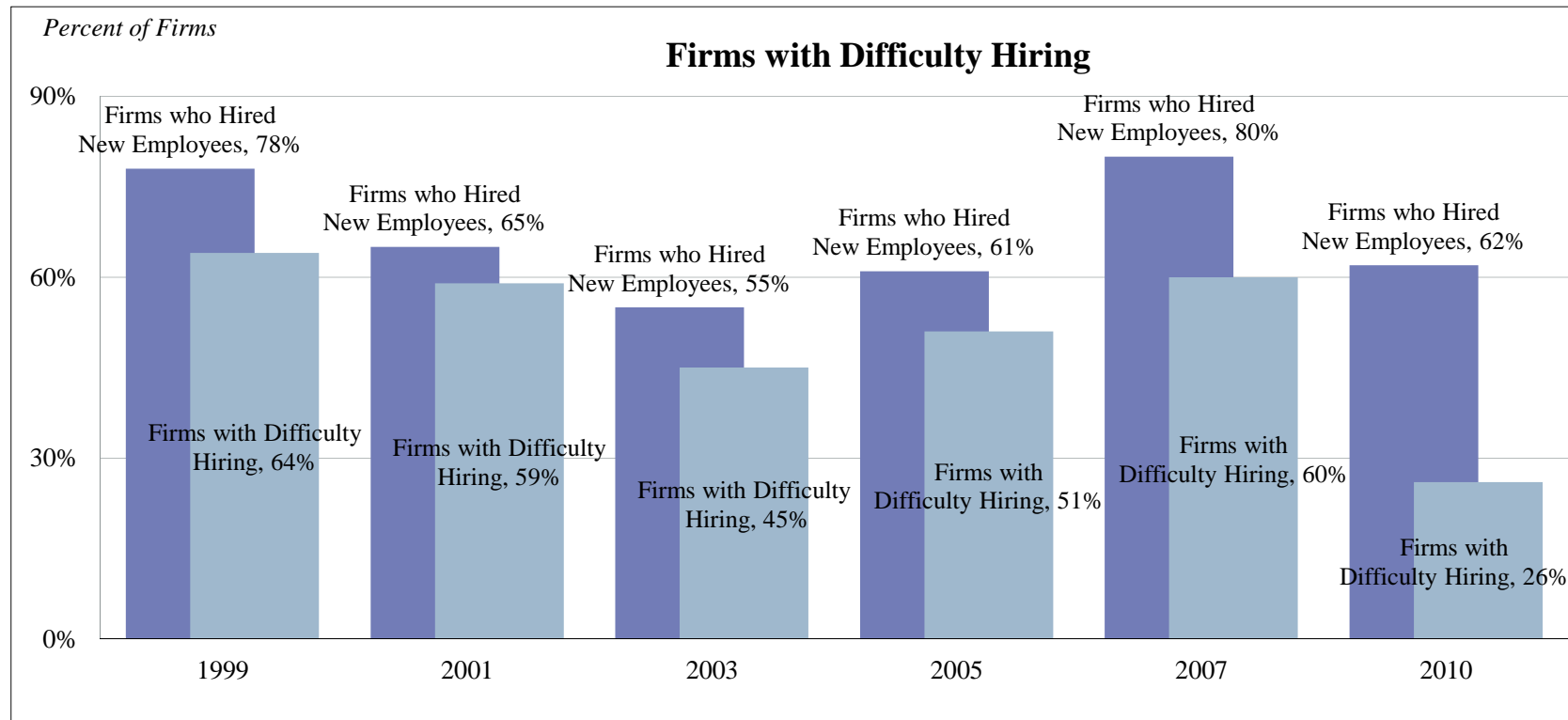


Workforce Training and Education Coordinating Board  
Employer Needs Survey  
2007-2010



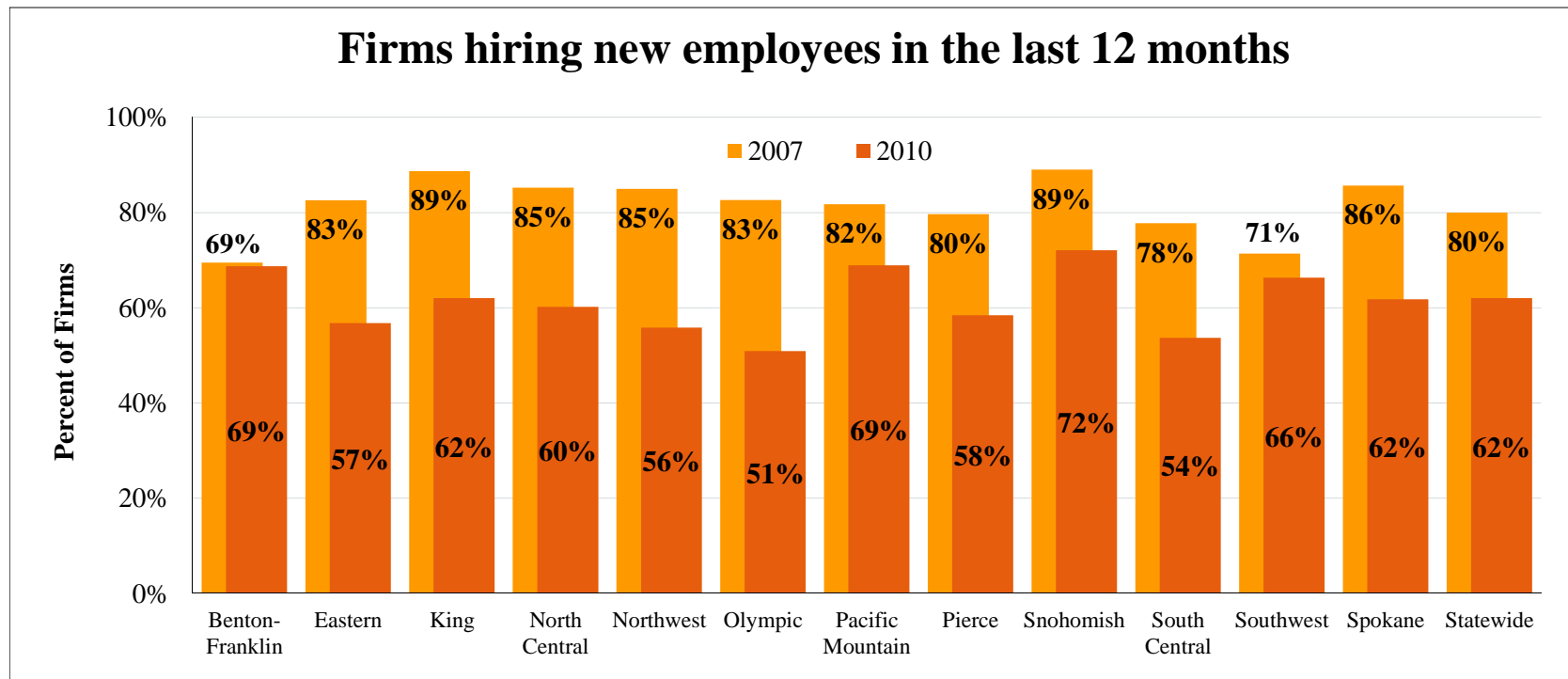


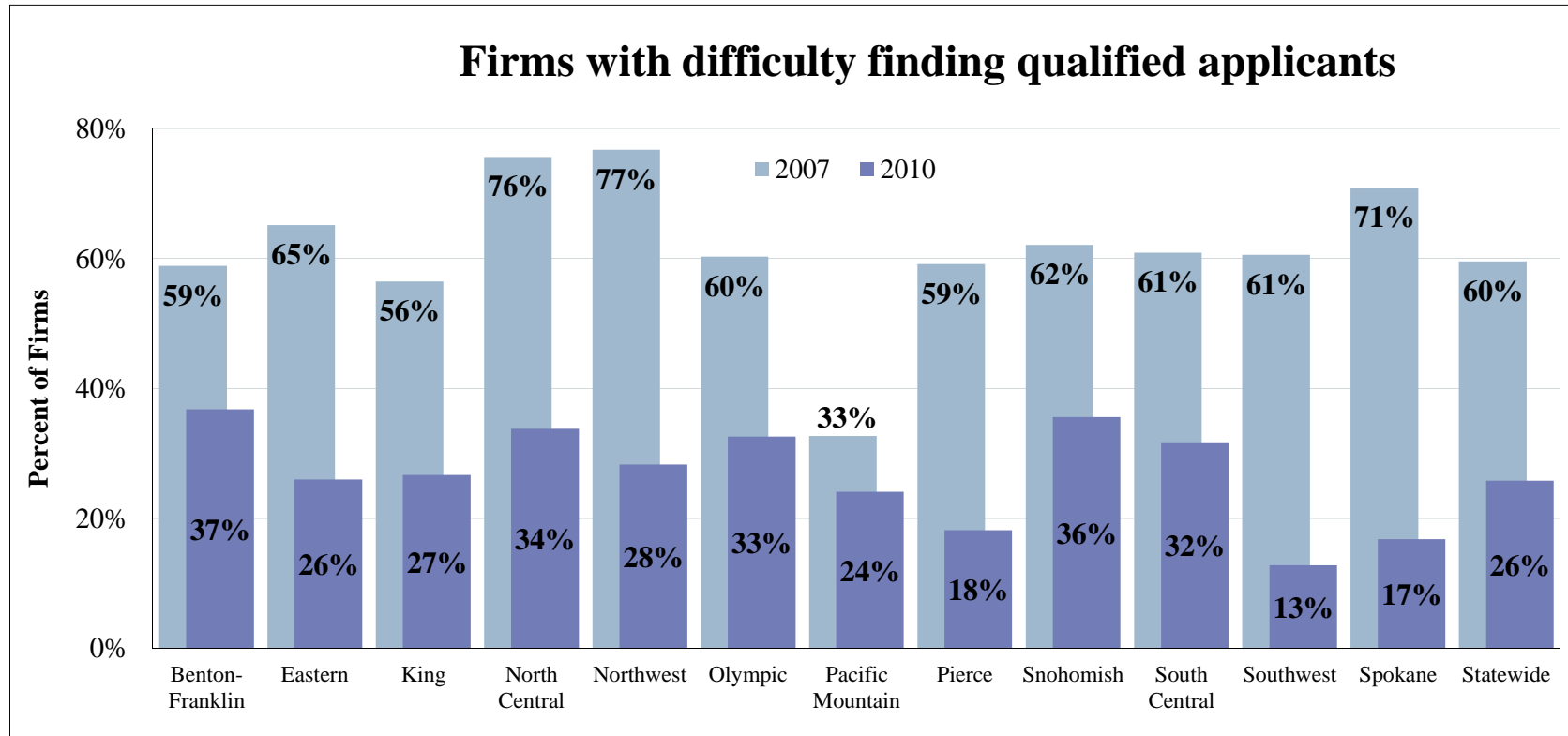
**Has your firm hired any new employees in the last 12 months?**

| WDA              | All Employers |            |
|------------------|---------------|------------|
|                  | 2007          | 2010       |
| Benton-Franklin  | 69%           | 69%        |
| Eastern          | 83%           | 57%        |
| King             | 89%           | 62%        |
| North Central    | 85%           | 60%        |
| Northwest        | 85%           | 56%        |
| Olympic          | 83%           | 51%        |
| Pacific Mountain | 82%           | 69%        |
| Pierce           | 80%           | 58%        |
| Snohomish        | 89%           | 72%        |
| South Central    | 78%           | 54%        |
| Southwest        | 71%           | 66%        |
| Spokane          | 86%           | 62%        |
| <b>Statewide</b> | <b>80%</b>    | <b>62%</b> |

**In the last 12 months, did your firm have any difficulty finding qualified applicants for any jobs you were trying to fill?**

| WDA              | Among those attempting to hire |            | All Employers |            |
|------------------|--------------------------------|------------|---------------|------------|
|                  | 2007                           | 2010       | 2007          | 2010       |
| Benton-Franklin  | 59%                            | 37%        | 42%           | 27%        |
| Eastern          | 65%                            | 26%        | 52%           | 17%        |
| King             | 56%                            | 27%        | 50%           | 17%        |
| North Central    | 76%                            | 34%        | 64%           | 23%        |
| Northwest        | 77%                            | 28%        | 66%           | 18%        |
| Olympic          | 60%                            | 33%        | 50%           | 21%        |
| Pacific Mountain | 33%                            | 24%        | 27%           | 18%        |
| Pierce           | 59%                            | 18%        | 47%           | 13%        |
| Snohomish        | 62%                            | 36%        | 55%           | 26%        |
| South Central    | 61%                            | 32%        | 47%           | 18%        |
| Southwest        | 61%                            | 13%        | 43%           | 10%        |
| Spokane          | 71%                            | 17%        | 61%           | 13%        |
| <b>Statewide</b> | <b>60%</b>                     | <b>26%</b> | <b>50%</b>    | <b>17%</b> |





Q1.) Did you hire any new employees in the last 12 months.

|                  | Projected Number of Firms Hired 2007 | Projected Number of Firms Hired 2010 | Decline from 2007-2010 |
|------------------|--------------------------------------|--------------------------------------|------------------------|
| Benton-Franklin  | 4,000                                | 3,600                                | 10%                    |
| Eastern          | 5,000                                | 2,300                                | 54%                    |
| King             | 63,600                               | 39,400                               | 38%                    |
| North Central    | 7,300                                | 3,400                                | 53%                    |
| Northwest        | 12,400                               | 6,100                                | 51%                    |
| Olympic          | 9,500                                | 4,600                                | 52%                    |
| Pacific Mountain | 13,000                               | 8,000                                | 38%                    |
| Pierce           | 16,600                               | 10,700                               | 36%                    |
| Snohomish        | 12,700                               | 10,700                               | 16%                    |
| South Central    | 8,100                                | 3,700                                | 54%                    |
| Southwest        | 10,400                               | 8,000                                | 23%                    |
| Spokane          | 12,600                               | 8,300                                | 34%                    |
| <b>Statewide</b> | <b>175,100</b>                       | <b>108,800</b>                       | <b>38%</b>             |

Q2.) Did you have difficulty finding qualified applicants for the jobs you were trying to fill?

