

Thurston County's Economic and Social Structure, A Regional Perspective

Ali Modarres

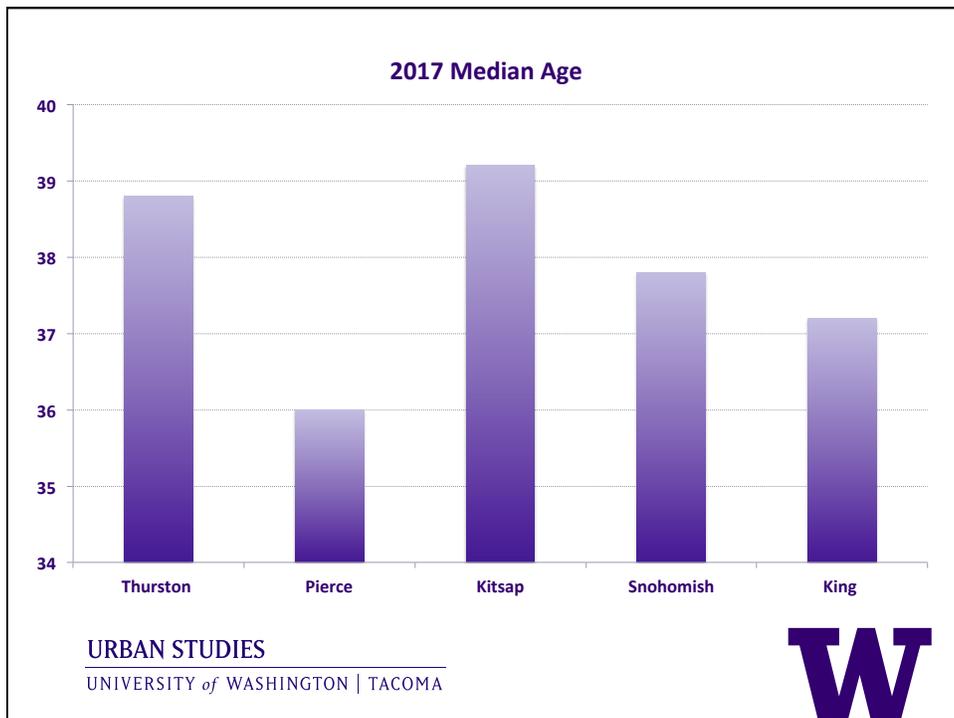
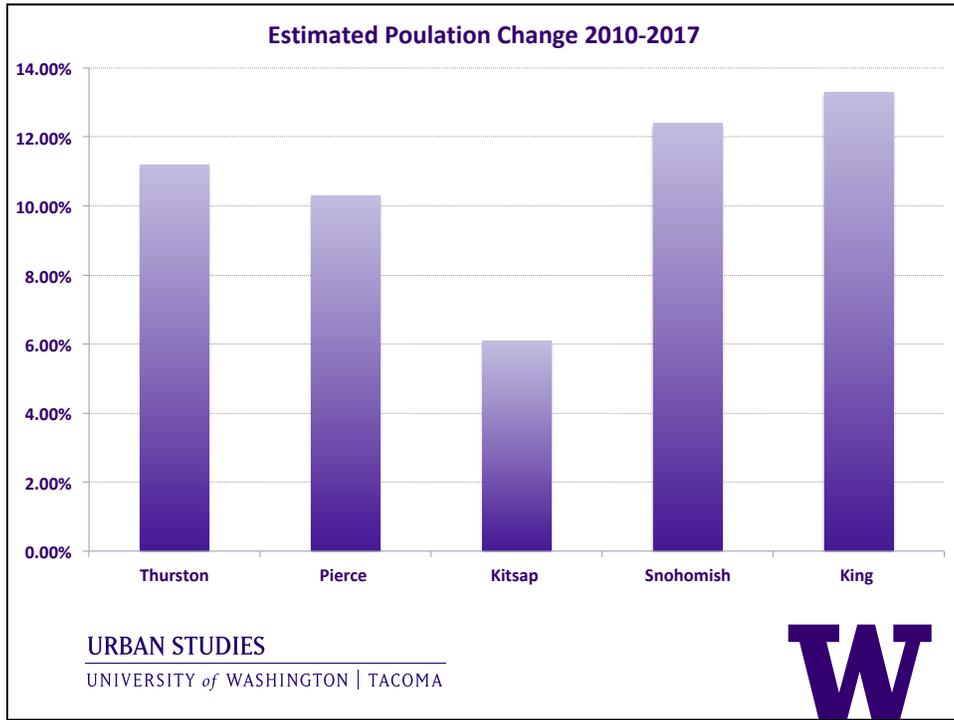
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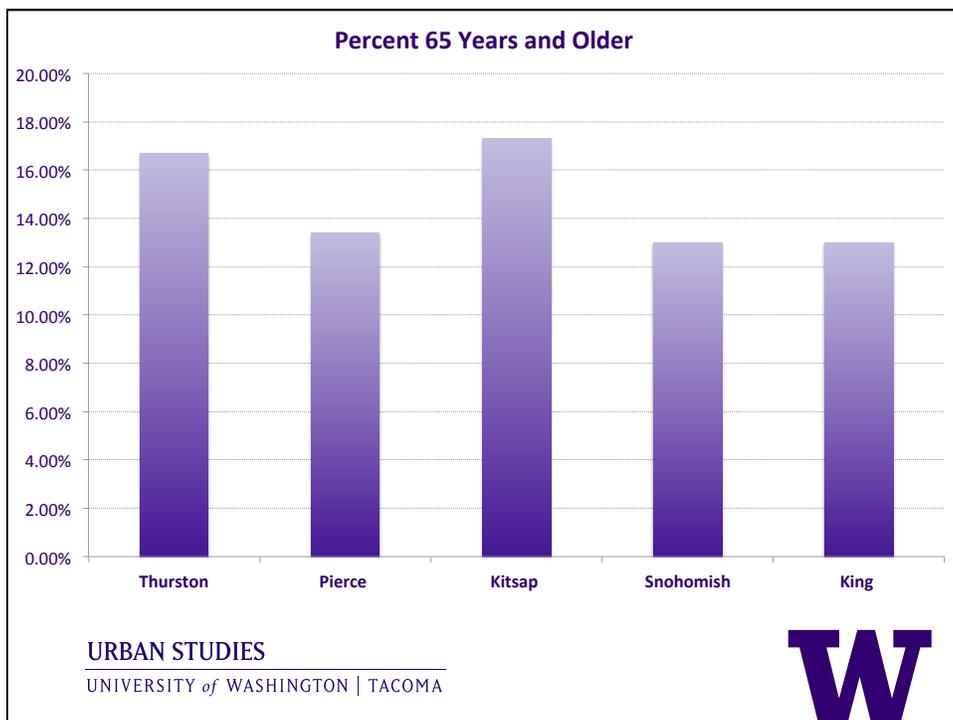
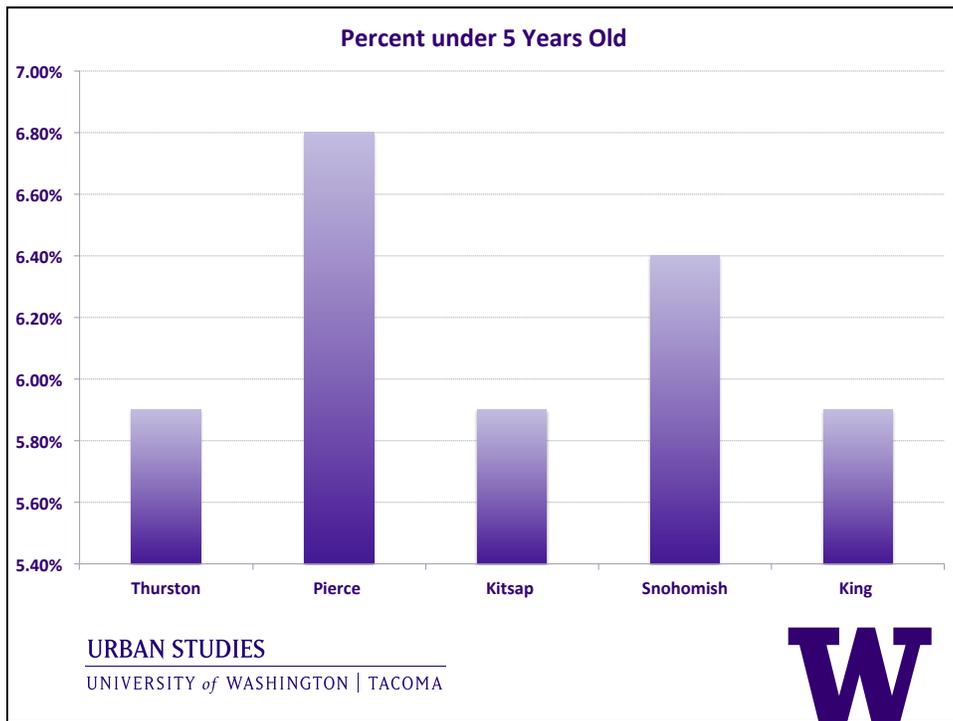


