

Washington State Labor Area Summaries



Prepared by the
Labor Market and
Economic Analysis Branch
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November 2003
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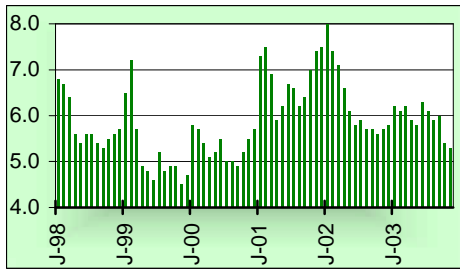
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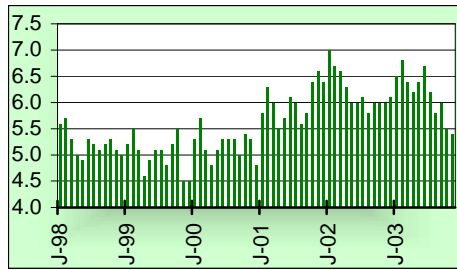
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Auxiliary aids and services are available upon request to persons with disabilities.

MSA Jobless Rates 1998-2003

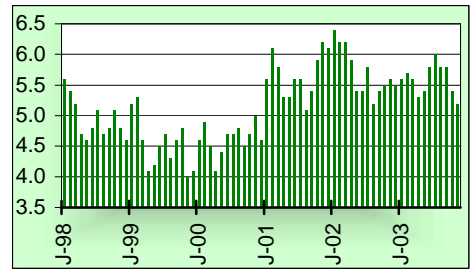
Bellingham MSA



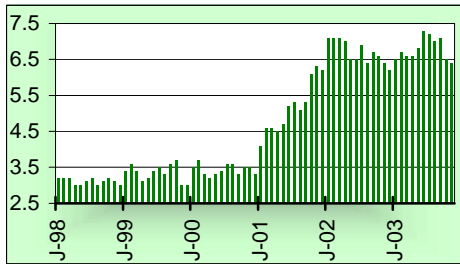
Bremerton PMSA



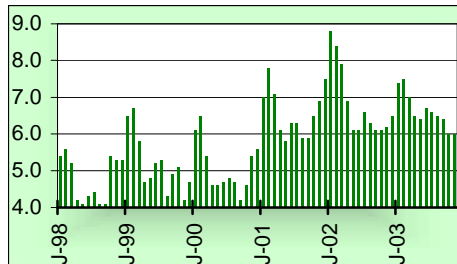
Olympia PMSA



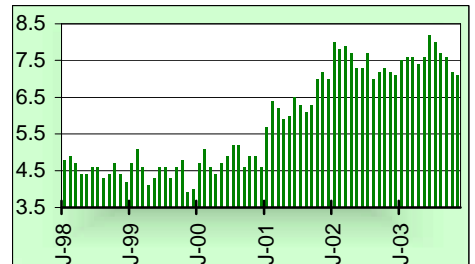
Seattle-Bellevue-Everett PMSA



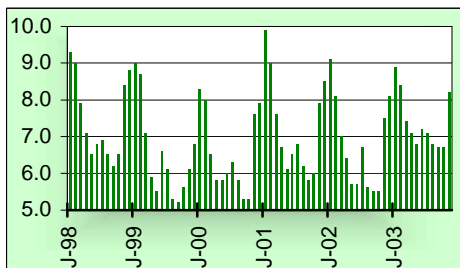
Spokane MSA



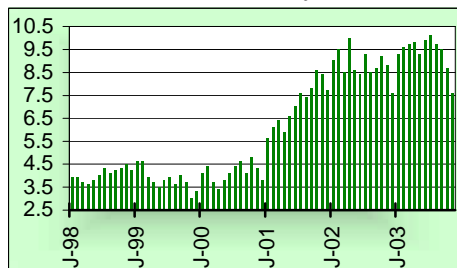
Tacoma PMSA



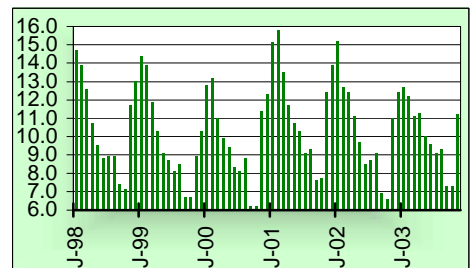
Richland-Kennewick-Pasco MSA



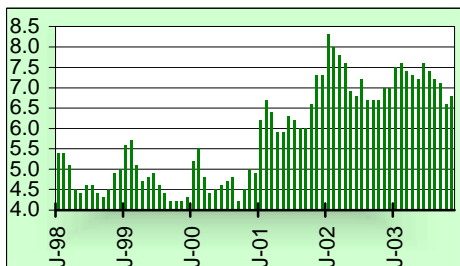
Clark County



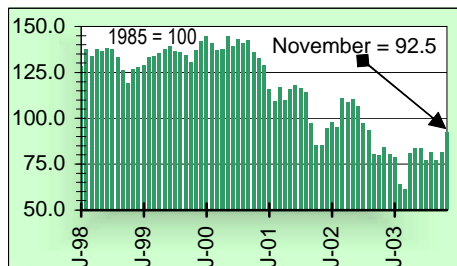
Yakima MSA



Washington State



Index of Consumer Confidence 1993-2003



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- Walla Walla County 28
- Cowlitz County 30

Resident Labor Force and Employment in Washington State and Labor Market Areas 1/

Not Seasonally Adjusted/ Benchmark: December 2002

| | November 2003 Preliminary | | | | October 2003 Revised | | | | November 2002 Revised | | | |
|-------------------------------|---------------------------|------------|---------|---------|----------------------|------------|---------|---------|-----------------------|------------|---------|---------|
| | Labor Force | Employment | Unemp. | UI Rate | Labor Force | Employment | Unemp. | UI Rate | Labor Force | Employment | Unemp. | UI Rate |
| Washington State Total | 3,112,600 | 2,900,600 | 212,000 | 6.8 | 3,142,000 | 2,933,900 | 208,100 | 6.6 | 3,109,300 | 2,891,100 | 218,200 | 7.0 |
| Bellingham MSA | 90,300 | 85,500 | 4,800 | 5.3 | 90,000 | 85,100 | 4,900 | 5.4 | 86,100 | 81,100 | 4,900 | 5.7 |
| Bremerton PMSA | 102,500 | 97,000 | 5,500 | 5.4 | 101,800 | 96,200 | 5,600 | 5.5 | 102,600 | 96,400 | 6,100 | 6.0 |
| Olympia PMSA | 108,500 | 102,800 | 5,700 | 5.2 | 108,000 | 102,200 | 5,800 | 5.4 | 106,100 | 100,200 | 5,900 | 5.6 |
| Seattle-Bellevue-Everett PMSA | 1,396,500 | 1,307,500 | 89,000 | 6.4 | 1,390,100 | 1,299,700 | 90,400 | 6.5 | 1,401,300 | 1,311,300 | 90,100 | 6.4 |
| King County 2/ | 1,021,800 | 960,600 | 61,200 | 6.0 | 1,017,200 | 954,900 | 62,300 | 6.1 | 1,026,700 | 963,300 | 63,400 | 6.2 |
| Snohomish County 2/ | 346,400 | 320,400 | 26,000 | 7.5 | 344,700 | 318,500 | 26,200 | 7.6 | 346,300 | 321,300 | 25,000 | 7.2 |
| Island County 2/ | 28,500 | 26,600 | 1,900 | 6.6 | 28,200 | 26,400 | 1,800 | 6.5 | 28,350 | 26,640 | 1,720 | 6.0 |
| Spokane MSA | 214,500 | 201,600 | 12,900 | 6.0 | 213,500 | 200,700 | 12,800 | 6.0 | 215,200 | 201,900 | 13,300 | 6.2 |
| Tacoma PMSA | 355,400 | 330,300 | 25,100 | 7.1 | 353,900 | 328,500 | 25,500 | 7.2 | 349,500 | 324,300 | 25,200 | 7.2 |
| Tri-Cities MSA | 101,800 | 93,400 | 8,400 | 8.2 | 106,200 | 99,100 | 7,100 | 6.7 | 102,400 | 94,700 | 7,700 | 7.5 |
| Benton County 2/ | 76,600 | 71,200 | 5,400 | 7.0 | 80,700 | 75,500 | 5,200 | 6.4 | 77,100 | 72,100 | 5,000 | 6.5 |
| Franklin County 2/ | 25,300 | 22,300 | 3,000 | 12.0 | 25,500 | 23,600 | 1,900 | 7.5 | 25,200 | 22,600 | 2,700 | 10.6 |
| Yakima MSA | 106,400 | 94,500 | 11,900 | 11.2 | 118,700 | 109,900 | 8,700 | 7.3 | 104,600 | 93,100 | 11,500 | 11.0 |
| Adams | 7,680 | 6,810 | 870 | 11.4 | 8,770 | 8,280 | 480 | 5.5 | 8,250 | 7,220 | 1,030 | 12.5 |
| Asotin 2/ | 12,250 | 11,400 | 850 | 6.9 | 12,050 | 11,460 | 600 | 5.0 | 11,930 | 11,090 | 840 | 7.0 |
| Chelan-Douglas LMA | 49,040 | 44,790 | 4,250 | 8.7 | 56,680 | 53,200 | 3,480 | 6.1 | 50,540 | 46,270 | 4,270 | 8.4 |
| Chelan County 2/ | 32,860 | 29,930 | 2,930 | 8.9 | 37,980 | 35,550 | 2,430 | 6.4 | 33,970 | 30,920 | 3,050 | 9.0 |
| Douglas County 2/ | 16,180 | 14,860 | 1,320 | 8.2 | 18,700 | 17,650 | 1,050 | 5.6 | 16,570 | 15,350 | 1,220 | 7.4 |
| Clallam | 25,490 | 23,850 | 1,640 | 6.4 | 25,570 | 24,000 | 1,570 | 6.1 | 25,080 | 23,290 | 1,780 | 7.1 |
| Clark 2/ | 183,000 | 169,100 | 13,900 | 7.6 | 183,000 | 167,100 | 15,900 | 8.7 | 187,600 | 171,000 | 16,600 | 8.8 |
| Columbia | 1,100 | 1,000 | 100 | 9.1 | 1,120 | 1,030 | 90 | 8.2 | 1,110 | 970 | 130 | 12.1 |
| Cowlitz | 39,820 | 36,390 | 3,430 | 8.6 | 40,090 | 36,460 | 3,630 | 9.1 | 40,930 | 36,860 | 4,070 | 10.0 |
| Ferry | 2,420 | 2,090 | 330 | 13.8 | 2,420 | 2,120 | 300 | 12.5 | 2,520 | 2,220 | 290 | 11.6 |
| Garfield | 1,080 | 1,050 | 30 | 2.8 | 1,120 | 1,080 | 40 | 3.2 | 1,160 | 1,110 | 50 | 4.4 |
| Grant | 36,910 | 33,180 | 3,730 | 10.1 | 41,800 | 39,070 | 2,730 | 6.5 | 36,330 | 32,730 | 3,600 | 9.9 |
| Grays Harbor | 26,310 | 23,940 | 2,370 | 9.0 | 26,480 | 24,060 | 2,420 | 9.2 | 26,050 | 23,520 | 2,530 | 9.7 |
| Jefferson | 11,910 | 11,290 | 620 | 5.2 | 12,070 | 11,430 | 640 | 5.3 | 11,900 | 11,110 | 790 | 6.7 |
| Kittitas | 16,680 | 15,630 | 1,050 | 6.3 | 16,980 | 16,070 | 910 | 5.3 | 15,790 | 14,910 | 880 | 5.6 |
| Klickitat | 8,290 | 7,300 | 990 | 12.0 | 9,020 | 7,990 | 1,030 | 11.4 | 7,860 | 6,860 | 1,000 | 12.8 |
| Lewis | 29,770 | 27,420 | 2,350 | 7.9 | 29,980 | 27,690 | 2,280 | 7.6 | 29,500 | 26,990 | 2,510 | 8.5 |
| Lincoln | 4,620 | 4,370 | 250 | 5.4 | 4,710 | 4,500 | 210 | 4.5 | 4,570 | 4,310 | 260 | 5.8 |
| Mason | 21,750 | 20,260 | 1,490 | 6.8 | 21,630 | 20,090 | 1,540 | 7.1 | 19,980 | 18,410 | 1,570 | 7.9 |
| Okanogan | 17,270 | 15,670 | 1,600 | 9.3 | 22,370 | 21,060 | 1,320 | 5.9 | 18,090 | 16,160 | 1,930 | 10.7 |
| Pacific | 7,630 | 6,980 | 650 | 8.5 | 7,740 | 7,120 | 630 | 8.1 | 7,830 | 7,110 | 720 | 9.2 |
| Pend Oreille | 4,520 | 4,150 | 370 | 8.2 | 4,530 | 4,150 | 380 | 8.4 | 4,320 | 3,960 | 360 | 8.4 |
| San Juan | 6,340 | 6,070 | 270 | 4.3 | 6,640 | 6,380 | 260 | 3.9 | 6,570 | 6,250 | 330 | 5.0 |
| Skagit | 53,050 | 49,260 | 3,790 | 7.1 | 53,990 | 50,310 | 3,690 | 6.8 | 52,920 | 48,910 | 4,010 | 7.6 |
| Skamania | 3,730 | 3,370 | 360 | 9.6 | 3,870 | 3,500 | 370 | 9.5 | 3,900 | 3,530 | 380 | 9.7 |
| Stevens | 16,720 | 15,380 | 1,340 | 8.0 | 16,840 | 15,670 | 1,170 | 6.9 | 16,710 | 15,320 | 1,390 | 8.3 |
| Wahkiakum | 1,590 | 1,490 | 100 | 6.1 | 1,620 | 1,520 | 100 | 6.4 | 1,760 | 1,630 | 130 | 7.4 |
| Walla Walla | 27,610 | 26,070 | 1,540 | 5.6 | 28,600 | 27,390 | 1,210 | 4.2 | 28,410 | 26,860 | 1,550 | 5.5 |
| Whitman | 20,140 | 19,690 | 450 | 2.2 | 20,110 | 19,690 | 430 | 2.1 | 19,920 | 19,450 | 470 | 2.3 |

Labor Area Summaries, Page 2

1/ Official U.S. Department of Labor, Bureau of Labor Statistics data. 2/ Estimates are determined by using the Population/Claims Share disaggregation methodology. Detail may not add due to rounding.

Washington State Employment Security Department
 Labor Market and Economic Analysis Branch (LMEA)

Directory of LMEA Economists and Areas Served

| Economists | Address/Telephone | Areas Served <i>(MSA Counties are Capitalized)</i> |
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| Cummins, Carolyn , <i>Staff Economist</i> 360/438-4814 FAX 438-4846 | PO Box 9046, MS: 46000 Olympia, WA 98507-9046 ccummins@esd.wa.gov | Statewide |
| Wallace, David , <i>Staff Economist</i> 360/438-4818 FAX 438-4846 | PO Box 9046, MS: 46000 Olympia, WA 98507-9046 dbwallace@esd.wa.gov | Statewide |
| Graudins, Ivars , <i>Area LMI Supervisor</i> 360/438-4825 FAX 438-4846 | PO Box 9046, MS: 46000 Olympia, WA 98507-9046 igraudins@esd.wa.gov | Statewide |
| Bailey, Scott , <i>Regional Economist</i> 360/735-5043 FAX 735-5093 | 5411 East Mill Plain Blvd., Suite B3 Vancouver, WA 98661 scott.bailey@esd.wa.gov | CLARK, Cowlitz, Skamania, Wahkiakum |
| Dillingham, William , <i>Regional Economist</i> 509/532-3188 FAX 532-3035 | 130 South Arthur Spokane, WA 99202-2259 wdillingham@esd.wa.gov | SPOKANE, Columbia, Ferry, Garfield, Lincoln, Pend Oreille, Stevens, Whitman |
| Johnson, Chris , <i>Regional Economist</i> 253/593-7336 FAX 593-7377 | 1313 Tacoma Avenue South Tacoma, WA 98402 chris.johnson@esd.wa.gov | PIERCE |
| Meseck, Don , <i>Regional Economist</i> 509/963-2606 FAX 963-1992 | Central Washington University 400 East 8 th Avenue Ellensburg, WA 98926-7486 dmeseck@esd.wa.gov | YAKIMA, Okanogan, Chelan, Adams, Douglas, Grant, Kittitas, Klickitat* |
| Pauer, Roberta , <i>Regional Economist</i> 206/720-3394 FAX 720-3393 | 400 East Pine, Suite 310 Seattle, WA 98122 rpauer@esd.wa.gov | KING Seattle-Bellevue-Everett PMSA |
| Schau, Dean , <i>Regional Economist</i> 509/547-0511 ext. 2217 FAX 546-0401 | Columbia Basin College 2600 North 20 th Avenue Pasco, WA 99301-3379 schaud@cbc2.org | BENTON, FRANKLIN, Walla Walla |
| Thompson, Donna , <i>Regional Economist</i> 425/339-4954 FAX 425/339-1949 | PO Box 870 Everett, WA 98206 dthompson@esd.wa.gov | SNOHOMISH |
| Turek, Paul , <i>Regional Economist</i> 360/438-4813 FAX 438-4846 | PO Box 9046, MS: 46000 Olympia, WA 98507-9046 pturek@esd.wa.gov | Grays Harbor, Lewis, Mason, Pacific, THURSTON |
| Vleming, Jim , <i>Regional Economist</i> 360/438-4821 FAX 438-4846 | PO Box 9046, MS: 46000 Olympia, WA 98507-9046 jvleming@esd.wa.gov | Clallam, Jefferson, KITSAP WHATCOM, ISLAND, San Juan Skagit |
| Labor Market Information Center 1-800-215-1617 Fax 360/438-4109 | PO Box 9046, MS 46000 Olympia WA 98507-9046 | For statewide and area information Asotin** |

*For current information on Klickitat County, please contact Scott Bailey at (360) 735-5043.

**For current information on Asotin County, please contact Doug Tweedy, Labor Market Analyst,
 Lewiston ID at (208) 799-5000.