*Among those who attempted to hire*

|                  | Projected Number with Difficulty 2007 | Projected Number with Difficulty 2010 | Decline from 2007-2010 |
|------------------|---------------------------------------|---------------------------------------|------------------------|
| Benton-Franklin  | 2,400                                 | 1,320                                 | 45%                    |
| Eastern          | 3,200                                 | 600                                   | 81%                    |
| King             | 35,800                                | 10,520                                | 71%                    |
| North Central    | 5,500                                 | 1,150                                 | 79%                    |
| Northwest        | 9,500                                 | 1,730                                 | 82%                    |
| Olympic          | 5,700                                 | 1,500                                 | 74%                    |
| Pacific Mountain | 4,300                                 | 1,930                                 | 55%                    |
| Pierce           | 9,700                                 | 1,950                                 | 80%                    |
| South Central    | 5,000                                 | 1,170                                 | 77%                    |
| Snohomish        | 7,700                                 | 3,810                                 | 51%                    |
| Southwest        | 6,200                                 | 1,020                                 | 84%                    |
| Spokane          | 8,900                                 | 1,390                                 | 84%                    |
| <b>Statewide</b> | <b>104,100</b>                        | <b>28,090</b>                         | <b>73%</b>             |

| <b>In the last 12 months, did your firm have any difficulty finding qualified applicants for any jobs you were trying to fill?</b> |                |               |                |
|--|----------------|---------------|----------------|
| Employers with Difficulty (Among Those Attempting to Hire)   |                |               |                |
|  | <b>2007</b>    | <b>2010</b>   | <b>Decline</b> |
| Ag_Food  | 3,000          | 740           | 75%            |
| Construction   | 10,400         | 850           | 92%            |
| High-Tech  | 1,300          | 500           | 62%            |
| Manufacturing  | 3,100          | 770           | 75%            |
| Other  | 23,100         | 6,470         | 72%            |
| Services   | 36,200         | 12,780        | 65%            |
| Trade  | 27,000         | 5,990         | 78%            |
| <b>Statewide</b>   | <b>104,100</b> | <b>28,100</b> | <b>73%</b>     |

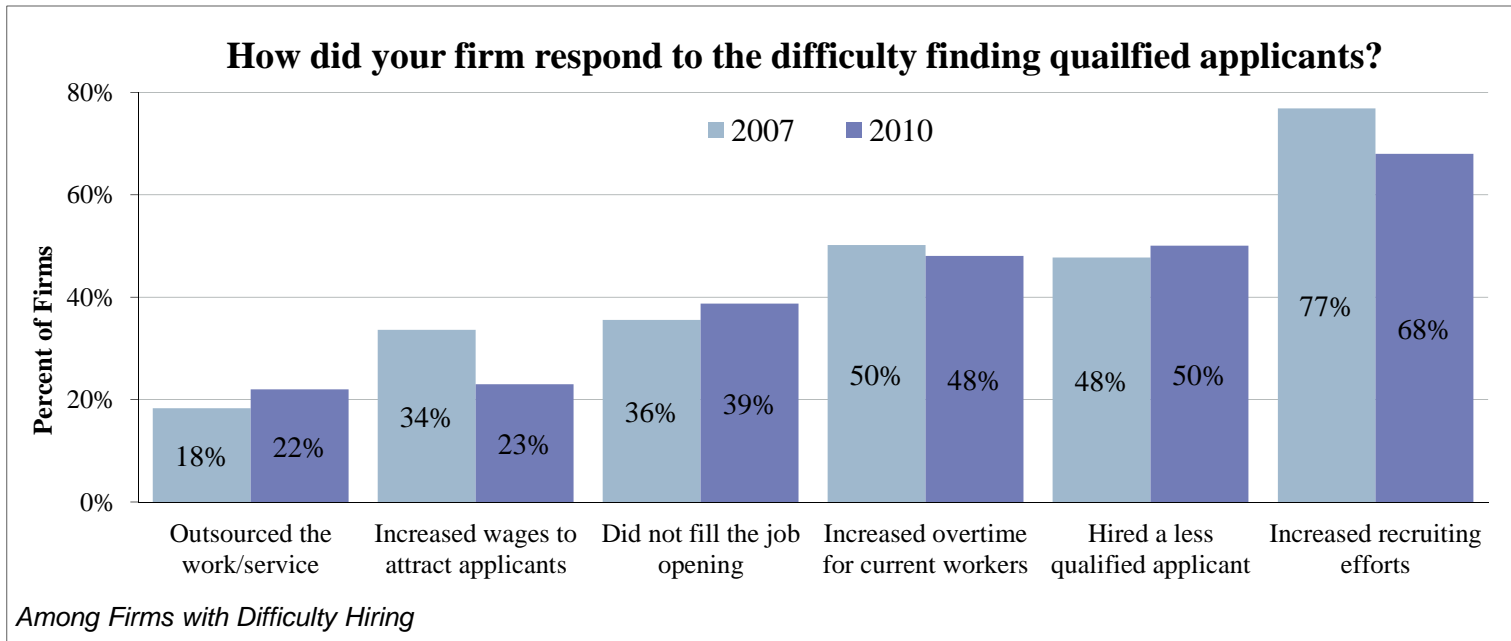
| <b>In the last 12 months, did your firm have any difficulty finding qualified applicants for any jobs you were trying to fill?</b> |                |               |                |
|--|----------------|---------------|----------------|
| Employers with Difficulty (Among Those Attempting to Hire)   |                |               |                |
|  | <b>2007</b>    | <b>2010</b>   | <b>Decline</b> |
| Micro  |                | 11,790        |                |
| Small  | 75,200         | 10,210        | 71%            |
| Medium   | 22,200         | 5,380         | 76%            |
| Large  | 6,600          | 860           | 87%            |
| <b>Statewide</b>   | <b>104,100</b> | <b>28,240</b> | <b>73%</b>     |

Question 3

**How did your firm respond to the difficulty finding qualified applicants?**

*Among those with difficulty hiring*

|  | Among Those Attempting to Hire |      | Percent of All Employers |      | Projected Number of Employers |        |
|--|--------------------------------|------|--------------------------|------|-------------------------------|--------|
|  | 2007                           | 2010 | 2007                     | 2010 | 2007                          | 2010   |
| Outsourced the work/service            | 18%                            | 22%  | 9%                       | 4%   | 19,100                        | 6,200  |
| Increased wages to attract applicants  | 34%                            | 23%  | 17%                      | 4%   | 35,000                        | 6,500  |
| Did not fill the job opening           | 36%                            | 39%  | 19%                      | 6%   | 37,060                        | 10,900 |
| Increased overtime for current workers | 50%                            | 48%  | 26%                      | 8%   | 52,300                        | 13,500 |
| Hired a less qualified applicant       | 48%                            | 50%  | 25%                      | 9%   | 49,700                        | 14,100 |
| Increased recruiting efforts           | 77%                            | 68%  | 39%                      | 12%  | 80,030                        | 19,100 |



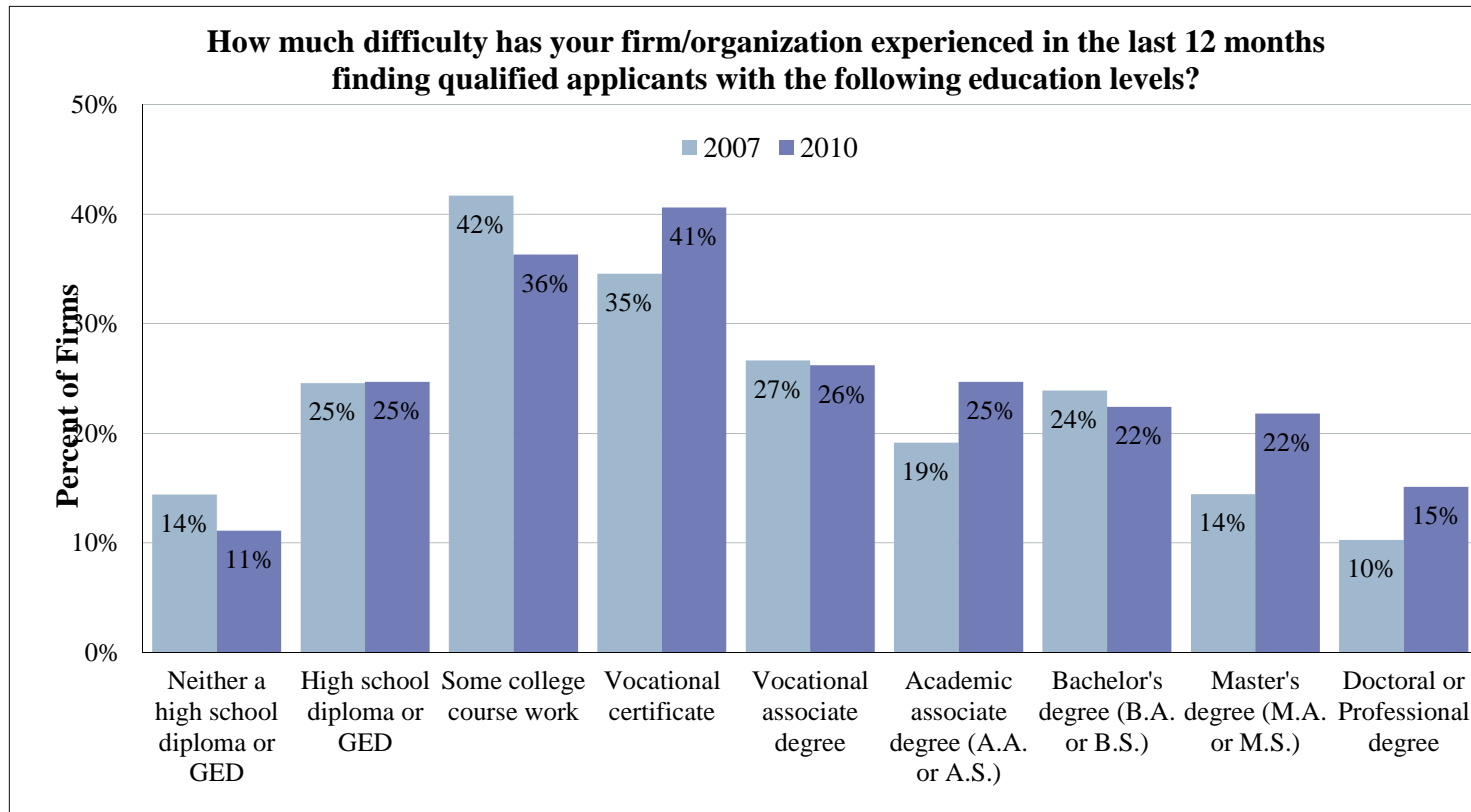


Question 5

**How much difficulty has your firm/organization experienced in the last 12 months finding qualified applicants with the following education levels?**

*Among firms with difficulty hiring*

|  | 2007 | 2010 |
|--|------|------|
| Neither a high school diploma or GED     | 14%  | 11%  |
| High school diploma or GED               | 25%  | 25%  |
| Some college course work                 | 42%  | 36%  |
| Vocational certificate                   | 35%  | 41%  |
| Vocational associate degree              | 27%  | 26%  |
| Academic associate degree (A.A. or A.S.) | 19%  | 25%  |
| Bachelor's degree (B.A. or B.S.)         | 24%  | 22%  |
| Master's degree (M.A. or M.S.)           | 14%  | 22%  |
| Doctoral or Professional degree          | 10%  | 15%  |



