

THE
5-COUNTY PACIFIC MOUNTAIN REGION
LABOR AVAILABILITY REPORT

June, 2010

Compiled and Prepared by



THE PATHFINDERS

www.thepathfindersus.com

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INTRODUCTION

The Pathfinders has employed its many years of experience in workforce assessments for corporate site-selection clients and civilian workforce assessments for the Department of Defense in locations that faced military base closures to produce this evaluation of the 5-County Pacific Mountain Region workforce. In site-selection projects, the question that most often drives the search is whether the candidate location has the workforce needed for a new or expanding operation.

When considering the workforce of a possible location, a prospect basically wants to know:

- Can I find the workers I need in this location?
- Do these workers have any skills and/or experience that pertain to my operation?
- How much will these workers cost?

Consequently, an analysis of an area's workforce became a key component of site searches conducted by The Pathfinders. The report that follows was developed as a tool for economic development officials for use in business recruitment and workforce development efforts. Senior human resources executives from among corporate clients assisted in refining the methodology and report format.

With regard to labor availability, while unemployed workers are a source considered in hiring, companies typically also staff a new operation with individuals who are working but who desire better jobs and who appear to possess the skills, education, and experience to qualify them for those better jobs. **By that definition**, those individuals can be considered "underemployed" and are identified as such in this report. The Pathfinders was retained by the Pacific Mountain Workforce Consortium to quantify the extent to which both unemployment and underemployment exist in the 5-County Pacific Mountain Region. This report also represents the objective and professional view of The Pathfinders with regard to workforce quality, availability, costs, experience and skills that a new or expanding employer can expect in the 5-County Pacific Mountain Region.

The information presented in this report has been developed independently of the client, and the client has not influenced the findings.



KEY FINDINGS

- **The 5-County Pacific Mountain Region, referred to in this report as the “labor shed”, has a household population of approximately 476,800; a civilian labor force of approximately 233,300; and a pool of approximately 25,300 unemployed persons who are actively seeking work.**
- **The results of this survey indicate that a new or expanding employer will be able to attract employees from an additional pool of about 40,600 underemployed workers.**
- **The desired pay rates of the underemployed workers are reasonable when compared to their existing pay rates. The median current pay rate of the underemployed workers is \$21.15 per hour, and their median desired pay rate is \$22.75 per hour.**
- **Survey results indicate that the underemployed workers in the labor shed have high levels of experience and skills in office operations and customer service.**
- **The median desired pay rate of the unemployed workers who are actively seeking work is \$12.07 per hour.**
- **Survey results indicate 2% of the underemployed and 12% of unemployed, actively seeking work individuals have less than a high school degree.**
- **Approximately 6,500 unemployed individuals in the labor shed who are not actively seeking work would consider re-entering the workforce.**
- **In total, the 5-County Pacific Mountain Region has approximately 72,400 available workers for new or expanding businesses.**



METHODOLOGY

The first step in assessing the workforce of the 5-County Pacific Mountain Region was to determine the boundaries of the area to be assessed. To accomplish this task, The Pathfinders applied the same reasoning that would be used during a site search for a corporate client considering the area as a potential location. The 5-County Pacific Mountain Region survey area includes those locations from which workers might be drawn to a new employer and is referred to in this report as the “labor shed”. This labor shed consists of Grays Harbor, Lewis, Mason, Pacific and Thurston Counties in Washington.

A map of the 5-County Pacific Mountain Region labor shed is included on the following page.

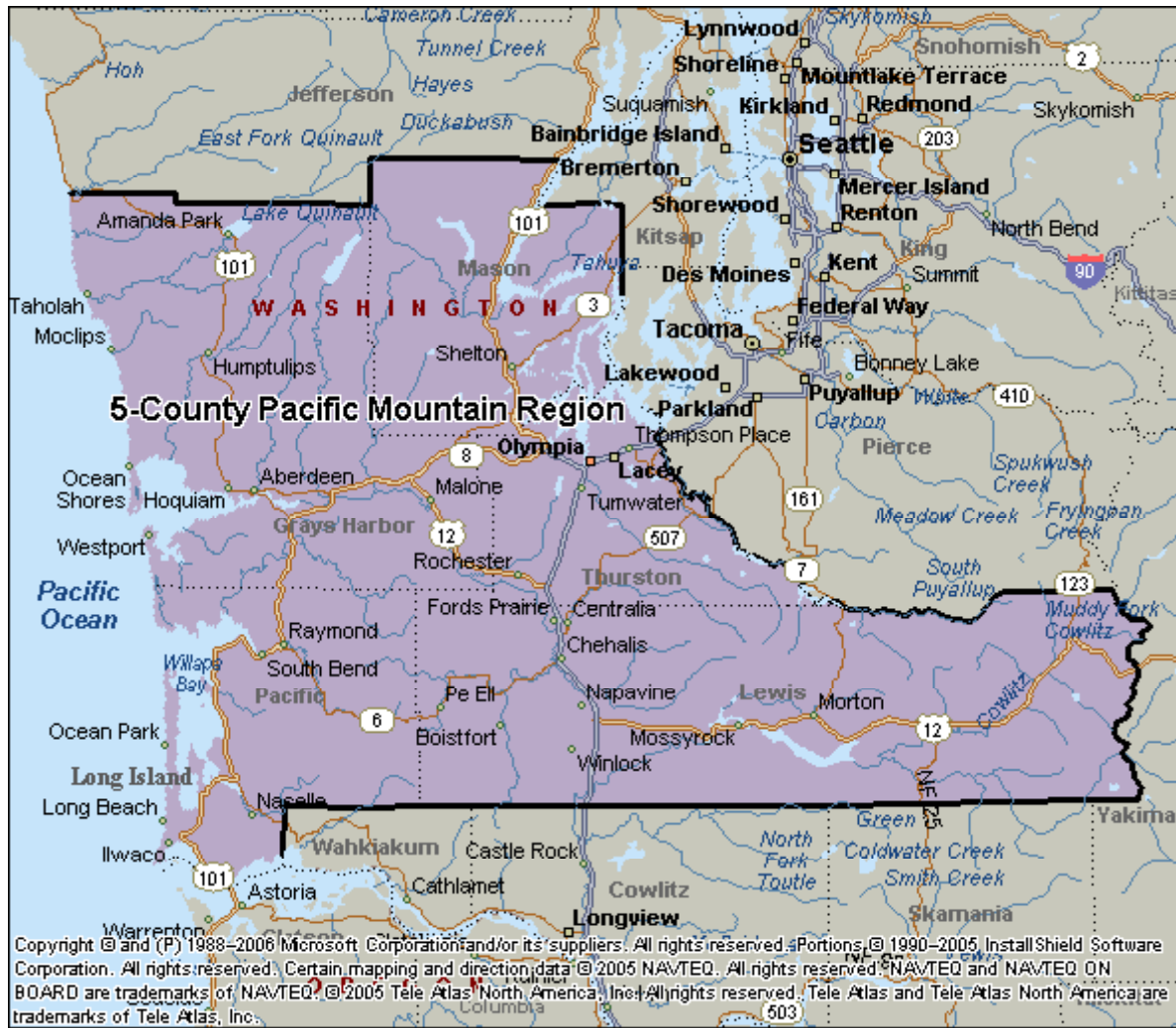
Selected online resources were used in this project. Additionally, The Pathfinders conducted interviews with individuals throughout the 5-County Pacific Mountain Region. Those individuals were proportionally stratified across age, household income, and zip codes. The purpose of these surveys was to ascertain availability for work with a new employer; determine desired pay rates; and, collect information on such factors as age, education, commuting patterns, experience, and skills.

The data obtained as a result of those interviews enabled The Pathfinders to apply and employ a proprietary methodology that accurately determined the existence of underemployment and the quality and characteristics of both the underemployed and unemployed workers in the area. Further, The Pathfinders applied a proprietary process to the analysis of the data to correct for invalid responses. For example, those persons indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable are not included in the results.

It is important to note that companies making location decisions based upon these surveys have reported that when staffing actually began, the numbers reported by The Pathfinders proved to be accurate.



MAP OF THE 5-COUNTY PACIFIC MOUNTAIN REGION LABOR SHED



NUMBER OF AVAILABLE WORKERS

The 5-County Pacific Mountain Region Labor Shed

The 5-County Pacific Mountain Region labor shed has a household population of approximately 476,800. The civilian labor force numbers approximately 233,300, and the labor shed contains approximately 25,300 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 40,600 workers can be defined as underemployed: those individuals who are currently working but would take a better job if offered by a new or existing employer and who appear to possess the skills, education, and experience to qualify them to do so. Another 6,500 individuals would consider re-entering the workforce. Together with the unemployed, actively seeking work individuals, the 5-County Pacific Mountain Region has approximately 72,400 available workers for new or existing employers.