Revised 11/12/03

Washington State Labor Area Summary Bellingham MSA Whatcom County

Prepared by the Labor Market and Economic Analysis Branch, Jim Vleming, *Regional Labor Economist*
605 Woodland Square Loop SE, Olympia, WA 98507-9046 Phone: (360) 438-4821

Highlights:

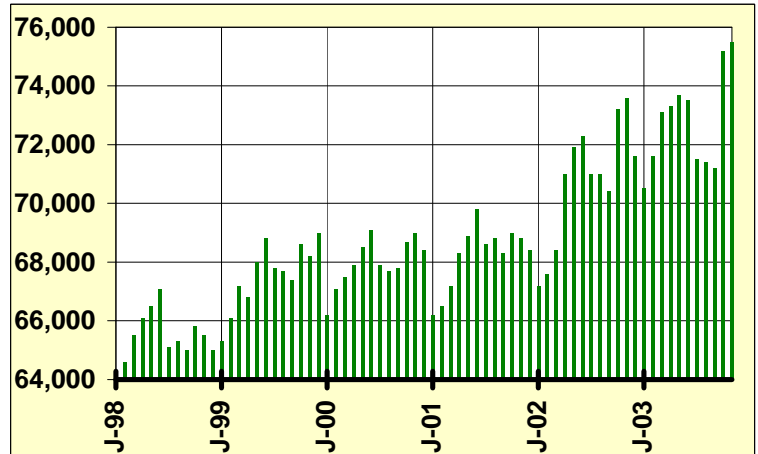
The month of the turkey proved to be a positive one on all fronts for the Bellingham MSA. The unemployment rate dropped slightly and nonagricultural wage and salary employment also rose modestly between October and November.

On the unemployment side, 4,800 Whatcom County residents were counted as unemployed, while 85,500 cashed paychecks in November. The end result was an unemployment rate of 5.3, down from the 5.4 of October, and down even more when compared to the 5.7 rate of November 2002. The November MSA trend bucks the state's direction, as statewide total unemployment went up to 6.8 percent from 6.6 in October. The November 2002 state unemployment rate was an even 7 percent.

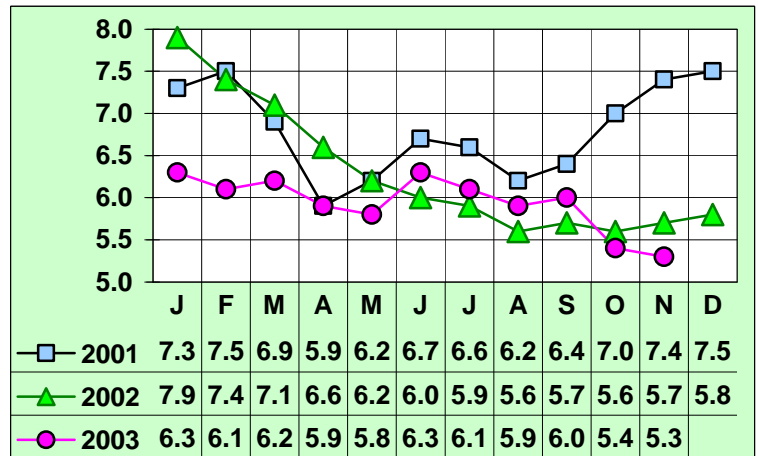
Nonagricultural employment in November topped out at 75,500 jobs in the MSA. This figure was up 300 over the month and 1,900 over the year. The over-the-month movements were a matter of give and take. Employment in Construction and Manufacturing sectors experienced some contraction, as both sectors lost employment. Once again, the plus side was achieved by the Services Providing sector, which continues—and will continue—to provide the bulk of the added jobs. In that sector, paychecks increased by 600 over the month. Employment in Retail Trade, and State and Local Government can take the bow as all added employment between October and November.

Over the year, nonagricultural employment has grown at nearly a 2.6 percent pace. That's the good news, especially as the state struggles at less than 1.0 percent gain. With the exception of Construction, which added 300 jobs over the year, all the gains can be attributed to the Services Providing sector. That segment of the local economy saw jobs expand from 58,600 in November 2002 to 60,500 in November 2003. The numbers indicate that, as of November 2003, just over 80 percent of the MSA's economy can be found in the Services Providing sector.

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



LABOR MARKET SUMMARY
BELLINGHAM MSA (Whatcom County)

Preliminary Quarterly Benchmark: June 2003

| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 90,300 | 90,000 | 86,100 | 300 | 4,200 | 4.9% |
| Resident Employment | 85,500 | 85,100 | 81,100 | 400 | 4,400 | 5.4% |
| Unemployment | 4,800 | 4,900 | 4,900 | -100 | -100 | -2.0% |
| Unemployment Rate | 5.3 | 5.4 | 5.7 | -0.1 | -0.4 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 75,500 | 75,200 | 73,600 | 300 | 1,900 | 2.6% |
| TOTAL PRIVATE | 58,900 | 59,200 | 57,400 | -300 | 1,500 | 2.6% |
| <i>GOODS PRODUCING</i> | 15,000 | 15,300 | 15,000 | -300 | 0 | 0.0% |
| NATURAL RESOURCES and MINING | 400 | 400 | 400 | 0 | 0 | 0.0% |
| CONSTRUCTION | 6,500 | 6,700 | 6,200 | -200 | 300 | 4.8% |
| MANUFACTURING | 8,100 | 8,200 | 8,400 | -100 | -300 | -3.6% |
| Durable Goods | 4,600 | 4,700 | 4,600 | -100 | 0 | 0.0% |
| Non Durable Goods | 3,500 | 3,500 | 3,800 | 0 | -300 | -7.9% |
| Food Manufacturing | 1,500 | 1,500 | 1,600 | 0 | -100 | -6.3% |
| <i>SERVICES PROVIDING</i> | 60,500 | 59,900 | 58,600 | 600 | 1,900 | 3.2% |
| TRADE, TRANSPORTATION and UTILITIES | 14,600 | 14,400 | 13,800 | 200 | 800 | 5.8% |
| Wholesale Trade | 2,800 | 2,800 | 2,600 | 0 | 200 | 7.7% |
| Retail Trade | 9,900 | 9,700 | 9,400 | 200 | 500 | 5.3% |
| Transportation, Warehousing and Utilities | 1,900 | 1,900 | 1,800 | 0 | 100 | 5.6% |
| INFORMATION and FINANCIAL ACTIVITIES | 4,300 | 4,300 | 4,300 | 0 | 0 | 0.0% |
| GOVERNMENT | 16,700 | 16,000 | 16,200 | 700 | 500 | 3.1% |
| Federal Government | 1,100 | 1,100 | 1,000 | 0 | 100 | 10.0% |
| State Government | 6,300 | 5,800 | 6,100 | 500 | 200 | 3.3% |
| Local Government | 9,300 | 9,100 | 9,100 | 200 | 200 | 2.2% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | 0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly
Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports
(currently the second quarter 2003) and estimates employment from that point to present. Please visit our Internet site at:

www.workforceexplorer.com

Washington State
Labor Area Summary
Bremerton PMSA
Kitsap County

Prepared by the Labor Market and Economic Analysis Branch, Jim Vleming, *Regional Labor Economist*
 605 Woodland Square Loop, Olympia, WA 98507-9046 Phone: (360) 438-4821

Highlights:

The Bremerton PMSA economy keeps chugging along, and November was a continuance of that pattern. Nonagricultural jobs over the month were up and the unemployment rate was down. That combination makes for good news and continued hope that the upward bounce can't be too far off.

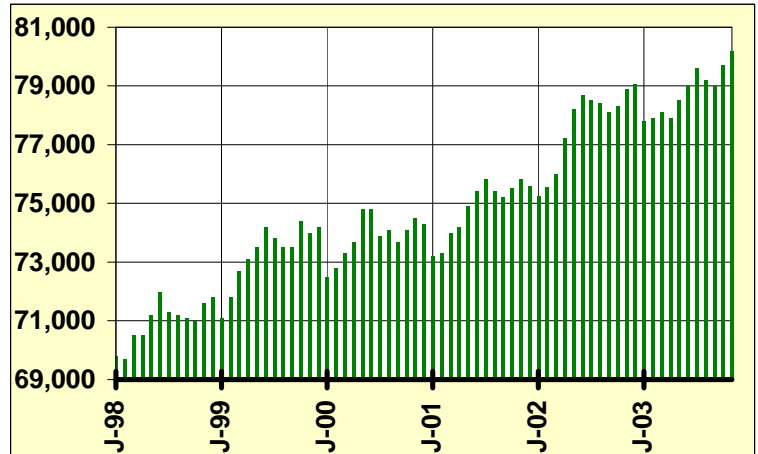
November nonag employment was tagged at 80,200, up 500 jobs from the October total of 79,700, and 1,300 better than last November's totals. The Services Providing sector was the strength of the over-the-month changes. Jobs in that sector gained 600; Retail Trade and Government each added payroll in November. On the down side was a seasonal decline in Construction, Natural Resources and Mining.

Over the year, it was more of the same. The good news continues to be growth. Nonagricultural jobs in the PMSA expanded by better than 1.6 percent over the year. Once again, Services Providing employment gains fueled the expansion, as 1,400 more jobs than November of 2002 were counted. Employment in Trade and Government were the main players in the gain, while Information and Financial Activities were slightly down from a year ago.

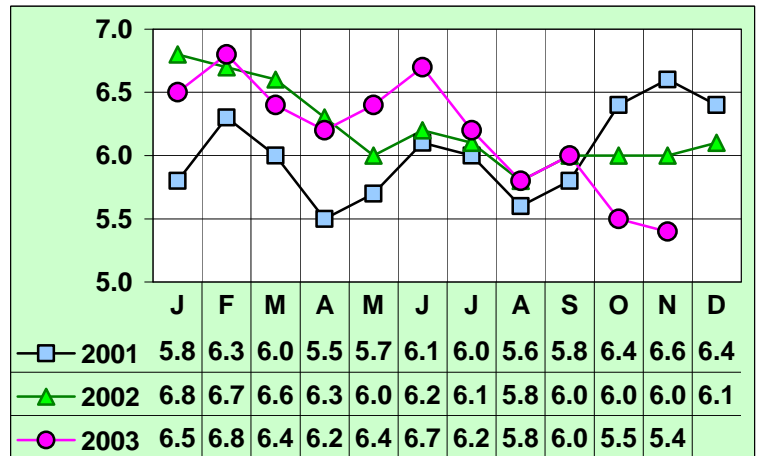
In November 2003, there were 97,000 Bremerton PMSA residents counted as employed. This number contrasts with the 5,500 that were actively seeking a job during the month. The rate of unemployment in November was 5.4 percent, down from the 5.5 in October, and the 6.0 percent rate posted in November 2002. The Bremerton rate compares favorably to the state's November rate of 6.8 percent, which was up from the 6.6 figure of October, but down from last November's 7.0 percent.

The coming months will see a continuing pattern of caution, and seasonal ebbs and flows to the local economy. The unemployment rate will remain steady, as nonagricultural jobs come and go with the seasonal impacts of weather and the holidays.

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



LABOR MARKET SUMMARY
BREMERTON PMSA (Kitsap County)
Preliminary Quarterly Benchmark: June 2003

| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 102,500 | 101,800 | 102,600 | 700 | -100 | -0.1% |
| Resident Employment | 97,000 | 96,200 | 96,400 | 800 | 600 | 0.6% |
| Unemployment | 5,500 | 5,600 | 6,100 | -100 | -600 | -9.8% |
| Unemployment Rate | 5.4 | 5.5 | 6.0 | -0.1 | -0.6 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 80,200 | 79,700 | 78,900 | 500 | 1,300 | 1.6% |
| TOTAL PRIVATE | 52,000 | 51,800 | 50,800 | 200 | 1,200 | 2.4% |
| <i>GOODS PRODUCING</i> | 6,400 | 6,500 | 6,500 | -100 | -100 | -1.5% |
| CONSTRUCTION, NAT. RESOURCES & MINING | 4,500 | 4,700 | 4,700 | -200 | -200 | -4.3% |
| MANUFACTURING | 1,800 | 1,800 | 1,800 | 0 | 0 | 0.0% |
| <i>SERVICES PROVIDING</i> | 73,800 | 73,200 | 72,400 | 600 | 1,400 | 1.9% |
| TRADE, TRANSPORTATION and UTILITIES | 13,500 | 13,200 | 12,900 | 300 | 600 | 4.7% |
| Wholesale Trade | 1,300 | 1,300 | 1,300 | 0 | 0 | 0.0% |
| Retail Trade | 11,200 | 10,900 | 10,700 | 300 | 500 | 4.7% |
| Transportation, Warehousing and Utilities | 1,000 | 1,000 | 1,000 | 0 | 0 | 0.0% |
| INFORMATION and FINANCIAL ACTIVITIES | 5,100 | 5,000 | 5,200 | 100 | -100 | -1.9% |
| GOVERNMENT | 28,200 | 27,800 | 28,100 | 400 | 100 | 0.4% |
| Federal Government | 15,000 | 14,900 | 15,000 | 100 | 0 | 0.0% |
| State and Local Government | 13,200 | 12,900 | 13,100 | 300 | 100 | 0.8% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | 0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly
Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports
(currently the second quarter 2003) and estimates employment from that point to present. Please visit our Internet site at:

www.workforceexplorer.com

Washington State Labor Area Summary Olympia PMSA Thurston County

Prepared by the Labor Market and Economic Analysis Branch, Paul Turek, *Regional Labor Economist*
605 Woodland Square Loop, Olympia, WA 98507-9046 Phone: (360) 438-4813

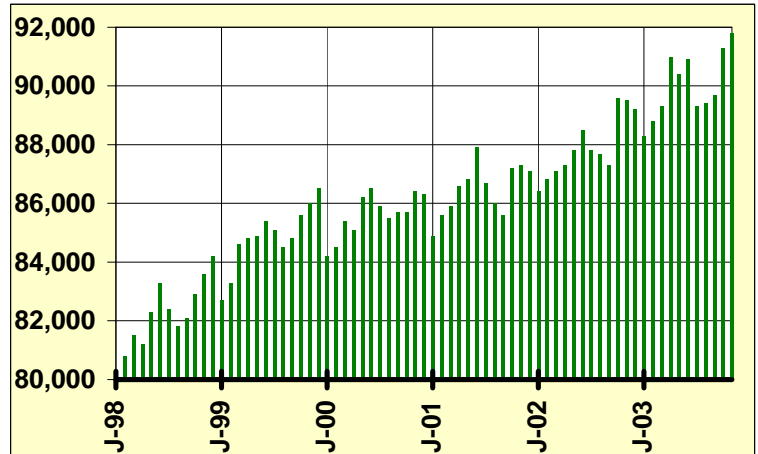
Highlights:

The Olympia PMSA labor market maintained its momentum in November. The area has emerged out the back end to escape the downturn that had been produced by the national economic recession, the state budget deficit, and the closure of the Tumwater brewery. The local area gained 500 jobs over the course of the month. This figure surpassed the gains posted in the same month during 2001 and 2002, and matched the gain recorded for the same month in 2000. The decent showing by the local labor market continued to place downward pressure upon the Olympia unemployment rate, which declined by two tenths of one percentage point to 5.2 percent. This compares favorably to the unemployment rate seen at this same time last year, which stood at 5.6 percent. For comparison purposes at the state level, Washington's unemployment rate rose two-tenths of one percentage point to 6.8 percent.

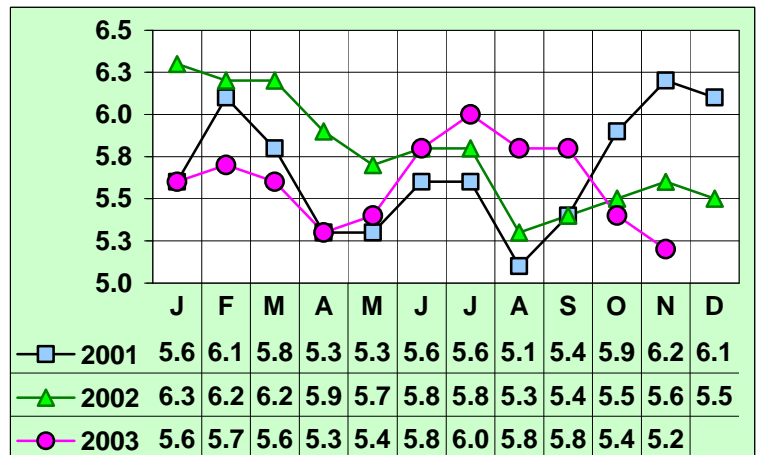
The job gains were led by the Retail Trade sector, as merchants continued ramping up hiring for the holiday season, and by the Government sector as education-related hiring continued. Each of the sectors gained 400 jobs. Transportation, Warehousing and Utilities posted a modest gain of 100 jobs. In other activity, employment within Construction declined by 200 jobs due to seasonal layoffs. Weak seasonal factors also contributed to an overall 100 job decline in employment within the Other Services category, with Leisure and Hospitality services bearing the brunt of the decline. Jobs in Wholesale Trade were also off slightly this month, as 100 jobs were shed.