Question 6

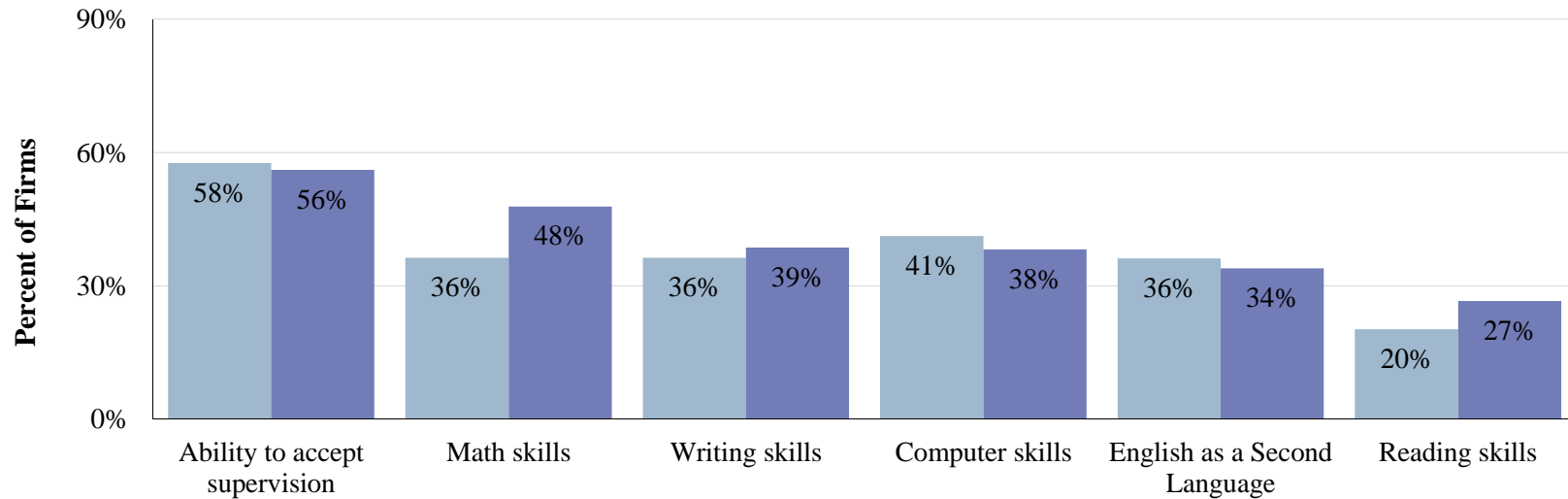
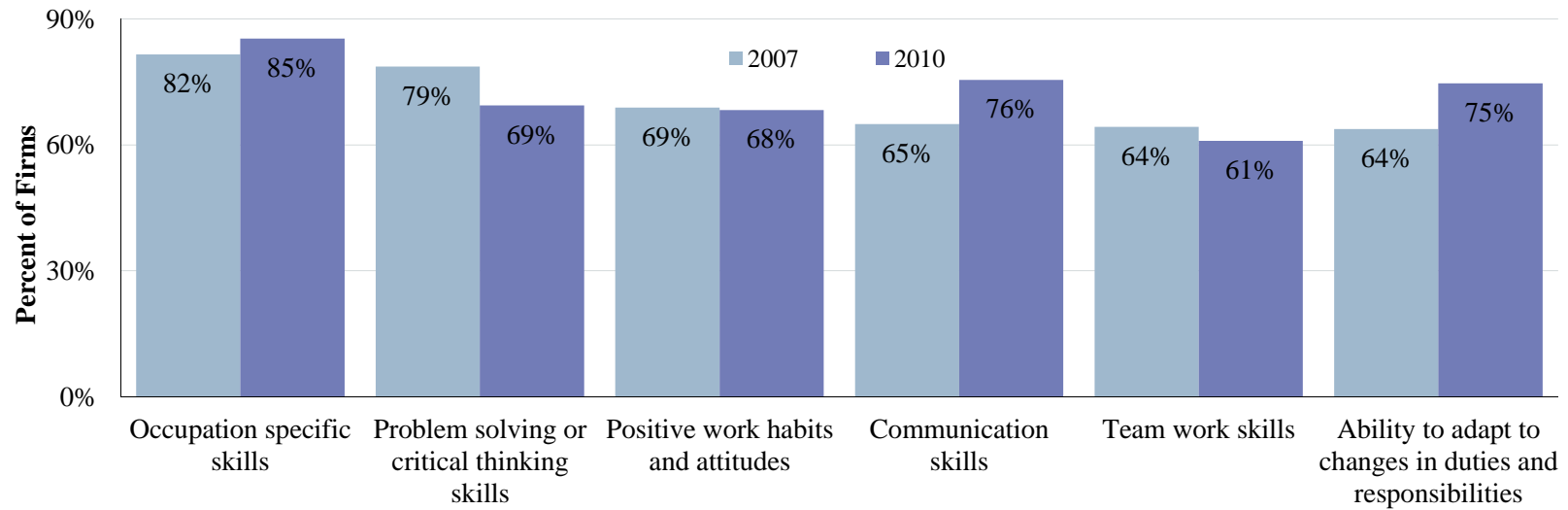
**How much difficulty has your firm/organization had finding employees with the following skills?**

*Among those with difficulty hiring*

|  | <b>2007</b> | <b>2010</b> |
|--|-------------|-------------|
| Occupation specific skills                                 | 82%         | 85%         |
| Problem solving or critical thinking skills                | 79%         | 69%         |
| Positive work habits and attitudes                         | 69%         | 68%         |
| Communication skills                                       | 65%         | 76%         |
| Team work skills   | 64%         | 61%         |
| Ability to adapt to changes in duties and responsibilities | 64%         | 75%         |
| Ability to accept supervision                              | 56%         | 58%         |
| Math skills  | 48%         | 36%         |
| Writing skills   | 39%         | 36%         |
| Computer skills  | 38%         | 41%         |
| English as a Second Language                               | 34%         | 36%         |
| Reading skills   | 27%         | 20%         |

Question 6

**How much difficulty has your firm/organization had finding employees with the following skills?**

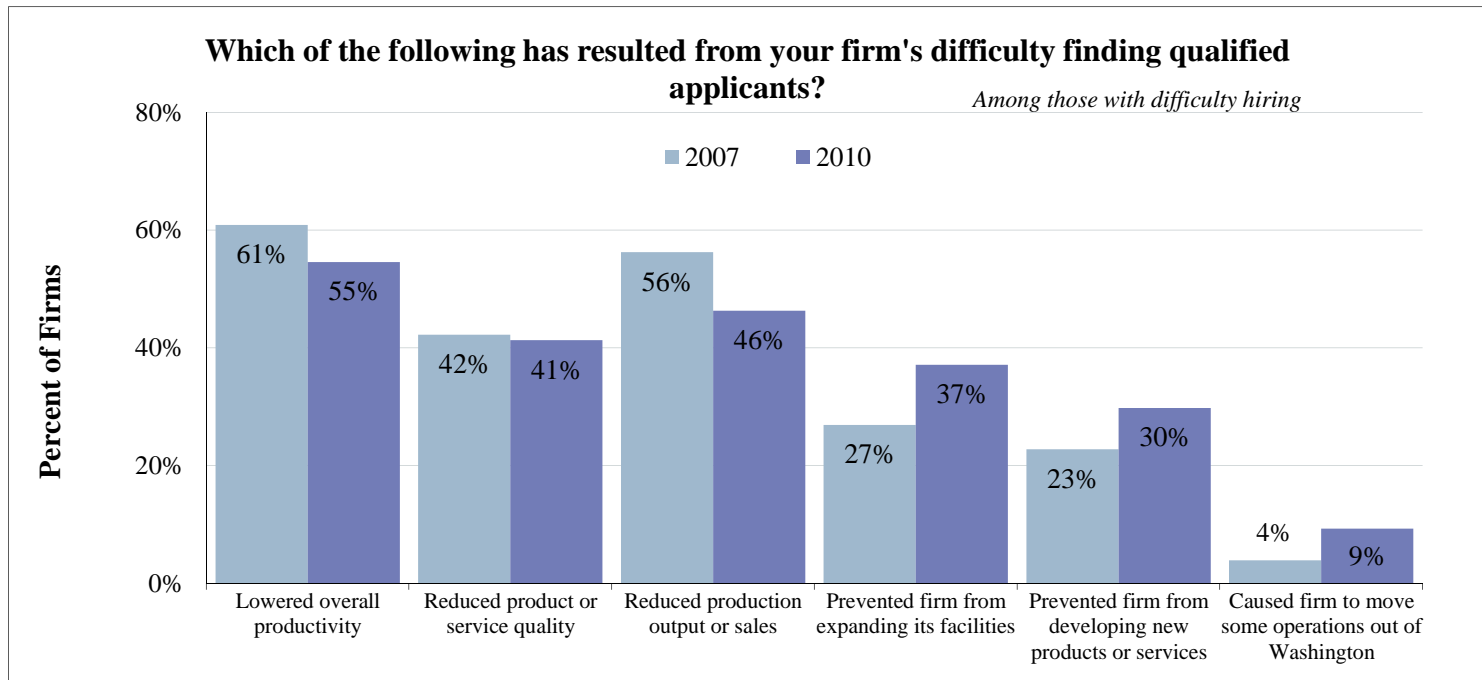


Question 7

**Which of the following has resulted from your firm's difficulty finding qualified applicants?**

*Among those with difficulty hiring*

|   | 2007 | 2010 | 2007   | 2010   |
|---|------|------|--------|--------|
| Lowered overall productivity                            | 61%  | 55%  | 63,300 | 15,340 |
| Reduced product or service quality                      | 42%  | 41%  | 44,000 | 11,600 |
| Reduced production output or sales                      | 56%  | 46%  | 58,600 | 13,010 |
| Prevented firm from expanding its facilities            | 27%  | 37%  | 28,000 | 10,420 |
| Prevented firm from developing new products or services | 23%  | 30%  | 23,700 | 8,370  |
| Caused firm to move some operations out of Washington   | 4%   | 9%   | 4,000  | 2,610  |

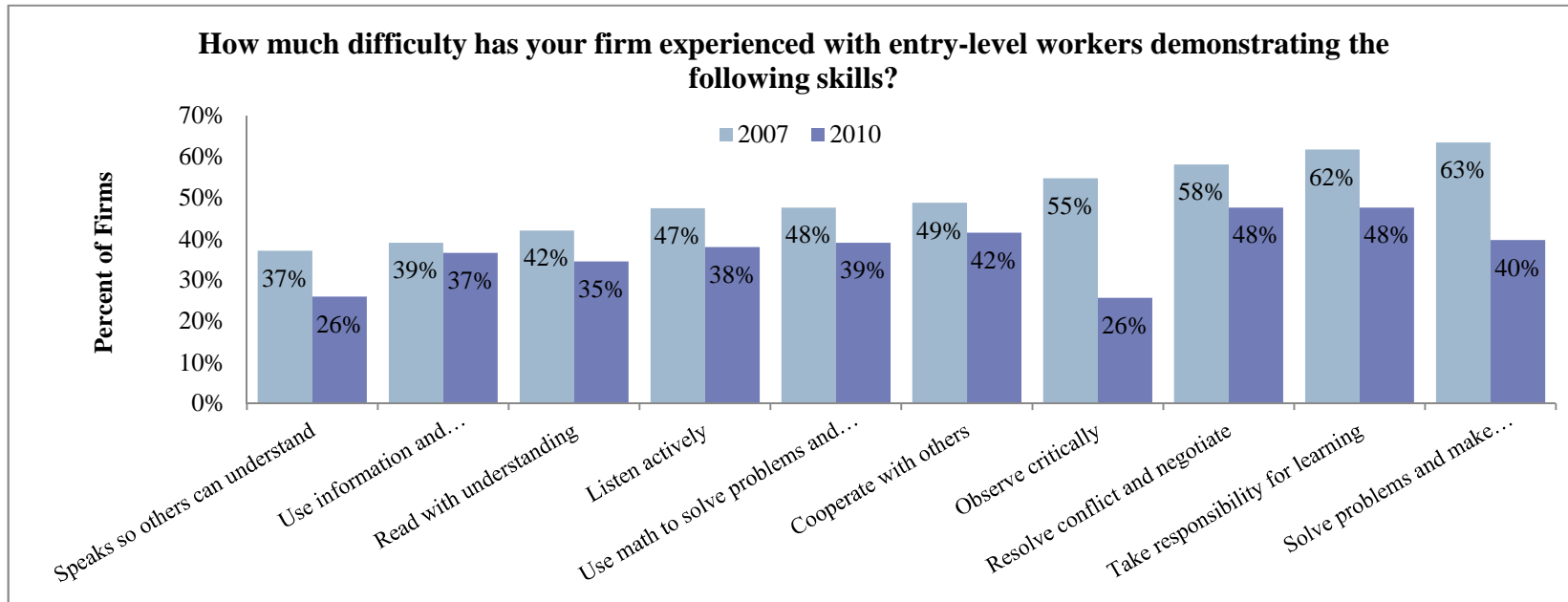


Question 8

**How much difficulty has your firm/organization experienced with entry-level workers demonstrating the following skills?**

*Among those with difficulty hiring*

|  | 2007 | 2010 |
|--|------|------|
| <b>Speaks so others can understand</b>               | 37%  | 26%  |
| <b>Use information and communications technology</b> | 39%  | 37%  |
| <b>Read with understanding</b>                       | 42%  | 35%  |
| <b>Listen actively</b>                               | 47%  | 38%  |
| <b>Use math to solve problems and communicate</b>    | 48%  | 39%  |
| <b>Cooperate with others</b>                         | 49%  | 42%  |
| <b>Observe critically</b>                            | 55%  | 26%  |
| <b>Resolve conflict and negotiate</b>                | 58%  | 48%  |
| <b>Take responsibility for learning</b>              | 62%  | 48%  |
| <b>Solve problems and make decisions</b>             | 63%  | 40%  |



