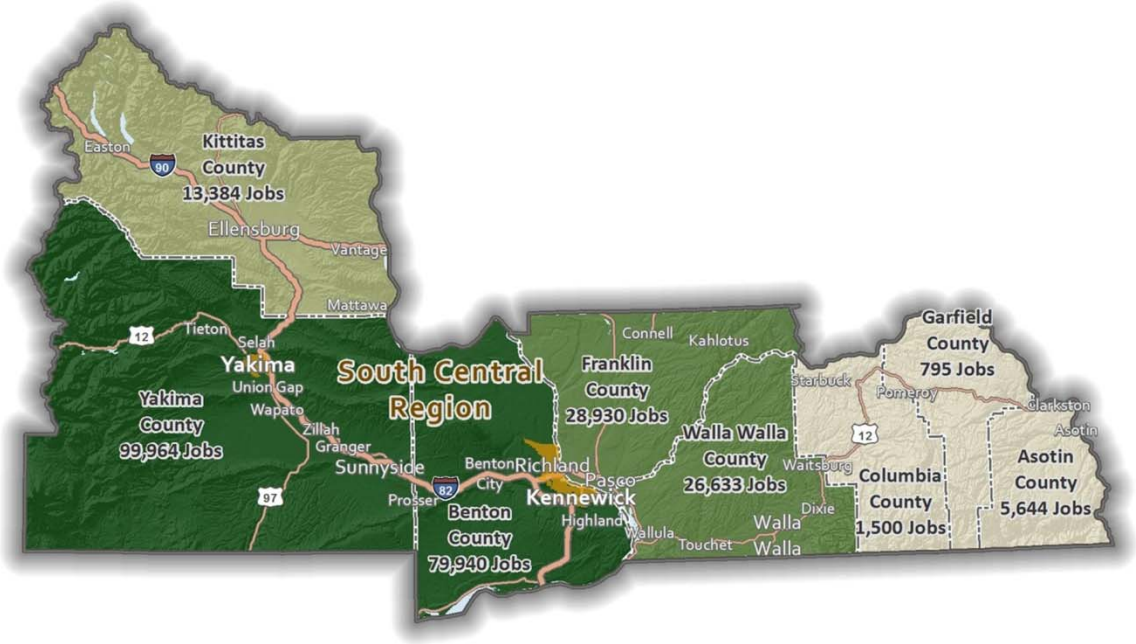
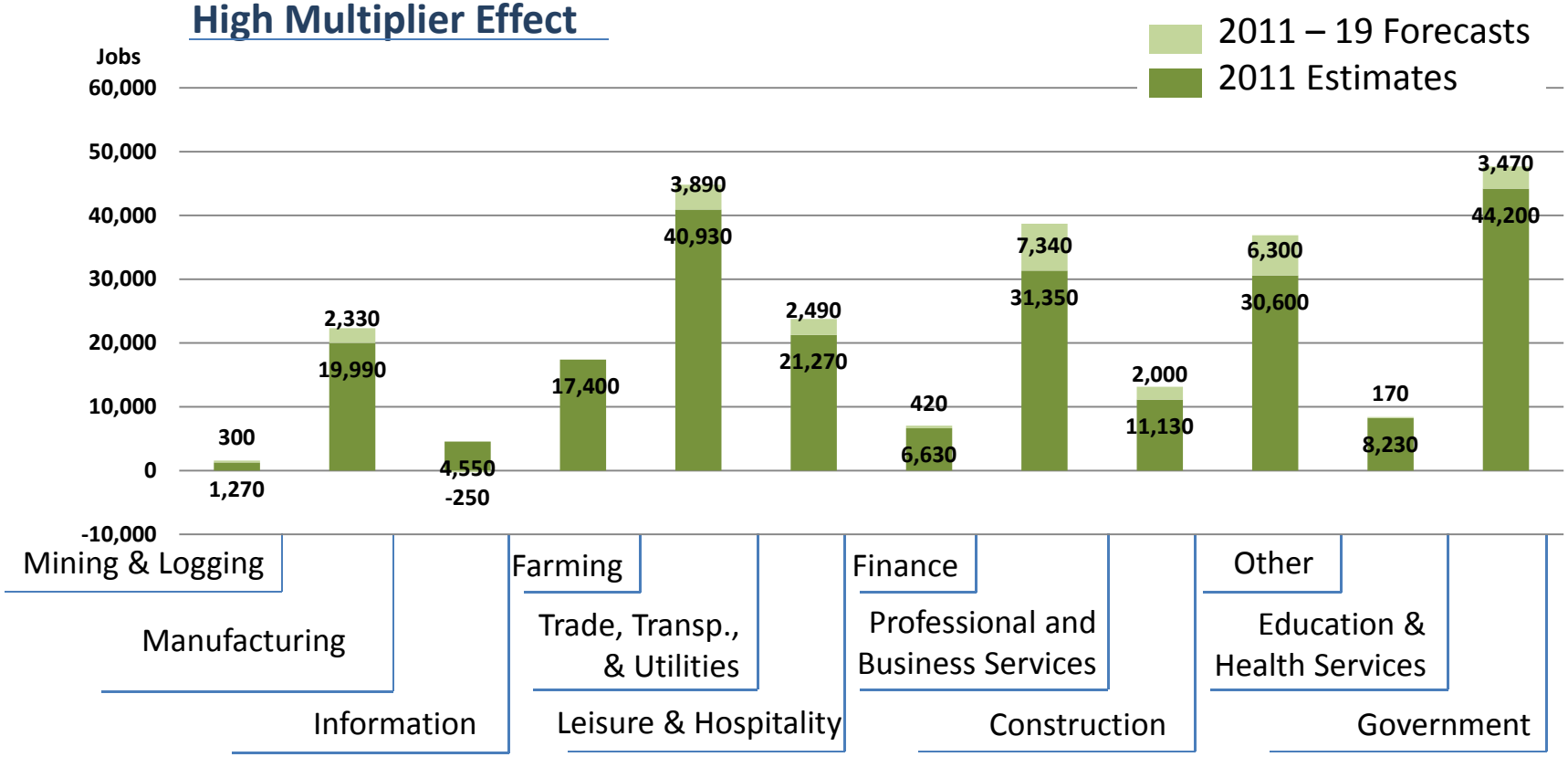

