

PacMtn Industry Analysis Update

Economic Forecast Expo

December 2019

Adjustments

2012 Industry Clusters

- Food Manufacturing
- Wood Products
- Life Sciences
- Chemical Products
- IT/Telecommunication
- Tourism and Recreation

2019 Industry Clusters

- Food Manufacturing
- Wood Products
- Health Care
- Specialty Manufacturing/Logistics
- IT/Telecommunication
- Tourism and Recreation

Approach Updates

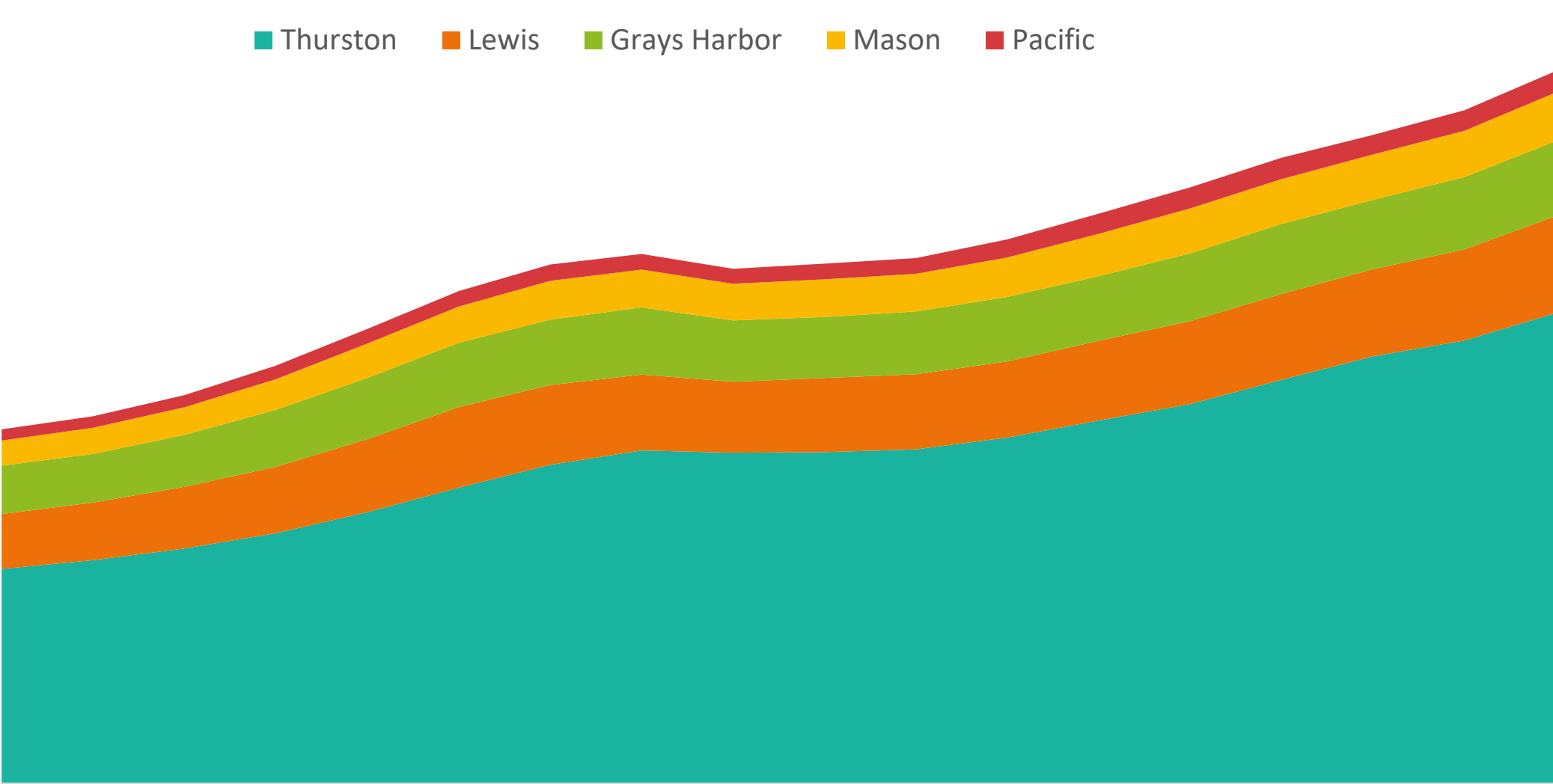
- Industry and Workforce Tracks
- Real-Time Data Query Structures + Training
- Customized County Findings