	Population (2017)	Labor Force (2017)	Jobs (2017)	Cost of Living	GRP	Imports	Exports
Thurston County	278,226	138,027	124,966	112.7	\$12.4B	\$22.7B	\$27.3B
State	7,366,582	3,748,139	3,727,292	113.5	\$488.0B	\$351.1B	\$477.0B
Pierce County, WA	869,918	426,660	367,495	113.1	\$41.8B	\$49.9B	\$53.1B
King County, WA	2,181,730	1,238,973	1,502,260	132.0	\$251.3B	\$162.4B	\$234.3B
Kitsap County, WA	266,507	124,095	109,298	114.8	\$12.6B	\$25.4B	\$37.4B
Snohomish County, WA	798,213	424,072	322,009	114.5	\$42.9B	\$50.9B	\$48.4B

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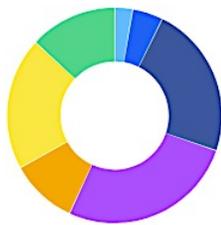


Thurston Demographics

> Compared to the national average for an area of this size:

- Millennial population (20-34) = 56,478 (national avg = 57,117)
- Retiring soon (55+) = 82,418 (national avg = 77,260)
- Racial diversity = 67,088 (national avg = 106,603)
- Veteran population = 28,794 (national avg = 16,639)
- At risk for disproportionate retirement among current residents (labor replacement through attraction of new residents) and low on racial diversity.

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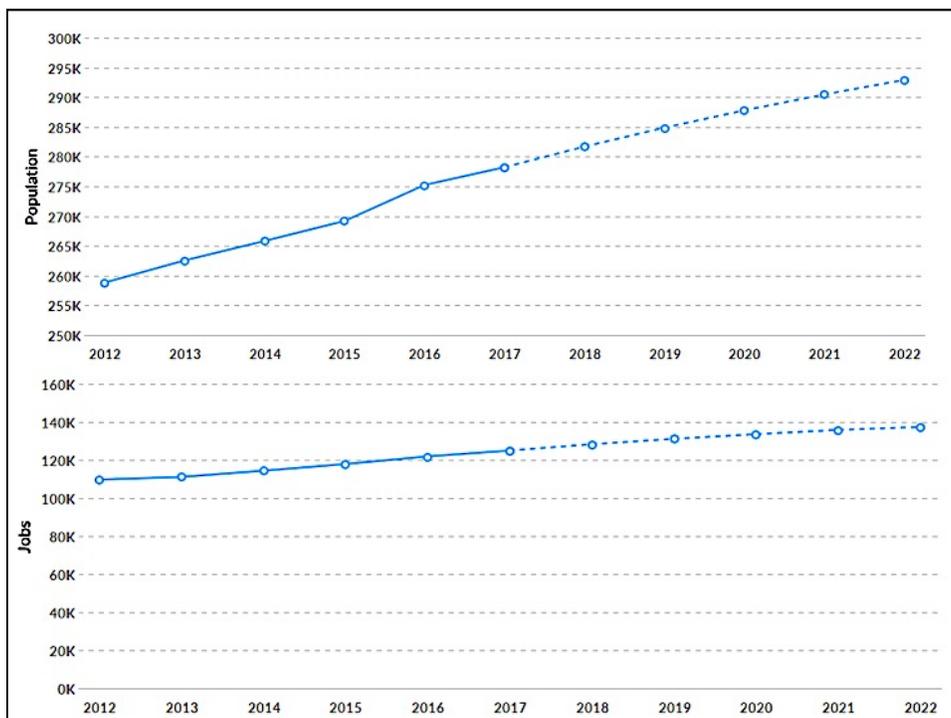
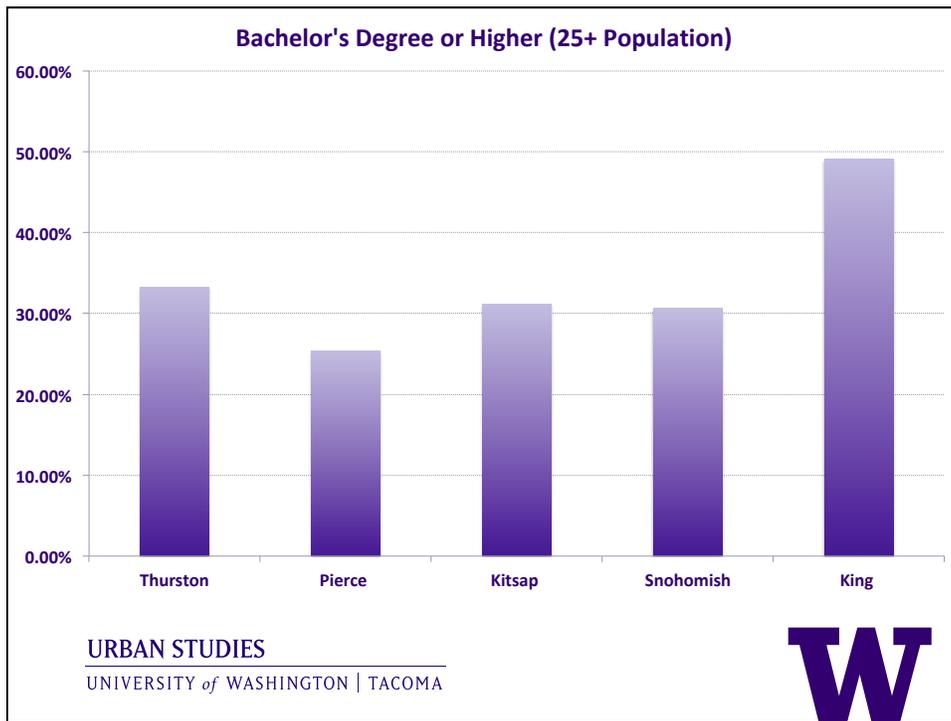