TOTAL AVAILABLE WORKERS

Number of underemployed workers	40,600
Number of unemployed, actively seeking work individuals	25,300
Number of unemployed individuals who are considering re-entering the workforce	6,500
Total Number of Workers Available for Employers*	72,400

* The reader is cautioned that, while the number of workers identified in the region, as well as their skills, experience, education, and costs, is accurate, all of those individuals may not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors are not considered in this report.



ASSESSMENT OF THE UNDEREMPLOYED WORKFORCE

The 5-County Pacific Mountain Region Labor Shed

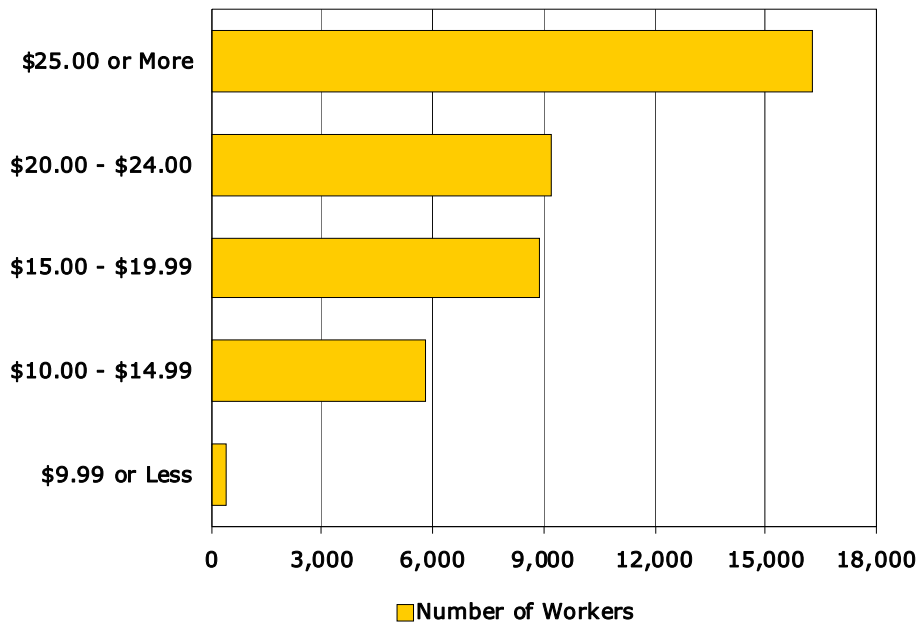
The 40,600 underemployed workers identified in this report might also be termed “upgraders”. They desire to move into an upgraded job and appear to possess the skills, education, and experience to enable them to do so. The following charts represent the desired pay rates of the underemployed individuals in the labor shed. Desired wages are shown by specific rates, range and percentiles.

NUMBER OF UNDEREMPLOYED WORKERS AVAILABLE AT SPECIFIC WAGE RATES PER HOUR (rounded)

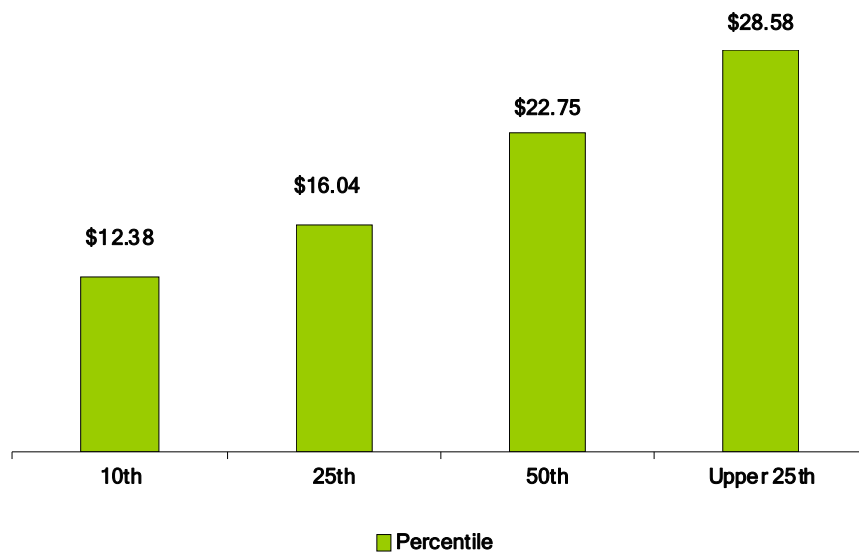
Desired Pay Rate	Number Available
\$9.99 or Less	400
\$10.00 - \$11.99	1,200
\$12.00 - \$13.99	3,400
\$14.00 - \$15.99	5,100
\$16.00 - \$17.99	3,400
\$18.00 - \$19.99	1,600
\$20.00 - \$21.99	4,600
\$22.00 - \$23.99	2,700
\$24.00 - \$25.99	4,200
\$26.00 - \$27.99	3,400
\$28.00 - \$29.99	2,700
\$30.00 - \$31.99	2,000
\$32.00 - \$33.99	400
\$34.00 - \$35.99	3,100
\$36.00 or More	2,400



DESIRED WAGE RATES PER HOUR BY RANGE
40,600 Underemployed Workers



DESIRED WAGE RATES PER HOUR BY PERCENTILE
40,600 Underemployed Workers



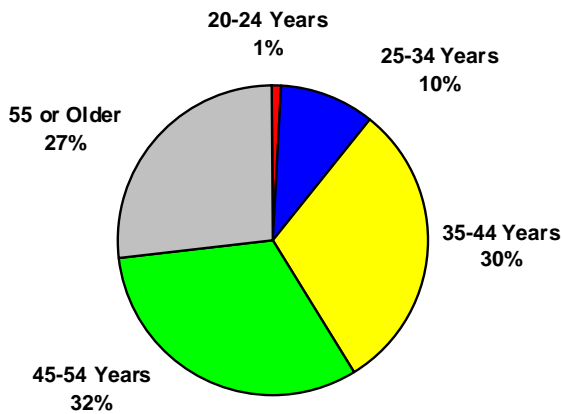
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

The 5-County Pacific Mountain Region Labor Shed

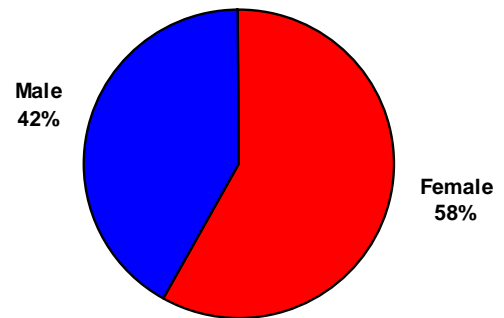
40,600 Underemployed Workers

The following charts provide information on various characteristics of the underemployed workers in the labor shed. **As these data relate solely to those individuals in the labor shed who are underemployed, they will vary from data representative of the population and civilian labor force as a whole.**