PacMtn Gross Domestic Product, 2001-2108

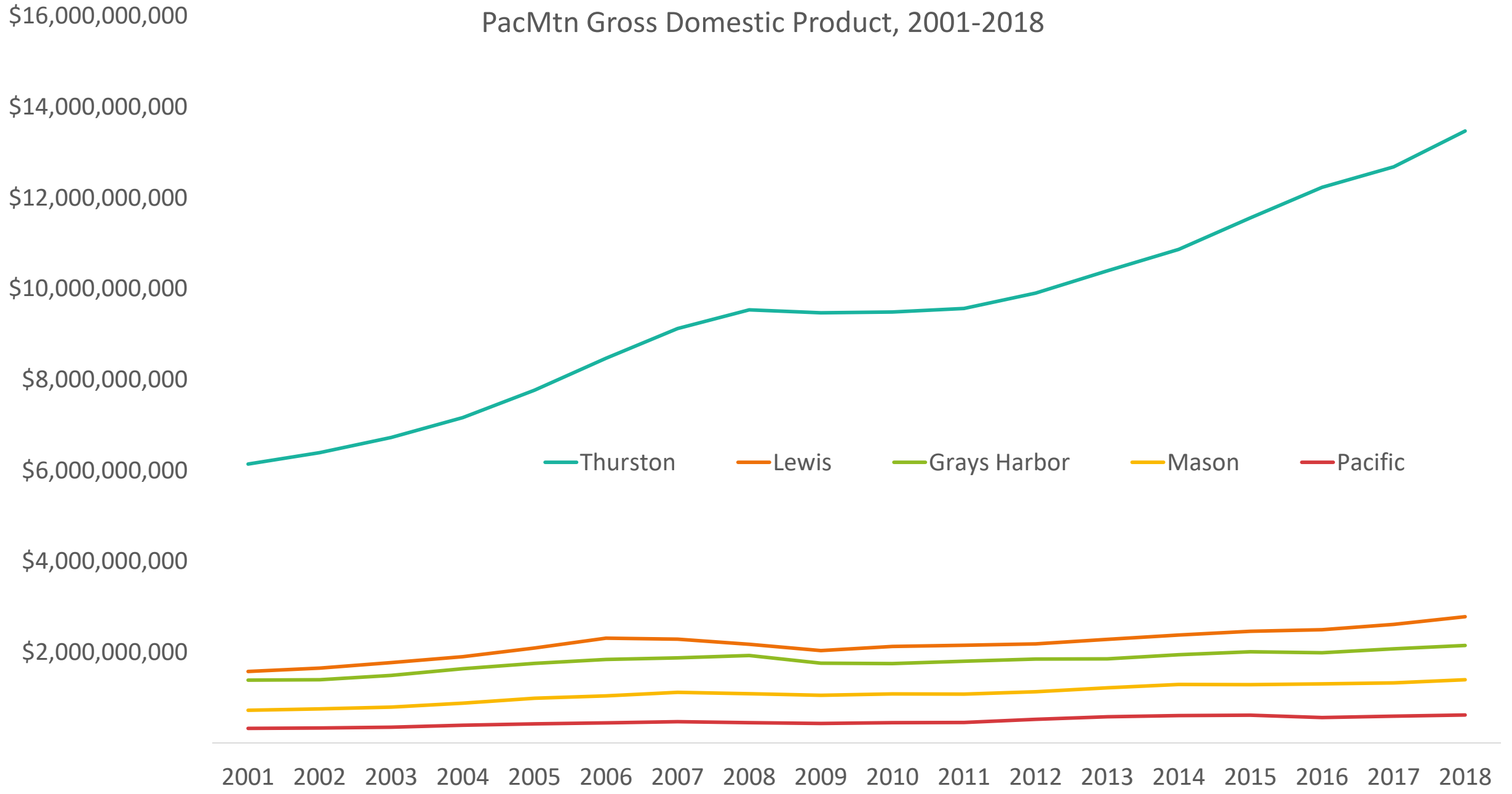
Thurston Lewis Grays Harbor Mason Pacific

\$25,000,000,000
\$20,000,000,000
\$15,000,000,000
\$10,000,000,000
\$5,000,000,000