Question 9

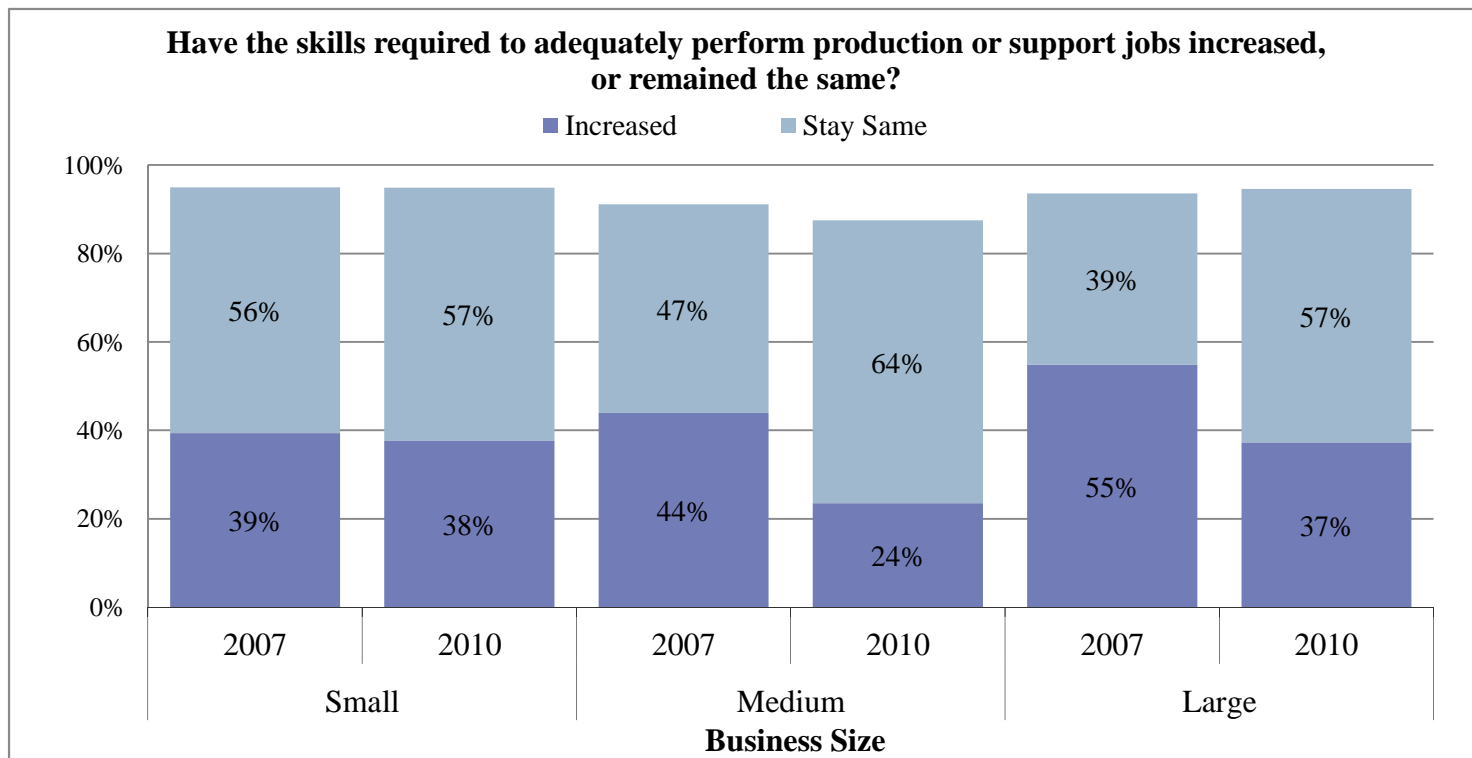
**How will your firm's/organization's need for employees with each of the types of education listed below change in the next five years?**

|   | Increase |      | Stay About the Same |      | Decrease |      | Not Needed |      |
|---|----------|------|---------------------|------|----------|------|------------|------|
|   | 2007     | 2010 | 2007                | 2010 | 2007     | 2010 | 2007       | 2010 |
| <b>Neither a high school diploma or GED</b>     | 12%      | 7%   | 45%                 | 43%  | 4%       | 5%   | 39%        | 45%  |
| <b>High school diploma or GED</b>               | 18%      | 12%  | 63%                 | 63%  | 2%       | 1%   | 17%        | 22%  |
| <b>Some college course work</b>                 | 27%      | 19%  | 46%                 | 55%  | 1%       | 1%   | 26%        | 24%  |
| <b>Vocational certificate</b>                   | 22%      | 19%  | 39%                 | 48%  | 1%       | 1%   | 39%        | 32%  |
| <b>Vocational associate degree</b>              | 17%      | 15%  | 39%                 | 47%  | 1%       | 1%   | 43%        | 37%  |
| <b>Academic associate degree (A.A. or A.S.)</b> | 10%      | 16%  | 41%                 | 45%  | 5%       | 1%   | 44%        | 37%  |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 18%      | 17%  | 35%                 | 38%  | 1%       | 2%   | 46%        | 42%  |
| <b>Master's degree (M.A. or M.S.)</b>           | 7%       | 6%   | 30%                 | 30%  | 5%       | 2%   | 58%        | 60%  |
| <b>Doctoral or Professional degree</b>          | 4%       | 6%   | 25%                 | 29%  | 5%       | 2%   | 66%        | 62%  |

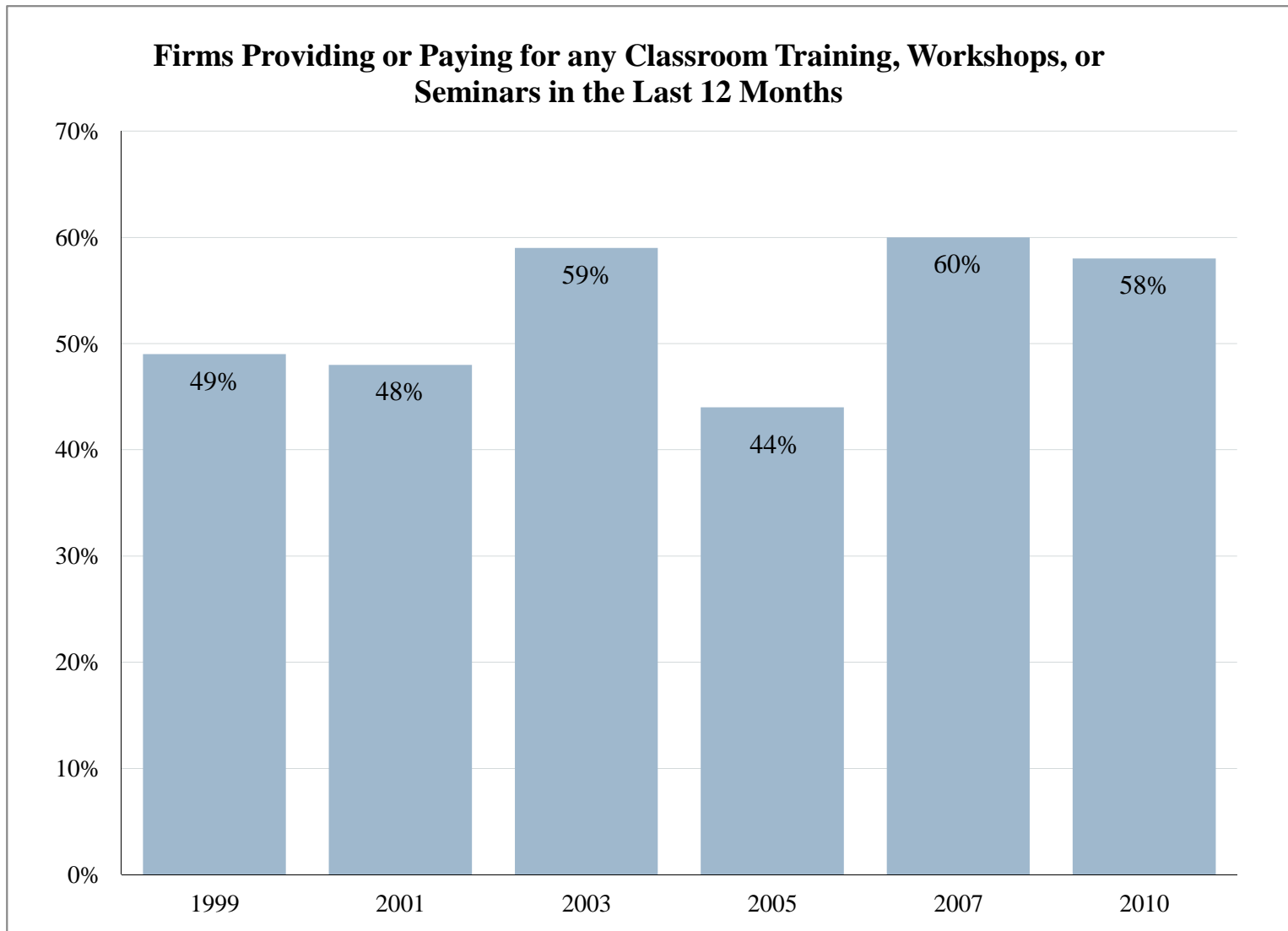
Question 10

**In the last three years, have the skills required to adequately perform production or support jobs (primary or front-line services or support jobs) increased, decreased or remained the same?**

|               |      | Increased | Stay Same | Decreased | Don't Know |
|---------------|------|-----------|-----------|-----------|------------|
| <b>Small</b>  | 2007 | 39%       | 56%       | 1%        | 4%         |
|               | 2010 | 38%       | 57%       | 5%        | 0%         |
| <b>Medium</b> | 2007 | 44%       | 47%       | 6%        | 3%         |
|               | 2010 | 24%       | 64%       | 12%       | 1%         |
| <b>Large</b>  | 2007 | 55%       | 39%       | 4%        | 3%         |
|               | 2010 | 37%       | 57%       | 3%        | 2%         |







Question 12

**What percentage received classroom training, workshops, or seminars (lasting at least 4 hours) did each type of employee received in the last 12 months?**

|   | 2007      | 2010       |
|---|-----------|------------|
| Managerial and administrative occupations   | 49%       | <b>60%</b> |
| Professional occupations  | 32%       | <b>45%</b> |
| Technical and paraprofessional occupations  | 30%       | <b>41%</b> |
| Marketing and sales-related occupations   | 19%       | <b>35%</b> |
| Clerical and administrative support occupations                                     | 26%       | <b>36%</b> |
| Service occupations   | 24%       | <b>38%</b> |
| Production, construction, operation, maintenance, and material-handling occupations | 26%       | <b>37%</b> |
| Agricultural, forestry, fishing, and related occupations                            | <b>9%</b> | 6%         |

Question 13

**What percent of your current employees would you say need further training in a formal program in order to reach the current level of productivity and competence that your company needs?**

| 2010                                 | Percent |
|--------------------------------------|---------|
| At a community or technical college  | 13.9%   |
| At a four-year college or university | 5.4%    |

Question 14

**In the last three years, has the percentage of your employees who receive classroom training, workshops, or seminars of some kind increased, decreased, or stayed the same?**

| 2007 |                       | Increased  | Stayed Same | Decreased |
|------|-----------------------|------------|-------------|-----------|
|      | Small (5-19)          | 37%        | 53%         | 6%        |
|      | Medium (20-99)        | 49%        | 47%         | 2%        |
|      | Large (100+)          | 51%        | 43%         | 2%        |
|      | <b>All Industries</b> | <b>41%</b> | <b>51%</b>  | <b>5%</b> |

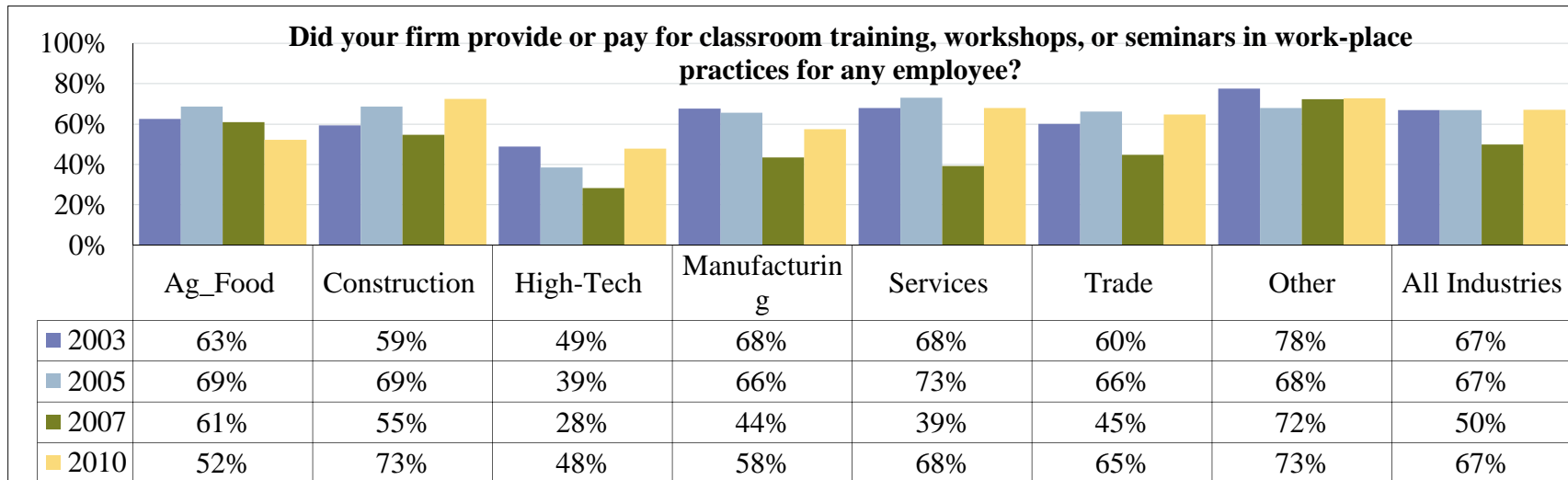
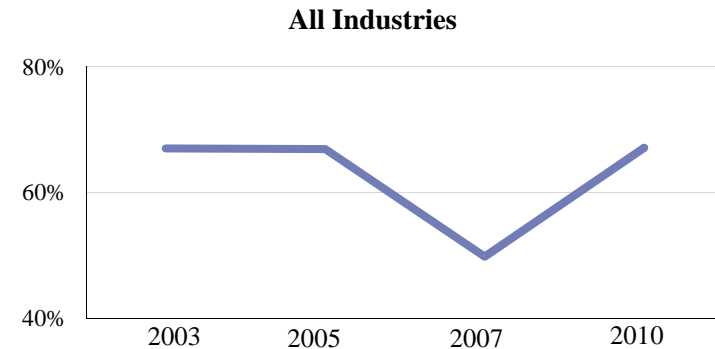
| 2010 |                | Increased  | Stayed Same | Decreased |
|------|----------------|------------|-------------|-----------|
|      | Small (5-19)   | 26%        | 69%         | 5%        |
|      | Medium (20-99) | 30%        | 63%         | 7%        |
|      | Large (100+)   | 28%        | 61%         | 9%        |
|      | <b>All</b>     | <b>27%</b> | <b>67%</b>  | <b>6%</b> |