The over-the-year trend shows the clear progress the area's labor market has achieved. Annual job gains of 2,300 have been largely produced by the Services Providing sector, which includes Information and Financial Activities (100 annual jobs gained), and the Other Services category (900 annual jobs gained). Job growth in Employment Services (temporary help agencies) and Food Services (eating and drinking establishments) have been mostly responsible for the gains in Other Services. Retail Trade has been supported by strong consumer spending that has helped generate 800 new jobs for the year. The rise in Warehousing activity, owing to the Target warehouse and its Home Depot counterpart in Hawk's Prairie, has bolstered employment in this sector by 700

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



LABOR MARKET SUMMARY
OLYMPIA PMSA (Thurston County)
Preliminary Quarterly Benchmark: March 2003

| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 108,500 | 108,000 | 106,100 | 500 | 2,400 | 2.3% |
| Resident Employment | 102,800 | 102,200 | 100,200 | 600 | 2,600 | 2.6% |
| Unemployment | 5,700 | 5,800 | 5,900 | -100 | -200 | -3.4% |
| Unemployment Rate | 5.2 | 5.4 | 5.6 | -0.2 | -0.4 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 91,800 | 91,300 | 89,500 | 500 | 2,300 | 2.6% |
| TOTAL PRIVATE | 56,000 | 55,900 | 53,600 | 100 | 2,400 | 4.5% |
| <i>GOODS PRODUCING</i> | 8,100 | 8,300 | 8,300 | -200 | -200 | -2.4% |
| NATURAL RESOURCES and MINING | 400 | 400 | 400 | 0 | 0 | 0.0% |
| CONSTRUCTION | 4,500 | 4,700 | 4,300 | -200 | 200 | 4.7% |
| MANUFACTURING | 3,200 | 3,200 | 3,600 | 0 | -400 | -11.1% |
| <i>SERVICES PROVIDING</i> | 83,700 | 83,000 | 81,200 | 700 | 2,500 | 3.1% |
| TRADE, TRANSPORTATION and UTILITIES | 15,300 | 14,900 | 13,700 | 400 | 1,600 | 11.7% |
| Wholesale Trade | 1,700 | 1,800 | 1,600 | -100 | 100 | 6.3% |
| Retail Trade | 11,600 | 11,200 | 10,800 | 400 | 800 | 7.4% |
| Transportation, Warehousing and Utilities | 2,000 | 1,900 | 1,300 | 100 | 700 | 53.8% |
| INFORMATION and FINANCIAL ACTIVITIES | 4,800 | 4,800 | 4,700 | 0 | 100 | 2.1% |
| ALL OTHER SERVICES | 27,800 | 27,900 | 26,900 | -100 | 900 | 3.3% |
| GOVERNMENT | 35,800 | 35,400 | 35,900 | 400 | -100 | -0.3% |
| Federal Government | 1,000 | 1,000 | 1,000 | 0 | 0 | 0.0% |
| State Government | 23,500 | 23,300 | 23,500 | 200 | 0 | 0.0% |
| State Government Educational Services | 2,500 | 2,300 | 2,400 | 200 | 100 | 4.2% |
| Local Government | 11,300 | 11,100 | 11,400 | 200 | -100 | -0.9% |
| Local Government Educational Services | 6,600 | 6,400 | 6,900 | 200 | -300 | -4.3% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | 0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly
Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports
(currently the first quarter 2003) and estimates employment from that point to present. Please visit our Internet site at:

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jobs over the year. The strong annual performance mirrors the total job gains registered during the November 2001- November 2002 period, which also qualifies as a good employment growth year for the PMSA.

The boost given to the local area by the national economy has been significant of late. The outlook for the near future continues to be even more promising. The Commerce Department's release of third quarter U.S. gross domestic product growth measured in at an 8.2 percent annual rate, while the advanced fourth quarter figure registered 4.0 percent. This brings the total annual growth for the year to 3.1 percent. The rate of economic growth for 2003 was the strongest since 2000, when the economy grew by 3.7 percent. Economic growth is likely to top 4 percent in 2004, as business spending is expected to pick up. Indicators of Manufacturing activity show this sector to be strengthening. Business inventories are declining, and the excesses accumulated from over expansion in the 1990s have been depleted. The productivity gains that businesses have enjoyed due to new technology integration cannot be sustained much longer at such high levels, so new hiring is inevitable. The local area appears to be in for better times. It just won't be as big of a party as the one that was held during the second half of the 1990s.

Washington State
Labor Area Summary
Seattle-Bellevue-Everett PMSA
King, Island and Snohomish Counties

Prepared by the Labor Market and Economic Analysis Branch, Roberta Pauer, *Regional Labor Economist*
 400 East Pine, Suite 310, Seattle, WA 98122 Phone: (206) 720-3394

Highlights:

November's labor market conditions in the Seattle-Bellevue-Everett (S-B-E) PMSA showed some seasonal improvement, as unemployment edged down slightly from 6.5 percent to 6.4 percent of the labor force. The number of wage and salary jobs in the nonfarm sector gained 5,700 between October and November, due largely to public sector hiring of temporary poll workers. But overall, the Seattle-Bellevue-Everett PMSA economy remained quite weak.

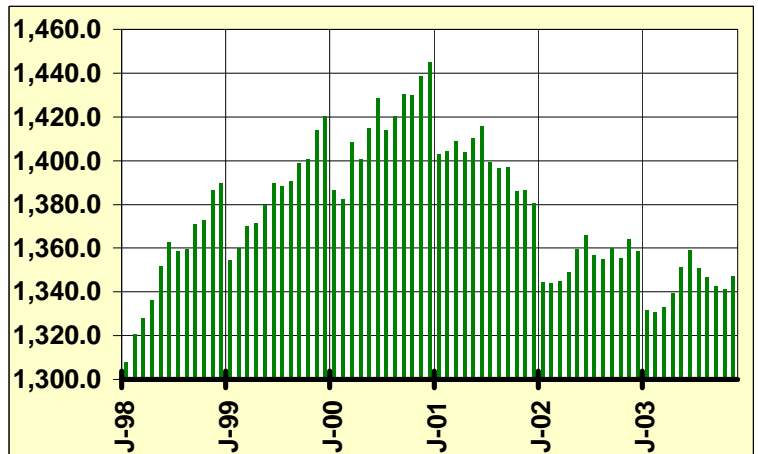
Over the year, unemployment was unchanged from November 2002's level of 6.4 percent.

Over-the-year wage and salary job totals, however, registered a decline of 17,000 from November 2002 to November 2003. Of those, -13,500 have been lost from the manufacturing arena over all, with -9,700 from the aerospace manufacturing sector.

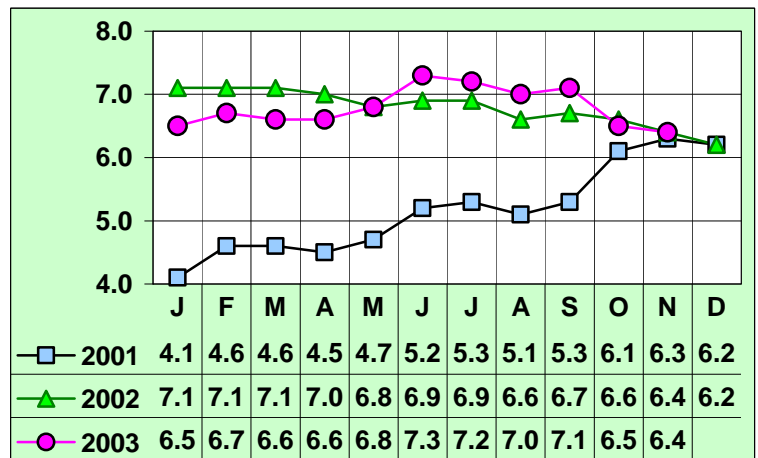
The Seattle-Bellevue-Everett PMSA ("primary metropolitan statistical area") is a three-county area, designated by the U. S. Department of Labor as a single labor market for statistical purposes, due to high levels of home to work commuting across county lines. The S-B-E PMSA comprises King County (with 81 percent of the PMSA's total jobs), Snohomish County (with 18 percent of the total jobs), and Island County (with a slight 1 percent of the total jobs).

King County's unemployment rate in November 2003 was 6.0 percent, slightly improved both from October 2003's 6.1 percent, and from the year-ago level of 6.2 percent. Snohomish County's November unemployment rate of 7.5 percent was much higher than King's, as is typical of long-term trends between the two counties. Last November, Snohomish had unemployment of 7.2 percent. It is Snohomish's higher unemployment rate which pulls up the S-B-E PMSA's overall rate. Island County, at 6.6 percent in November, also was higher than year-ago levels, when in November 2002, it registered 6.0 percent.

Nonfarm Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



LABOR MARKET SUMMARY
SEATTLE-BELLEVUE-EVERETT PMSA (King, Island and Snohomish Counties)

Not Seasonally Adjusted/Preliminary Quarterly Benchmark: June 2003

| EMPLOYMENT BY PLACE OF RESIDENCE | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Revised Oct-02 | Change | | | |
|--|------------------|-------------------|-------------------|-------------------|------------------|------------------|------------------|--------------------|
| | | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Oct-02 Nov-02 | Nov-02 Nov-03 % |
| Civilian Labor Force | 1,396.5 | 1,390.1 | 1,401.3 | 1,403.7 | 6.4 | -4.8 | -2.4 | -0.3% |
| Resident Employment | 1,307.5 | 1,299.7 | 1,311.3 | 1,310.8 | 7.8 | -3.8 | 0.5 | -0.3% |
| Unemployment | 89.0 | 90.4 | 90.1 | 92.9 | -1.4 | -1.1 | -2.8 | -1.2% |
| Unemployment Rate | 6.4 | 6.5 | 6.4 | 6.6 | -0.1 | 0.0 | -0.2 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title, Numbers Reported in Thousands) | | | | | | | | |
| TOTAL NONFARM 1/ | 1,347.1 | 1,341.4 | 1,364.1 | 1,355.5 | 5.7 | -17.0 | 8.6 | -1.2% |
| TOTAL PRIVATE | 1,139.6 | 1,139.9 | 1,156.1 | 1,154.0 | -0.3 | -16.5 | 2.1 | -1.4% |
| GOODS PRODUCING | 225.9 | 228.3 | 239.0 | 242.3 | -2.4 | -13.1 | -3.3 | -5.5% |
| NATURAL RESOURCES and MINING | 2.0 | 2.1 | 1.6 | 1.6 | -0.1 | 0.4 | 0.0 | 25.0% |
| CONSTRUCTION | 77.9 | 78.7 | 77.9 | 79.9 | -0.8 | 0.0 | -2.0 | 0.0% |
| Construction of Buildings | 20.5 | 20.6 | 19.6 | 20.1 | -0.1 | 0.9 | -0.5 | 4.6% |
| Heavy and Civil Engineering Construction | 8.5 | 8.8 | 8.4 | 9.0 | -0.3 | 0.1 | -0.6 | 1.2% |
| Specialty Trade Contractors | 48.9 | 49.3 | 49.9 | 50.8 | -0.4 | -1.0 | -0.9 | -2.0% |
| MANUFACTURING | 146.0 | 147.5 | 159.5 | 160.8 | -1.5 | -13.5 | -1.3 | -8.5% |
| Durable Goods Manufacturing | 114.9 | 115.6 | 126.5 | 127.5 | -0.7 | -11.6 | -1.0 | -9.2% |
| Fabricated Metal Product Mfg | 8.5 | 8.5 | 8.8 | 8.9 | 0.0 | -0.3 | -0.1 | -3.4% |
| Computer and Electronic Product Mfg | 14.9 | 15.1 | 16.3 | 16.4 | -0.2 | -1.4 | -0.1 | -8.6% |
| Navigation., Measuring, Electromed. & Control | 8.8 | 8.9 | 9.3 | 9.3 | -0.1 | -0.5 | 0.0 | -5.4% |
| Transportation Equipment Mfg | 65.4 | 65.7 | 74.6 | 75.1 | -0.3 | -9.2 | -0.5 | -12.3% |
| Aerospace Product and Parts Mfg | 59.9 | 60.3 | 69.6 | 69.8 | -0.4 | -9.7 | -0.2 | -13.9% |
| Non-Durable Goods Manufacturing | 31.1 | 31.9 | 33.0 | 33.3 | -0.8 | -1.9 | -0.3 | -5.8% |
| Food Manufacturing | 11.2 | 11.8 | 12.0 | 12.1 | -0.6 | -0.8 | -0.1 | -6.7% |
| SERVICES PROVIDING | 1,121.2 | 1,113.1 | 1,125.1 | 1,113.2 | 8.1 | -3.9 | 11.9 | -0.3% |
| TRADE, TRANSPORTATION and UTILITIES | 263.7 | 259.8 | 267.8 | 264.1 | 3.9 | -4.1 | 3.7 | -1.5% |
| Wholesale Trade | 68.1 | 68.2 | 68.1 | 68.3 | -0.1 | 0.0 | -0.2 | 0.0% |
| Retail Trade | 146.8 | 142.8 | 148.7 | 144.4 | 4.0 | -1.9 | 4.3 | -1.3% |
| Motor Vehicle and Parts Dealers | 16.8 | 17.1 | 17.3 | 17.4 | -0.3 | -0.5 | -0.1 | -2.9% |
| Food and Beverage Stores | 27.0 | 26.9 | 28.3 | 28.2 | 0.1 | -1.3 | 0.1 | -4.6% |
| Health and Personal Care Stores | 7.1 | 7.0 | 7.1 | 7.1 | 0.1 | 0.0 | 0.0 | 0.0% |
| Clothing and Clothing Accessories Stores | 14.9 | 13.9 | 15.7 | 14.7 | 1.0 | -0.8 | 1.0 | -5.1% |
| General Merchandise Stores | 23.0 | 20.6 | 21.1 | 19.2 | 2.4 | 1.9 | 1.9 | 9.0% |
| Transportation, Warehousing and Utilities | 48.8 | 48.8 | 51.0 | 51.4 | 0.0 | -2.2 | -0.4 | -4.3% |
| Transportation and Warehousing | 47.2 | 47.3 | 49.7 | 50.0 | -0.1 | -2.5 | -0.3 | -5.0% |
| Air Transportation | 11.9 | 12.0 | 12.8 | 12.9 | -0.1 | -0.9 | -0.1 | -7.0% |
| Water Transportation | 2.8 | 2.8 | 2.7 | 2.7 | 0.0 | 0.1 | 0.0 | 3.7% |
| Truck Transportation | 7.9 | 7.9 | 7.9 | 8.0 | 0.0 | 0.0 | -0.1 | 0.0% |
| Support Activities for Transportation | 10.0 | 10.1 | 10.0 | 10.3 | -0.1 | 0.0 | -0.3 | 0.0% |
| Support Activities for Water Transportation | 2.5 | 2.4 | 2.9 | 2.7 | 0.1 | -0.4 | 0.2 | -13.8% |
| Warehousing and Storage | 2.9 | 2.8 | 3.4 | 3.3 | 0.1 | -0.5 | 0.1 | -14.7% |
| INFORMATION | 72.1 | 72.2 | 73.1 | 72.9 | -0.1 | -1.0 | 0.2 | -1.4% |
| Newspaper, Book and Directory Publishers | 5.9 | 5.9 | 6.3 | 6.3 | 0.0 | -0.4 | 0.0 | -6.3% |
| Software Publishers | 36.3 | 36.5 | 35.5 | 35.4 | -0.2 | 0.8 | 0.1 | 2.3% |
| Broadcasting, except Internet | 2.7 | 2.7 | 2.6 | 2.6 | 0.0 | 0.1 | 0.0 | 3.8% |
| Telecommunications | 19.3 | 19.3 | 20.5 | 20.4 | 0.0 | -1.2 | 0.1 | -5.9% |
| Wired Telecommunications Carriers | 5.7 | 5.7 | 6.3 | 6.3 | 0.0 | -0.6 | 0.0 | -9.5% |
| Wireless Telecommunications Carriers | 11.1 | 10.8 | 10.5 | 10.5 | 0.3 | 0.6 | 0.0 | 5.7% |

LABOR MARKET SUMMARY
SEATTLE-BELLEVUE-EVERETT PMSA (King, Island and Snohomish Counties)

Not Seasonally Adjusted/Preliminary Quarterly Benchmark: June 2003

| Employment by Place of Residence (NAICS Industry Title) | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Revised Oct-02 | Change | | | |
|---|------------------|-------------------|-------------------|-------------------|------------------|------------------|------------------|--------------------|
| | | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Oct-02 Nov-02 | Nov-02 Nov-03 % |
| FINANCIAL ACTIVITIES | 90.2 | 90.2 | 88.7 | 88.1 | 0.0 | 1.5 | 0.6 | 1.7% |
| Finance and Insurance | 62.1 | 62.1 | 60.8 | 60.2 | 0.0 | 1.3 | 0.6 | 2.1% |
| Credit Intermediation & Related | 29.8 | 29.6 | 27.0 | 26.5 | 0.2 | 2.8 | 0.5 | 10.4% |
| Insurance Carriers & Related | 24.8 | 25.0 | 25.7 | 25.5 | -0.2 | -0.9 | 0.2 | -3.5% |
| Real Estate and Rental Leasing | 28.1 | 28.1 | 27.9 | 27.9 | 0.0 | 0.2 | 0.0 | 0.7% |
| PROFESSIONAL and BUSINESS SERVICES | 182.3 | 181.9 | 182.8 | 182.2 | 0.4 | -0.5 | 0.6 | -0.3% |
| Professional, Scientific and Tech Services | 87.4 | 87.1 | 88.1 | 87.7 | 0.3 | -0.7 | 0.4 | -0.8% |
| Legal Services | 13.5 | 13.5 | 13.1 | 13.0 | 0.0 | 0.4 | 0.1 | 3.1% |
| Accounting, Tax Prep, Bookkpng & Payroll | 9.3 | 9.3 | 9.1 | 9.2 | 0.0 | 0.2 | -0.1 | 2.2% |
| Architectural, Engineering and Related | 17.9 | 18.0 | 18.2 | 18.4 | -0.1 | -0.3 | -0.2 | -1.6% |
| Computer Systems Design and Related | 15.4 | 15.2 | 17.6 | 17.5 | 0.2 | -2.2 | 0.1 | -12.5% |
| Mgmt of Companies and Enterprises | 23.9 | 23.8 | 22.7 | 22.6 | 0.1 | 1.2 | 0.1 | 5.3% |
| Admin, Support, Waste Mgmt & Remediation | 71.0 | 71.0 | 72.0 | 71.9 | 0.0 | -1.0 | 0.1 | -1.4% |
| Administrative and Support Services | 68.5 | 68.5 | 69.3 | 69.2 | 0.0 | -0.8 | 0.1 | -1.2% |
| Employment Services | 30.1 | 29.6 | 29.9 | 29.4 | 0.5 | 0.2 | 0.5 | 0.7% |
| EDUCATION and HEALTH SERVICES | 138.6 | 138.0 | 137.8 | 136.5 | 0.6 | 0.8 | 1.3 | 0.6% |
| Educational Services | 22.7 | 22.3 | 22.5 | 21.6 | 0.4 | 0.2 | 0.9 | 0.9% |
| Ambulatory Health Care Services | 48.5 | 48.3 | 47.6 | 47.4 | 0.2 | 0.9 | 0.2 | 1.9% |
| Hospitals | 26.6 | 26.7 | 26.9 | 26.7 | -0.1 | -0.3 | 0.2 | -1.1% |
| Nursing and Residential Care Facilities | 20.7 | 20.7 | 20.3 | 20.4 | 0.0 | 0.4 | -0.1 | 2.0% |
| Social Assistance | 20.1 | 20.0 | 20.5 | 20.4 | 0.1 | -0.4 | 0.1 | -2.0% |
| LEISURE and HOSPITALITY | 117.8 | 120.6 | 117.7 | 118.9 | -2.8 | 0.1 | -1.2 | 0.1% |
| Arts, Entertainment and Recreation | 19.4 | 20.4 | 21.0 | 21.5 | -1.0 | -1.6 | -0.5 | -7.6% |
| Accommodation | 13.5 | 13.6 | 13.0 | 13.2 | -0.1 | 0.5 | -0.2 | 3.8% |
| Food Services and Drinking Places | 84.9 | 86.6 | 83.7 | 84.2 | -1.7 | 1.2 | -0.5 | 1.4% |
| OTHER SERVICES | 49.0 | 48.9 | 49.2 | 49.0 | 0.1 | -0.2 | 0.2 | -0.4% |
| Repair and Maintenance | 13.1 | 13.1 | 13.9 | 13.9 | 0.0 | -0.8 | 0.0 | -5.8% |
| Personal and Laundry Services | 13.3 | 13.3 | 13.4 | 13.4 | 0.0 | -0.1 | 0.0 | -0.7% |
| Religious, Grantmaking, Civic, Prof. and Similar | 22.6 | 22.5 | 21.9 | 21.7 | 0.1 | 0.7 | 0.2 | 3.2% |
| GOVERNMENT | 207.5 | 201.5 | 208.0 | 201.5 | 6.0 | -0.5 | 6.5 | -0.2% |
| Federal Government | 26.6 | 26.3 | 26.7 | 26.3 | 0.3 | -0.1 | 0.4 | -0.4% |
| Total State Government | 61.4 | 60.6 | 60.9 | 59.9 | 0.8 | 0.5 | 1.0 | 0.8% |
| State Government Educational Services | 44.4 | 43.8 | 43.8 | 43.0 | 0.6 | 0.6 | 0.8 | 1.4% |
| Total Local Government | 119.5 | 114.6 | 120.4 | 115.3 | 4.9 | -0.9 | 5.1 | -0.7% |
| Local Government Educational Services | 51.8 | 50.3 | 52.1 | 51.1 | 1.5 | -0.3 | 1.0 | -0.6% |
| Workers in Labor/Management Disputes | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture. Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month. Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly Benchmark process. This process uses the most recent quarter from the Unemployment Insurance Tax Reports (currently second quarter 2003) and estimates employment from that point until present.