2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018



PacMtn Gross Domestic Product, 2001-2018

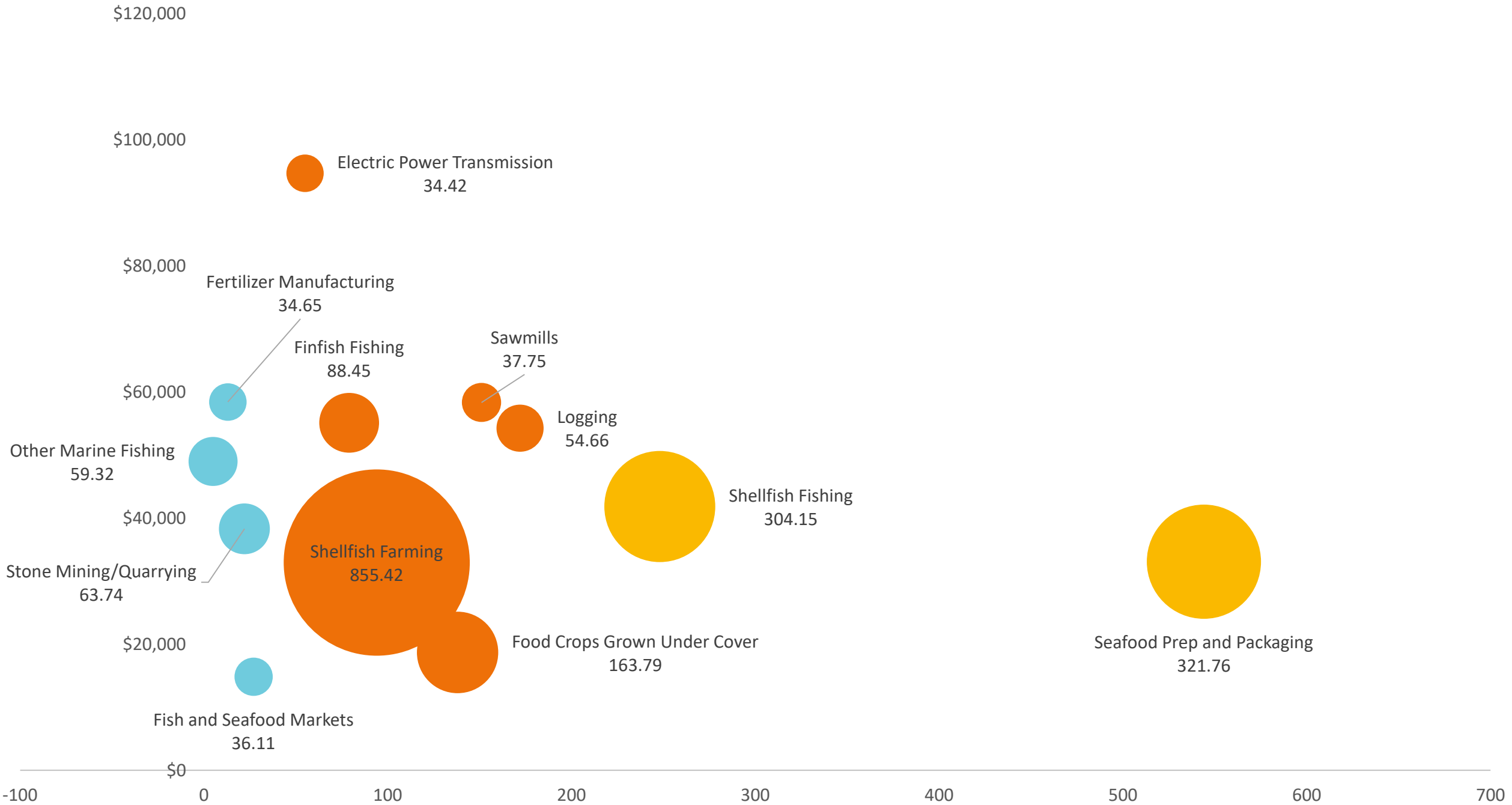


Highest
Industry LQ

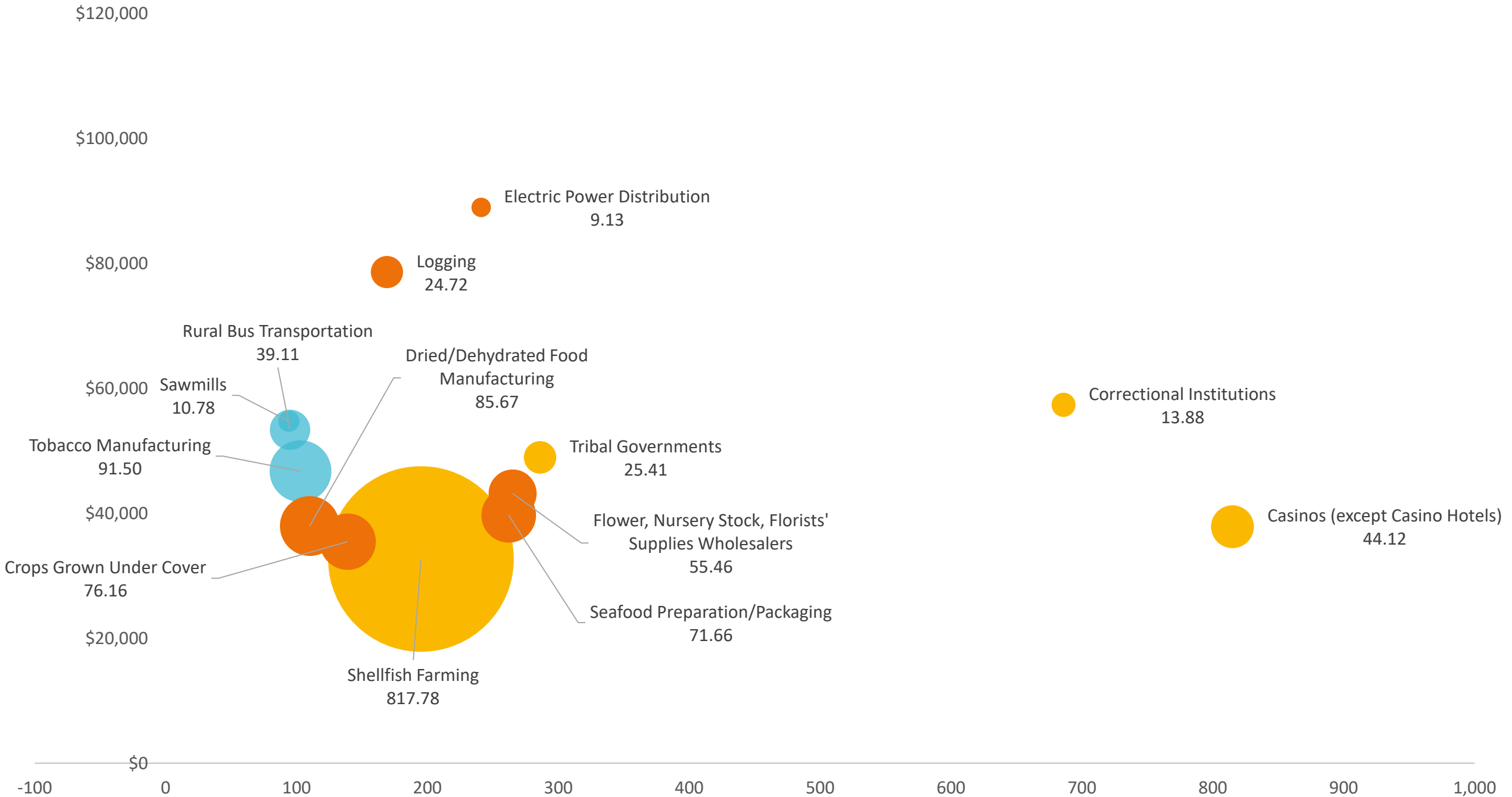
Above 10.0

Industry	Emp	Avg Ann Wages	LQ	Total New Demand
Shellfish Farming	484	\$34,003	158.28	610
Other Food Crops Grown Under Cover	858	\$29,491	36.68	1,143
Seafood Product Preparation and Packaging	1,294	\$35,737	27.62	1,296
Forest Nurseries and Gathering of Forest Products	86	\$66,431	26.65	117
Softwood Veneer and Plywood Manufacturing	460	\$70,036	24.32	468
Sawmills	2,027	\$68,106	18.26	2,184
Shellfish Fishing	396	\$44,002	17.51	365