Question 18

**In the last 12 months, did your firm provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in work-place practices for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 63%        | 69%        | 61%        | 52%        |
| Construction          | 59%        | 69%        | 55%        | 73%        |
| High-Tech             | 49%        | 39%        | 28%        | 48%        |
| Manufacturing         | 68%        | 66%        | 44%        | 58%        |
| Services              | 68%        | 73%        | 39%        | 68%        |
| Trade                 | 60%        | 66%        | 45%        | 65%        |
| Other                 | 78%        | 68%        | 72%        | 73%        |
| <b>All Industries</b> | <b>67%</b> | <b>67%</b> | <b>50%</b> | <b>67%</b> |

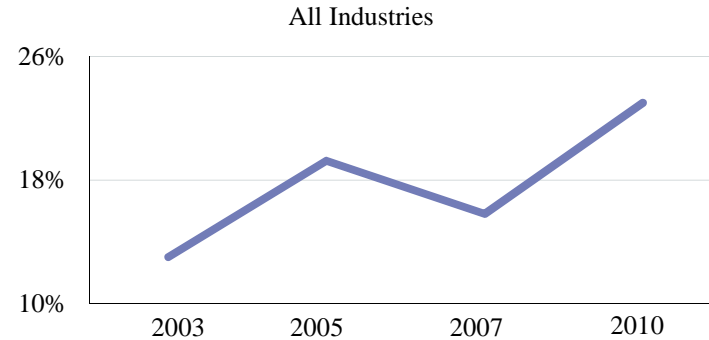


Question 19

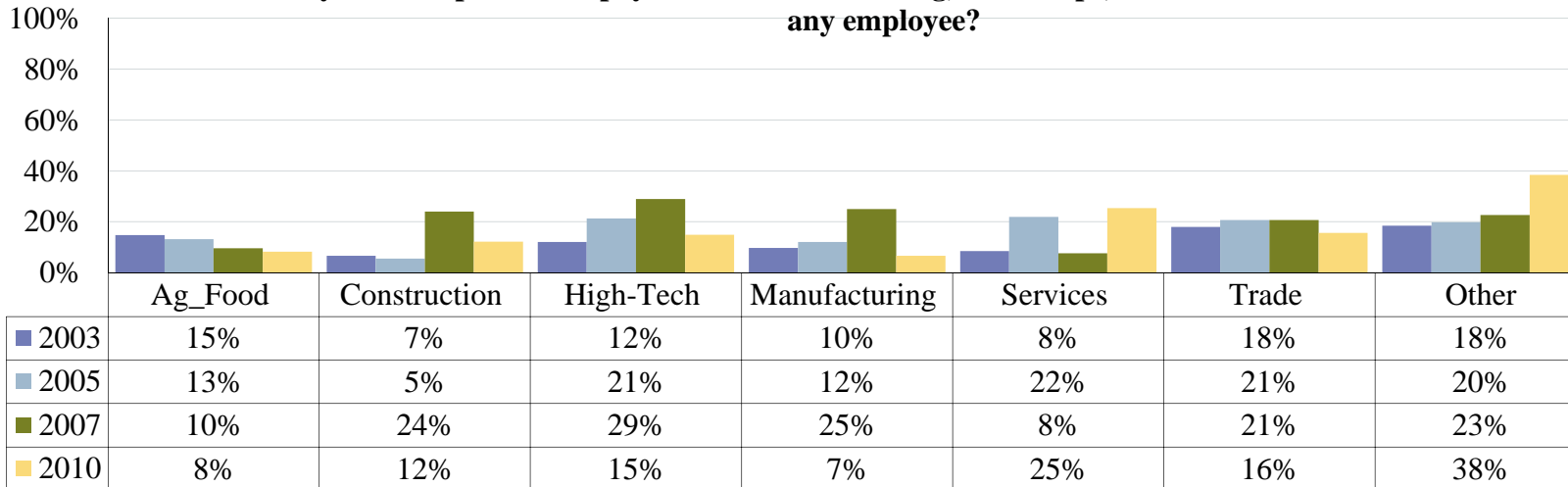
**In the past 12 months, did your firm/organization provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in basic skills for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 15%        | 13%        | 10%        | 8%         |
| Construction          | 7%         | 5%         | 24%        | 12%        |
| High-Tech             | 12%        | 21%        | 29%        | 15%        |
| Manufacturing         | 10%        | 12%        | 25%        | 7%         |
| Services              | 8%         | 22%        | 8%         | 25%        |
| Trade                 | 18%        | 21%        | 21%        | 16%        |
| Other                 | 18%        | 20%        | 23%        | 38%        |
| <b>All Industries</b> | <b>13%</b> | <b>19%</b> | <b>16%</b> | <b>23%</b> |



**Did your firm provide or pay for classroom training, workshops, or seminars in basic skills for any employee?**

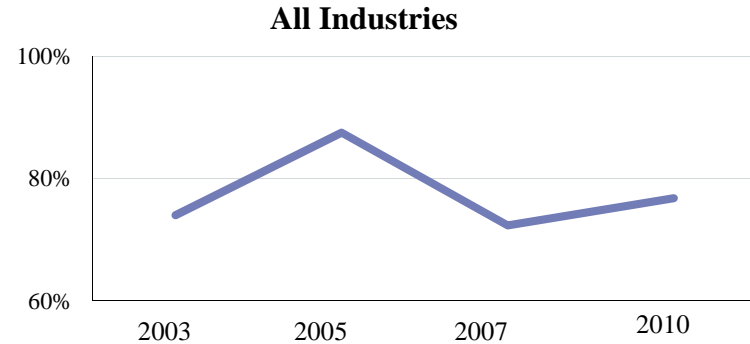


Question 20

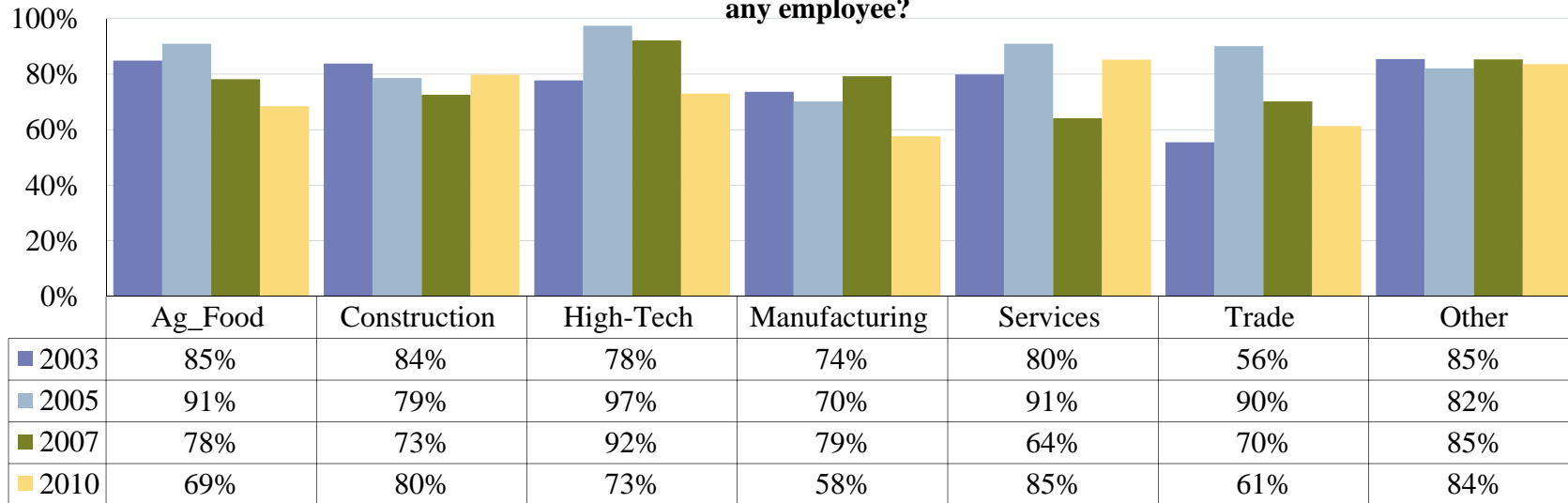
**In the past 12 months, did your firm/organization provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in job-specific skills for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 85%        | 91%        | 78%        | 69%        |
| Construction          | 84%        | 79%        | 73%        | 80%        |
| High-Tech             | 78%        | 97%        | 92%        | 73%        |
| Manufacturing         | 74%        | 70%        | 79%        | 58%        |
| Services              | 80%        | 91%        | 64%        | 85%        |
| Trade                 | 56%        | 90%        | 70%        | 61%        |
| Other                 | 85%        | 82%        | 85%        | 84%        |
| <b>All Industries</b> | <b>74%</b> | <b>88%</b> | <b>72%</b> | <b>77%</b> |



**Did your firm provide or pay for classroom training, workshops, or seminars in job-specific skills for any employee?**



Question 21

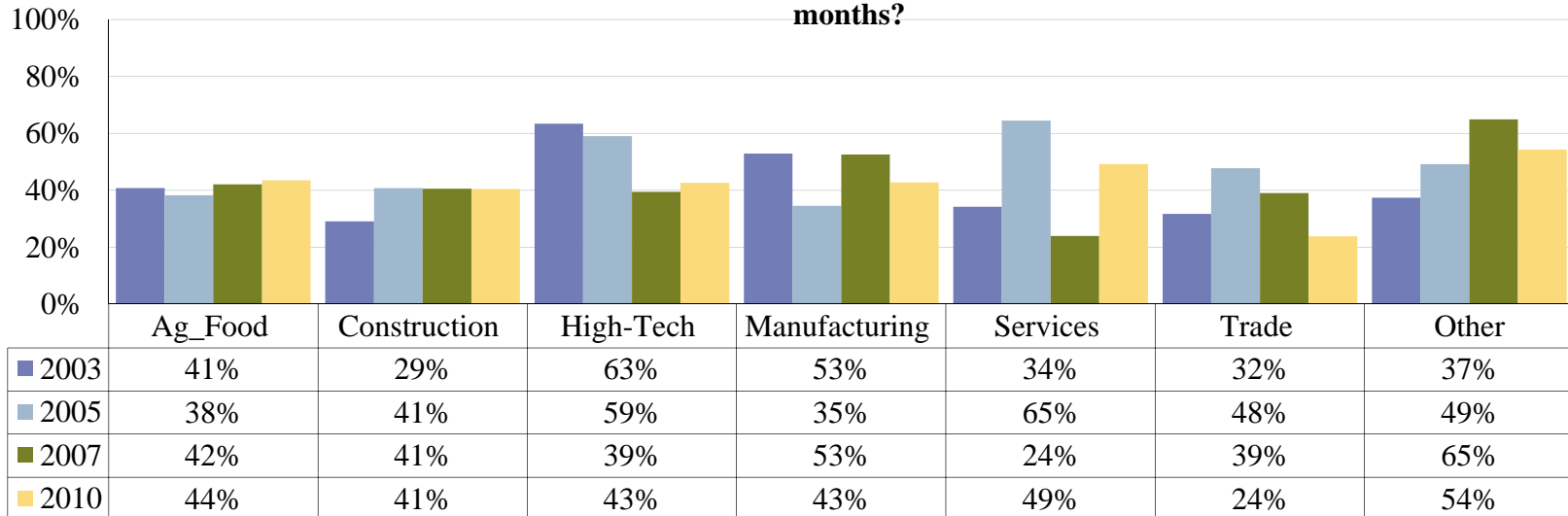
**Did your firm/organization have a tuition reimbursement program for any employee during the past 12 months?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 41%        | 38%        | 42%        | 44%        |
| Construction          | 29%        | 41%        | 41%        | 41%        |
| High-Tech             | 63%        | 59%        | 39%        | 43%        |
| Manufacturing         | 53%        | 35%        | 53%        | 43%        |
| Services              | 34%        | 65%        | 24%        | 49%        |
| Trade                 | 32%        | 48%        | 39%        | 24%        |
| Other                 | 37%        | 49%        | 65%        | 54%        |
| <b>All Industries</b> | <b>35%</b> | <b>50%</b> | <b>39%</b> | <b>44%</b> |