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Washington State Labor Area Summary Snohomish County

Prepared by the Labor Market and Economic Analysis Branch, Donna Thompson, *Regional Labor Economist*
804 Broadway North, Building-B, Everett, WA 98201 Phone: (425) 339-4354

Highlights:

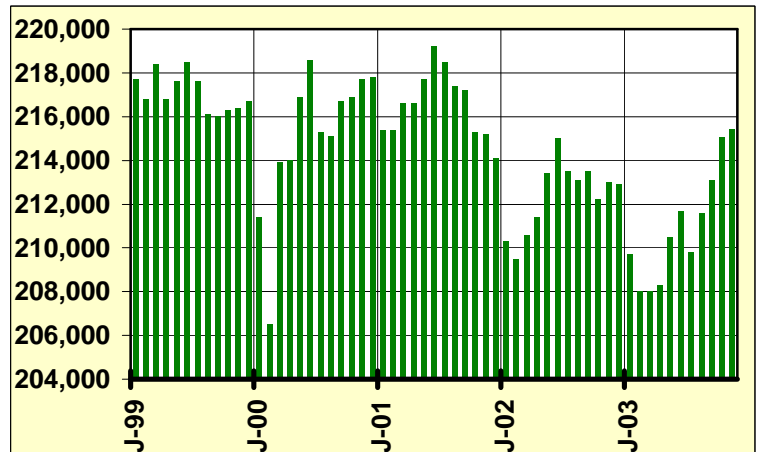
IT'S OFFICIAL! The Boeing 7E7 Dreamliner is coming to Everett. Assembling the plane here will mean 800 to 1,200 new jobs. These positions will generate an additional 2,000 jobs in the economy, commonly referred to as the ripple effect. Some of these openings will be with companies that provide parts and services to Boeing, and some will result because of the additional consumer spending by the new Dreamliner employees.

In January of 2001, there were 30,000 jobs in Snohomish County in Aerospace Products and Parts Manufacturing. This includes Boeing and approximately 60 other companies that primarily provide services and parts to Boeing. By November of 2003, this number had fallen to 22,400, for a loss of 7,600 jobs. Even though the new Dreamliner jobs won't make up for all the jobs that have been lost it will give a psychological boost to the rest of the local economy. There has been a fear that if the 7E7 Dreamliner were assembled in another state, then other new planes would also be assembled there. This could lead to additional job losses at the Everett plant.

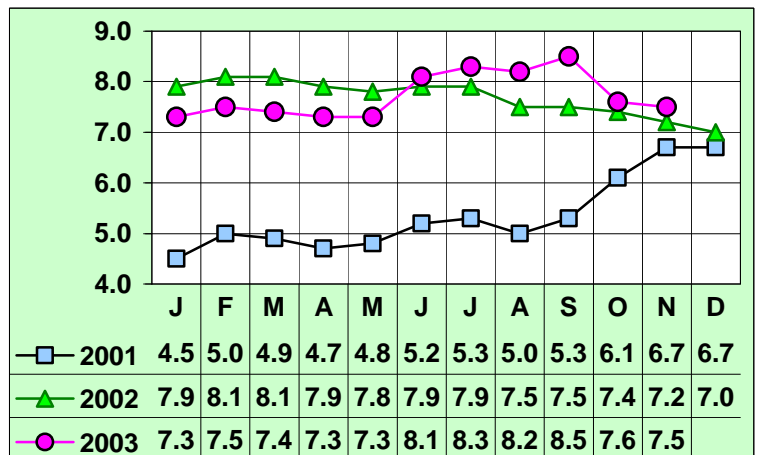
The Snohomish County economy has been hit hard by the downturn in commercial airlines since the September 11, 2001 attacks and the resulting layoff of 30,000 Boeing employees in the Puget Sound area. The unemployment rate had been in the 3- to 4-percent range in the later part of the 1990's. In early 2000, it was slightly above 4 percent. Since the beginning of 2002, it has remained around 7.5 percent, and even above 8 percent in some months.

The current unemployment rate for November 2003 is 7.5 percent. This is down one tenth of a percentage point from the revised October rate of 7.6 percent. Non-farm jobs posted a modest net gain of 400 jobs over the month. We see a continuing restructuring of the economy with the Manufacturing sector dropping by 400 and the Services sector adding 800 new jobs. Aerospace accounted for half the loss in Manufacturing, dropping by 200. Holiday spending added 600 jobs to the Retail sector over the month. Financial Activities (Banks, Insurance & Real Estate) added 100 jobs over the month and the sector is up by 900 jobs over the year. Low interest rates continue to produce strength in this area. Food

Nonag Industry Employment, 1999-2003



Unemployment Rates by Month, 2001-2003



Services & Drinking Places (Restaurants & Bars) lost 400 jobs over the month and Local Education added another 300 jobs.

The 7E7 Dreamliner project will have a positive effect on the Snohomish County economy on many fronts.

LABOR MARKET SUMMARY
Snohomish County

Preliminary Quarterly Benchmark: June 2003

| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 346.4 | 344.7 | 346.3 | 1.7 | 0.1 | 0.0% |
| Resident Employment | 320.4 | 318.5 | 321.3 | 1.9 | -0.9 | -0.3% |
| Unemployment | 26.0 | 26.2 | 25.0 | -0.2 | 1.0 | 4.0% |
| Unemployment Rate | 7.5 | 7.6 | 7.2 | -0.1 | 0.3 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 215.4 | 215.1 | 213.0 | 0.4 | 2.4 | 1.1% |
| TOTAL PRIVATE | 179.6 | 179.5 | 178.3 | 0.1 | 1.3 | 0.7% |
| GOODS PRODUCING | 60.6 | 61.0 | 62.7 | -0.4 | -2.0 | -3.2% |
| SERVICES PROVIDING | 154.8 | 154.0 | 150.4 | 0.8 | 4.5 | 3.0% |
| CONSTRUCTION | 18.3 | 18.3 | 18.1 | 0.0 | 0.2 | 1.0% |
| Construction of Buildings | 3.7 | 3.6 | 3.3 | 0.1 | 0.4 | 12.3% |
| Heavy and Civil Engineering Construction | 2.3 | 2.4 | 2.1 | -0.1 | 0.2 | 8.8% |
| Specialty Trade Contractors | 12.4 | 12.3 | 12.8 | 0.1 | -0.4 | -3.2% |
| MANUFACTURING | 41.8 | 42.2 | 44.0 | -0.4 | -2.2 | -4.9% |
| Durable Goods | 37.9 | 38.2 | 39.2 | -0.3 | -1.3 | -3.3% |
| Wood Product Manufacturing | 2.1 | 2.1 | 1.8 | 0.0 | 0.3 | 14.0% |
| Fabricated Metal Product Manufacturing | 2.8 | 2.8 | 2.6 | 0.1 | 0.2 | 8.0% |
| Computer and Electronic Product Mfg | 5.5 | 5.5 | 5.3 | 0.0 | 0.2 | 4.0% |
| Electronic Instrument Manufacturing | 4.1 | 4.1 | 3.5 | 0.0 | 0.6 | 15.6% |
| Transportation Equipment Manufacturing | 23.4 | 23.6 | 25.7 | -0.2 | -2.3 | -8.8% |
| Aerospace Product and Parts Manufacturing | 22.4 | 22.6 | 24.6 | -0.2 | -2.1 | -8.7% |
| Non-Durable Goods | 3.9 | 4.1 | 4.8 | -0.1 | -0.9 | -18.2% |
| TRADE, TRANSPORTATION, and UTILITIES | 37.0 | 36.4 | 37.0 | 0.6 | 0.1 | 0.2% |
| Wholesale Trade | 6.1 | 6.2 | 6.1 | -0.1 | 0.1 | 1.0% |
| Retail Trade | 27.7 | 27.1 | 27.5 | 0.6 | 0.2 | 0.7% |
| Motor Vehicle and Parts Dealers | 4.5 | 4.5 | 4.4 | 0.0 | 0.1 | 2.9% |
| Building Material and Garden Supply Stores | 2.2 | 2.4 | 2.7 | -0.2 | -0.5 | -19.1% |
| Food and Beverage Stores | 5.2 | 5.1 | 5.7 | 0.1 | -0.6 | -10.0% |
| General Merchandise Stores | 5.5 | 4.9 | 5.0 | 0.6 | 0.5 | 9.8% |
| Transportation, Warehousing and Utilities | 3.2 | 3.2 | 3.4 | 0.0 | -0.2 | -5.7% |
| INFORMATION | 3.5 | 3.5 | 3.6 | 0.0 | -0.2 | -4.6% |
| Telecommunications | 1.6 | 1.6 | 1.7 | 0.0 | -0.2 | -10.1% |
| FINANCIAL ACTIVITIES | 12.6 | 12.5 | 11.7 | 0.1 | 0.9 | 7.3% |
| Finance and Insurance | 9.5 | 9.4 | 8.7 | 0.1 | 0.8 | 9.4% |
| Credit Intermediation and Related Activities | 3.9 | 3.8 | 3.4 | 0.1 | 0.5 | 14.9% |
| Insurance Carriers and Related Activities | 5.1 | 5.1 | 4.9 | 0.0 | 0.2 | 4.5% |
| Real Estate, Rental and Leasing | 3.1 | 3.1 | 3.1 | 0.0 | 0.0 | 1.4% |
| PROFESSIONAL and BUSINESS SERVICES | 18.4 | 18.4 | 16.8 | -0.1 | 1.5 | 9.1% |
| Professional, Scientific and Technical Services | 8.0 | 8.0 | 7.1 | 0.0 | 0.9 | 12.5% |
| Architectural, Engineering, and Related | 1.9 | 1.9 | 2.0 | 0.1 | -0.1 | -5.3% |
| Admin, Support, Waste Mgmt., and Remediation | 8.8 | 8.8 | 8.4 | -0.1 | 0.3 | 4.1% |
| Employment Services | 3.3 | 3.3 | 3.0 | 0.0 | 0.4 | 12.1% |
| EDUCATIONAL and HEALTH SERVICES | 20.7 | 20.6 | 20.7 | 0.2 | 0.1 | 0.3% |
| Ambulatory Health Care Services | 8.7 | 8.7 | 8.7 | 0.0 | 0.1 | 1.1% |
| Nursing and Residential Care Facilities | 4.2 | 4.2 | 4.2 | 0.0 | 0.0 | 0.9% |
| Social Assistance | 3.2 | 3.2 | 3.2 | 0.0 | 0.0 | -0.7% |

LABOR MARKET SUMMARY
Snohomish County

Preliminary Quarterly Benchmark: June 2003

| Employment by Place of Work (NAICS Industry Title) | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|--|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| LEISURE and HOSPITALITY | 18.6 | 19.0 | 17.4 | -0.4 | 1.2 | 6.7% |
| Arts, Entertainment and Recreation | 2.9 | 2.9 | 2.6 | -0.1 | 0.3 | 11.7% |
| Accommodation and Food Services | 15.5 | 16.0 | 14.9 | -0.5 | 0.7 | 4.4% |
| Food Services and Drinking Places | 14.9 | 15.3 | 14.1 | -0.4 | 0.7 | 5.2% |
| OTHER SERVICES | 8.2 | 8.1 | 8.4 | 0.1 | -0.2 | -2.2% |
| Repair and Maintenance | 2.5 | 2.5 | 2.4 | 0.0 | 0.0 | 0.6% |
| Personal and Laundry Services | 2.1 | 2.1 | 2.2 | 0.0 | -0.1 | -2.9% |
| Membership Associations and Organizations | 3.5 | 3.5 | 3.8 | 0.0 | -0.3 | -7.6% |
| GOVERNMENT | 35.9 | 35.6 | 34.7 | 0.3 | 1.1 | 3.3% |
| Federal Government | 2.2 | 2.1 | 2.1 | 0.0 | 0.0 | 1.9% |
| State Government | 5.3 | 5.3 | 5.2 | -0.1 | 0.1 | 2.3% |
| State Educational Services | 2.2 | 2.3 | 2.2 | 0.0 | 0.1 | 3.5% |
| Local Government | 28.4 | 28.1 | 27.4 | 0.3 | 1.0 | 3.5% |
| Local Educational Services | 14.1 | 13.8 | 14.3 | 0.3 | -0.2 | -1.6% |
| Workers in Labor/Management Disputes | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly
Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports
(currently the second quarter 2003) and estimates employment from that point to present. Please visit our Internet site at:

www.workforceexplorer.com

Washington State Labor Area Summary Spokane MSA Spokane County

Prepared by the Labor Market and Economic Analysis Branch, William Dillingham, *Regional Labor Economist*
130 South Arthur, Spokane WA 99202-2259 Phone: (509) 532-3188

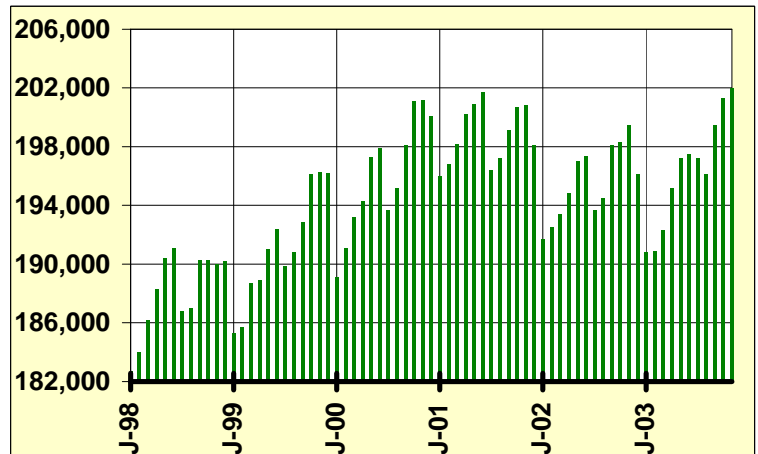
Highlights:

Spokane MSA's labor market indicators, based upon the household survey, held relatively steady for November. 'Tis the season for Retail Trade job growth, and that about tells the story. Resident employment was up 900 from October. Unemployment (not seasonally adjusted) was unchanged at 6.0 percent in November. The number of people not employed, but actively seeking work, was up about 100. The unadjusted unemployment rate was down somewhat from November 2002's 6.2 percent, but so too is employment (down 300).

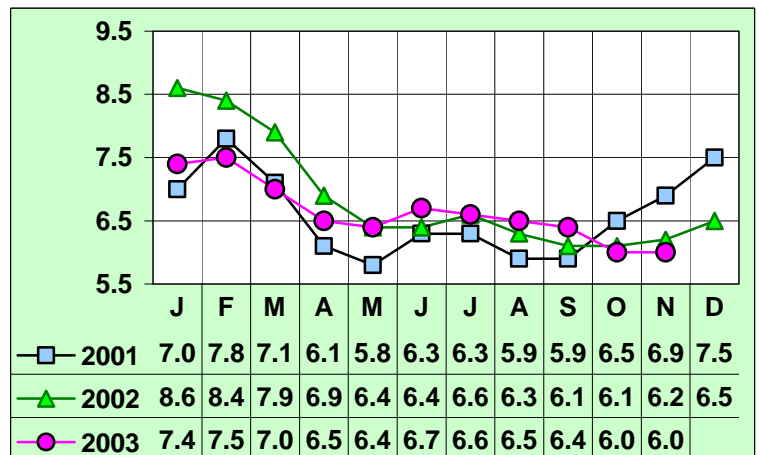
Nonagricultural employment for the month of November was an even 202,000, up just 700 from October's revised total. Private nonfarm employment inched up by two-tenths of one percent (+300) to 166,800. Most new jobs were part of the seasonal jump in retail store staff, up 700. State and county education-related hiring also grew by combined 500 jobs. Construction and Durable Goods manufacturing together clawed back 500 seasonal positions from the gain, however. Overall, the Goods Producing sector was down 400 and the Services Providing sector, which includes Government, was up 1,100.