Kittitas County 13,384 Jobs
Easton
90
Ellensburg
Vantage
Mattawa
12
Tieton
Selah
Yakima
Union Gap
Wapato
Zillah
Granger
Sunnyside
Yakima County 99,964 Jobs
97
South Central Region
Benton City
Prosser
82
Benton County 79,940 Jobs
Richland
Kennewick
Pasco
Highland
Wallula
Connell
Kahlotus
Franklin County 28,930 Jobs
Starbuck
Walla Walla County 26,633 Jobs
Touchet
Walla Walla
Dixie
Waitsburg
12
Pomeroy
Garfield County 795 Jobs
Columbia County 1,500 Jobs
Clarkston
Asotin
Asotin County 5,644 Jobs

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
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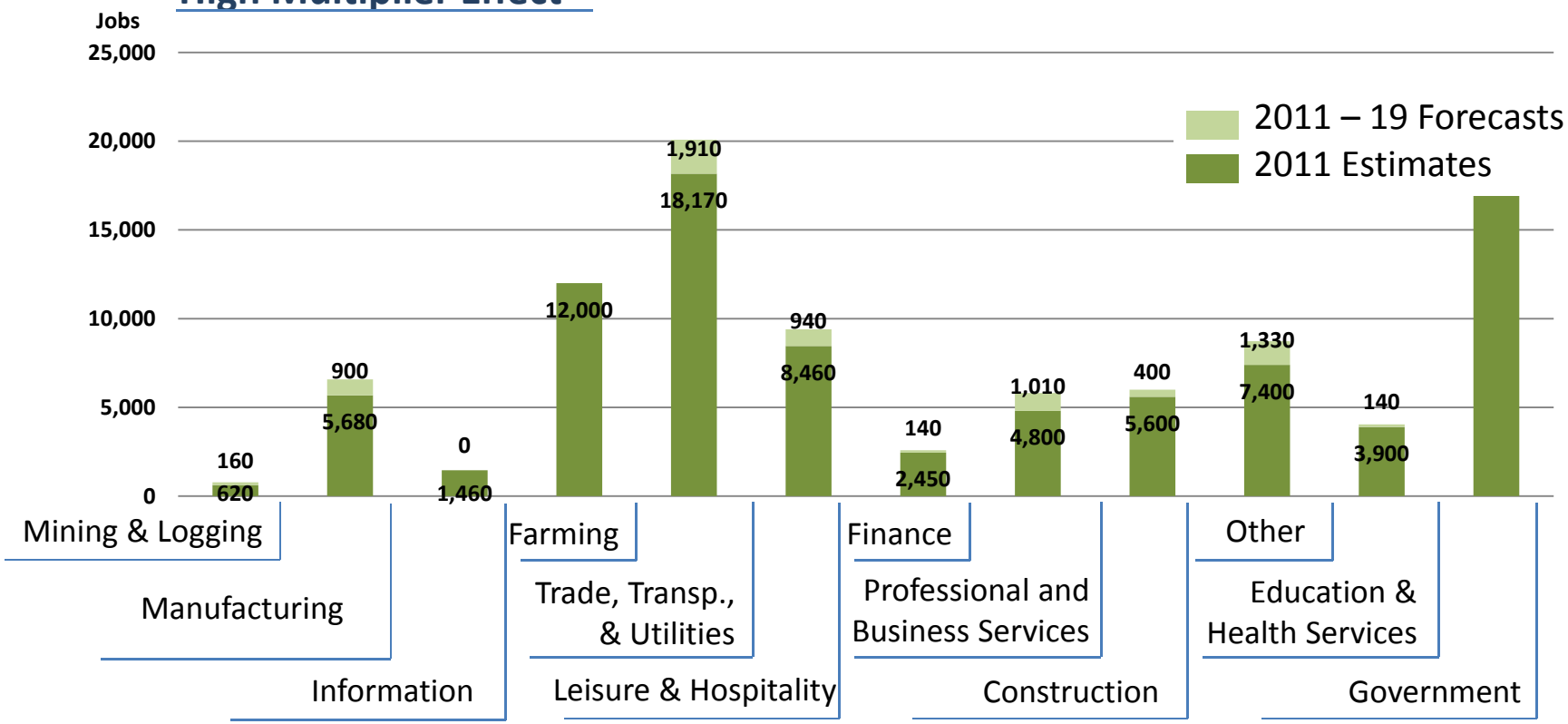
North Central Region
Okanogan County
17,332 Jobs
Chelan County
38,195 Jobs
Douglas County
10,839 Jobs
Grant County
34,270 Jobs
Oroville
Tonasket
Republic
Conconully
Riverside
Winthrop
Omak
Twisp
Okanogan
Nespelem Community
Brewster
Elmer City
Pateros
Bridgeport
Chelan
Mansfield
Almira
Hartline
Entiat
Leavenworth
Waterville
Coulee City
Cashmere
Wenatchee
Wilson Creek
Krupp
Soap Lake
Ephrata
Quincy
Moses Lake
George
Warden
Vantage
Royal City
Mattawa
Desert Aire
20
97
2
17
90
26