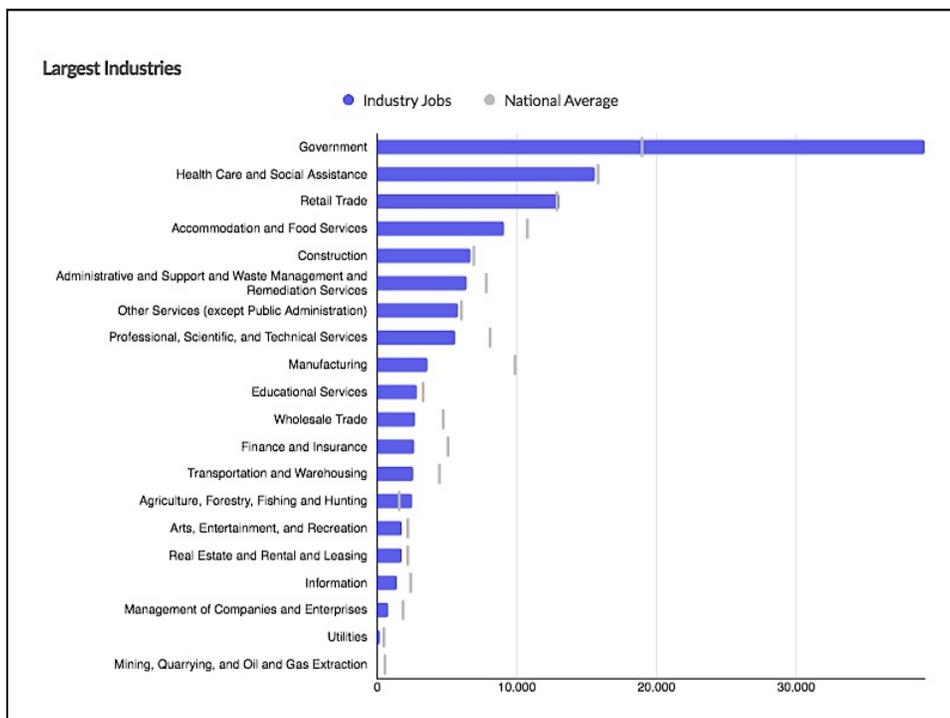
	% of Population	Population
Less Than 9th Grade	2.6%	5,126
9th Grade to 12th Grade	4.6%	9,007
High School Diploma	23.0%	44,876
Some College	26.6%	51,885
Associate's Degree	10.1%	19,638
Bachelor's Degree	19.9%	38,909
Graduate Degree and Higher	13.2%	25,736

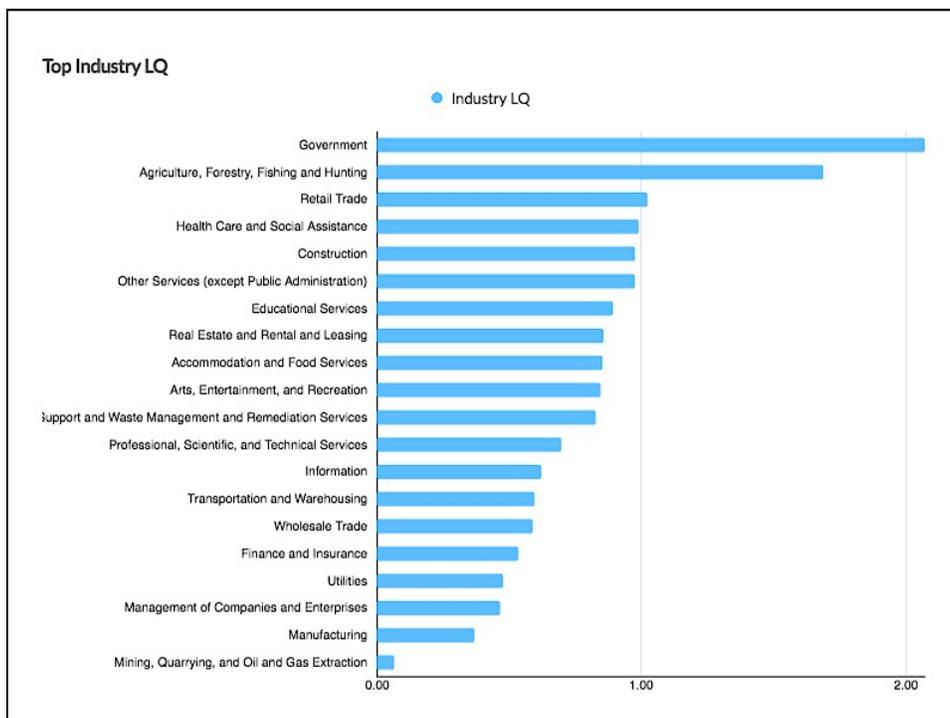
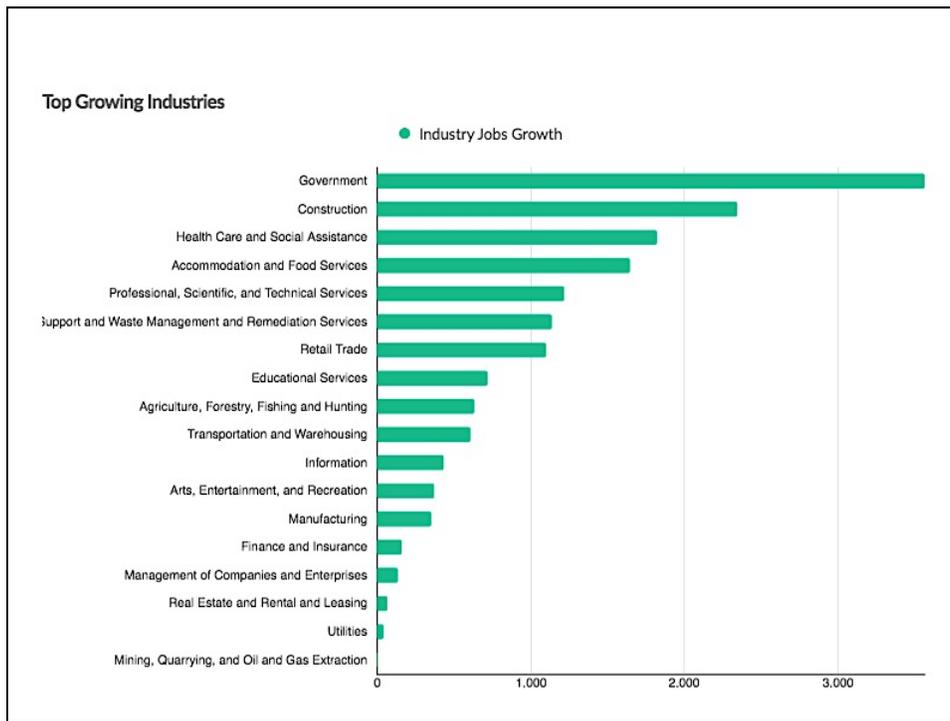
- 19.9% of Thurston County, WA residents possess a Bachelor's Degree (1.6% above the national average)
- 10.1% hold an Associate's Degree (2.2% above the national average).