Finfish Farming and Fish Hatcheries	78	\$51,065	15.04	100
Logging	1,239	\$59,963	14.18	1,092
American Indian Tribal Governments	1,989	\$50,883	13.82	2,013
Support Activities for Forestry	429	\$41,087	12.89	486
Crushed and Broken Stone Mining and Quarrying	117	\$51,583	12.07	108
Engineered Wood Member Manufacturing	101	\$79,904	11.55	107
Casinos (except Casino Hotels)	2,606	\$39,319	11.02	4,004
Administration of Education Programs	957	\$71,419	10.41	947
Administration of Human Resource Programs	5,170	\$67,285	10.26	5,043

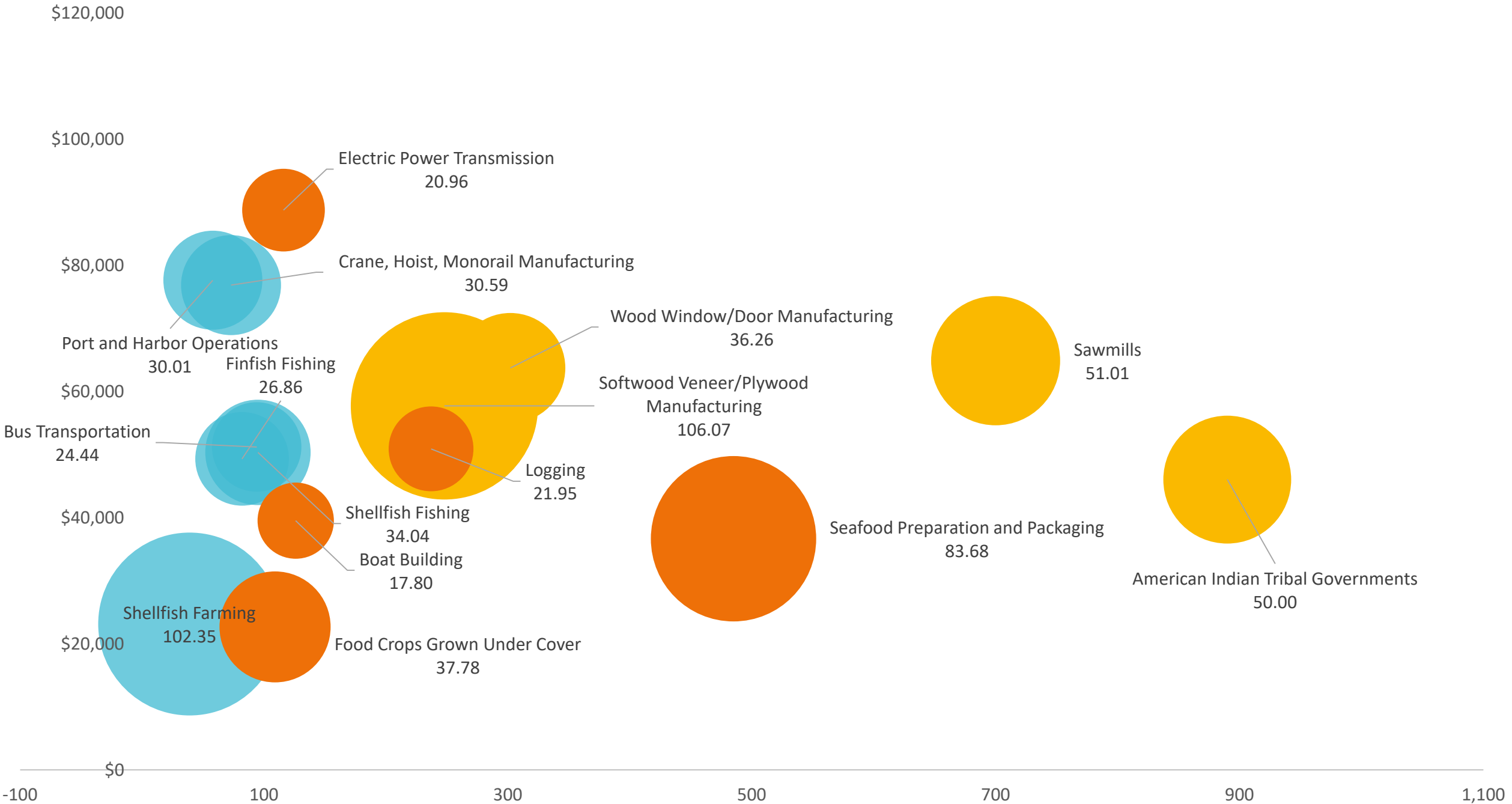
Pacific County: Highest LQ Industries by Total Employment with Annual Wage, 2019