**Did your firm have a tuition reimbursement program for any employee during the past 12 months?**

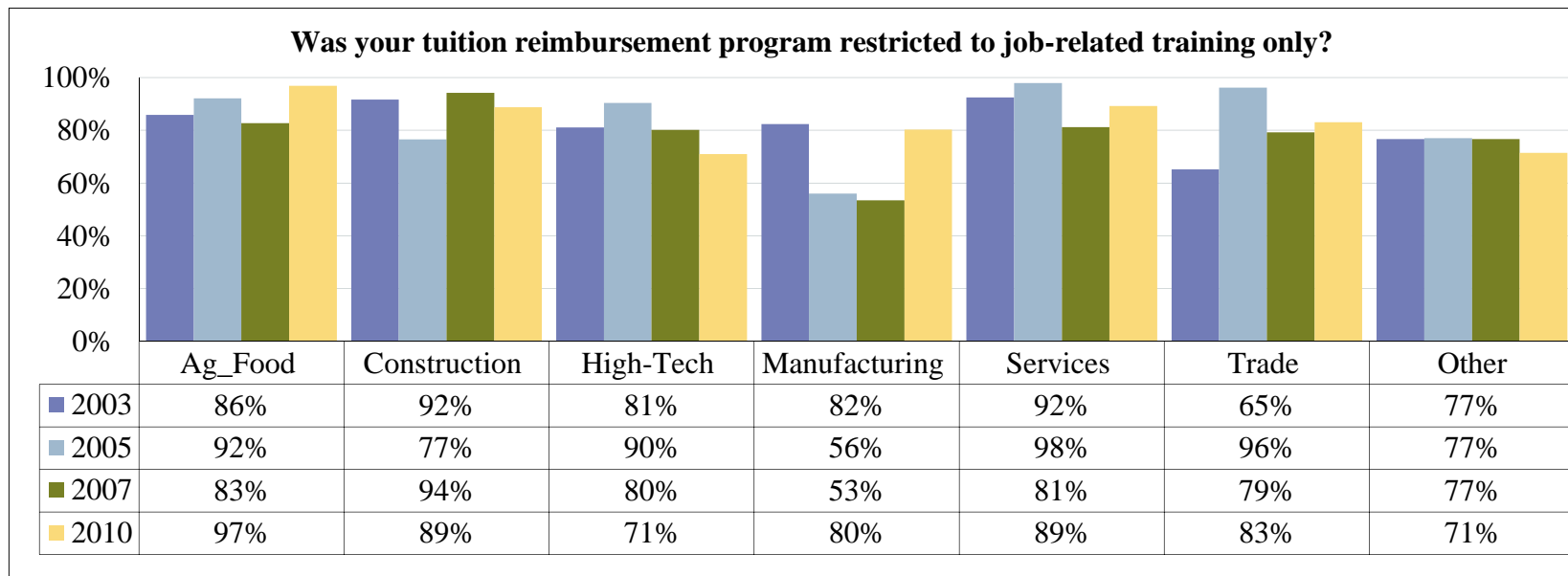
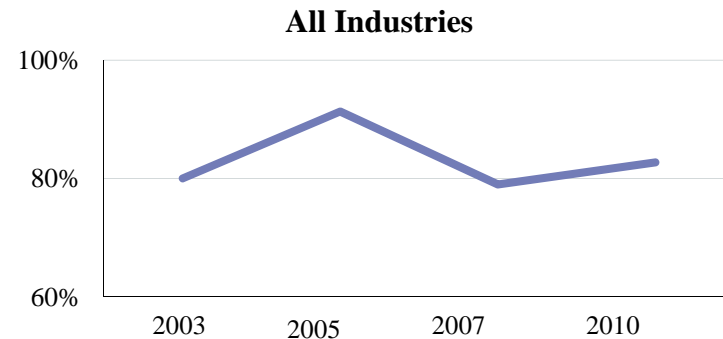


Question 22

**Was your tuition reimbursement program restricted to job-related training only?**

*Among those who have a tuition reimbursement program (Q21=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 86%        | 92%        | 83%        | 97%        |
| Construction          | 92%        | 77%        | 94%        | 89%        |
| High-Tech             | 81%        | 90%        | 80%        | 71%        |
| Manufacturing         | 82%        | 56%        | 53%        | 80%        |
| Services              | 92%        | 98%        | 81%        | 89%        |
| Trade                 | 65%        | 96%        | 79%        | 83%        |
| Other                 | 77%        | 77%        | 77%        | 71%        |
| <b>All Industries</b> | <b>80%</b> | <b>91%</b> | <b>79%</b> | <b>83%</b> |

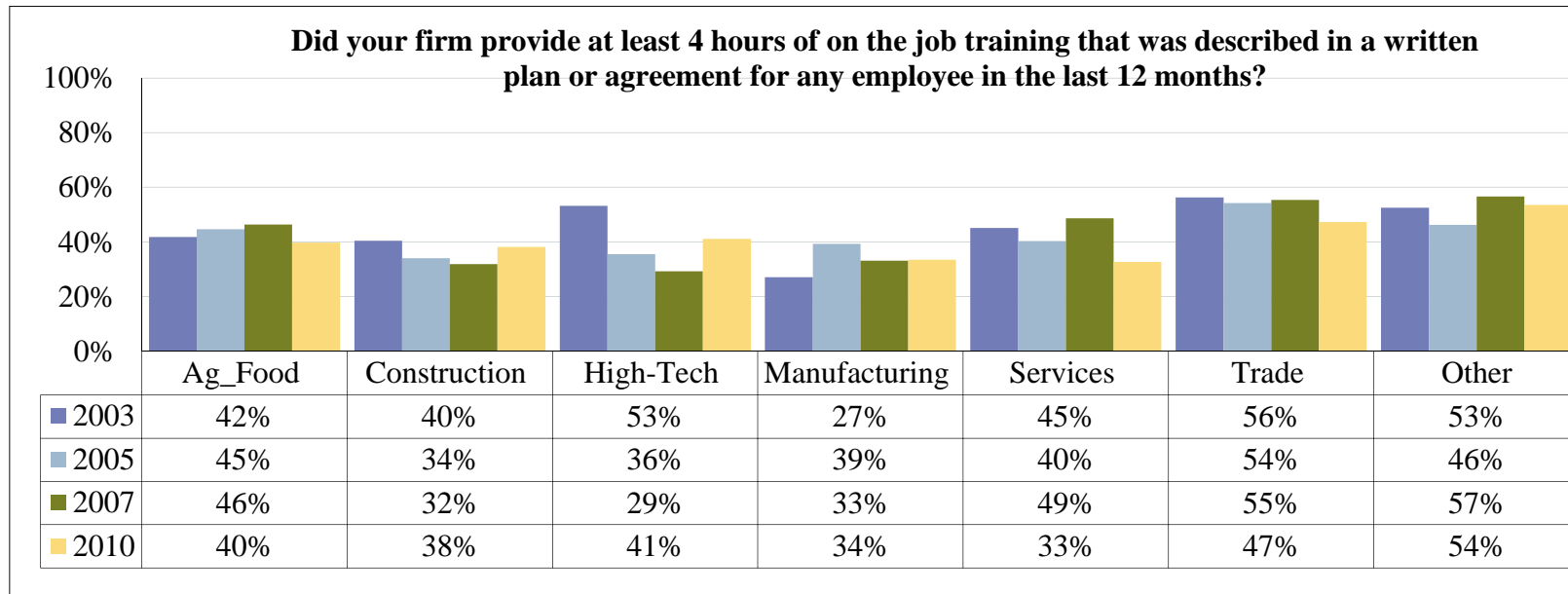
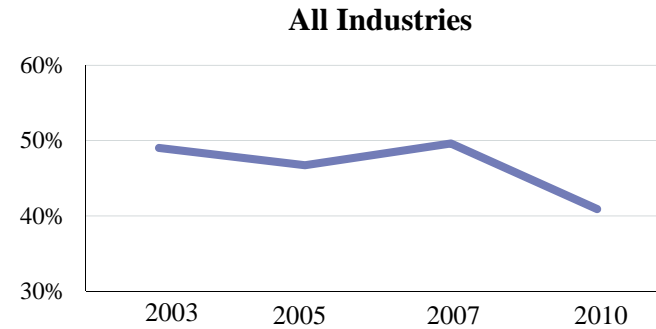




Question 23

**Did your firm/organization provide at least 4 hours of on the job training that was described in a written plan or agreement for any employee in the last 12 months?**

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 42%        | 45%        | 46%        | 40%        |
| Construction          | 40%        | 34%        | 32%        | 38%        |
| High-Tech             | 53%        | 36%        | 29%        | 41%        |
| Manufacturing         | 27%        | 39%        | 33%        | 34%        |
| Services              | 45%        | 40%        | 49%        | 33%        |
| Trade                 | 56%        | 54%        | 55%        | 47%        |
| Other                 | 53%        | 46%        | 57%        | 54%        |
| <b>All Industries</b> | <b>49%</b> | <b>47%</b> | <b>50%</b> | <b>41%</b> |



Question 24

**For each type of employee listed below, approximately what percentage received on-the-job training in the last 12 months?**

|   | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|---|-------------|-------------|-------------|-------------|
| Managerial and administrative occupations   | 43%         | 38%         | 28%         | 52%         |
| Professional occupations  | 33%         | 26%         | 16%         | 38%         |
| Technical and paraprofessional occupations  | 31%         | 25%         | 21%         | 36%         |
| Marketing and sales-related occupations   | 35%         | 33%         | 18%         | 34%         |
| Clerical and administrative support occupations                                     | 40%         | 37%         | 34%         | 41%         |
| Service occupations   | 40%         | 23%         | 20%         | 49%         |
| Production, construction, operation, maintenance, and material-handling occupations | 29%         | 32%         | 28%         | 35%         |
| Agricultural, forestry, fishing, and related occupations                            | 11%         | 6%          | 9%          | 5%          |

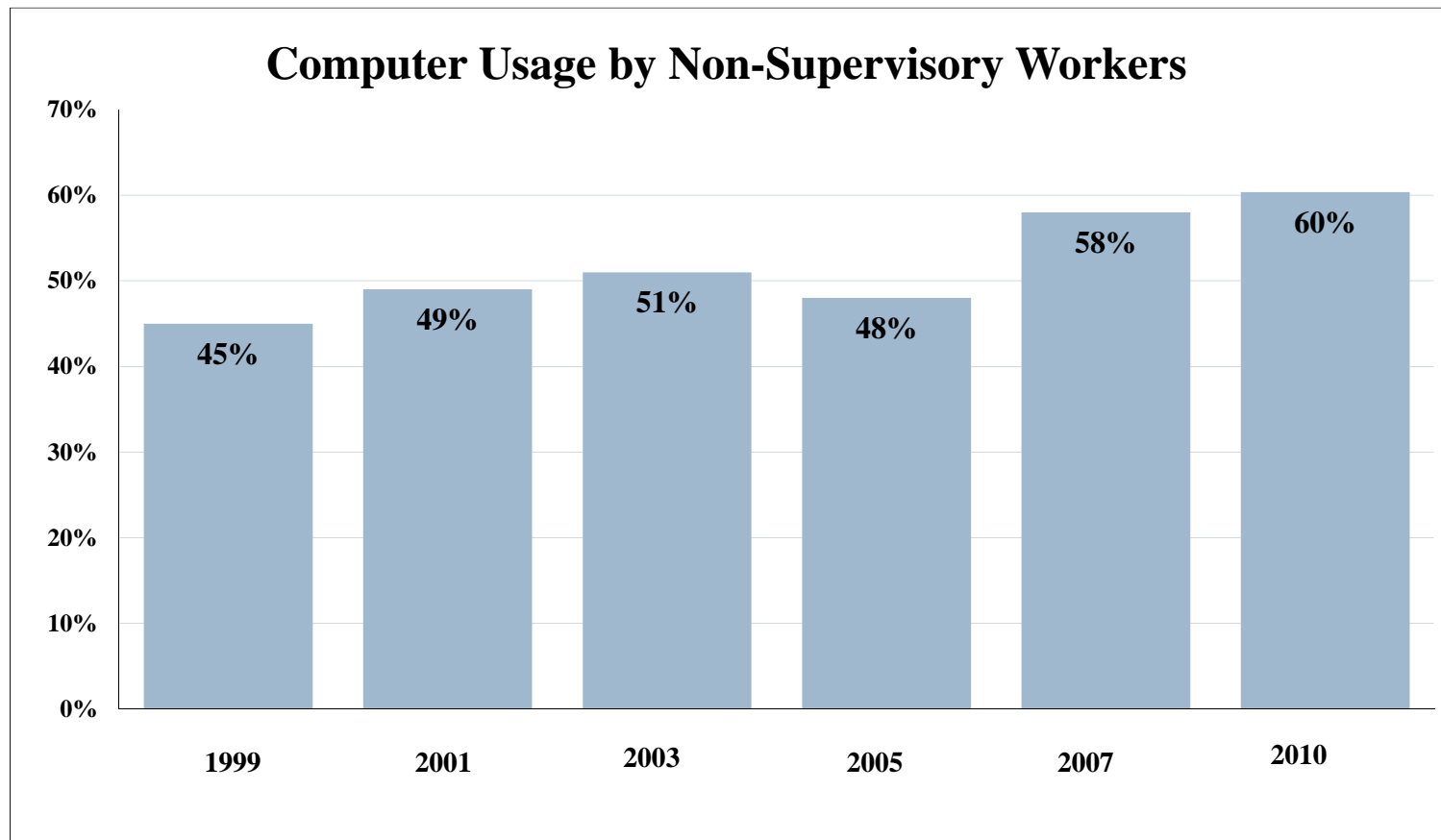
Question 25

**What percent of your firm's current employees are in jobs that require each of the educational levels listed below.**

|  | <b>2007</b> | <b>2010</b> |
|--|-------------|-------------|
| Neither a high school diploma or GED     | 21.0%       | 19.9%       |
| High school diploma or GED               | 37.8%       | 43.7%       |
| Some college course work                 | 11.2%       | 7.7%        |
| Vocational certificate                   | 5.8%        | 5.9%        |
| Vocational associate degree              | 2.3%        | 2.3%        |
| Academic associate degree (A.A. or A.S.) | 4.5%        | 3.4%        |
| Bachelor's degree (B.A. or B.S.)         | 12.4%       | 13.5%       |
| Master's degree (M.A. or M.S.)           | 2.9%        | 2.0%        |
| Doctoral or Professional degree          | 1.5%        | 1.4%        |