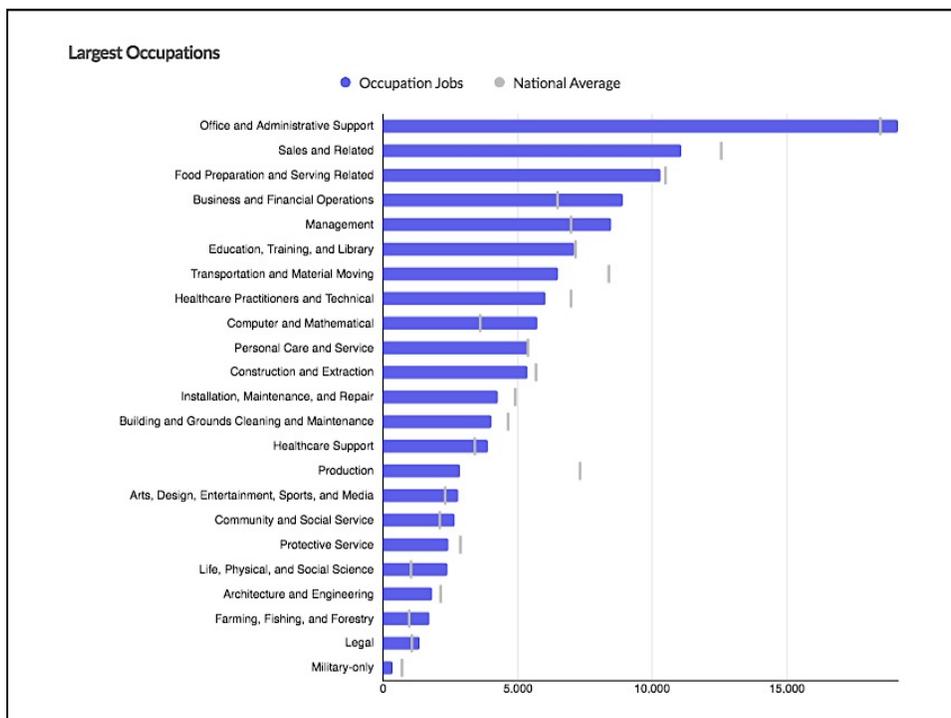
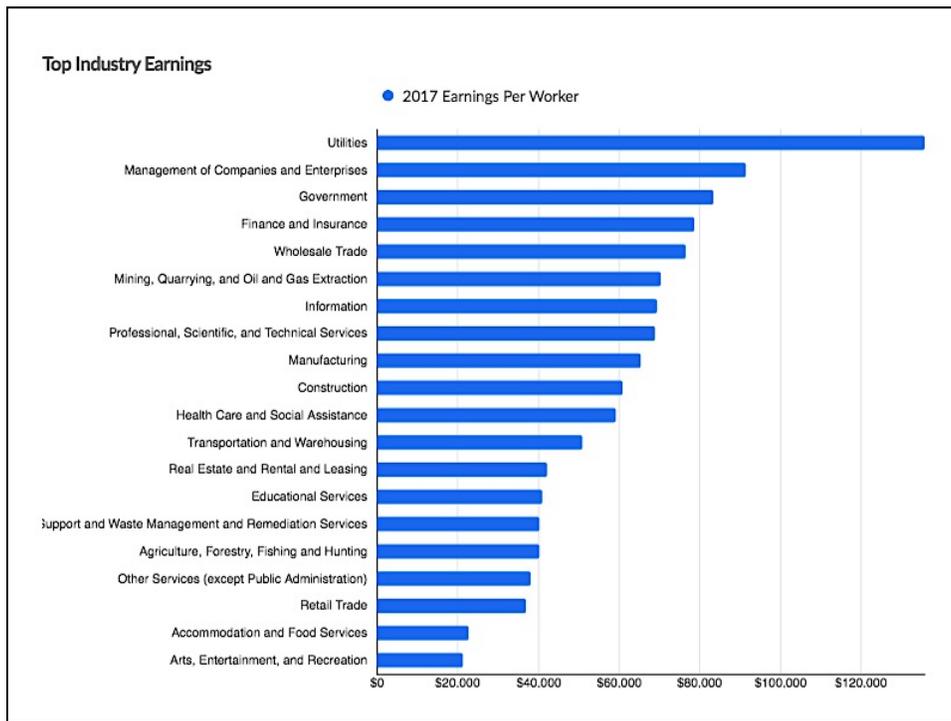
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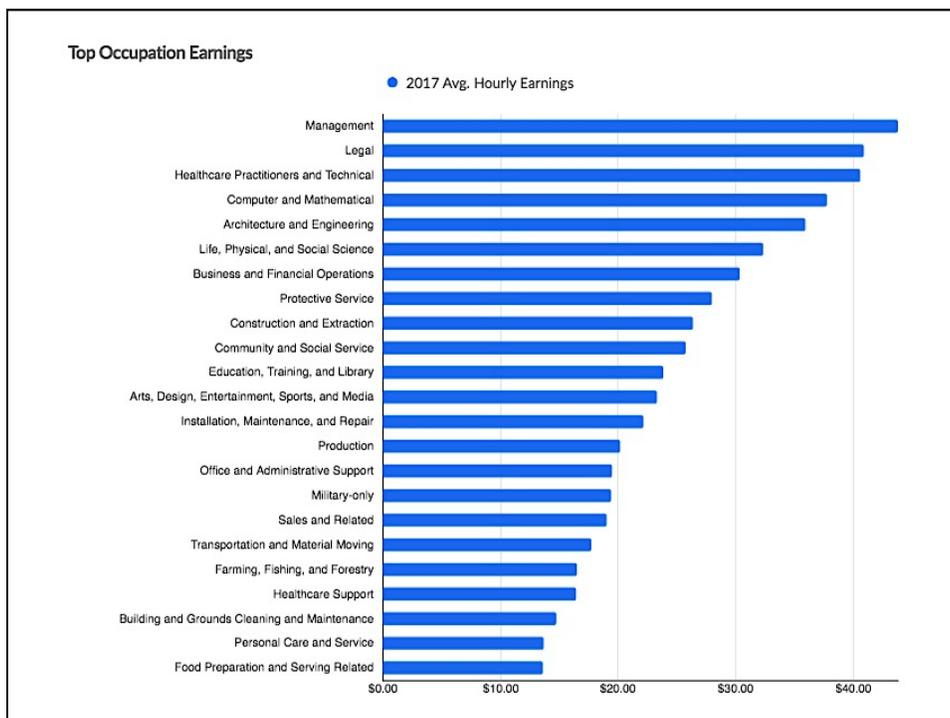
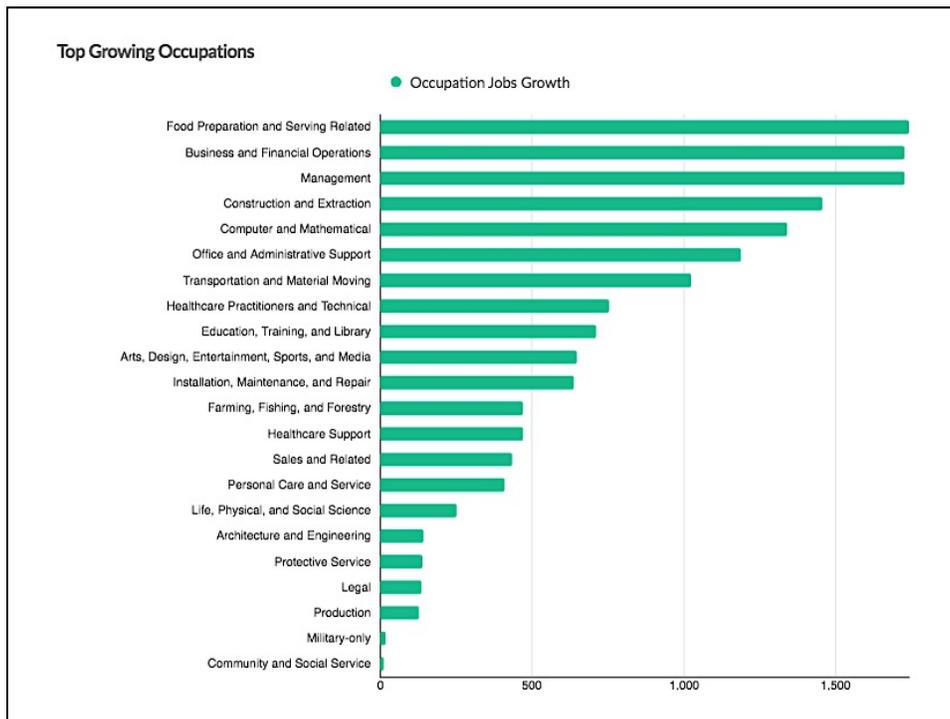