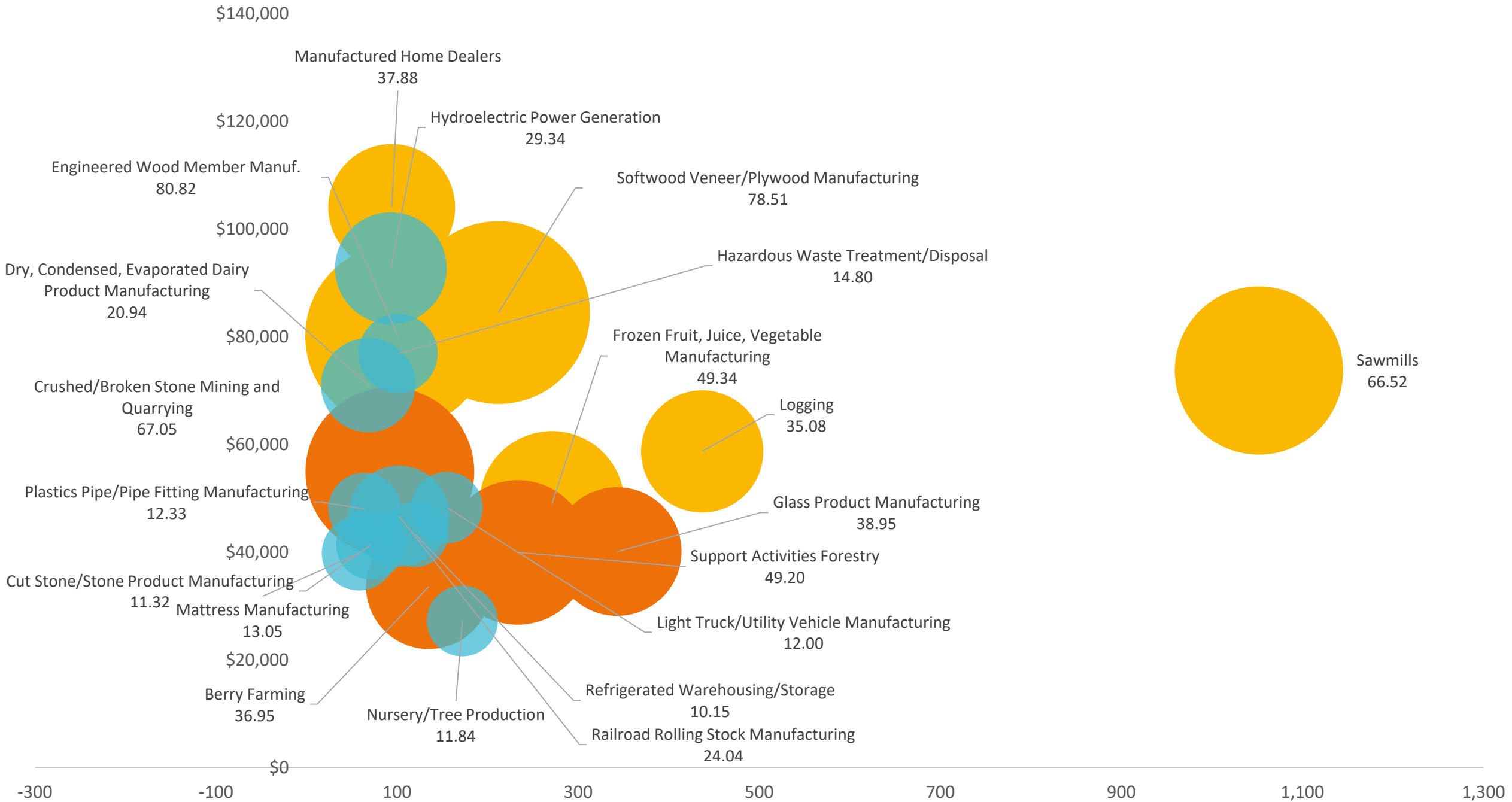
Mason County: Highest LQ Industries (min 50 jobs) by Total Employment with Average Annual Wage, 2019