Over-the-year employment was up a modest 2,500, with nearly all (2,300) in the private sector. Manufacturing jobs were down 500 from November 2002, while Construction jobs were up 500. Service sector jobs, excluding Government, were up 2,300. The biggest job-creators were Financial Activities (+900), and Education and Health Services (+600).

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



**LABOR MARKET SUMMARY
SPOKANE MSA (Spokane County)**

Not Seasonally Adjusted/Preliminary Quarterly Benchmark: June 2003

| EMPLOYMENT BY PLACE OF RESIDENCE | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Revised Oct-02 | Change | | | |
|--|------------------|-------------------|-------------------|-------------------|------------------|------------------|------------------|--------------------|
| | | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Oct-02 Nov-02 | Nov-02 Nov-03 % |
| Civilian Labor Force | 214.5 | 213.5 | 215.2 | 216.5 | 1.0 | -0.7 | -1.3 | -0.3% |
| Resident Employment | 201.6 | 200.7 | 201.9 | 203.3 | 0.9 | -0.3 | -1.4 | -0.1% |
| Unemployment | 12.9 | 12.8 | 13.3 | 13.1 | 0.1 | -0.4 | 0.2 | -3.0% |
| Unemployment Rate | 6.0 | 6.0 | 6.2 | 6.1 | 0.0 | -0.2 | 0.1 | |
| Employment By Place of Work: (NAICS IndustryTitle, Numbers Reported in Thousands) | | | | | | | | |
| TOTAL NONFARM 1/ | 202.0 | 201.3 | 199.5 | 198.8 | 0.7 | 2.5 | 0.7 | 1.3% |
| TOTAL PRIVATE | 166.8 | 166.5 | 164.5 | 164.3 | 0.3 | 2.3 | 0.2 | 1.4% |
| GOODS PRODUCING | 28.6 | 29.0 | 28.6 | 29.1 | -0.4 | 0.0 | -0.5 | 0.0% |
| NATURAL RESOURCES and CONSTRUCTION | 11.8 | 12.1 | 11.3 | 11.6 | -0.3 | 0.5 | -0.3 | 4.4% |
| MANUFACTURING | 16.8 | 16.9 | 17.3 | 17.5 | -0.1 | -0.5 | -0.2 | -2.9% |
| Durable Goods | 12.6 | 12.8 | 13.0 | 13.3 | -0.2 | -0.4 | -0.3 | -3.1% |
| Computer and Electronic Product Mfg | 2.5 | 2.5 | 2.9 | 3.0 | 0.0 | -0.4 | -0.1 | -13.8% |
| SERVICES PROVIDING | 173.4 | 172.3 | 170.9 | 169.7 | 1.1 | 2.5 | 1.2 | 1.5% |
| TRADE, TRANSPORTATION and UTILITIES | 41.6 | 40.8 | 41.6 | 40.9 | 0.8 | 0.0 | 0.7 | 0.0% |
| Wholesale Trade | 10.0 | 9.9 | 9.5 | 9.5 | 0.1 | 0.5 | 0.0 | 5.3% |
| Retail Trade | 25.6 | 24.9 | 25.9 | 25.2 | 0.7 | -0.3 | 0.7 | -1.2% |
| Food and Beverage Stores | 4.7 | 4.8 | 5.0 | 5.0 | -0.1 | -0.3 | 0.0 | -6.0% |
| General Merchandise Stores | 4.9 | 4.4 | 4.4 | 4.0 | 0.5 | 0.5 | 0.4 | 11.4% |
| Transportation, Warehousing and Utilities | 6.0 | 6.0 | 6.2 | 6.2 | 0.0 | -0.2 | 0.0 | -3.2% |
| INFORMATION | 2.8 | 2.8 | 2.8 | 2.8 | 0.0 | 0.0 | 0.0 | 0.0% |
| FINANCIAL ACTIVITIES | 13.8 | 13.8 | 12.9 | 12.8 | 0.0 | 0.9 | 0.1 | 7.0% |
| Finance and Insurance | 10.6 | 10.6 | 9.9 | 9.8 | 0.0 | 0.7 | 0.1 | 7.1% |
| PROFESSIONAL and BUSINESS SERVICES | 19.8 | 20.0 | 19.0 | 19.3 | -0.2 | 0.8 | -0.3 | 4.2% |
| Management of Companies and Enterprises | 2.8 | 2.9 | 2.8 | 2.8 | -0.1 | 0.0 | 0.0 | 0.0% |
| EDUCATION and HEALTH SERVICES | 32.8 | 32.7 | 32.2 | 32.1 | 0.1 | 0.6 | 0.1 | 1.9% |
| Health and Social Assistance | 28.2 | 28.2 | 27.7 | 27.6 | 0.0 | 0.5 | 0.1 | 1.8% |
| Ambulatory Health Care Services | 10.7 | 10.7 | 10.4 | 10.3 | 0.0 | 0.3 | 0.1 | 2.9% |
| Hospitals | 8.2 | 8.1 | 8.0 | 8.1 | 0.1 | 0.2 | -0.1 | 2.5% |
| LEISURE and HOSPITALITY | 18.2 | 18.2 | 18.5 | 18.4 | 0.0 | -0.3 | 0.1 | -1.6% |
| Food Services and Drinking Places | 12.9 | 12.9 | 13.4 | 13.4 | 0.0 | -0.5 | 0.0 | -3.7% |
| OTHER SERVICES | 9.2 | 9.2 | 8.9 | 8.9 | 0.0 | 0.3 | 0.0 | 3.4% |
| GOVERNMENT | 35.2 | 34.8 | 35.0 | 34.5 | 0.4 | 0.2 | 0.5 | 0.6% |
| Federal Government | 4.6 | 4.6 | 4.7 | 4.7 | 0.0 | -0.1 | 0.0 | -2.1% |
| Total State Government | 11.3 | 10.9 | 11.2 | 10.8 | 0.4 | 0.1 | 0.4 | 0.9% |
| State Government Educational Services | 6.2 | 5.9 | 6.2 | 5.8 | 0.3 | 0.0 | 0.4 | 0.0% |
| Total Local Government | 19.3 | 19.3 | 19.1 | 19.0 | 0.0 | 0.2 | 0.1 | 1.0% |
| Local Government Educational Services | 11.7 | 11.5 | 11.6 | 11.4 | 0.2 | 0.1 | 0.2 | 0.9% |
| Workers in Labor/Management Disputes | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture. Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month. Columns may not add due to rounding.

Prepared by the Labor Market and Economic Analysis Branch using a Quarterly Benchmark process. This process uses the most recent quarter from the Unemployment Insurance Tax Reports (currently second quarter 2003) and estimates employment from that point until present.

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Washington State Labor Area Summary Tacoma PMSA Pierce County

Prepared by the Labor Market and Economic Analysis Branch, Chris Johnson, *Regional Labor Economist*
1313 Tacoma Avenue South, Tacoma, WA 98402 Phone: (253) 593-7336

Highlights:

The labor market picture in the Tacoma PMSA remained sluggish in November. The October to November data shows the numbers moving in the right direction, but with not much spring in their step. Unemployment over the month dropped to 7.1 percent down from the 7.2 of October. In November 2002, the unemployment rate was also 7.2 percent. On the nonag side, there was an increase of 500 jobs between October and November.

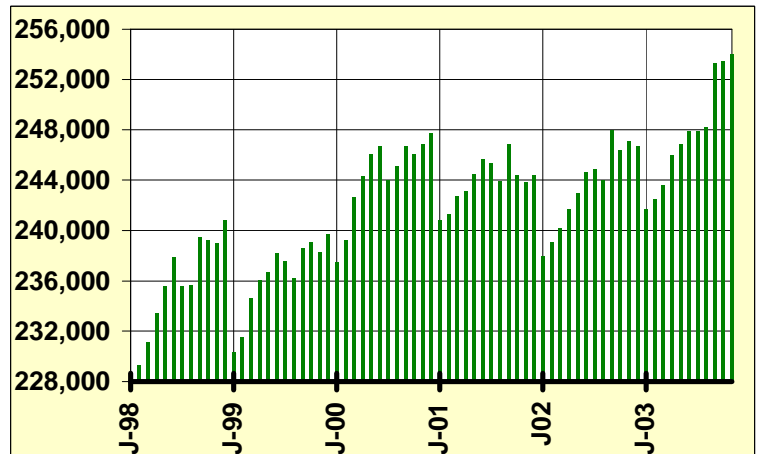
In November 2003, the Tacoma PMSA data showed 330,300 collecting paychecks as 25,100 actively sought work. The end result was an unemployment rate of 7.1 percent. The Tacoma PMSA rate remains higher than the state rate in November of 6.8 percent, but it must be pointed out that between October and November, the state rate of unemployment rose from 6.6 percent. Last November, the state unemployment rate was 7.0 percent.

The October to November detail was a mixed bag. Nonag employment in November totaled 254,000 jobs, up 500 from the October total. The detail indicated Goods Producing employment slipping 400 jobs from the October total, as Services Providing employment added 900 to payroll. Employment in Trade and in Government enjoyed gains, while Leisure and Hospitality, and Other Services posted small losses.

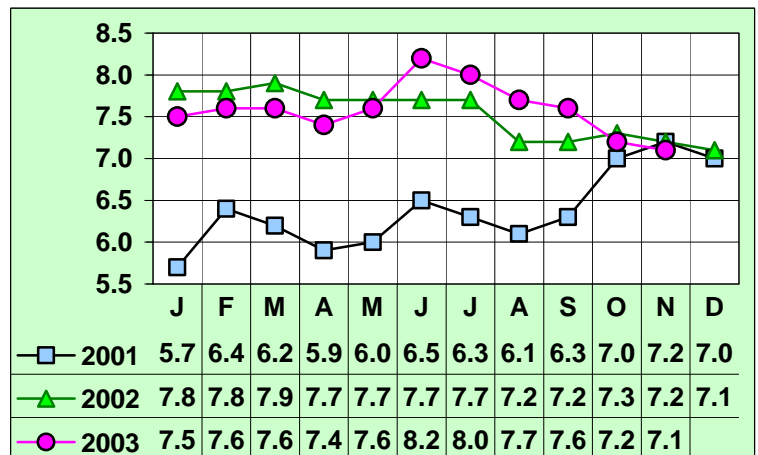
Over the year, the November 2003 numbers are more optimistic; nonag employment from November to November grew by 2.8 percent. The bulk of the over-the-year growth can be attributed to Services Providing employment that expanded by 6,300. On the Goods Producing side, Construction activity counted an over-the-year gain of 1,400 jobs.

The next few months will be marked by seasonal activity, with the unemployment rate continuing to be just around the state average. The nonag, with seasonal impacts, will remain in its current neighborhood, showing ups and downs in the individual sectors, but not much overall punch.

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



LABOR MARKET SUMMARY
TACOMA PMSA (Pierce County)

Not Seasonally Adjusted/Preliminary Quarterly Benchmark: June 2003

| EMPLOYMENT BY PLACE OF RESIDENCE | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Revised Oct-02 | Change | | | |
|---|------------------|-------------------|-------------------|-------------------|------------------|------------------|------------------|--------------------|
| | | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Oct-02 Nov-02 | Nov-02 Nov-03 % |
| Civilian Labor Force | 355.4 | 353.9 | 349.5 | 350.4 | 5.9 | 5.9 | -0.9 | 0.4% |
| Resident Employment | 330.3 | 328.5 | 324.3 | 324.7 | 6.0 | 6.0 | -0.4 | 0.5% |
| Unemployment | 25.1 | 25.5 | 25.2 | 25.7 | -0.1 | -0.1 | -0.5 | -1.6% |
| Unemployment Rate | 7.1 | 7.2 | 7.2 | 7.3 | -0.1 | -0.1 | -0.1 | |
| Employment By Place of Work: (NAICS Industry Title, Numbers Reported in Thousands) | | | | | | | | |
| TOTAL NONFARM 1/ | 254.0 | 253.5 | 247.1 | 246.4 | 0.5 | 6.9 | 0.7 | 2.8% |
| TOTAL PRIVATE | 199.9 | 199.9 | 194.0 | 193.8 | 0.0 | 5.9 | 0.2 | 3.0% |
| GOODS PRODUCING | 37.3 | 37.7 | 36.7 | 37.4 | -0.4 | 0.6 | -0.7 | 1.6% |
| NATURAL RESOURCES and MINING | 0.6 | 0.6 | 0.6 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0% |
| CONSTRUCTION | 18.1 | 18.4 | 16.7 | 17.1 | -0.3 | 1.4 | -0.4 | 8.4% |
| Specialty Trade Contractors | 10.6 | 10.8 | 9.9 | 10.2 | -0.2 | 0.7 | -0.3 | 7.1% |
| MANUFACTURING | 18.6 | 18.7 | 19.4 | 19.7 | -0.1 | -0.8 | -0.3 | -4.1% |
| Durable Goods | 12.1 | 12.2 | 12.4 | 12.5 | -0.1 | -0.3 | -0.1 | -2.4% |
| Non-Durable Goods | 6.5 | 6.5 | 7.0 | 7.2 | 0.0 | -0.5 | -0.2 | -7.1% |
| SERVICES PROVIDING | 216.7 | 215.8 | 210.4 | 209.0 | 0.9 | 6.3 | 1.4 | 3.0% |
| TRADE, TRANSPORTATION, and UTILITIES | 48.8 | 48.2 | 48.4 | 47.4 | 0.6 | 0.4 | 1.0 | 0.8% |
| Wholesale Trade | 8.9 | 9.1 | 9.2 | 9.1 | -0.2 | -0.3 | 0.1 | -3.3% |
| Retail Trade | 30.6 | 29.6 | 30.5 | 29.5 | 1.0 | 0.1 | 1.0 | 0.3% |
| Food and Beverage Stores | 5.1 | 5.1 | 5.7 | 5.8 | 0.0 | -0.6 | -0.1 | -10.5% |
| General Merchandise Stores | 6.9 | 5.9 | 6.4 | 5.8 | 1.0 | 0.5 | 0.6 | 7.8% |
| Transportation, Warehousing and Utilities | 9.3 | 9.5 | 8.7 | 8.8 | -0.2 | 0.6 | -0.1 | 6.9% |
| INFORMATION | 3.0 | 2.9 | 3.0 | 2.9 | 0.1 | 0.0 | 0.1 | 0.0% |
| FINANCIAL ACTIVITIES | 13.7 | 13.6 | 12.9 | 12.8 | 0.1 | 0.8 | 0.1 | 6.2% |
| PROFESSIONAL and BUSINESS SERVICES | 21.0 | 21.1 | 20.5 | 20.3 | -0.1 | 0.5 | 0.2 | 2.4% |
| Admin, Support, Waste Mgmt., & Remediation | 12.5 | 12.5 | 11.9 | 11.7 | 0.0 | 0.6 | 0.2 | 5.0% |
| Administrative and Support Services | 11.6 | 11.6 | 11.0 | 10.8 | 0.0 | 0.6 | 0.2 | 5.5% |
| EDUCATION and HEALTH SERVICES | 39.0 | 38.9 | 38.2 | 38.1 | 0.1 | 0.8 | 0.1 | 2.1% |
| Ambulatory Health Care Services | 12.6 | 12.5 | 12.2 | 12.2 | 0.1 | 0.4 | 0.0 | 3.3% |
| Hospitals | 8.3 | 8.3 | 8.1 | 8.1 | 0.0 | 0.2 | 0.0 | 2.5% |
| Social Assistance | 7.1 | 7.1 | 6.8 | 6.7 | 0.0 | 0.3 | 0.1 | 4.4% |
| LEISURE and HOSPITALITY | 25.2 | 25.5 | 23.0 | 23.6 | -0.3 | 2.2 | -0.6 | 9.6% |
| Arts, Entertainment and Recreation | 3.9 | 4.0 | 3.4 | 3.6 | -0.1 | 0.5 | -0.2 | 14.7% |
| Food Services and Drinking Places | 19.1 | 19.2 | 18.4 | 18.8 | -0.1 | 0.7 | -0.4 | 3.8% |
| OTHER SERVICES | 11.9 | 12.0 | 11.3 | 11.3 | -0.1 | 0.6 | 0.0 | 5.3% |
| GOVERNMENT | 54.1 | 53.6 | 53.1 | 52.6 | 0.5 | 1.0 | 0.5 | 1.9% |
| Federal Government | 9.9 | 9.9 | 9.8 | 9.8 | 0.0 | 0.1 | 0.0 | 1.0% |
| Total State Government | 11.4 | 11.3 | 11.3 | 11.3 | 0.1 | 0.1 | 0.0 | 0.9% |
| State Government Educational Services | 3.9 | 3.8 | 3.8 | 3.7 | 0.1 | 0.1 | 0.1 | 2.6% |
| Total Local Government | 32.8 | 32.4 | 32.0 | 31.5 | 0.4 | 0.8 | 0.5 | 2.5% |
| Local Government Educational Services | 18.6 | 18.2 | 18.5 | 17.9 | 0.4 | 0.1 | 0.6 | 0.5% |
| Workers in Labor/Management Disputes | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture. Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month. Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly Benchmark process. This process uses the most recent quarter from the Unemployment Insurance Tax Reports (currently second quarter 2003) and estimates employment from that point until present.

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Washington State
Labor Area Summary
Richland-Kennewick-Pasco MSA
Benton and Franklin Counties

Prepared by the Labor Market and Economic Analysis Branch, Dean Schau, *Regional Labor Economist*
 3900 West Court Street, Pasco, WA 99301 Phone: (509) 543-3017

Highlights:

The Five Billion Dollar Economy

Personal income in the Tri-Cities came to almost five billion or \$4,967 million in the year 2001. This was up sharply from \$4,639 in 2000 and \$4,288 million in 1999.