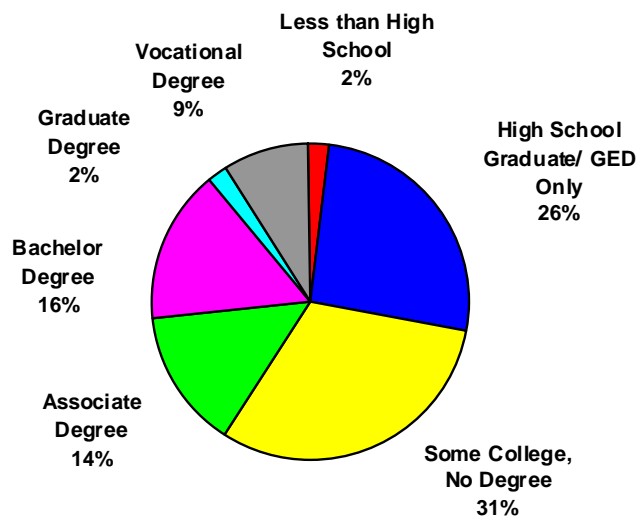
AGE - Average 46 Years



GENDER



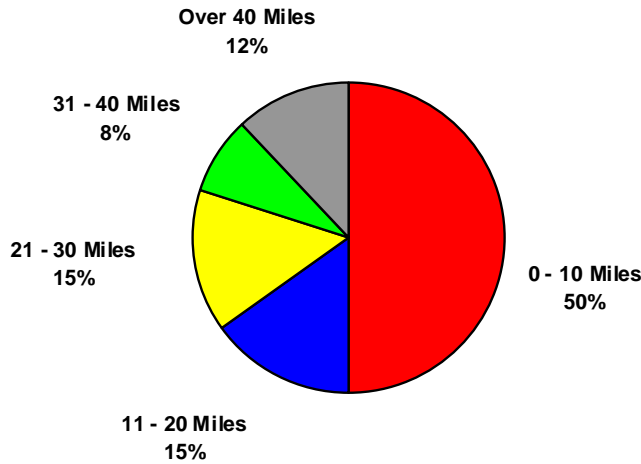
EDUCATION



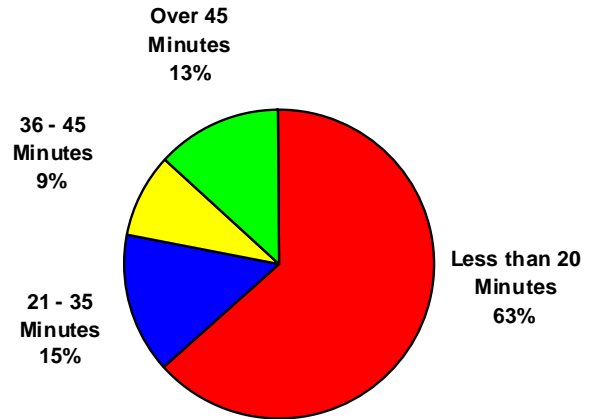
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

40,600 Underemployed Workers

CURRENT COMMUTE DISTANCE



CURRENT COMMUTE TIME



The average commute time of the underemployed workers in the labor shed is 24 minutes, and the average current commute distance is 19 miles.

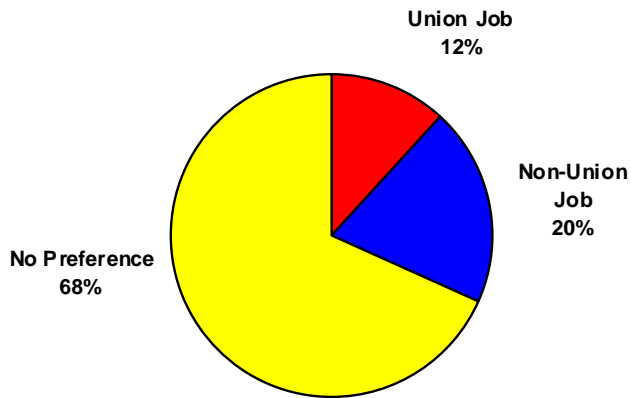
LENGTH OF TIME IN CURRENT JOB



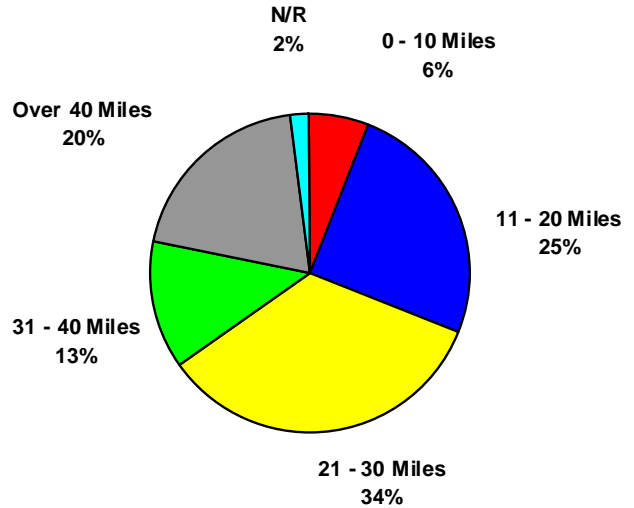
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

40,600 Underemployed Workers

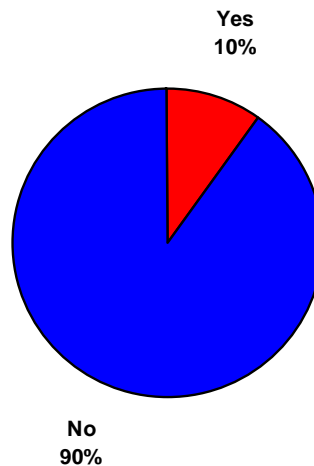
UNION PREFERENCE



MILES WILLING TO COMMUTE
Average 31 Miles



SPEAK ANOTHER LANGUAGE IN ADDITION TO ENGLISH



Of the 10% of underemployed workers who speak another language besides English, 50% speak Spanish; 20% speak Italian; 20% speak French; and 30% speak other languages. It should be noted that some individuals speak more than one language in addition to English.



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

40,600 Underemployed Workers

The similarities between the experience and skills categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. It should be noted that individuals polled normally have experience and/or skills in multiple categories.

The experience chart reports the approximate number of workers experienced in each category. The chart also gives the percentage of the total number of underemployed experienced in each category and the average number of years of experience in each category.

EXPERIENCE OF UNDEREMPLOYED WORKERS

Experience Category	Number of Individuals (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	28,400	70%	13
Office Operations	23,100	57%	10
Warehouse/Distribution/Transportation	18,700	46%	8
Manufacturing/Assembly/Fabrication	14,200	35%	12
Government/Education	14,200	35%	11
Maintenance/Installation/Repair	13,800	34%	11
Food Processing/Agriculture	13,800	34%	10
Information Technology	13,400	33%	8
Medical/Health Sciences	10,600	26%	8
Call Center	7,300	18%	3



Likewise, in the skills category chart, the chart below illustrates the approximate number of underemployed workers in the labor shed who are skilled in each of the categories and the percent of the total underemployed.

SKILLS OF UNDEREMPLOYED WORKERS

Skills Category	Number of Individuals (Rounded)	Percentage of Total
Office Operations	24,800	61%
Warehouse/Materials Handling	20,700	51%
Information Technology	17,100	42%
Technician/Quality Assurance	15,000	37%
Maintenance/Installation/Repair	14,200	35%
Manufacturing/Assembly/Fabrication	13,800	34%
Food Processing/Agriculture	13,000	32%
Medical/Health Sciences	10,600	26%
Electronics/Engineering	5,700	14%

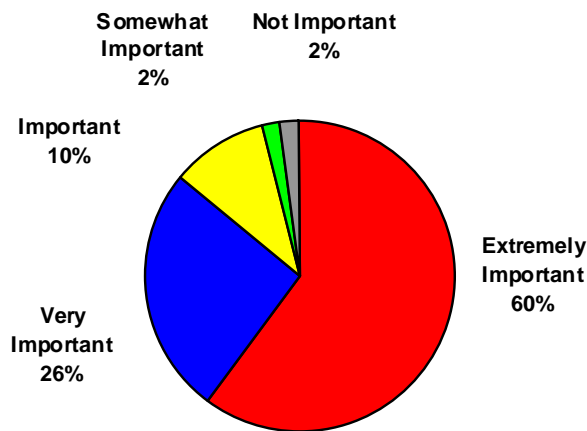


FACTORS AFFECTING JOB DESIRABILITY

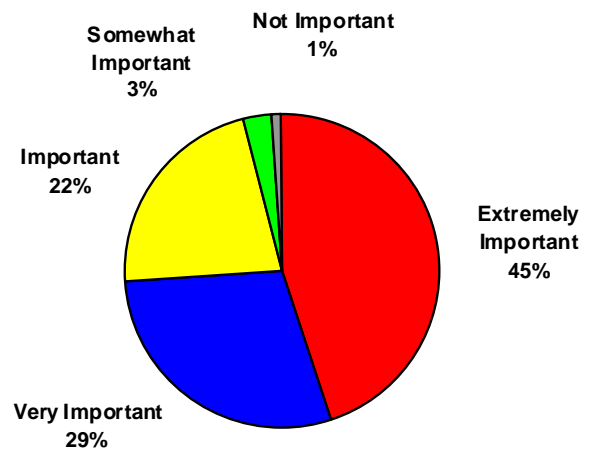
40,600 Underemployed Workers

In an effort to identify those factors most important to the 5-County Pacific Mountain Region’s underemployed workers relative to consideration of an employer’s desirability and a potential job change, the respondents were asked to rate the following job factors from “extremely important” to “not important”.