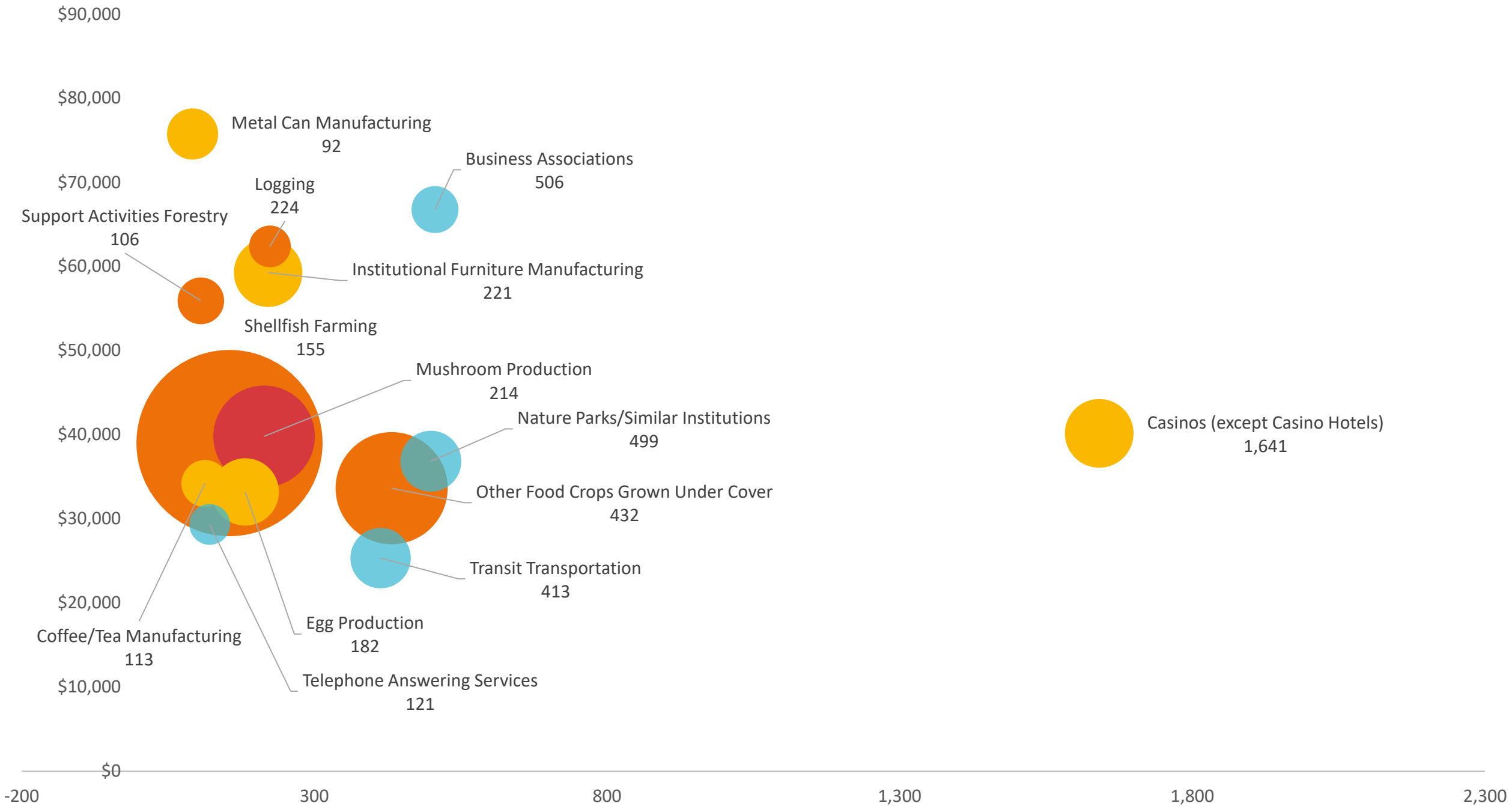
Grays Harbor: Highest LQ Industries by Total Employment and Annual Average Wage, 2019



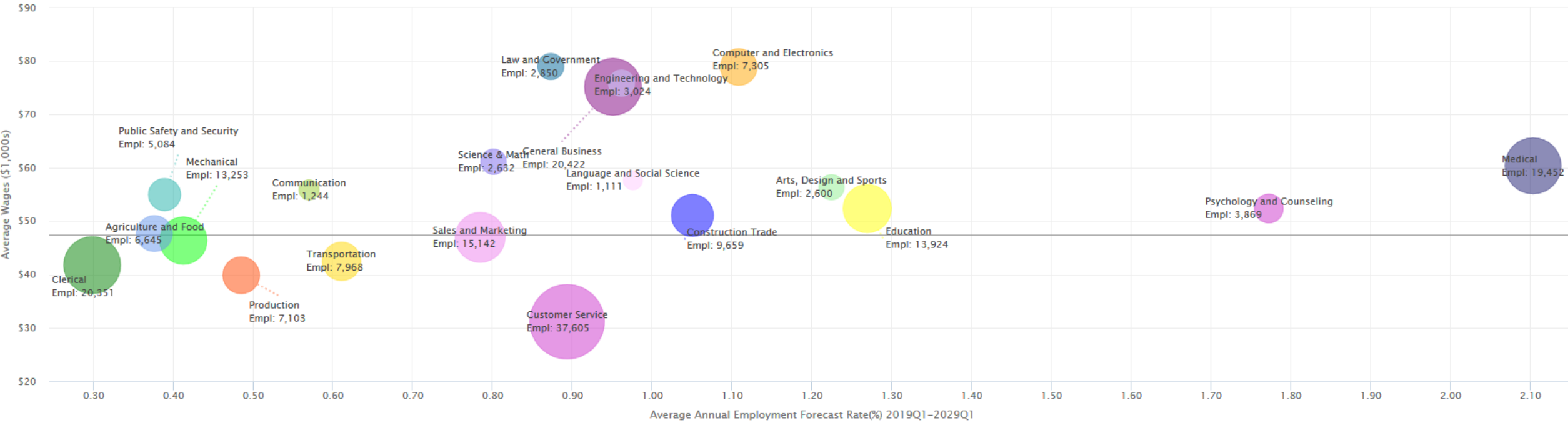
Lewis County: Highest LQ Industries by Total Employment with Annual Average Wage, 2019