Serious students of the Tri-Cities economy may well already know that Benton County, from 2000 to 2001, lead the state's thirty-nine counties in the growth of personal income.

The rate of growth for the county was a wonderful 7.9 percent relative to a state gain of 2.6 percent and a national gain of 3.3 percent. While trailing Benton County, Franklin County did beat both the state and the nation coming in at 3.8 percent gain.

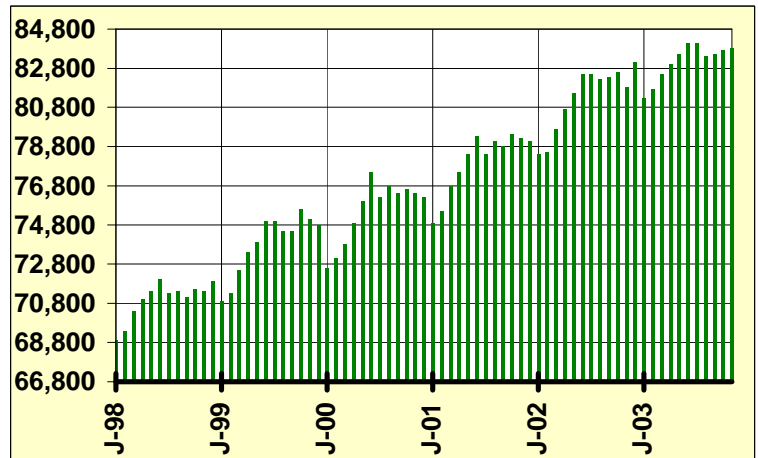
Hanford: Employment held very steady from October to November. Hanford, during the first quarter of this year, generated a \$237 million quarterly payroll among the major Department of Energy (DOE) contractors and an unknown subcontractor payroll. That comes out to a yearly payroll of \$948 million, or roughly 20-percent of total community personal income. Coupled with the federal transfer payments, the federal budget constitutes roughly 30-percent of community personal income.

Construction: Still holding remarkably strong, and up over the year by 500.

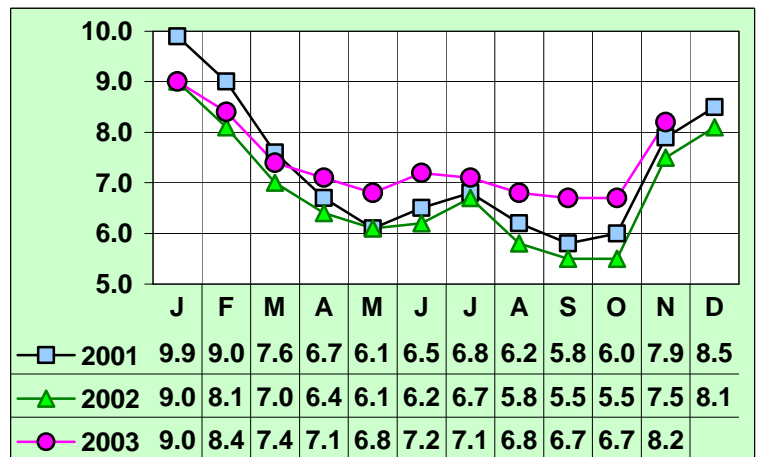
Manufacturing: Big time deficit for the Tri-Cities is in the area of manufacturing jobs, where we are 35 percent below the average for the state. However, if just food manufacturing jobs are isolated, we are 3.15 times higher than the state. However, again, if we extract food processing jobs from both the state's total and the Tri-Cities total, the comparison then shows a 70 percent deficit.

Trade: Employment in Retail Trade was up by 400 over the month, and up by 4.0 percent over the year. The gain into November was due to retailers gearing up for Christmas shoppers. So, as the Christmas bells were a-ringing, the cash registers were a-dinging. Expect that major retailers will add an additional 6 to 8 percent to their workforces until the very day that Santa arrives. Remarkably, the 6 to 8 percent employment gain from November to December is just about how much my weight goes up over the same period of time.

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



Offsetting the gain in Retail Trade was a roughly 100 loss in Wholesale Trade tied to the end of the harvest season.

Finance, Insurance & Real Estate (FIRE): A good portion of the 200 over-the-year gain in FIRE was in the financial area, with the remainder in Real Estate. It would not be a surprise to anyone driving around the TriCities that employment in Real Estate has grown by nearly 20 percent over the past two years.

LABOR MARKET SUMMARY
RICHLAND-KENNEWICK-PASCO MSA (Benton and Franklin Counties)

Preliminary Quarterly Benchmark: December 2002

| EMPLOYMENT BY PLACE OF RESIDENCE | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| Civilian Labor Force | 101,800 | 106,200 | 102,400 | -4,400 | -600 | -0.6% |
| Resident Employment | 93,400 | 99,100 | 94,700 | -5,700 | -1,300 | -1.4% |
| Unemployment | 8,400 | 7,100 | 7,700 | 1,300 | 700 | 9.1% |
| Unemployment Rate | 8.2 | 6.7 | 7.5 | 1.6 | 0.7 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 83,800 | 83,700 | 81,800 | 100 | 2,000 | 2.4% |
| TOTAL PRIVATE | 68,000 | 68,100 | 66,400 | -100 | 1,600 | 2.4% |
| GOODS PRODUCING | 11,000 | 11,300 | 10,400 | -300 | 600 | 5.8% |
| CONSTRUCTION, NAT. RESOURCES & MINING | 5,300 | 5,400 | 4,800 | -100 | 500 | 10.4% |
| MANUFACTURING | 5,700 | 5,800 | 5,600 | -100 | 100 | 1.8% |
| Food Manufacturing | 3,400 | 3,600 | 3,300 | -200 | 100 | 3.0% |
| Chemicals and Allied Products | 900 | 800 | 800 | 100 | 100 | 12.5% |
| Primary and Fabricated Metal Products | 300 | 300 | 400 | 0 | -100 | -25.0% |
| Other Manufacturing | 1,100 | 1,100 | 1,100 | 0 | 0 | 0.0% |
| SERVICES PROVIDING | 72,700 | 72,400 | 71,500 | 300 | 1,200 | 1.7% |
| TRADE, TRANSPORTATION and UTILITIES | 14,000 | 13,800 | 13,600 | 200 | 400 | 2.9% |
| Wholesale Trade | 2,000 | 2,200 | 2,000 | -200 | 0 | 0.0% |
| Retail Trade | 10,400 | 10,000 | 10,000 | 400 | 400 | 4.0% |
| Transportation, Warehousing and Utilities | 1,600 | 1,600 | 1,600 | 0 | 0 | 0.0% |
| INFORMATION | 1,000 | 1,000 | 1,000 | 0 | 0 | 0.0% |
| FINANCE, INSURANCE and REAL ESTATE | 3,100 | 3,100 | 2,900 | 0 | 200 | 6.9% |
| SERVICES | 39,000 | 39,000 | 38,400 | 0 | 600 | 1.6% |
| Professional, Scientific and Technical Services | 10,300 | 10,300 | 9,900 | 0 | 400 | 4.0% |
| Health Services | 6,600 | 6,600 | 6,300 | 0 | 300 | 4.8% |
| Waste Treatment | 9,400 | 9,500 | 9,900 | -100 | -500 | -5.1% |
| GOVERNMENT | 15,700 | 15,600 | 15,500 | 100 | 200 | 1.3% |
| Federal Government | 1,400 | 1,400 | 1,400 | 0 | 0 | 0.0% |
| State and Local Government | 14,300 | 14,200 | 14,100 | 100 | 200 | 1.4% |
| Educational Services | 7,500 | 7,500 | 7,500 | 0 | 0 | 0.0% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | 0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.

Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports (currently the fourth quarter 2002) and estimates employment from that point to present. Please visit our Internet site at:

www.workforceexplorer.com

Services: Growth was constant over-the-month, and up a bit over the year, as gains with the Vit-Plant and other areas of Services overshadowed some moderate jobs losses at Hanford.

Government: Employment in the public sector was up by 1.3 percent since November of last year, which lags the overall 2.4 percent gain in nonfarm jobs over the same period of time.

Down on the Farm: Employment on farms fell seasonally from 12,600 in October to 7,100 in November. The November count was fairly favorably compared with November of last year when the count was 6,900.

Labor Force Numbers: The seasonal drop in farm jobs pushed the number of persons drawing unemployment benefits from 3,342 in October to 4,829 in November. This compared very unfavorably to November of last year with the unemployment count was 4,066.

Washington State Labor Area Summary Clark County

Prepared by the Labor Market and Economic Analysis Branch, Scott Bailey, *Regional Labor Economist*
5411 East Mill Plain Boulevard, Vancouver, WA 98661 Phone: (360) 735-5043

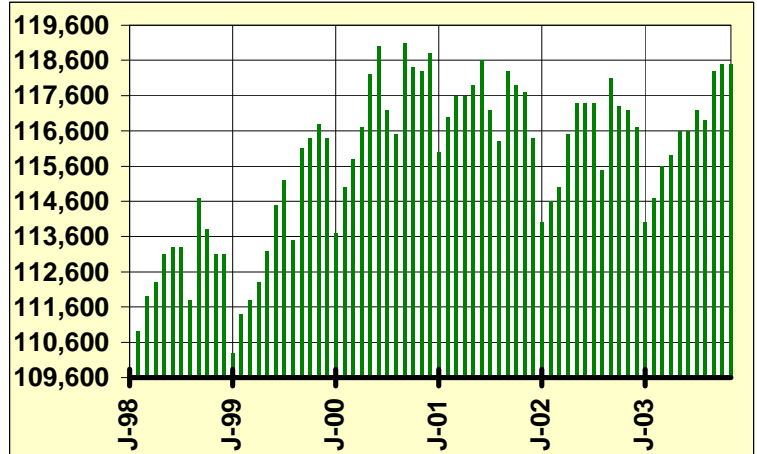
Highlights:

Remember last month's big drop in the unemployment rate, from 9.5 percent in September down to 7.9 percent in October? Well, most of it disappeared—the October rate was revised up to 8.7 percent—only to reappear this month. The preliminary November rate came in at 7.6 percent. This will likely be revised upwards next month. It appears that the data problem that cropped up last year is with us again. Washington needs data inputs from Oregon to calculate Clark's unemployment rate, but Washington's deadline comes before the Oregon data is ready, so we have to guesstimate a factor. If we underestimate, then, *voilà*, the rate will be revised upward next month. The number of unemployed residents, estimated at 13,900 in November, would then also be revised upward.

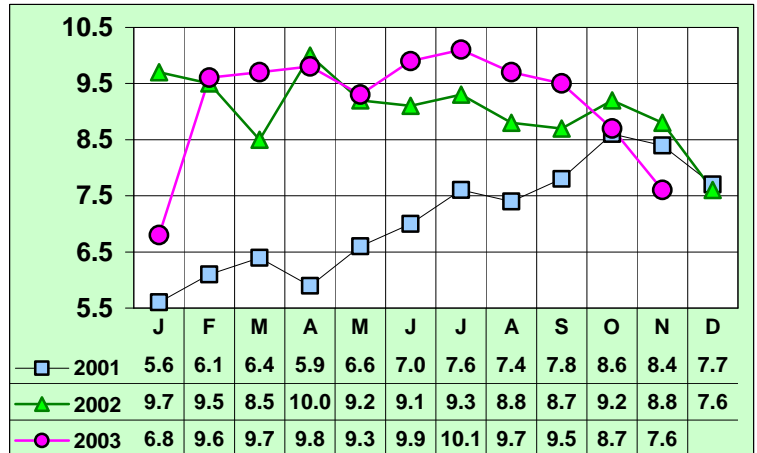
Nonfarm employment in the county remained at 118,500 in November. Retailers added 400 seasonal workers, and K-12 Education rounded out its fall hiring by bringing on another 200 staff, while Construction trailed off by 300, and food processing by 200. There was little change in other industries.

Over the year, employment growth inched up to 1,300 jobs or 1.1 percent. Retail Trade has added 500 jobs, mostly at General Merchandise Stores. Finance and Insurance is up 300, with employment still up due to refinancing. Health Care has also grown 200 new jobs, mostly in outpatient care. Losses have occurred in Manufacturing, Administrative and Support Services, and Other Services.

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



**LABOR MARKET SUMMARY
CLARK COUNTY**

Preliminary Quarterly Benchmark: March 2003

| EMPLOYMENT BY PLACE OF RESIDENCE | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| Civilian Labor Force | 183,000 | 183,000 | 187,600 | 0 | -4,600 | -2.5% |
| Resident Employment | 169,100 | 167,100 | 171,000 | 2,000 | -1,900 | -1.1% |
| Unemployment | 13,900 | 15,900 | 16,600 | -2,000 | -2,700 | -16.3% |
| Unemployment Rate | 7.6 | 8.7 | 8.8 | -1.1 | -1.2 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 118,500 | 118,500 | 117,200 | 0 | 1,300 | 1.1% |
| CONSTRUCTION, MINING, UTIL. and LOGGING | 10,400 | 10,700 | 10,400 | -300 | 0 | 0.0% |
| Construction, Mining and Utilities | 10,300 | 10,600 | 10,300 | -300 | 0 | 0.0% |
| Logging | 100 | 100 | 100 | 0 | 0 | 0.0% |
| MANUFACTURING | 13,300 | 13,400 | 13,300 | -100 | 0 | 0.0% |
| Food Manufacturing | 1,200 | 1,400 | 1,100 | -200 | 100 | 9.1% |
| Wood Product Manufacturing | 800 | 800 | 700 | 0 | 100 | 14.3% |
| Paper Manufacturing | 2,100 | 2,100 | 2,200 | 0 | -100 | -4.5% |
| Plastics and Rubber Products Manufacturing | 700 | 700 | 700 | 0 | 0 | 0.0% |
| Fabricated Metal Product Manufacturing | 1,100 | 1,100 | 1,200 | 0 | -100 | -8.3% |
| Machinery Manufacturing | 1,300 | 1,300 | 1,200 | 0 | 100 | 8.3% |
| Computer and Electronic Product Manufacturing | 3,100 | 3,000 | 3,100 | 100 | 0 | 0.0% |
| Transportation Equipment Manufacturing | 500 | 500 | 600 | 0 | -100 | -16.7% |
| Other Manufacturing | 2,500 | 2,500 | 2,500 | 0 | 0 | 0.0% |
| WHOLESALE TRADE | 4,500 | 4,400 | 4,400 | 100 | 100 | 2.3% |
| RETAIL TRADE | 14,100 | 13,700 | 13,600 | 400 | 500 | 3.7% |
| Motor Vehicle and Parts Dealers | 1,900 | 1,900 | 1,800 | 0 | 100 | 5.6% |
| Food and Beverage Stores | 2,300 | 2,300 | 2,600 | 0 | -300 | -11.5% |
| Health and Personal Care Stores | 800 | 800 | 800 | 0 | 0 | 0.0% |
| General Merchandise Stores | 4,200 | 3,800 | 3,600 | 400 | 600 | 16.7% |
| Other Retail | 4,900 | 4,900 | 4,800 | 0 | 100 | 2.1% |
| TRANSPORTATION and WAREHOUSING | 3,300 | 3,300 | 3,300 | 0 | 0 | 0.0% |
| INFORMATION | 3,200 | 3,200 | 3,000 | 0 | 200 | 6.7% |
| FINANCE and INSURANCE | 3,500 | 3,500 | 3,200 | 0 | 300 | 9.4% |
| REAL ESTATE, RENTAL and LEASING | 2,300 | 2,300 | 2,200 | 0 | 100 | 4.5% |
| PROF., SCIENTIFIC and TECHNICAL SERVICES | 5,800 | 5,800 | 5,900 | 0 | -100 | -1.7% |
| ADMIN., SUPPORT and WASTE MGMT. | 4,900 | 5,000 | 5,000 | -100 | -100 | -2.0% |
| EDUCATION SERVICES | 1,100 | 1,100 | 1,100 | 0 | 0 | 0.0% |
| HEALTH CARE and SOCIAL ASSISTANCE | 13,600 | 13,700 | 13,400 | -100 | 200 | 1.5% |
| Social Assistance | 2,100 | 2,100 | 2,100 | 0 | 0 | 0.0% |
| Health Services | 11,500 | 11,600 | 11,300 | -100 | 200 | 1.8% |
| ARTS, ENTERTAINMENT and RECREATION | 2,300 | 2,400 | 2,300 | -100 | 0 | 0.0% |
| ACCOMMODATION and FOOD SERVICES | 9,400 | 9,400 | 9,300 | 0 | 100 | 1.1% |
| OTHER SERVICES | 4,800 | 4,800 | 5,100 | 0 | -300 | -5.9% |
| GOVERNMENT | 22,000 | 21,800 | 21,700 | 200 | 300 | 1.4% |
| Federal Government | 2,600 | 2,600 | 2,800 | 0 | -200 | -7.1% |
| State Government | 3,500 | 3,500 | 3,400 | 0 | 100 | 2.9% |
| Local Government | 15,900 | 15,700 | 15,500 | 200 | 400 | 2.6% |
| K-12 Education | 10,800 | 10,600 | 10,500 | 200 | 300 | 2.9% |
| Other Local Government | 5,100 | 5,100 | 5,000 | 0 | 100 | 2.0% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | 0 |
| Nonfarm Employment without logging | 118,400 | 118,400 | 117,100 | 0 | 1,300 | 1.1% |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports (currently the first quarter 2003) and estimates employment from that point to present. Please visit our Internet site at:

www.workforceexplorer.com

Washington State
Labor Area Summary
Yakima MSA
Yakima County

Prepared by the Labor Market and Economic Analysis Branch, Don Meseck, *Regional Labor Economist*
 400-E 8th Avenue, Ellensburg, WA 98926-7486 Phone: (509) 963-2606

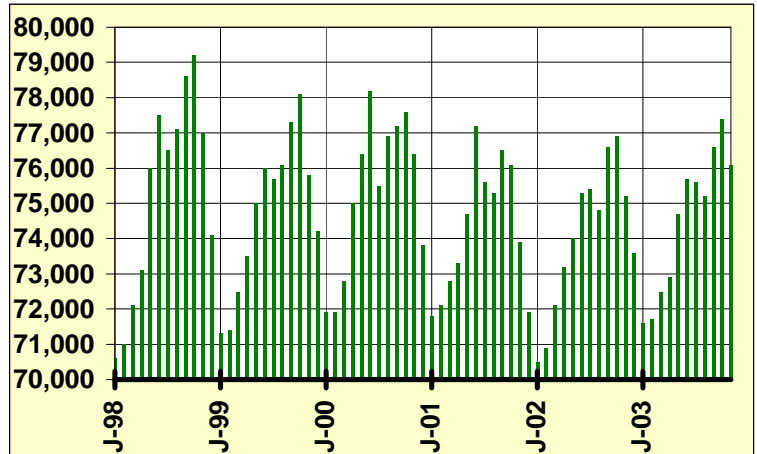
Highlights:

The total number of nonagricultural jobs plummeted 2.2 percent in Yakima County over the month of November 2003. Not to worry though, employment usually drops between October and November, and this year was nothing unusual. Seasonal downturns at food processors (i.e., Non-Durable Goods), fresh fruit packinghouses (i.e., Wholesale Trade), hotels and restaurants (i.e., Accommodation and Food Services), and in Construction accounted for the lion's share of the monthly downturn.