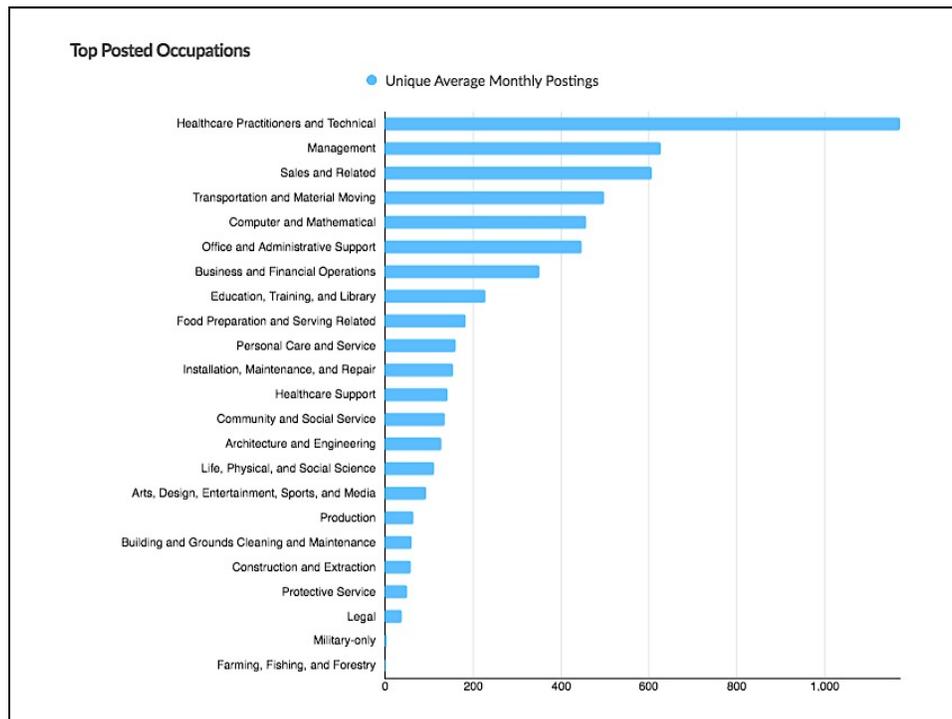












Analysis of Job Postings

- > Between September 2017 and August 2018, there were a total of 107,841 job postings. Among these, 31,980 were unique.
- > This means that on average every job showed up three times in different outlets (duplicate postings).
- > Median posting duration is 27 days.
- > Largest number of job postings came from Anthem, State of Washington, General Electric Company, Soliant Health, Providence Health & Services, CRST International, and Kaiser Permanente.

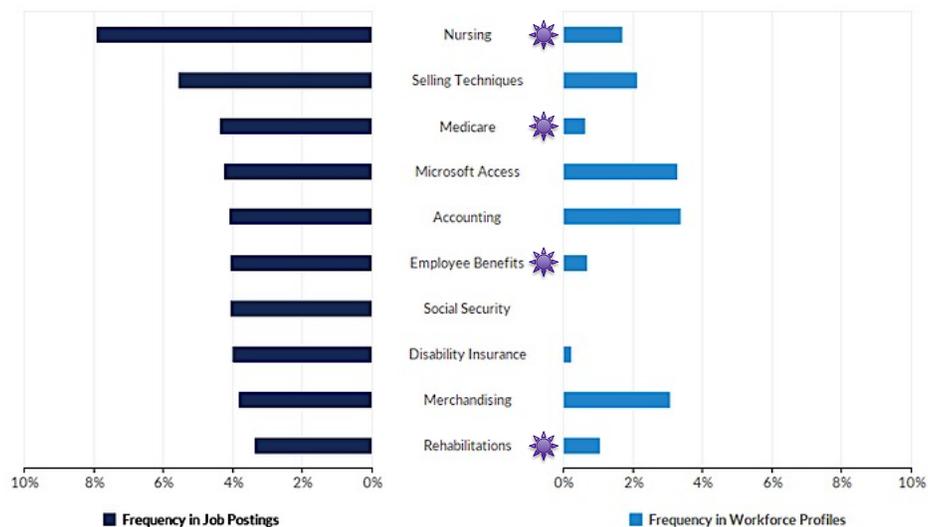
Analysis of Job Postings

- > Four cities had the largest number of job postings:
 - Olympia (27,687)
 - Yelm (1,687)
 - Rochester (994)
 - Rainier (502)
- > Top posted occupations:
 - Registered Nurses (2,142)
 - Heavy and Tractor - Trailer Truck Drivers (1,957)
 - Retail Salespersons (711)