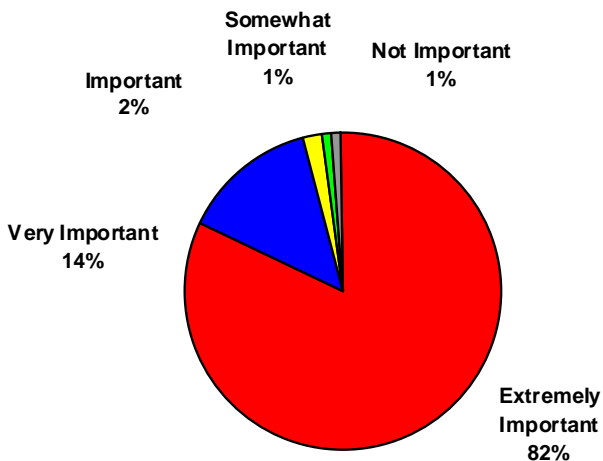
SALARY



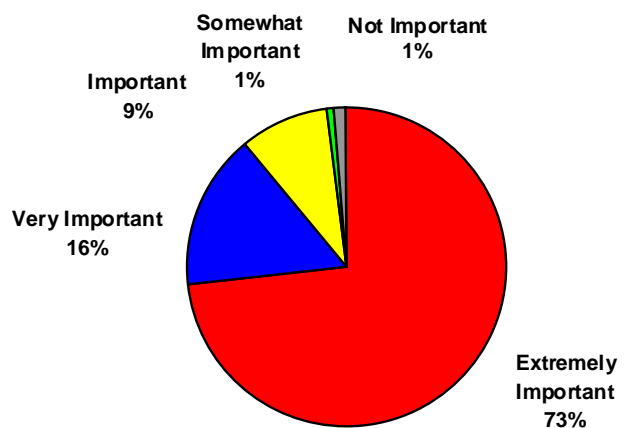
LOCATION



INSURANCE BENEFITS



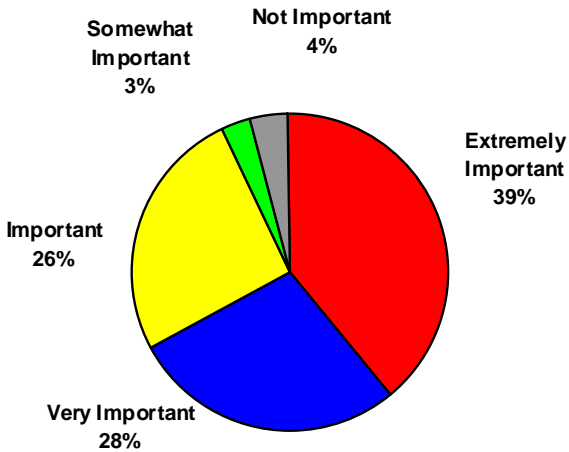
RETIREMENTS BENEFITS



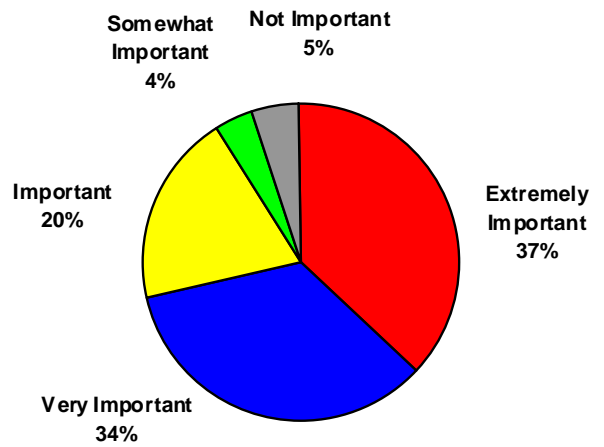
FACTORS AFFECTING JOB DESIRABILITY

40,600 Underemployed Workers

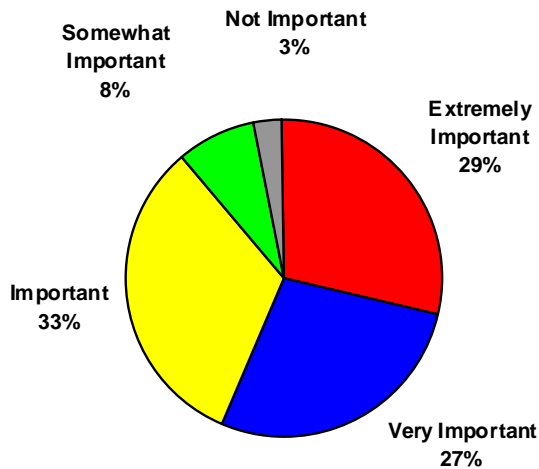
PHYSICAL WORKING ENVIRONMENT



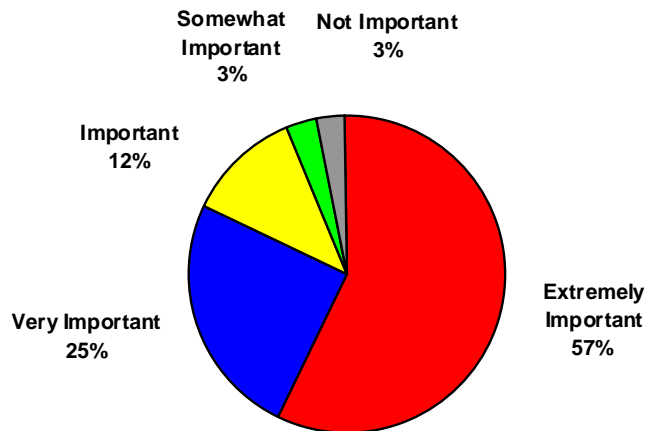
PAID TRAINING PROGRAMS



FLEXIBLE WORK SCHEDULE



OPPORTUNITY FOR ADVANCEMENT



ASSESSMENT OF THE UNEMPLOYED WORKFORCE

The 5-County Pacific Mountain Region Labor Shed

This report documents two groups of unemployed individuals in the 5-County Pacific Mountain Region labor shed who would be available workers for a new or expanding business. The groups are classified as:

- Individuals who are actively seeking work
- Individuals who are considering re-entering the workforce

Published statistics document 25,300 unemployed workers in the labor shed who are actively seeking work. This number could possibly be higher due to individuals looking for work who are not on the roles of the state unemployment agencies. Survey results suggest that an additional 6,500 people, who are not currently employed or actively seeking work, would consider re-entering the workforce.

In total, the labor shed has approximately 31,800 unemployed individuals who would be considered potential workers for a new or expanding operation.

UNEMPLOYED INDIVIDUALS

Number of unemployed, actively seeking work individuals	25,300
Number of unemployed individuals who would considering re-entering the workforce	6,500
Total Number of Unemployed Individuals Available for Employers	31,800

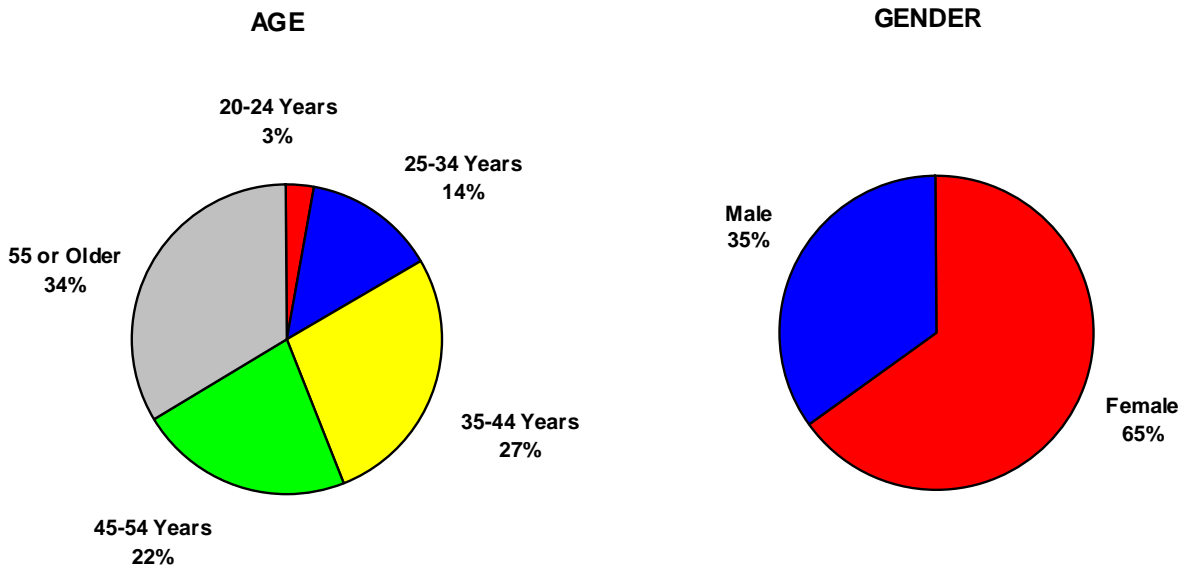
The determinations for these two segments of the workforce have a larger statistical variance than that for the underemployed.