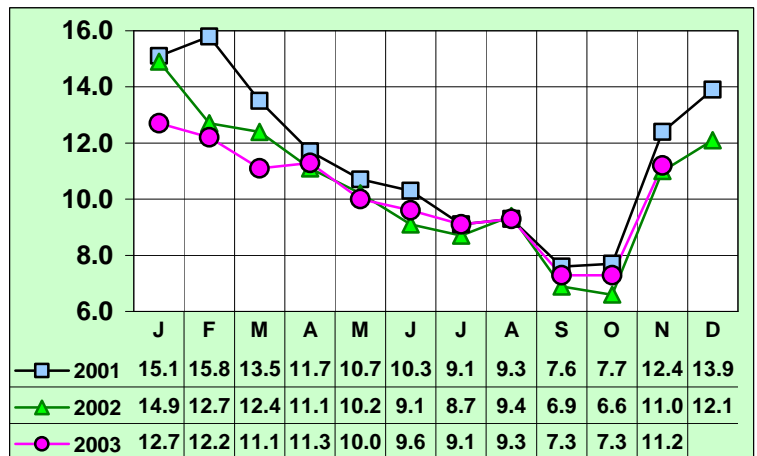
In November 2003, nonagricultural employers across Yakima County provided approximately 500 more jobs than in the same month one-year prior. Employment in three industries shifted considerably over the year. On the negative side, Wholesale Trade provided 400 fewer jobs in November 2003 than in November 2002. Why? Washington's apple harvest this year produced approximately 75.5 million fresh-packed boxes, down considerably from the 2002 crop, which yielded 88.8 million fresh-packed boxes. This meant that fewer sorters, packers, forklift drivers etc., were needed in fruit packinghouses to move the product to market. On the positive side, Health Services and Social Assistance, along with Retail Trade, each weighed in with 500 more jobs over the year. Retail store developments along the Valley Mall Boulevard in Union Gap are driving much of the retail upturn. Yakima County's labor economy has consistently been adding nonagricultural jobs over the past year. However, job growth rates have slowed from the 1.5 - 2.0-percent range in the 1st Quarter of 2003, to the 0.7-percent range for the first two months of the 4th Quarter of 2003.

In November 2003, Yakima County's unemployment rose only two-tenths of a point above the rate in November 2002. An estimated 11,900 Yakima County residents were out of work this November versus 11,600 in the corresponding month during 2002, a 300-person increase in the number of unemployed. But the number of employed Yakima County residents also rose by 1,400 since the prior November, despite fewer agricultural jobs, because of a smaller apple harvest. Thus, the slight, over-the-year climb in the unemployment rate is likely caused by two factors:

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



1. A slow statewide economy forcing more local residents, who commute to work outside Yakima County, onto the unemployment rolls, and
2. Fewer agricultural jobs available at farms and orchards this November.

LABOR MARKET SUMMARY
YAKIMA MSA (Yakima County)
Preliminary Quarterly Benchmark: June 2003

| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 106,400 | 118,700 | 104,600 | -12,300 | 1,800 | 1.7% |
| Resident Employment | 94,500 | 109,900 | 93,100 | -15,400 | 1,400 | 1.5% |
| Unemployment | 11,900 | 8,700 | 11,500 | 3,200 | 400 | 3.5% |
| Unemployment Rate | 11.2 | 7.3 | 11.0 | 3.9 | 0.2 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 75,700 | 77,400 | 75,200 | -1,700 | 500 | 0.7% |
| TOTAL PRIVATE | 59,300 | 61,100 | 58,600 | -1,800 | 700 | 1.2% |
| <i>GOODS PRODUCING</i> | <i>13,800</i> | <i>14,700</i> | <i>13,600</i> | <i>-900</i> | <i>200</i> | <i>1.5%</i> |
| NAT. RESOURCES, MINING, & CONSTRUCTION | 3,300 | 3,400 | 3,200 | -100 | 100 | 3.1% |
| MANUFACTURING | 10,500 | 11,300 | 10,400 | -800 | 100 | 1.0% |
| Durable Goods | 4,400 | 4,200 | 4,300 | 200 | 100 | 2.3% |
| Non-Durable Goods | 6,100 | 7,000 | 6,200 | -900 | -100 | -1.6% |
| <i>SERVICES PROVIDING</i> | <i>61,900</i> | <i>62,700</i> | <i>61,600</i> | <i>-800</i> | <i>300</i> | <i>0.5%</i> |
| WHOLESALE TRADE | 3,700 | 3,900 | 4,100 | -200 | -400 | -9.8% |
| RETAIL TRADE | 10,000 | 9,900 | 9,500 | 100 | 500 | 5.3% |
| TRANSPORTATION, WAREHOUSING & UTILITIES | 2,600 | 3,200 | 2,500 | -600 | 100 | 4.0% |
| INFORMATION | 1,400 | 1,400 | 1,300 | 0 | 100 | 7.7% |
| FINANCIAL ACTIVITIES | 2,500 | 2,500 | 2,600 | 0 | -100 | -3.8% |
| ALL OTHER SERVICES | 25,300 | 25,600 | 25,000 | -300 | 300 | 1.2% |
| Professional and Business Services | 4,600 | 4,600 | 4,700 | 0 | -100 | -2.1% |
| Health Services and Social Assistance | 11,100 | 10,900 | 10,600 | 200 | 500 | 4.7% |
| Accommodation and Food Services | 5,100 | 5,200 | 5,400 | -100 | -300 | -5.6% |
| GOVERNMENT | 16,400 | 16,300 | 16,600 | 100 | -200 | -1.2% |
| Federal Government | 1,300 | 1,400 | 1,400 | -100 | -100 | -7.1% |
| State Government | 3,000 | 2,900 | 3,000 | 100 | 0 | 0.0% |
| Local Government | 12,100 | 12,100 | 12,200 | 0 | -100 | -0.8% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | 0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
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Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports
(currently the second quarter 2003) and estimates employment from that point to present. Please visit our Internet site at:

www.workforceexplorer.com

Washington State Labor Area Summary Wenatchee LMA Chelan & Douglas Counties

Prepared by the Labor Market and Economic Analysis Branch, Don Meseck, *Regional Labor Economist*
400-E 8th Avenue, Ellensburg, WA 98926-7486 Phone: (509) 963-2606

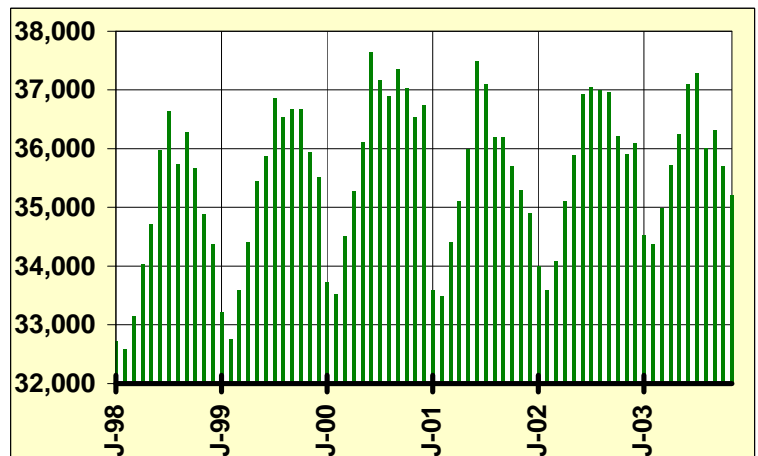
Highlights:

Total nonagricultural employment in Chelan and Douglas counties (also called the Wenatchee Labor Market Area or LMA) contracted by 400 jobs for a 1.4-percent shortening of payrolls over the month of November 2003. Two industries accounted for the lion's share of this over-the-month employment drop: Accommodation and Food Services; and Natural Resources, Mining, and Construction. The former chopped approximately 200 jobs as hotels and restaurants experienced the typical lull between the end of the summer and the beginning of the winter vacation periods. The latter experienced a 140-job cutback due to weather-related layoffs at local construction companies.

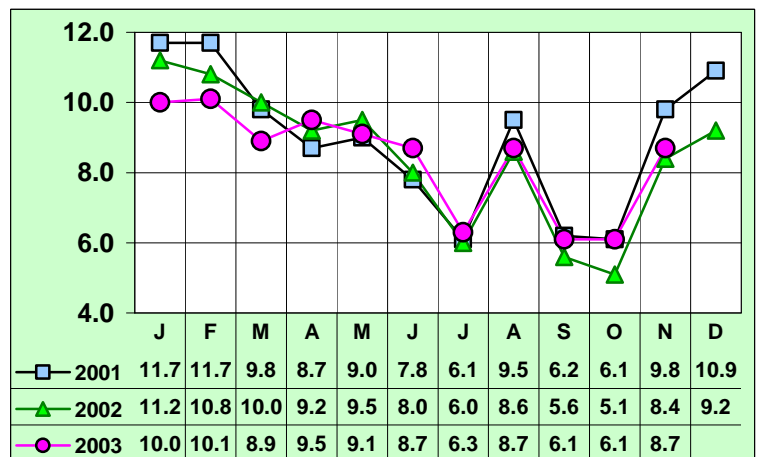
Over-the-year job growth rates in the Wenatchee LMA slipped into the negative column during each of the last six months. The softness in the local labor market has been exacerbated by the smaller apple harvest this autumn. According to an article in the November 7th edition of *The Wenatchee World*, the 2003 harvest is estimated to have produced only 75.5 million fresh packed boxes, whereas Washington's apple crop in 2002 yielded 88.8 million boxes. This year's smaller crop resulted in less need for packers, sorters, and graders than in November 2002. Thus, Wholesale Trade employment plummeted by 370 primarily because of fresh fruit packinghouse cutbacks. Transportation, Warehousing, and Utilities also declined over the year since fewer trucking jobs were required to haul produce from orchards to packinghouses, processors, ports, or grocery stores.

Nonagricultural employment across the LMA for 2003 will average out lower than in 2002, but higher than in 2001. Durable Goods manufacturers have seen the number of people on their payrolls slowly and steadily decline, since the large Alcoa Wenatchee Works layoffs took effect in the last quarter of 2001. Wholesale Trade employers (i.e., fresh fruit packinghouses) shortened their personnel rosters over the year, as mentioned earlier. Conversely, Mining, Natural Resources, and Construction has reached and rested on a higher employment plateau since June 2003. Much of this job growth occurred among residential construction contractors, and is still fueled by low interest rates. Retail Trade employment

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



LABOR MARKET SUMMARY
WENATCHEE LMA (Chelan and Douglas Counties)

Preliminary Quarterly Benchmark: June 2003

| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 49,040 | 56,680 | 50,540 | -7,640 | -1,500 | -3.0% |
| Resident Employment | 44,790 | 53,200 | 46,270 | -8,410 | -1,480 | -3.2% |
| Unemployment | 4,250 | 3,480 | 4,270 | 770 | -20 | -0.5% |
| Unemployment Rate | 8.7 | 6.1 | 8.4 | 2.6 | 0.3 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 35,400 | 35,800 | 35,900 | -400 | -500 | -1.4% |
| TOTAL PRIVATE | 26,910 | 27,480 | 27,480 | -570 | -570 | -2.1% |
| <i>GOODS PRODUCING</i> | 4,780 | 4,960 | 5,000 | -180 | -220 | -4.4% |
| NAT. RESOURCES, MINING & CONSTRUCTION | 2,780 | 2,920 | 2,860 | -140 | -80 | -2.8% |
| MANUFACTURING | 1,990 | 2,050 | 2,140 | -60 | -150 | -7.0% |
| Durable Goods | 1,210 | 1,230 | 1,340 | -20 | -130 | -9.7% |
| Non-Durable Goods | 780 | 820 | 790 | -40 | -10 | -1.3% |
| <i>SERVICES PROVIDING</i> | 30,620 | 30,830 | 30,910 | -210 | -290 | -0.9% |
| WHOLESALE TRADE | 1,440 | 1,490 | 1,810 | -50 | -370 | -20.4% |
| RETAIL TRADE | 5,520 | 5,420 | 5,520 | 100 | 0 | 0.0% |
| TRANSPORT., WAREHOUSING & UTILITIES | 1,070 | 1,090 | 1,280 | -20 | -210 | -16.4% |
| INFORMATION and FINANCIAL ACTIVITIES | 1,960 | 2,040 | 1,970 | -80 | -10 | -0.5% |
| ALL OTHER SERVICES | 12,150 | 12,460 | 11,910 | -310 | 240 | 2.0% |
| Health Services and Social Assistance | 5,010 | 5,010 | 4,820 | 0 | 190 | 3.9% |
| Accommodation and Food Services | 3,740 | 3,940 | 3,750 | -200 | -10 | -0.3% |
| GOVERNMENT | 8,490 | 8,320 | 8,430 | 170 | 60 | 0.7% |
| Federal Government | 1,010 | 1,020 | 930 | -10 | 80 | 8.6% |
| State Government | 1,300 | 1,220 | 1,350 | 80 | -50 | -3.7% |
| Local Government | 6,180 | 6,080 | 6,150 | 100 | 30 | 0.5% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | XXX |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
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www.workforceexplorer.com

has also been creeping upward. The December 2003 opening of Home Depot, and corresponding hiring one month earlier, helped Retail Trade return to the same employment level it was in November 2002.

The unemployment rate in Chelan and Douglas Counties rose from 8.4 percent in November 2002 to the November 2003 reading of 8.7 percent. This has been the sixth consecutive month in which the local unemployment rate rose above the corresponding month in 2002. It is no coincidence that November 2003 was also the sixth consecutive month in which the nonagricultural sector lost jobs over the year. Agricultural employment estimates also indicate fewer workers were required this November at local orchards due to a smaller, but more profitable, 2003 apple crop.

Washington State Labor Area Summary Walla Walla County

Prepared by the Labor Market and Economic Analysis Branch, Dean Schau, *Regional Labor Economist*
3900 West Court Street, Pasco, WA 99301 Phone: (509) 543-3017

Highlights:

Walla Walla County continues to do well, and it has one of the lowest unemployment rates for the state.

Manufacturing: The 240 loss in food processing was expected and seasonal.

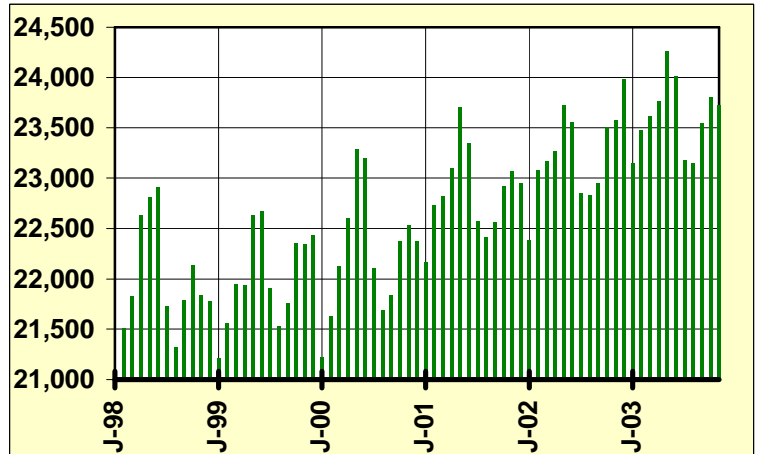
Trade Employment: It was constant over the month, but up by 100 when compared to one year ago.

Services: Employment was up by 60. The gain in Educational Services, up by 70, overshadowed some slight losses in other areas.

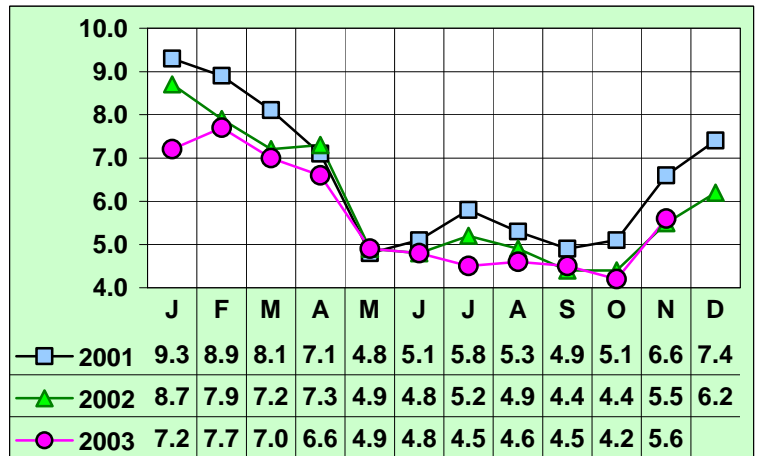
Government: Employment was up over the month, with the school districts continuing to add workers, but down over the year, the loss confined to mainly municipal government.

Down on the Farm: Farm employment dropped seasonally from 4,340 in October to 3,080 in November. This compared somewhat favorably with November of last year when the count was 3,020.