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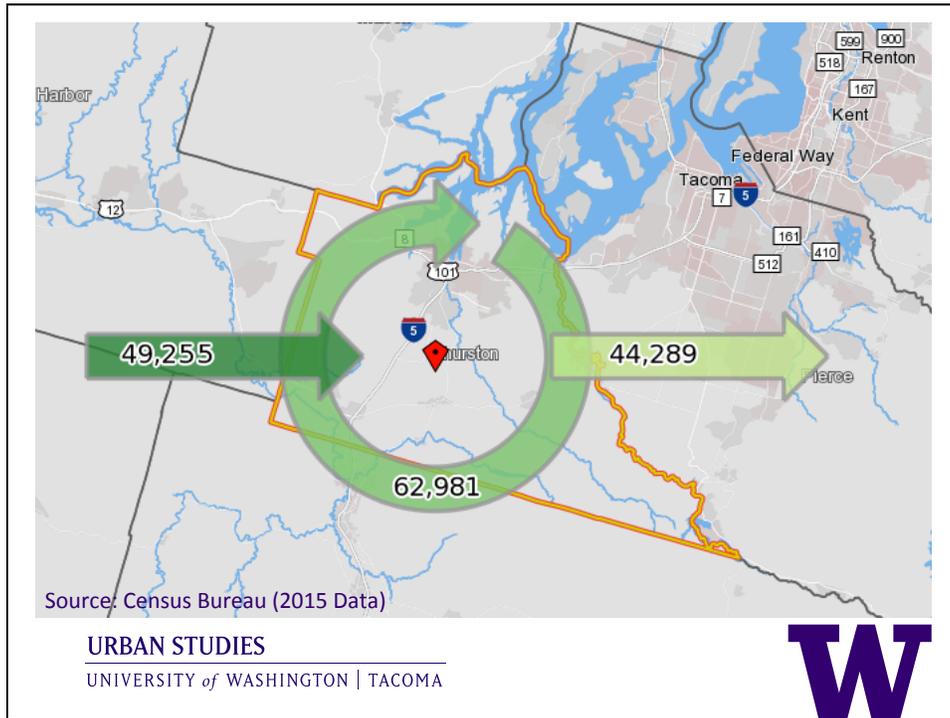


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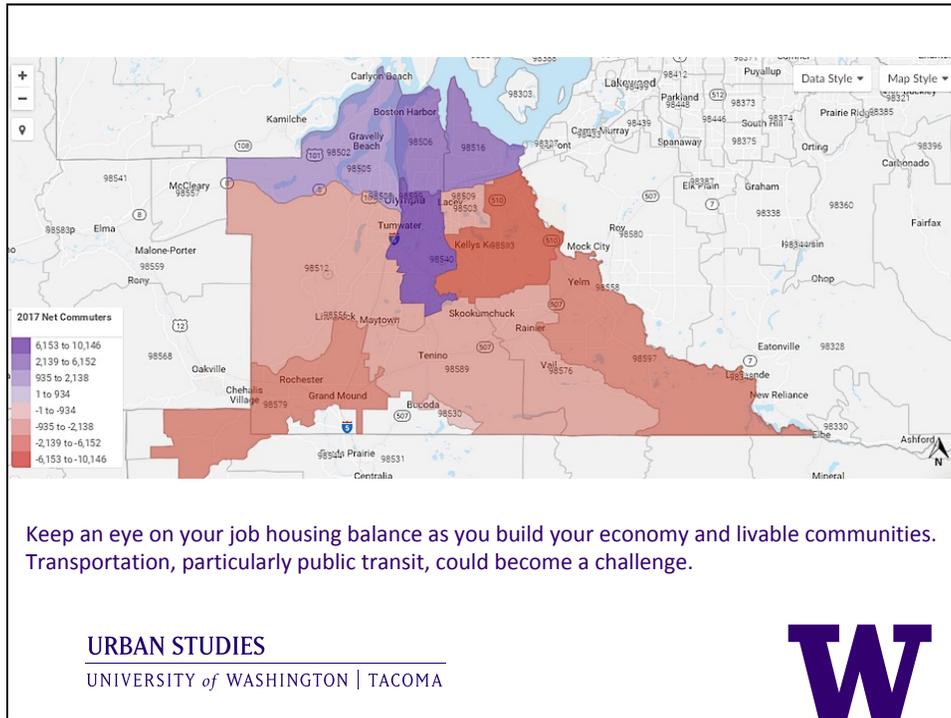


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ZIP	Location	2017 Jobs	2017 Resident Workers	Net Commuters
98556	Littlerock, WA	11	<10	Insf. Data
98540	East Olympia, WA	<10	545	Insf. Data
98501	Olympia, WA	27,195	20,527	6,668
98516	Olympia, WA	15,109	10,546	4,563
98506	Olympia, WA	12,680	10,379	2,301
98502	Olympia, WA	17,880	16,483	1,397
98505	Olympia, WA	1,345	16	1,329
98504	Olympia, WA	105	105	0
98599	Olympia, WA	0	0	0
98530	Bucoda, WA	62	63	-1
98508	Olympia, WA	72	366	-294
98511	Tumwater, WA	156	592	-436
98507	Olympia, WA	314	847	-533
98509	Lacey, WA	177	1,113	-936
98576	Rainier, WA	1,052	2,467	-1,415
98512	Olympia, WA	14,414	15,960	-1,546
98589	Tenino, WA	2,547	4,142	-1,595
98503	Lacey, WA	15,673	17,726	-2,053
98579	Rochester, WA	3,814	7,108	-3,294
98597	Yelm, WA	6,281	11,301	-5,020
98513	Olympia, WA	6,069	16,215	-10,146
		124,966	136,505	-11,538



Intercity Transit

- > 86 vanpools coming into Thurston County from other counties
 - From Seattle, Bellevue, Kent, Federal Way, Bothell and Tukwila
- > 89 vanpools leaving Thurston County for other counties
 - For Renton, Redmond, Seattle, Tukwila, Auburn, SeaTac, and Des Moines in King County
 - Bremerton in Kitsap County
 - For Tacoma, DuPont, JBLM, Camp Murray, Puyallup, and Lakewood in Pierce County
- > 5 vanpools operate in Thurston