**ASSESSMENT OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
 The 5-County Pacific Mountain Region Labor Shed
 6,500 Potential Workers**

The following charts provide information on that segment of unemployed individuals in the labor shed who would consider re-entering the workforce. **As these data relate solely to those individuals in the labor shed who are unemployed, they will vary from data representative of the population and civilian labor force as a whole.**

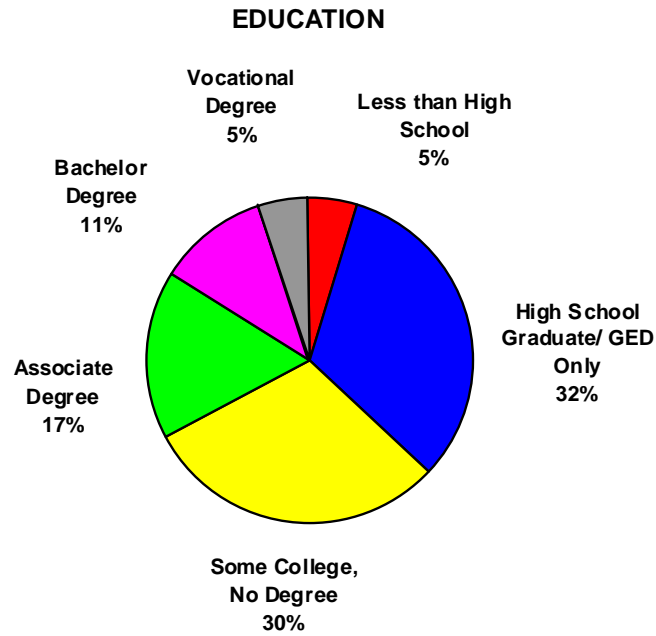
In the 5-County Pacific Mountain Region labor shed, there are approximately 6,500 individuals who are currently unemployed, not actively seeking work, but would consider re-entering the workforce. They are predominately female and their average age is 46 years.



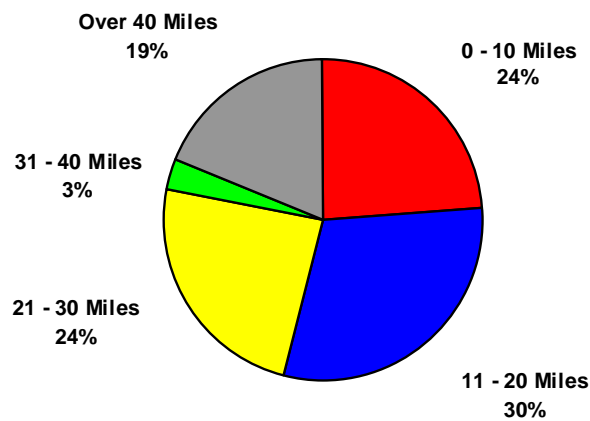
The median desired pay rate of the individuals who would consider re-entering the workforce is \$11.15 per hour.



**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
6,500 Potential Workers**



MILES WILLING TO COMMUTE – Average 27 Miles



**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
 6,500 Potential Workers**

Experience Category	Number of Individuals (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	3,800	59%	11
Office Operations	3,300	51%	10
Manufacturing/Assembly/Fabrication	2,300	35%	9
Food Processing/Agriculture	2,300	35%	6
Warehouse/Distribution/Transportation	2,100	32%	8
Government/Education	2,100	32%	11
Information Technology	1,800	27%	3
Maintenance/Installation/Repair	1,800	27%	12
Medical/Health Sciences	1,600	24%	7
Call Center	1,600	24%	3

The similarities between the experience and skills categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. It should be noted that individuals polled normally have experience and/or skills in multiple categories.



**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
 6,500 Potential Workers**

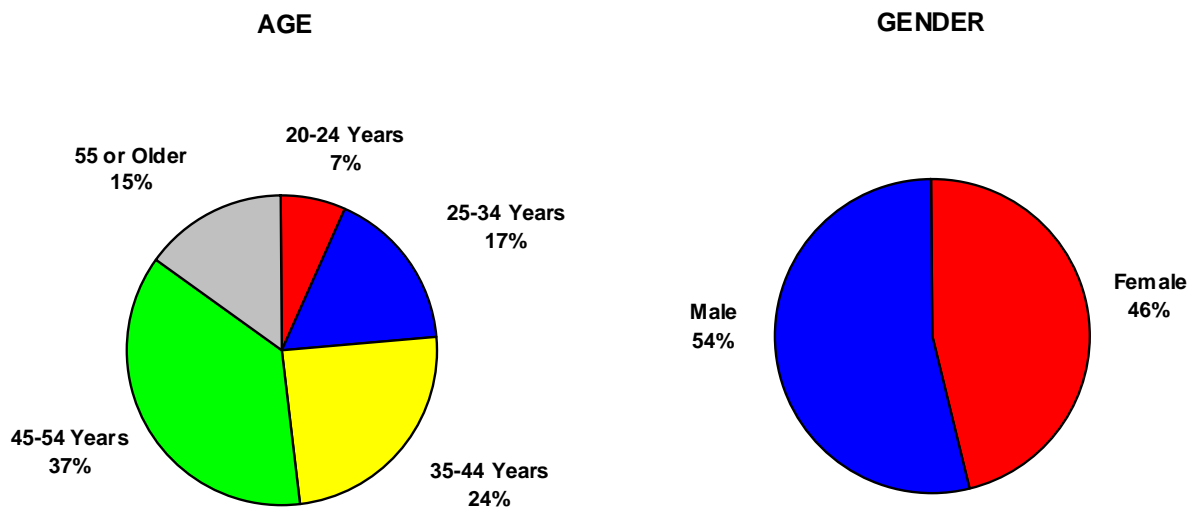
Skills Category	Number of Individuals (Rounded)	Percentage of Total
Office Operations	3,300	51%
Warehouse/Materials Handling	3,000	46%
Manufacturing/Assembly/Fabrication	2,900	45%
Food Processing/Agriculture	2,300	35%
Maintenance/Installation/Repair	2,100	32%
Medical/Health Sciences	2,100	32%
Information Technology	1,900	29%
Technician/Quality Assurance	1,800	27%
Electronics/Engineering	300	5%



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK
 25,300 Workers**

According to survey results, the following charts provide information on those unemployed workers in the labor shed who are actively seeking work. **As these data relate solely to those individuals in the labor shed who are unemployed, they will vary from data representative of the population and civilian labor force as a whole.**

In the 5-County Pacific Mountain Region labor shed, according to published sources, there are approximately 25,300 individuals who are actively seeking work. These individuals are relatively equal in gender, and their average age is 43 years.

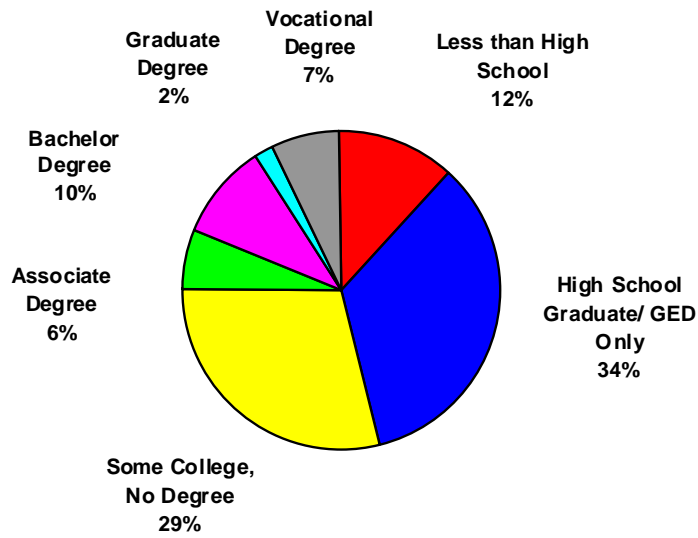


The median desired pay rate of the individuals who are unemployed, actively seeking work is \$12.07 per hour.