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



**LABOR MARKET SUMMARY
WALLA WALLA COUNTY**

Preliminary Quarterly Benchmark: December 2002

| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 27,610 | 28,600 | 28,410 | -990 | -800 | -2.8% |
| Resident Employment | 26,070 | 27,390 | 26,860 | -1,320 | -790 | -2.9% |
| Unemployment | 1,540 | 1,210 | 1,550 | 330 | -10 | -0.6% |
| Unemployment Rate | 5.6 | 4.2 | 5.5 | 1.4 | 0.1 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 23,730 | 23,810 | 23,580 | -80 | 150 | 0.6% |
| TOTAL PRIVATE | 18,440 | 18,620 | 18,220 | -180 | 220 | 1.2% |
| <i>GOODS PRODUCING</i> | <i>4,780</i> | <i>5,040</i> | <i>4,730</i> | <i>-260</i> | <i>50</i> | <i>1.1%</i> |
| CONSTRUCTION, NAT. RESOURCES, and MINING | 950 | 960 | 970 | -10 | -20 | -2.1% |
| MANUFACTURING | 3,840 | 4,080 | 3,760 | -240 | 80 | 2.1% |
| Durable Goods | 1,620 | 1,610 | 1,660 | 10 | -40 | -2.4% |
| Wineries | 210 | 240 | 200 | -30 | 10 | 5.0% |
| Food Manufacturing | 2,010 | 2,220 | 1,900 | -210 | 110 | 5.8% |
| <i>SERVICES PROVIDING</i> | <i>18,940</i> | <i>18,770</i> | <i>18,860</i> | <i>170</i> | <i>80</i> | <i>0.4%</i> |
| TRADE, TRANSPORTATION, and UTILITIES | 3,740 | 3,740 | 3,640 | 0 | 100 | 2.7% |
| Wholesale Trade | 660 | 680 | 610 | -20 | 50 | 8.2% |
| Retail Trade | 2,560 | 2,530 | 2,520 | 30 | 40 | 1.6% |
| Transportation, Warehousing, and Utilities | 470 | 480 | 470 | -10 | 0 | 0.0% |
| INFORMATION and FINANCIAL ACTIVITIES | 1,320 | 1,310 | 1,310 | 10 | 10 | 0.8% |
| ALL OTHER SERVICES | 8,600 | 8,540 | 8,530 | 60 | 70 | 0.8% |
| Educational Services | 1,960 | 1,890 | 1,960 | 70 | 0 | 0.0% |
| GOVERNMENT | 5,280 | 5,180 | 5,370 | 100 | -90 | -1.7% |
| Federal Government | 920 | 920 | 930 | 0 | -10 | -1.1% |
| State and Local Government | 4,350 | 4,260 | 4,440 | 90 | -90 | -2.0% |
| Educational Services | 2,200 | 2,130 | 2,200 | 70 | 0 | 0.0% |
| Workers in Labor/Management Disputes | 0 | 0 | 0 | 0 | 0 | 0 |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture
Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.
Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports (currently the fourth quarter 2002) and estimates employment from that point to present. Please visit our Internet site at:

www.workforceexplorer.com

Washington State Labor Area Summary Cowlitz County

Prepared by the Labor Market and Economic Analysis Branch, Scott Bailey, *Regional Labor Economist*
5411 East Mill Plain Boulevard, Vancouver, WA 98661 Phone: (360) 735-5043

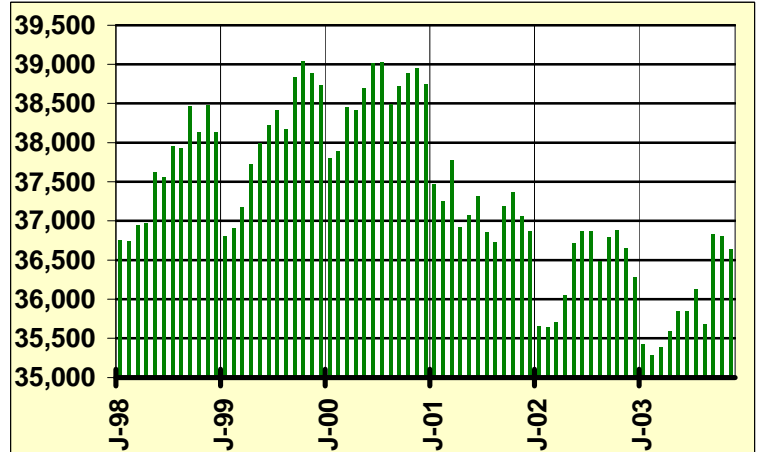
Highlights

Cowlitz County's jobless rate fell half a point to 8.6 percent in November, and is now well below year-ago levels. Any improvement in the rate, however, has been due to discouraged workers dropping out of the labor force. About 3,430 county residents are still officially counted as unemployed, down from over 4,000 a year ago.

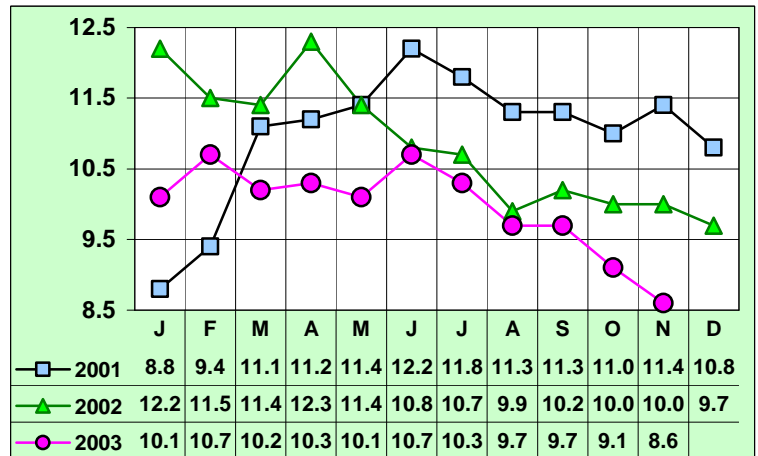
The county's nonfarm employment fell by 170 jobs over the month to a total of 36,640. Losses included seasonal layoffs in Construction & Mining (-200) and the Hospitality industry (-40). Manufacturing declined by 120 jobs as well. On the plus side, merchants added 110 jobs in anticipation of the holiday shopping season, while Transportation popped up by 50 jobs, and K-12 Education rounded out fall hiring by bringing on 40 workers.

Over the year, employment is down a mere 10 jobs from November 2003, but is short 2,200 jobs from November 1999. Over the past twelve months, the county has gained 160 Retail Trade jobs (mostly at General Merchandise Stores), but lost 150 Manufacturing jobs (mostly in the paper industry). Administrative and Support Services (which includes temp agencies, office management services, janitorial services, landscaping, and the like) has ebbed by 80 jobs, and Hospitality by another 70, but Construction is at +80.

Nonag Industry Employment, 1998-2003



Unemployment Rates by Month, 2001-2003



**LABOR MARKET SUMMARY
COWLITZ COUNTY**

Preliminary Quarterly Benchmark: March 2003

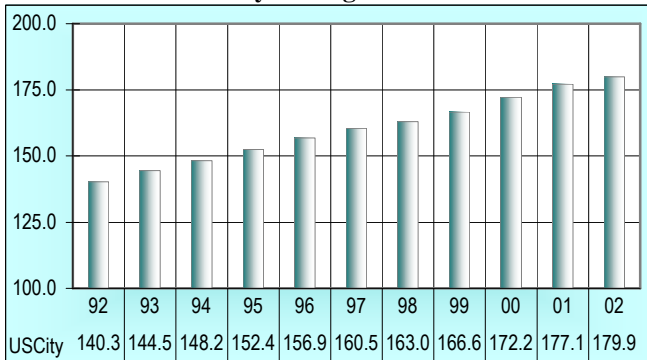
| | Prelim Nov-03 | Revised Oct-03 | Revised Nov-02 | Change | | |
|---|------------------|-------------------|-------------------|------------------|------------------|--------------------|
| | | | | Oct-03 Nov-03 | Nov-02 Nov-03 | Nov-02 Nov-03 % |
| EMPLOYMENT BY PLACE OF RESIDENCE | | | | | | |
| Civilian Labor Force | 39,820 | 40,090 | 40,930 | -270 | -1,110 | -2.7% |
| Resident Employment | 36,390 | 36,460 | 36,860 | -70 | -470 | -1.3% |
| Unemployment | 3,430 | 3,630 | 4,070 | -200 | -640 | -15.7% |
| Unemployment Rate | 8.6 | 9.1 | 10.0 | -0.5 | -1.4 | |
| EMPLOYMENT BY PLACE OF WORK (NAICS Industry Title) | | | | | | |
| TOTAL NONFARM 1/ | 36,640 | 36,810 | 36,650 | -170 | -10 | 0.0% |
| CONSTRUCTION, MINING, UTIL. and LOGGING | 3,480 | 3,690 | 3,430 | -210 | 50 | 1.5% |
| Construction, Mining and Utilities | 2,730 | 2,930 | 2,650 | -200 | 80 | 3.0% |
| Logging | 750 | 760 | 780 | -10 | -30 | -3.8% |
| MANUFACTURING | 6,910 | 7,030 | 7,060 | -120 | -150 | -2.1% |
| Wood Product Manufacturing | 1,190 | 1,240 | 1,200 | -50 | -10 | -0.8% |
| Paper Manufacturing | 2,910 | 2,910 | 3,010 | 0 | -100 | -3.3% |
| Other Manufacturing | 2,810 | 2,880 | 2,850 | -70 | -40 | -1.4% |
| WHOLESALE TRADE | 1,060 | 1,060 | 1,070 | 0 | -10 | -0.9% |
| RETAIL TRADE | 4,630 | 4,520 | 4,470 | 110 | 160 | 3.6% |
| Food and Beverage Stores | 980 | 970 | 1,000 | 10 | -20 | -2.0% |
| General Merchandise Stores | 1,250 | 1,190 | 1,100 | 60 | 150 | 13.6% |
| Other Retail | 2,400 | 2,360 | 2,370 | 40 | 30 | 1.3% |
| TRANSPORTATION and WAREHOUSING | 1,280 | 1,230 | 1,290 | 50 | -10 | -0.8% |
| FINANCE and INSURANCE | 940 | 930 | 910 | 10 | 30 | 3.3% |
| ADMIN., SUPPORT and WASTE MGMT. | 820 | 830 | 900 | -10 | -80 | -8.9% |
| HEALTH CARE and SOCIAL ASSISTANCE | 4,760 | 4,770 | 4,720 | -10 | 40 | 0.8% |
| ACCOMMODATION and FOOD SERVICES | 2,820 | 2,860 | 2,890 | -40 | -70 | -2.4% |
| OTHER SERVICES | 3,870 | 3,870 | 3,880 | 0 | -10 | -0.3% |
| GOVERNMENT | 6,070 | 6,020 | 6,030 | 50 | 40 | 0.7% |
| Federal Government | 270 | 270 | 260 | 0 | 10 | 3.8% |
| State Government | 1,290 | 1,290 | 1,270 | 0 | 20 | 1.6% |
| Local Government | 4,510 | 4,460 | 4,500 | 50 | 10 | 0.2% |
| K-12 Education | 2,890 | 2,850 | 2,890 | 40 | 0 | 0.0% |
| Other Local Government | 1,620 | 1,610 | 1,610 | 10 | 10 | 0.6% |
| Workers in Labor/Management Disputes | 0 | 0 | 10 | 0 | 0 | 0.0% |
| Nonfarm Employment without logging | 35,890 | 36,050 | 35,870 | -160 | 20 | 0.1% |

1/ Excludes proprietors, self-employed, members of the armed services, workers in private households, and agriculture. Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month. Columns may not add due to rounding. Prepared by the Labor Market and Economic Analysis Branch using a Quarterly Benchmark process. This process used the most recent quarter from the Unemployment Insurance Tax Reports (currently the first quarter 2003) and estimates employment from that point to present. Please visit our Internet site at:

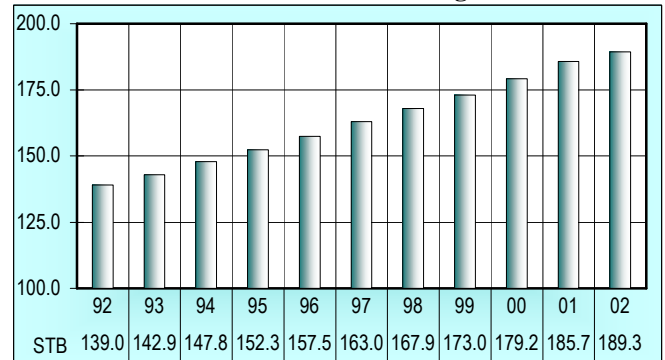
www.workforceexplorer.com

Consumer Price Indexes

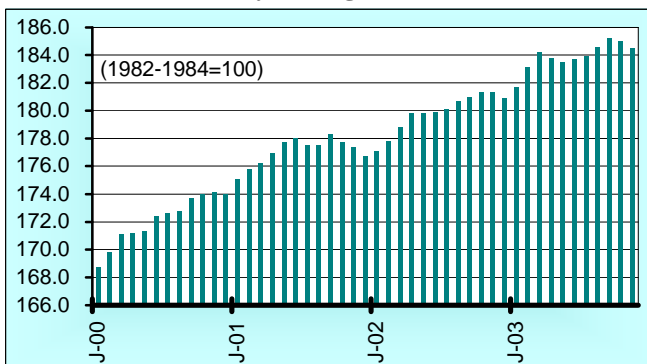
U.S. City Average 1990-2003



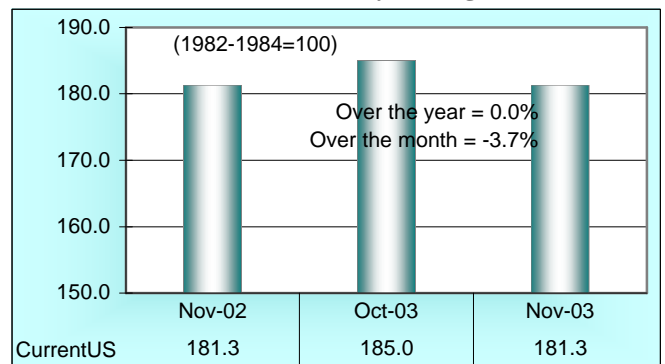
Seattle-Tacoma-Bremerton Average 1990-2003



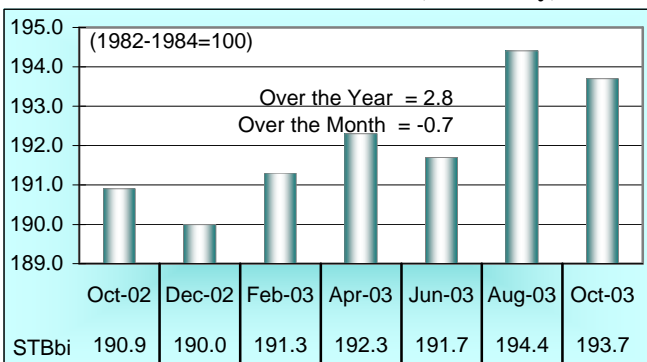
U.S. City Average 2000-2003



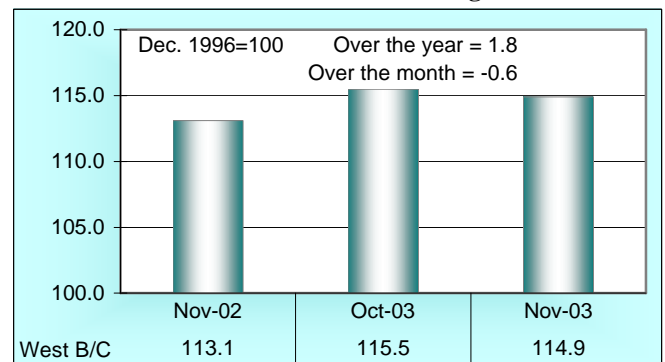
Current U.S. City Average



Seattle-Tacoma-Bremerton (bi-monthly)



Current West B/C Average



Note: Seattle-Tacoma-Bremerton is published bi-monthly on even months. Class "West-B/C" index covers less than 1,500,000 populations. Local area CPI indexes are by-products of the national CPI program. Each local index has a smaller sample size than the national index and, as a result, show greater volatility than the national index, but long-term trends are similar. **The Bureau of Labor Statistics (BLS) urges the use of the national average CPI for use in escalator clauses.** The Consumer Price Index (for the above tables, Consumer Price Index for All Urban Consumers or CPI-U data) is a measure of the average change in prices over time in a fixed listing of goods and services, such as food, clothing, shelter, transportation, medical care, and other goods and services that people buy for day-to-day living.

Technical Notes

This release is prepared by the Washington State Employment Security Department's Labor Market and Economic Analysis Branch. The current month's estimates are preliminary, while all previous months are subject to revisions. Industries are classified in accord with the *North America Industrial Classification System (NAICS)*, and implemented with the release of January 2003 data. This data is prepared using the most recent quarter from the Unemployment Insurance tax reports (currently June 2003 unless otherwise stated in nonagricultural table title) and estimates employment from that point until present. Material in this publication may be reproduced without special permission (but credit is welcome).

Nonagricultural wage and salary employment estimates include all full- and part-time wage and salary employees who worked during or received pay for the pay period through the twelfth of each month. Estimates measure the number of jobs by industry and reflect **employment by place of work**. The data is not strictly comparable with labor force data, which represents persons by place of residence.

Excluded from wage and salary estimates are proprietors, self-employed workers, private household employees, and unpaid family workers. A small percentage of wage and salary workers cannot be assigned to specific counties because of the nature of their jobs. Therefore, county data will not necessarily sum to state totals.

Use our toll free number **1-800-215-1617** to obtain up-to-date labor market information. Please direct subscription requests or address changes to the Labor Market and Economic Analysis Branch, Employment Security Department, PO Box 49046, Olympia, Washington 98507-9046, or call (360) 438-4800. Comments, suggestions and requests for information are also welcome at the editor's e-mail address: mcamilon@esd.wa.gov

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Labor Market Information

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Commissioner's Press Release
each month.

Washington State Labor Area Summaries are published monthly by the Labor Market and Economic Analysis Branch:
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