Thurston County: Highest LQ Industries (min 90 jobs) by Total Employment with Annual Average Wage, 2019



Occupation Clusters for PacMtn Region 2019 as of 2019Q1



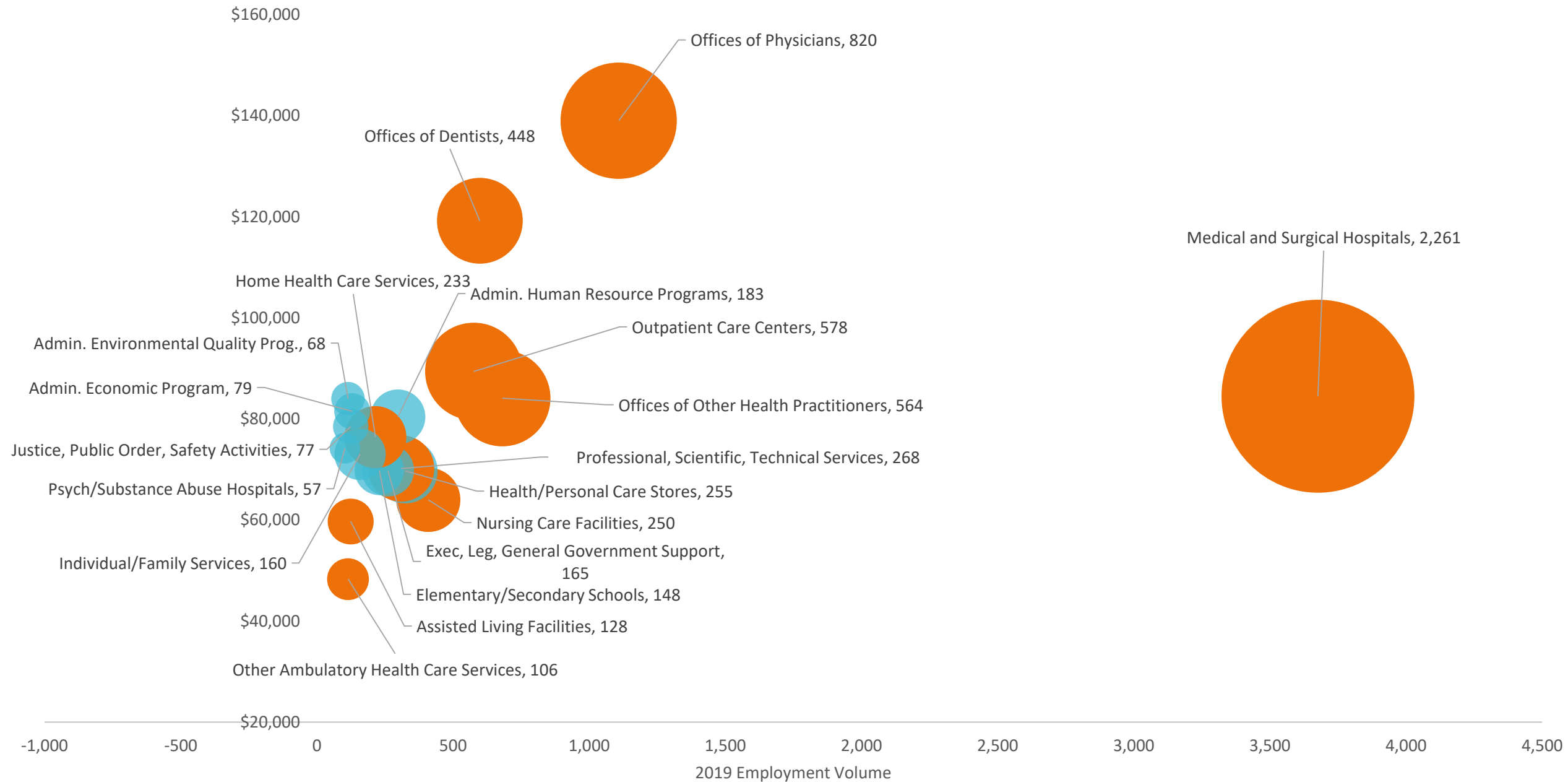
- Construction Trade
- Agriculture and Food
- Clerical
- Communication
- Computer and Electronics
- Arts, Design and Sports
- Customer Service
- Engineering and Technology
- General Business
- Language and Social Science
- Education
- Law and Government
- Mechanical
- Medical
- Production
- Public Safety and Security
- Sales and Marketing
- Transportation
- Psychology and Counseling