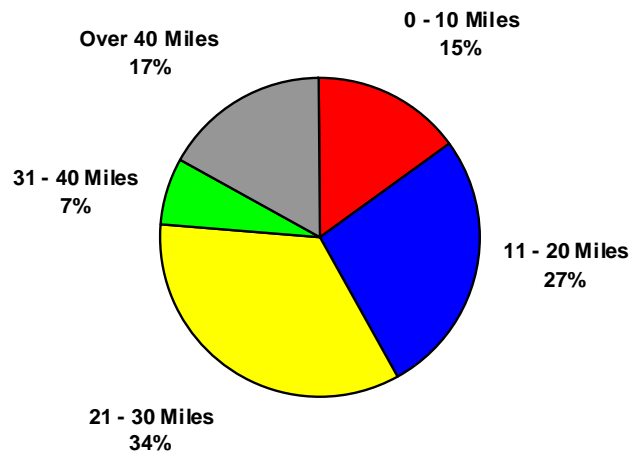


**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK
25,300 Workers**

EDUCATION



MILES WILLING TO COMMUTE – Average 29 Miles



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK**

25,300 Workers

Experience Category	Number of Individuals (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	18,500	73%	10
Warehouse/Distribution/Transportation	13,700	54%	7
Maintenance/Installation/Repair	12,400	49%	9
Food Processing/Agriculture	12,100	48%	8
Manufacturing/Assembly/Fabrication	11,700	46%	9
Office Operations	10,600	42%	8
Medical/Health Sciences	6,100	24%	5
Call Center	5,800	23%	2
Information Technology	5,600	22%	6
Government/Education	4,300	17%	7

The similarities between the experience and skills categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. It should be noted that individuals polled normally have experience and/or skills in multiple categories.



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK****25,300 Workers**

Skills Category	Number of Individuals (Rounded)	Percentage of Total
Warehouse/Materials Handling	14,200	56%
Manufacturing/Assembly/Fabrication	11,600	46%
Maintenance/Installation/Repair	11,400	45%
Food Processing/Agriculture	11,100	44%
Office Operations	9,900	39%
Technician/Quality Assurance	8,600	34%
Information Technology	8,100	32%
Medical/Health Sciences	6,100	24%
Electronics/Engineering	4,800	19%

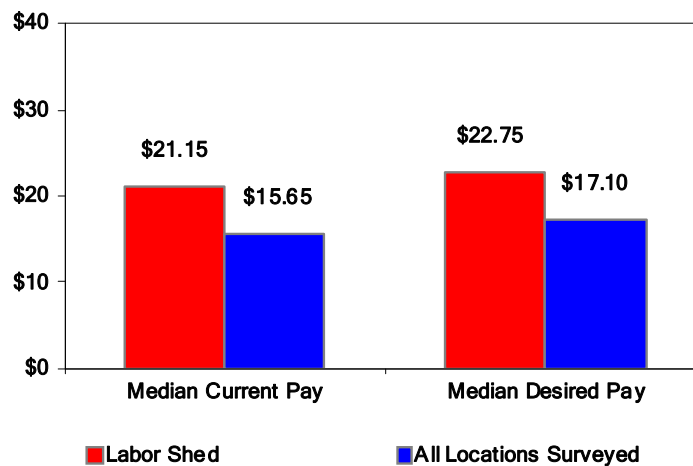


NATIONAL COMPARISONS OF UNDEREMPLOYED WORKFORCE

This section of the report provides comparisons of the pay rates, experience and skills of the labor shed’s underemployed workforce with the underemployed workforces in other areas previously surveyed by The Pathfinders. A prospect company considering the 5-County Pacific Mountain Region as a location will judge its workforce on a comparative basis. The comparative data for other locations used in the following charts reflect information accumulated over the past eighteen months. The Pathfinders maintains a continuing database of over 700 surveyed counties and communities. In the charts, the 5-County Pacific Mountain Region is referred to as “labor shed”.

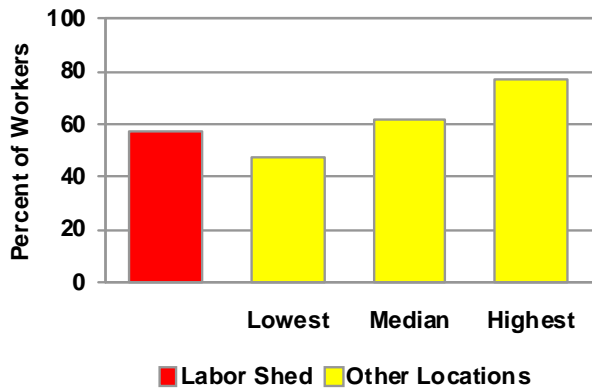
The chart below illustrates the median current and desired wages of the underemployed workers in the 5-County Pacific Mountain Region labor shed as compared to those underemployed workers in all locations surveyed by The Pathfinders over the past eighteen months. As indicated, the median current pay of all surveyed, underemployed workers over the past eighteen months is \$15.65 per hour, and the median desired pay of these workers is \$17.10 per hour. As shown, survey results indicate that the 5-County Pacific Mountain Region’s underemployed workers have higher pay rates in both median current pay and desired pay than other locations surveyed.

COMPARISON OF MEDIAN CURRENT / DESIRED WAGES (per hour)

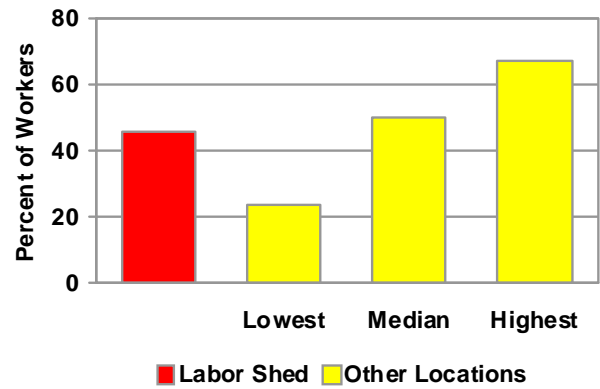


**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The 5-County Pacific Mountain Region /
Locations Surveyed Over the Past 18 Months**

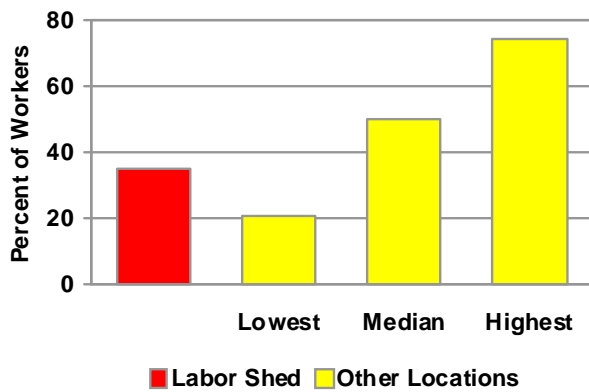
OFFICE



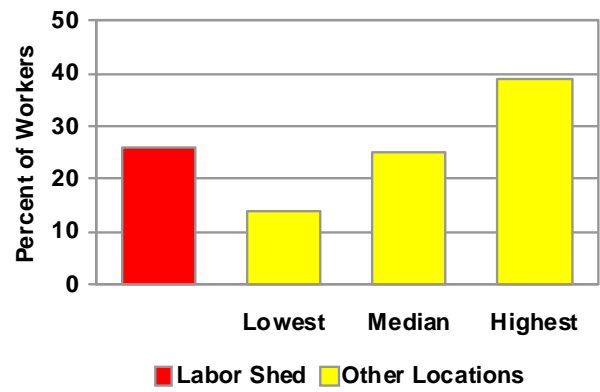
**WAREHOUSE / DISTRIBUTION /
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY /
FABRICATION**