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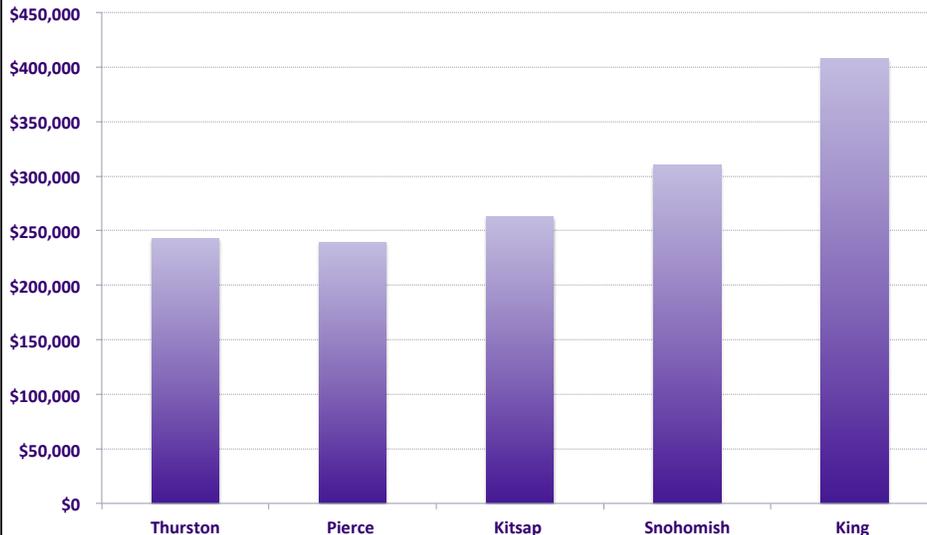
Intercity Transit

- > Improvement Proposal (2 of the 9 items)
 - Service to new and growing areas (NE Lacey, South Tumwater, West Olympia, and Yelm)
 - Bus Rapid Transit (Martin Way Corridor from Olympia to Lacey)
- > Based on Road Trip 2 survey (1508 respondents, August 1st), there is popular support for:
 - Extending service to growing population and economic activity center (70%+)
 - Increasing transit service to stay ahead of congestion and population growth (70%+)
- > Of course, when it comes to support for sales tax, there is slightly less enthusiasm (38% very supportive, 29% somewhat supportive).

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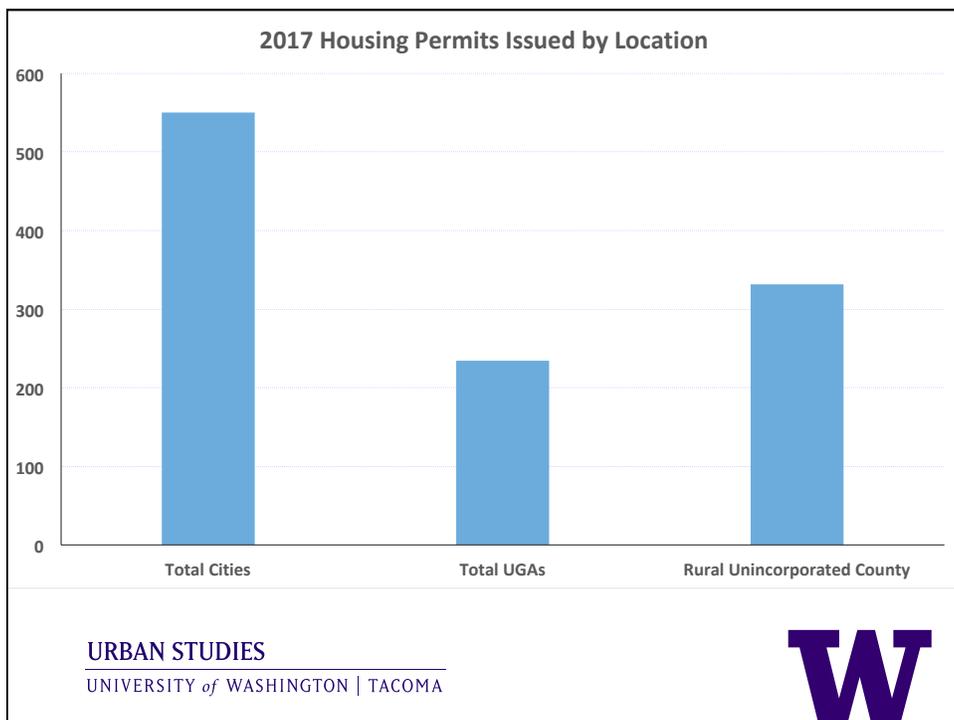
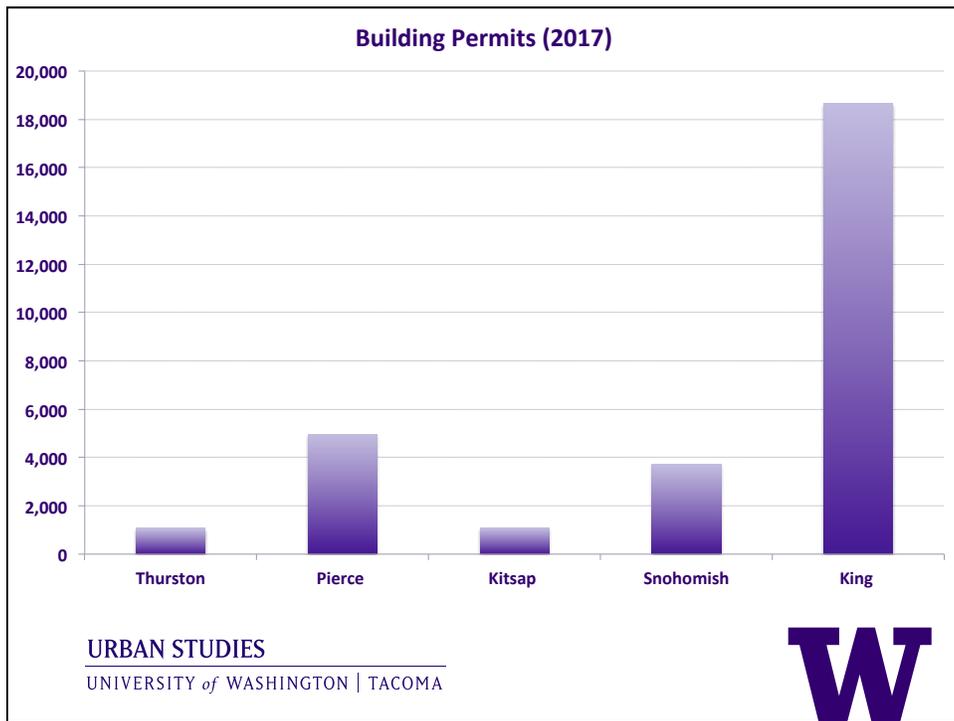