Source: JobsEQ®, Data as of 2019Q1

PacMtn: Top 20 Industries for Computer/Math Occupations by Employment/Annual Average Wage + 10-yr demand forecast, 2019



PacMtn: Top 20 Industries for **Healthcare Practitioners/Technical** Occupations by Employment/Average Annual Wage + 10-yr demand forecast, 2019



Highest AAR % growth:
2014-19

+/- 100 jobs
+/- \$30K wage
Positive job forecast

Industry	Empl	Avg Ann Wages	2014-2019 Emp Growth	Avg Ann % Chg in Empl	Total New Demand
Toilet Preparation Manufacturing	114	\$49,986	112	123.4%	115
Other Food Crops Grown Under Cover	858	\$29,491	819	86.0%	1,143
Administration of Veterans' Affairs	139	\$56,458	129	69.2%	127
Motion Picture and Video Production	324	\$43,760	273	44.6%	390
Payroll Services	256	\$39,342	214	43.8%	293
Other Nonresidential Building Equipment Contractors	130	\$86,259	109	43.3%	162
Facilities Support Services	661	\$62,055	544	41.2%	915
Mattress Manufacturing	130	\$43,360	97	31.8%	132
Engineered Wood Member (except Truss) Manufacturing	101	\$79,904	75	31.6%	107
Tobacco Manufacturing	103	\$46,894	76	30.7%	52
All Other Miscellaneous Schools and Instruction	644	\$66,758	454	27.6%	1,002
Roofing, Siding, and Insulation Material Merchant Wholesalers	103	\$74,737	72	27.1%	120
Metal Can Manufacturing	92	\$75,729	63	26.0%	97
Internet Publishing and Broadcasting and Web Search Portals	224	\$129,510	151	25.2%	355
Specialized Freight (except Used Goods) Trucking, Long-Distance	127	\$50,690	84	24.2%	139
Blood and Organ Banks	102	\$47,383	66	23.5%	142
Breweries	274	\$29,871	171	21.8%	360
Wood Window and Door Manufacturing	322	\$62,514	198	21.0%	299
Office Administrative Services	820	\$68,457	491	20.0%	1,062
Custom Computer Programming Services	416	\$97,816	246	19.5%	448
Industrial Building Construction	138	\$89,939	81	19.5%	156
Nonresidential Glass and Glazing Contractors	148	\$73,404	87	19.4%	184
Other Social Advocacy Organizations	217	\$47,514	128	19.3%	277
Meat Processed from Carcasses	111	\$35,943	65	19.3%	134
Computer Systems Design Services	1,180	\$102,030	656	17.6%	1,265
Residential Poured Concrete Foundation and Structure Contractors	133	\$34,930	74	17.5%	163
Psychiatric and Substance Abuse Hospitals	267	\$48,268	148	17.5%	231

Emerging Industry: **Motion Picture + Video Production** NAICS 51-2110



Olympia, WA
Corporate and wedding videography

324 workers in the PacMtn region
Average Annual Wage: \$43,760
Average Annual Employment Growth: **45%**



Aberdeen, WA
Specializes in animated business presentations
Includes subsidiary Grays Harbor Video Productions

Typical Occupations

Occupation	Median Hourly Wage
Producers and Directors	\$33.12
Video and Audio Technicians	\$23.95

In-Region Suppliers

- Postproduction Services
- Talent Agencies
- Insurance Agents

In-Region Buyers

- Business
- Government
- Nonprofits
- Consumers

Emerging Industry: **Computer Systems Design Services**

NAICS 54-1512

416 workers in the PacMtn region

Average Annual Wage: \$43,760

Average Annual Employment Growth: **32%**

Typical Occupations

Occupation	Median Hourly Wage
Computer Systems Analysts	\$37.95
Network & Computer Systems Administrators	\$39.29
Computer Network Support Specialists	\$30.41

In-Region Suppliers

- Data Hosting Services
- Wired and Wireless Telecommunications Carriers
- Computer Equipment Retailers
- Temporary Help Agencies

In-Region Buyers

- Government
- Business



Corporate HQ in Lacey, WA

Satellite offices in Bellevue, Portland, Boise

of employees: 52 in Lacey location

Hiring:

- EUC Engineer
- Inside Sales Administrator
- Tier 2 IT Support Technician



Lacey, WA

of employees: est. 10

Integrates marketing and computer systems design

Emerging Industry: **Breweries**

NAICS 31-2120

274 workers in the PacMtn region

Average Annual Wage: \$29,871

Average Annual Employment Growth: **22%**

Typical Occupations

Occupation	Median Hourly Wage
Brewer's Assistants	\$22.00
Sales Representatives	\$25.00 + commission
Light Truck Drivers	\$17.64
Hand Laborers/Freight, Stock & Material Movers	\$15.84

In-Region Suppliers

- Metal Can Manufacturing
- Glass Container Manufacturing
- Grain Wholesalers

In-Region Buyers

- Restaurants
- Drinking Establishments
- Grocers



Brewery in Tumwater, WA
Established 2019
of employees: est. 10
Estimated annual sales: \$5 million
6,000 sq. ft. facility



Brewery in Aberdeen, WA
Established 2019
of employees: est. 5
Owner used GoFundMe to raise capital

PacMtn: Notable Buyer Supply Chain Purchasing by Total Volume vs. % In-Region, 2019 (est.)