Question 26

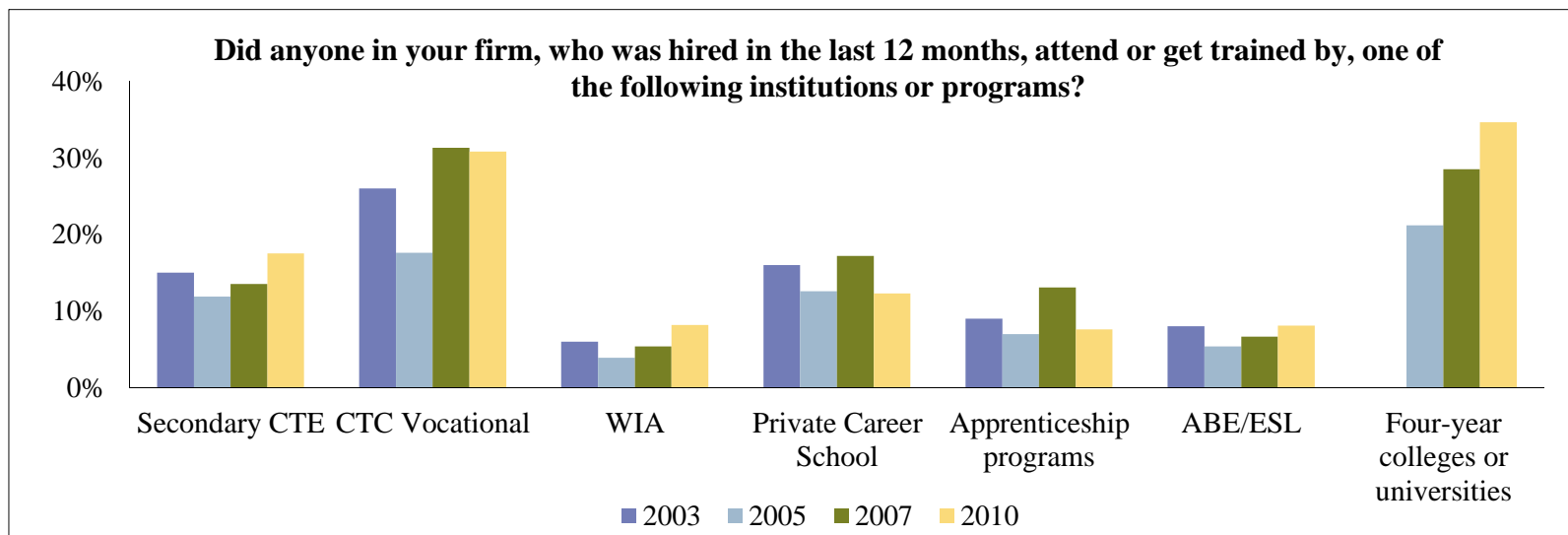
**What percentage of your non-supervisory employees use computers in their jobs?**



Question 27

**Did anyone in your firm, who was hired in the last 12 months, attend or get trained by, one of the following institutions or programs?**

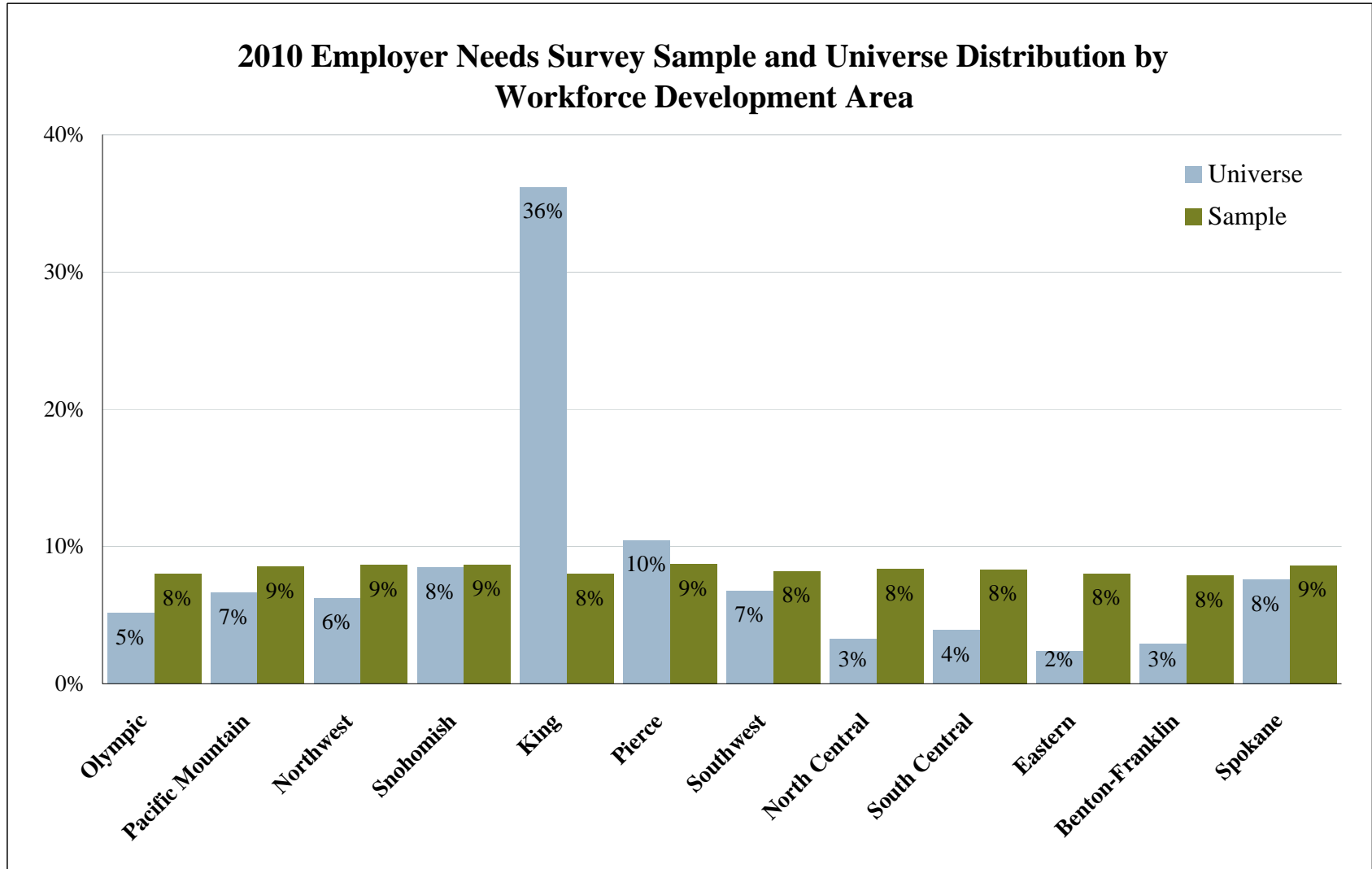
|                                    | 2003 | 2005 | 2007 | 2010 |
|------------------------------------|------|------|------|------|
| Secondary CTE                      | 15%  | 12%  | 14%  | 18%  |
| CTC Vocational                     | 26%  | 18%  | 31%  | 31%  |
| WIA                                | 6%   | 4%   | 5%   | 8%   |
| Private Career School              | 16%  | 13%  | 17%  | 12%  |
| Apprenticeship programs            | 9%   | 7%   | 13%  | 8%   |
| ABE/ESL                            | 8%   | 5%   | 7%   | 8%   |
| Four-year colleges or universities | N/A  | 21%  | 29%  | 35%  |