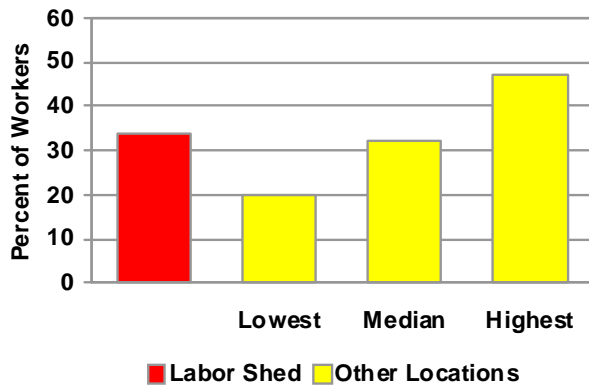


**MEDICAL /
HEALTH SCIENCES**

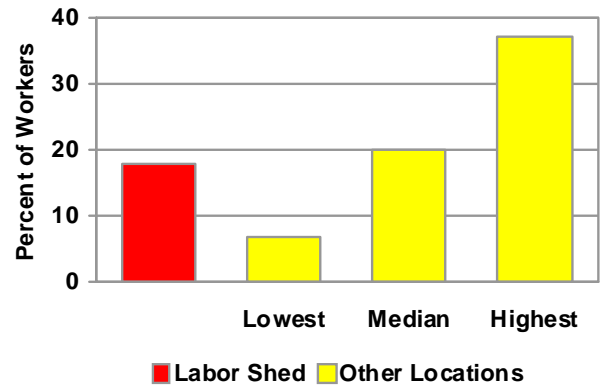


**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The 5-County Pacific Mountain Region /
Locations Surveyed Over the Past 18 Months**

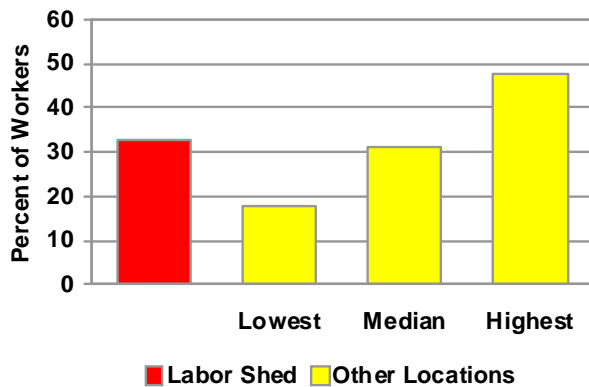
**MAINTENANCE /
INSTALLATION / REPAIR**



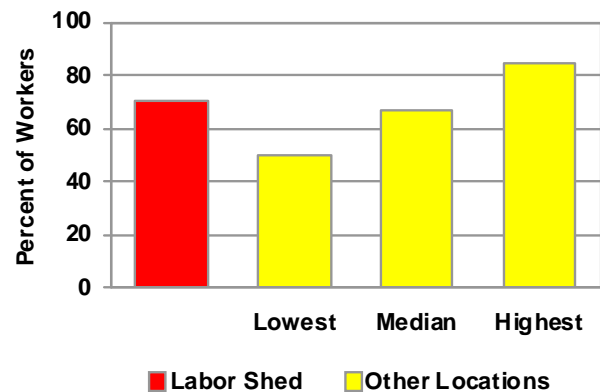
CALL CENTER



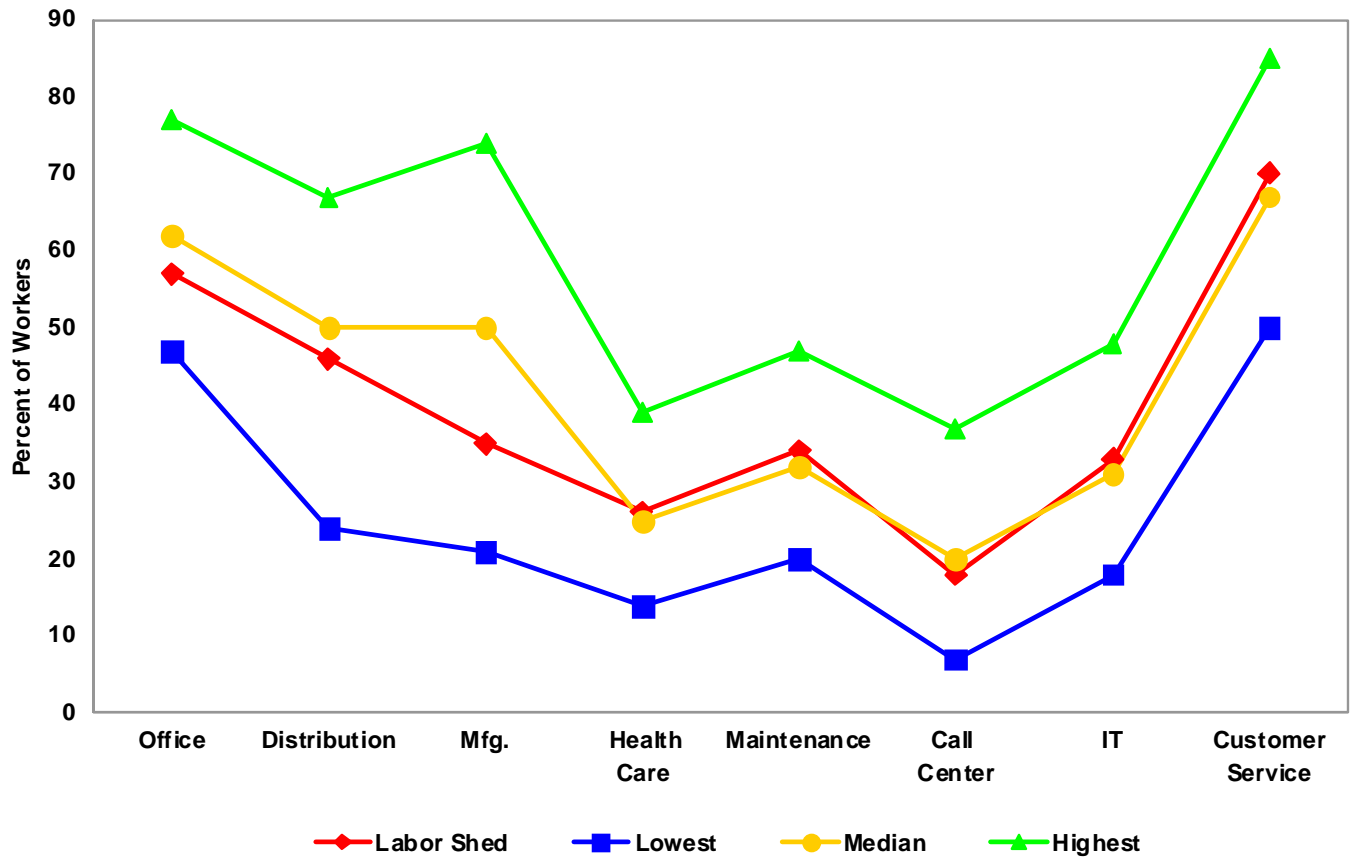
INFORMATION TECHNOLOGY



CUSTOMER SERVICE



**SUMMARY COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The 5-County Pacific Mountain Region /
Locations Surveyed Over the Past 18 Months**

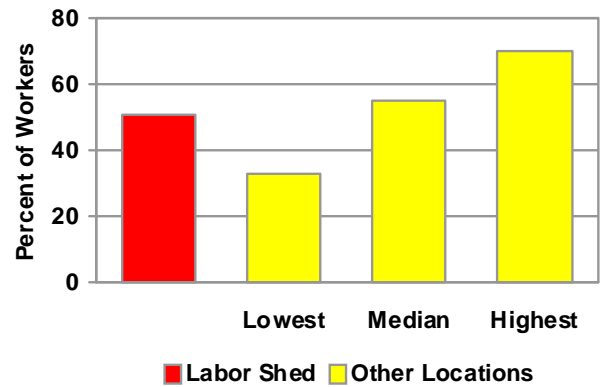


**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The 5-County Pacific Mountain Region /
Locations Surveyed Over the Past 18 Months**