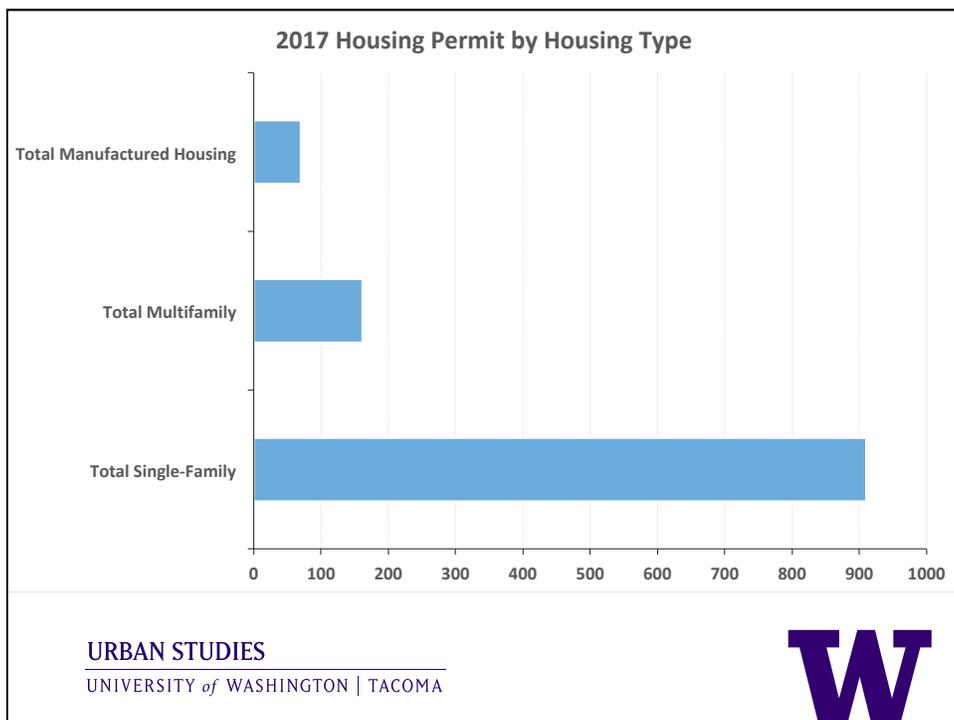
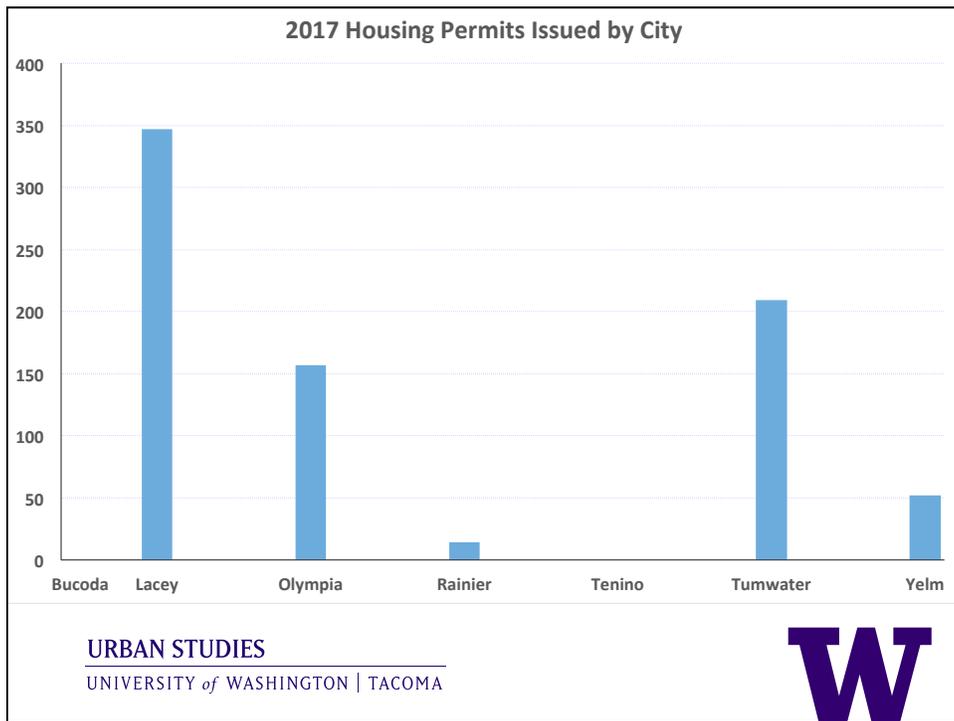
Median Value of Owner-Occupied Home



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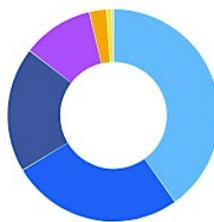
What Type of Housing is Needed?

- > Millennial Population
- > Retiree
- > Live, work, and play
- > Density to support transit nodes
- > Housing Cost versus Earnings

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Business Size



	Percentage	Business Count
1 to 4 employees	40.1%	4,155
5 to 9 employees	26.2%	2,721
10 to 19 employees	19.1%	1,979
20 to 49 employees	10.9%	1,127
50 to 99 employees	2.6%	274
100 to 249 employees	0.8%	81
250 to 499 employees	0.2%	23
500+ employees	0.1%	11

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Strategies for the future

- > Regional approaches are fundamentally important, especially in places like Thurston County, where no one location can have a global economic presence.
 - Thurston Community Economic Alliance seems to be a great conduit for that.
- > Focus on quality of life and livability, as a part of your regional strategy
 - This includes family wages
 - Affordable housing (which includes low-income housing)
 - > This means a balance between projected earnings and housing prices
- > Your Economic Development Strategic Plan indicates that you are thinking about that (Performance Indicator Index number 14).

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Strategies for the future

- > In terms of economic development, the future is not necessarily large firms.
- > One or two of those will be great. However, creating your own brand of economic development means that you fully mobilize local talent and attract new ones to build a solid entrepreneurial culture.
- > That connects with your current economic landscape of small firms and creates place-loyalty among your old and new firms.
- > Area 3 (Small Business & Entrepreneurial Resources) focus and action plan is an encouraging element of your future success.

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Strategies for the future

- > Three of the initiatives under Area 3 are on target:
 - Foster a culture of “innovation”
 - Identify emerging business sectors and support network to grow them
 - Ensure a multicultural business assistance environment.
- > There is a lot that EDC and various groups are doing to support innovation, including: working with community colleges, assisting with micro-loans, bringing in angel investors, providing data analysis and research support...
- > Many of these support services are directed at women-owned businesses.

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Strategies for the future

- > I was also delighted to learn this summer about the focus on smaller cities and rural/agricultural communities in Thurston County.
- > In searching for the new, you don't want to forget who you are. Furthermore, as the world becomes more urban it is important to work with places to maintain their authenticity. Soon, it will be a rare commodity.
- > Allow your region to represent who you are and who you want to be in a symbiotic manner that speaks to your love of place and purposeful progress.

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