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
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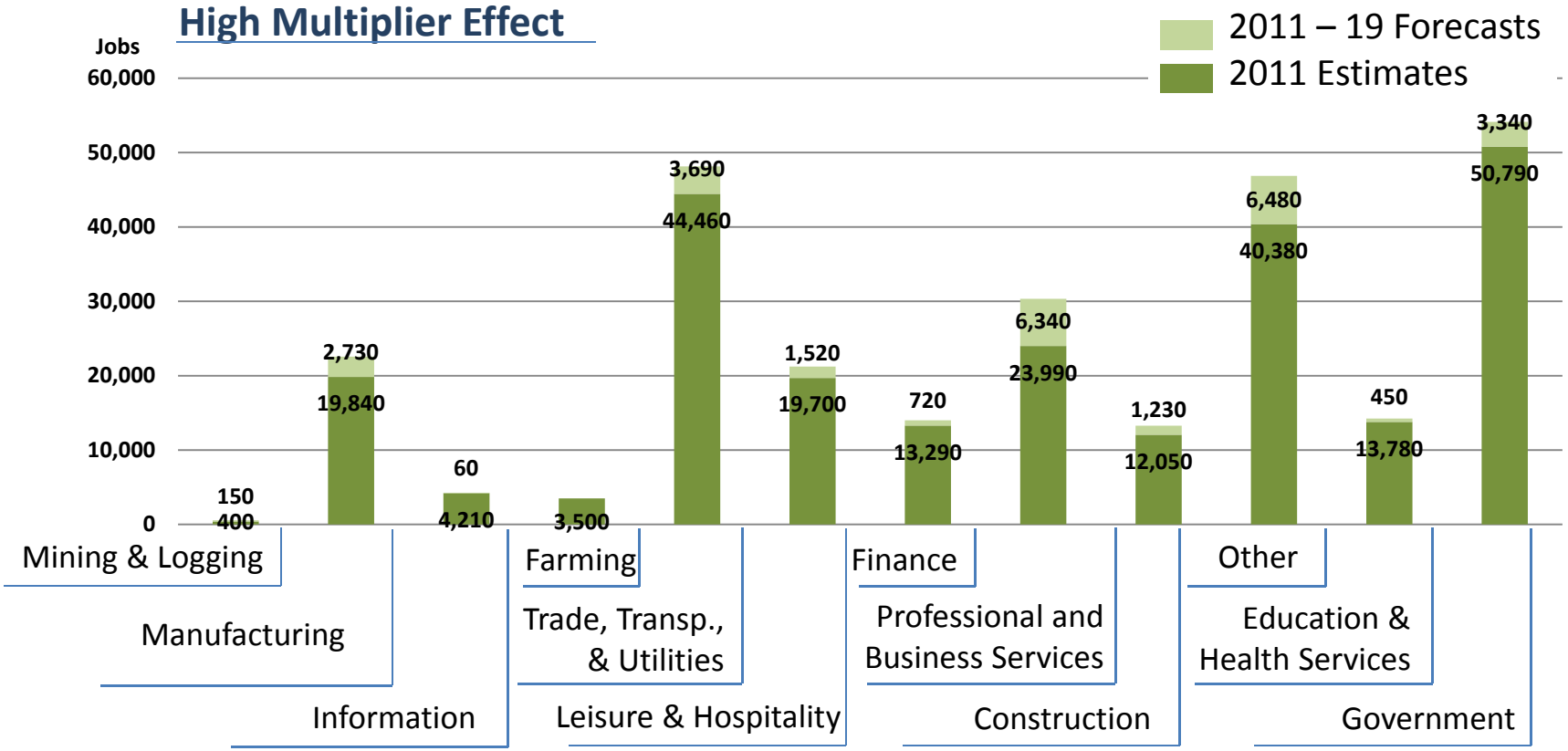
community attributes INTERNATIONAL

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



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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