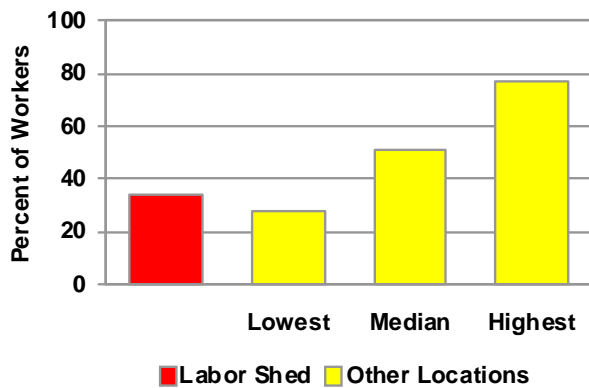
OFFICE



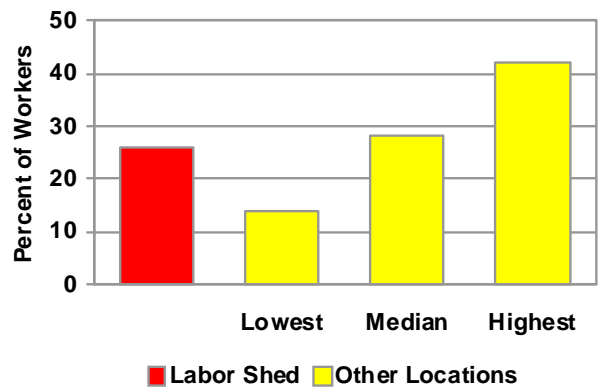
**WAREHOUSE /
MATERIALS HANDLING**



**MANUFACTURING / ASSEMBLY /
FABRICATION**

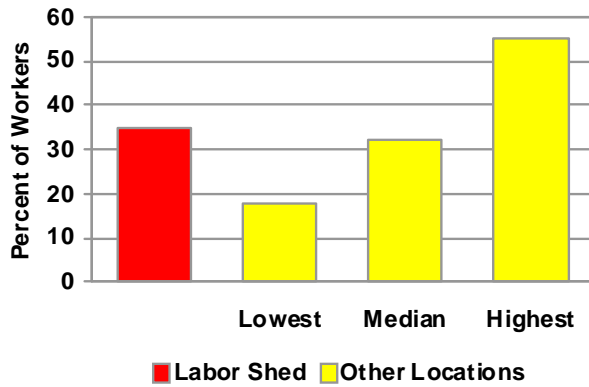


**MEDICAL /
HEALTH SCIENCES**

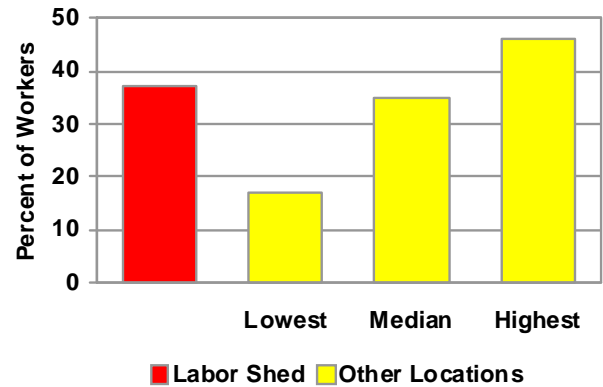


**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The 5-County Pacific Mountain Region /
Locations Surveyed Over the Past 18 Months**

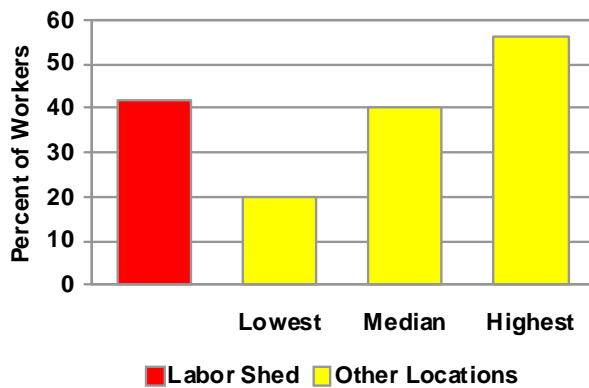
**MAINTENANCE /
INSTALLATION / REPAIR**



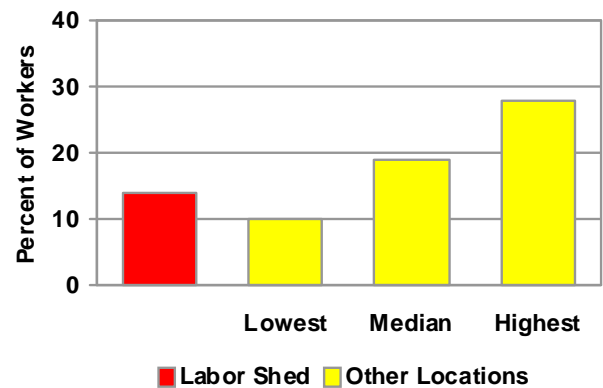
**TECHNICIAN / QUALITY
ASSURANCE**



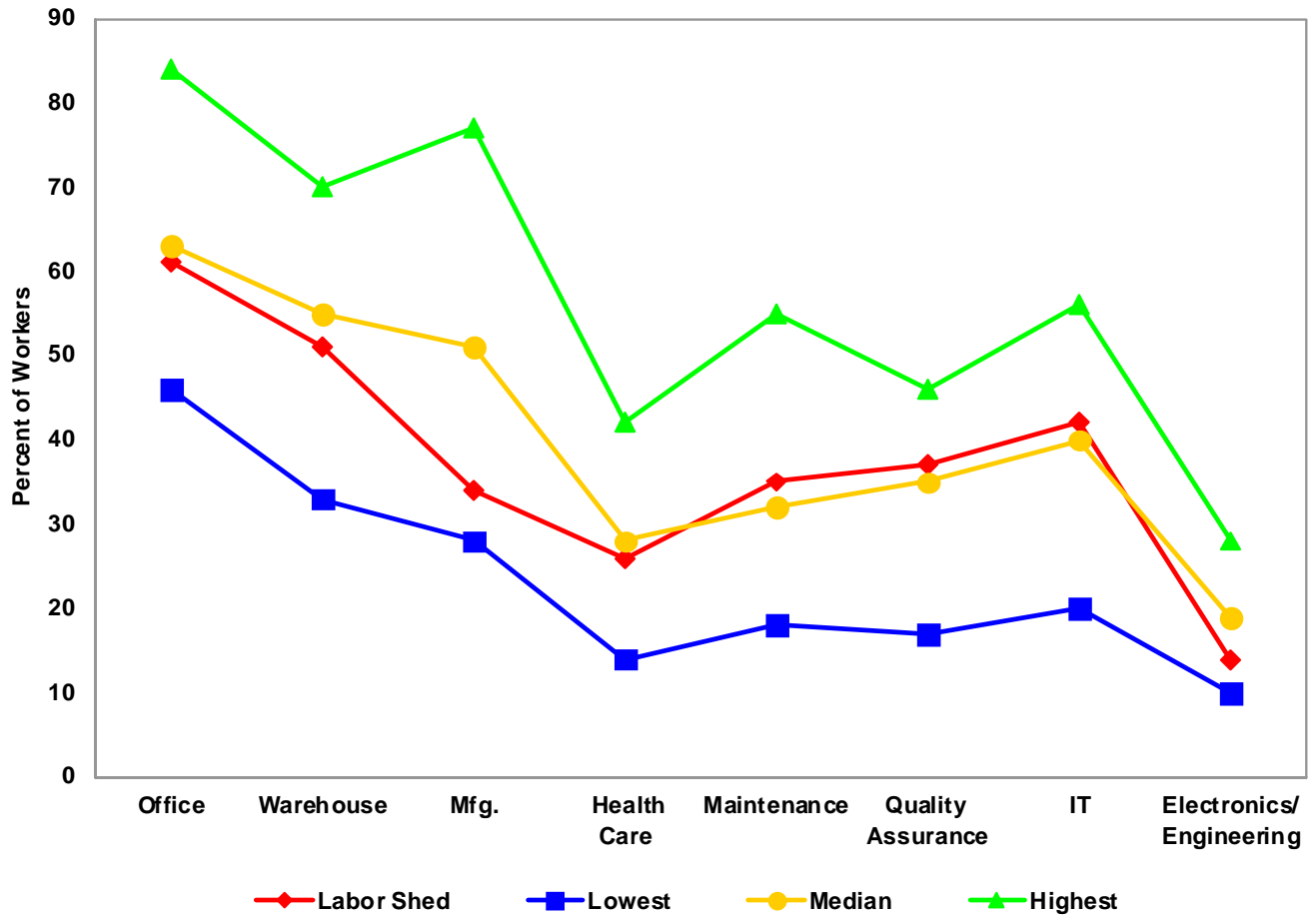
INFORMATION TECHNOLOGY



**ELECTRONICS /
ENGINEERING**



**SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The 5-County Pacific Mountain Region /
Locations Surveyed Over the Past 18 Months**





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