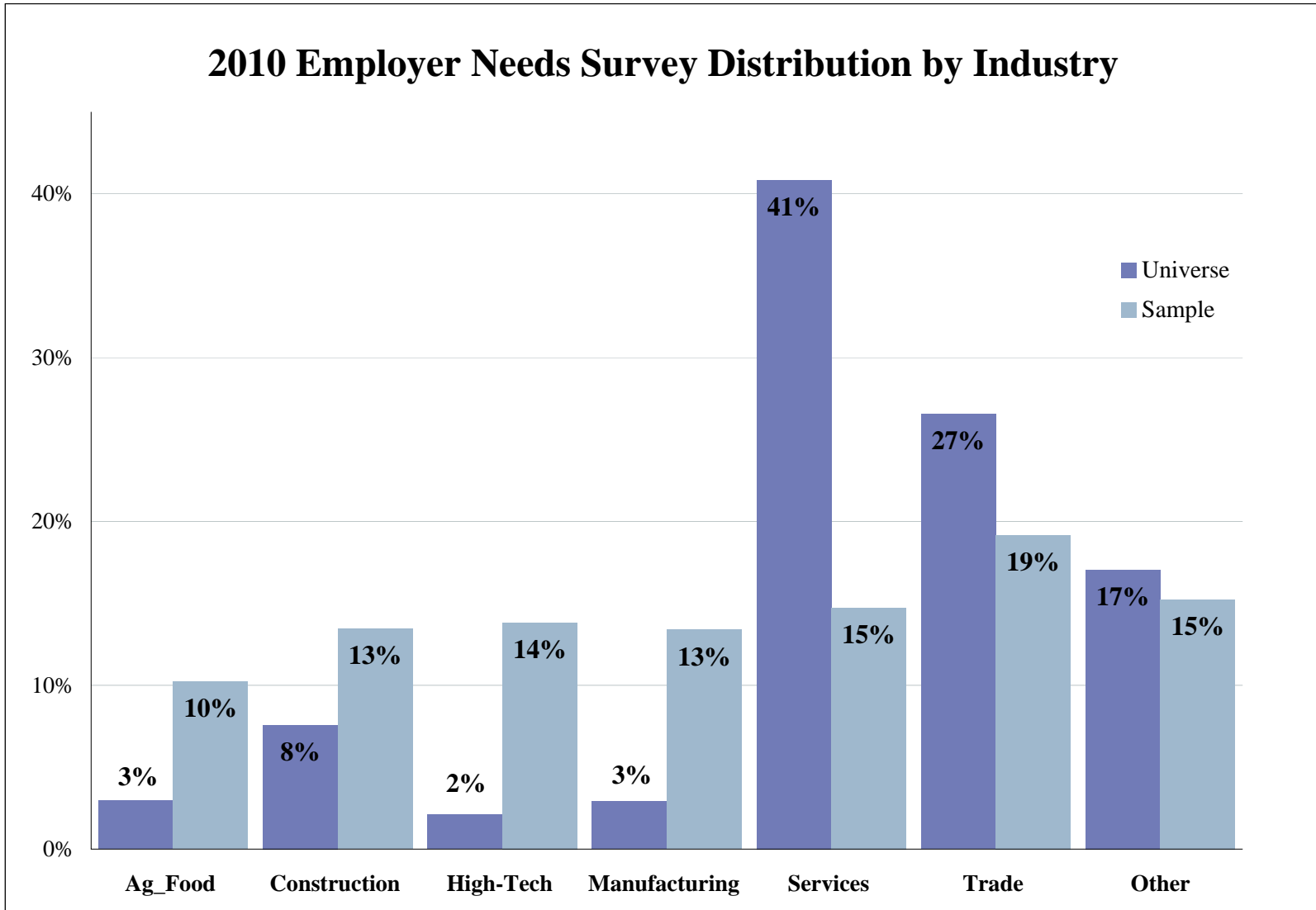


**Definition of Industry Sectors Used in the Survey**

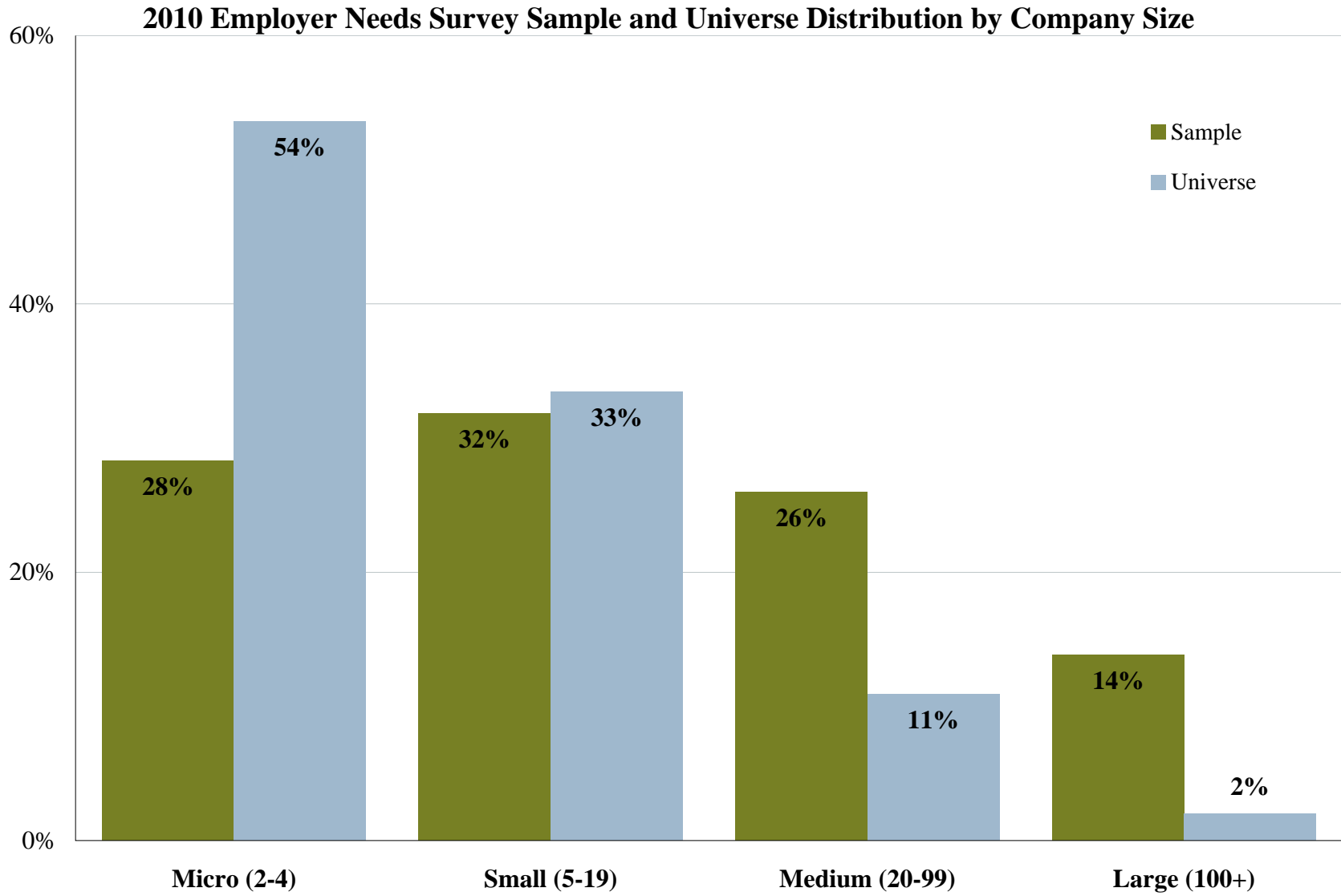
| <b>SIC</b> | <b>INDUSTRY NAME</b> | <b>MAJOR SUB GROUPS (at 2 Digit SIC)</b> | <b>SIC</b> | <b>MAJOR SUB GROUPS (at 2 Digit SIC)</b> |  |
|------------|----------------------|--|------------|--|--|
| 01         | Agriculture-Food     | AGRICULTURAL PRODUCTION CROPS            | 44         | Other                                    | WATER TRANSPORTATION                   |
| 02         | Agriculture-Food     | AGRICULTURAL PRODUCTION LIVESTOCK        | 45         | Other                                    | TRANSPORTATION BY AIR                  |
| 07         | Agriculture-Food     | AGRICULTURAL SERVICES                    | 46         | Other                                    | PIPELINES, EXCEPT NATURAL GAS          |
| 08         | Agriculture-Food     | FORESTRY                                 | 47         | Other                                    | TRANSPORTATION SERVICES                |
| 09         | Agriculture-Food     | FISHING, HUNTING AND TRAPPING            | 49         | Other                                    | ELECTRIC, GAS, AND SANITARY SERVICES   |
| 20         | Agriculture-Food     | FOOD AND KINDRED PRODUCTS                | 60         | Other                                    | DEPOSITORY INSTITUTIONS                |
| 10         | Construction         | METAL MINING                             | 61         | Other                                    | NONDEPOSITORY INSTITUTIONS             |
| 12         | Construction         | COAL MINING                              | 62         | Other                                    | SECURITY AND COMMODITY BROKERS         |
| 13         | Construction         | OIL AND GAS EXTRACTION                   | 63         | Other                                    | INSURANCE CARRIERS                     |
| 14         | Construction         | NONMETALLIC MINERALS, EXCEPT FUELS       | 64         | Other                                    | INSURANCE AGENTS, BROKERS, & SERVICE   |
| 16         | Construction         | HEAVY CONSTRUCTION, EX. BUILDING         | 65         | Other                                    | REAL ESTATE                            |
| 17         | Construction         | SPECIAL TRADE CONTRACTORS                | 67         | Other                                    | HOLDING AND OTHER INVESTMENT OFFICES   |
| 28         | High Tech            | CHEMICALS AND ALLIED PRODUCTS            | 70         | Services                                 | HOTELS AND OTHER LODGING PLACES        |
| 35         | High Tech            | INDUSTRIAL MACHINERY AND EQUIPMENT       | 72         | Services                                 | PERSONAL SERVICES                      |
| 36         | High Tech            | ELECTRONIC AND OTHER ELECTRIC EQUIPMENT  | 73         | Services                                 | BUSINESS SERVICES                      |
| 38         | High Tech            | INSTRUMENTS AND RELATED PRODUCTS         | 75         | Services                                 | AUTO REPAIR SERVICES AND PARKING       |
| 48         | High Tech            | COMMUNICATION                            | 76         | Services                                 | MISCELLANEOUS REPAIR SERVICES          |
| 73         | High Tech            | BUSINESS SERVICES                        | 78         | Services                                 | MOTION PICTURES                        |
| 87         | High Tech            | ENGINEERING AND MANAGEMENT SERVICES      | 79         | Services                                 | AMUSEMENT AND RECREATION SERVICES      |
| 22         | Manufacturing        | TEXTILE MILL PRODUCTS                    | 80         | Services                                 | HEALTH SERVICES                        |
| 23         | Manufacturing        | APPAREL AND OTHER TEXTILE PRODUCTS       | 81         | Services                                 | LEGAL SERVICES                         |
| 24         | Manufacturing        | LUMBER AND WOOD PRODUCTS                 | 82         | Services                                 | EDUCATIONAL SERVICES                   |
| 25         | Manufacturing        | FURNITURE AND FIXTURES                   | 83         | Services                                 | SOCIAL SERVICES                        |
| 26         | Manufacturing        | PAPER AND ALLIED PRODUCTS                | 84         | Services                                 | MUSEUMS, BOTANICAL, ZOOLOGICAL GARDENS |
| 27         | Manufacturing        | PRINTING AND PUBLISHING                  | 86         | Services                                 | MEMBERSHIP ORGANIZATIONS               |
| 28         | Manufacturing        | CHEMICALS AND ALLIED PRODUCTS            | 87         | Services                                 | ENGINEERING AND MANAGEMENT SERVICES    |
| 29         | Manufacturing        | PETROLEUM AND COAL PRODUCTS              | 89         | Services                                 | SERVICES, NEC                          |
| 30         | Manufacturing        | RUBBER AND MISC PLASTICS PRODUCTS        | 50         | Trade                                    | WHOLESALE TRADE DURABLE GOODS          |
| 31         | Manufacturing        | LEATHER AND LEATHER PRODUCTS             | 51         | Trade                                    | WHOLESALE TRADE NONDURABLE GOODS       |
| 32         | Manufacturing        | STONE, CLAY, AND GLASS PRODUCTS          | 52         | Trade                                    | BUILDING MATERIALS & GARDEN SUPPLIES   |
| 33         | Manufacturing        | PRIMARY METAL INDUSTRIES                 | 53         | Trade                                    | GENERAL MERCHANDISE STORES             |
| 34         | Manufacturing        | FABRICATED METAL PRODUCTS                | 54         | Trade                                    | FOOD STORES                            |
| 35         | Manufacturing        | INDUSTRIAL MACHINERY AND EQUIPMENT       | 55         | Trade                                    | AUTO DEALERS AND SERVICE STATIONS      |
| 37         | Manufacturing        | TRANSPORTATION EQUIPMENT                 | 56         | Trade                                    | APPAREL AND ACCESSORY STORES           |
| 39         | Manufacturing        | MISCELLANEOUS MANUFACTURING INDUSTRIES   | 57         | Trade                                    | FURNITURE AND HOME FURNISHING STORES   |
| 41         | Other                | LOCAL AND INTERURBAN PASSENGER TRANSIT   | 58         | Trade                                    | EATING AND DRINKING PLACES             |
| 42         | Other                | TRUCKING AND WAREHOUSING                 | 59         | Trade                                    | MISCELLANEOUS RETAIL                   |

Note: Boeing was grouped in Manufacturing rather than Hi-tech.









**Final Sample Size**

2010 Washington State Employers Needs and Practices Survey

| <b>WDA</b>       | <b>Completed Surveys</b> | <b>Percent</b> |
|------------------|--------------------------|----------------|
| Olympic          | 240                      | 8%             |
| Pacific Mountain | 256                      | 9%             |
| Northwest        | 260                      | 9%             |
| Snohomish        | 261                      | 9%             |
| King             | 240                      | 8%             |
| Pierce           | 262                      | 9%             |
| Southwest        | 246                      | 8%             |
| North Central    | 251                      | 8%             |
| South Central    | 250                      | 8%             |
| Eastern          | 241                      | 8%             |
| Benton-Franklin  | 237                      | 8%             |
| Spokane          | 259                      | 9%             |
| <b>Statewide</b> | <b>3003</b>              | <b>100%</b>    |

## Response Rate

| <b>Survey</b> | <b>Response Rate</b> | <b>Incidence Rate</b> |
|---------------|----------------------|-----------------------|
| Long-Form     | 72.20%               | 91.60%                |
| Short-Form    | 66.70%               | 70.40%                |

There are a total of 126 question on the long form of the survey and a total of 71 questions on the short form. In 2007 the total number of questions on the survey was 125.

## Question 1

**Has your firm/organization hired any new employees in the last 12 months?**

| WDA              | Percent Hired | Approximate Number of Firms Hired | Number of Firms in WDA |
|------------------|---------------|-----------------------------------|------------------------|
| Olympic          | 51%           | 4,600                             | 9,050                  |
| Pacific Mountain | 69%           | 8,000                             | 11,650                 |
| Northwest        | 56%           | 6,100                             | 11,000                 |
| Snohomish        | 72%           | 10,700                            | 14,900                 |
| King             | 62%           | 39,400                            | 63,600                 |
| Pierce           | 58%           | 10,700                            | 18,400                 |
| Southwest        | 66%           | 8,000                             | 12,000                 |
| North Central    | 60%           | 3,400                             | 5,700                  |
| South Central    | 54%           | 3,700                             | 6,900                  |
| Eastern          | 57%           | 2,300                             | 4,100                  |
| Benton-Franklin  | 69%           | 3,600                             | 5,200                  |
| Spokane          | 62%           | 8,300                             | 13,350                 |
| <b>Statewide</b> | <b>62%</b>    | <b>108,800</b>                    | <b>175,850</b>         |

|                      | Percent Hired | Approximate Number of Firms Hired | Number of Firms in Industry |
|----------------------|---------------|-----------------------------------|-----------------------------|
| <b>Ag Food</b>       | 52%           | 2,730                             | 5,220                       |
| <b>Construction</b>  | 48%           | 6,370                             | 13,300                      |
| <b>High-Tech</b>     | 57%           | 2,120                             | 3,690                       |
| <b>Manufacturing</b> | 51%           | 2,640                             | 5,140                       |
| <b>Services</b>      | 65%           | 46,320                            | 71,820                      |
| <b>Trade</b>         | 67%           | 31,040                            | 46,680                      |
| <b>Other</b>         | 59%           | 17,680                            | 29,960                      |

|               | Percent Hired | Approximate Number of Firms Hired | Number of Firms in Industry |
|---------------|---------------|-----------------------------------|-----------------------------|
| <b>Micro</b>  | 49%           | 46,038                            | 94,340                      |
| <b>Small</b>  | 72%           | 42,167                            | 58,810                      |
| <b>Medium</b> | 92%           | 17,654                            | 19,210                      |
| <b>Large</b>  | 94%           | 3,266                             | 3,460                       |

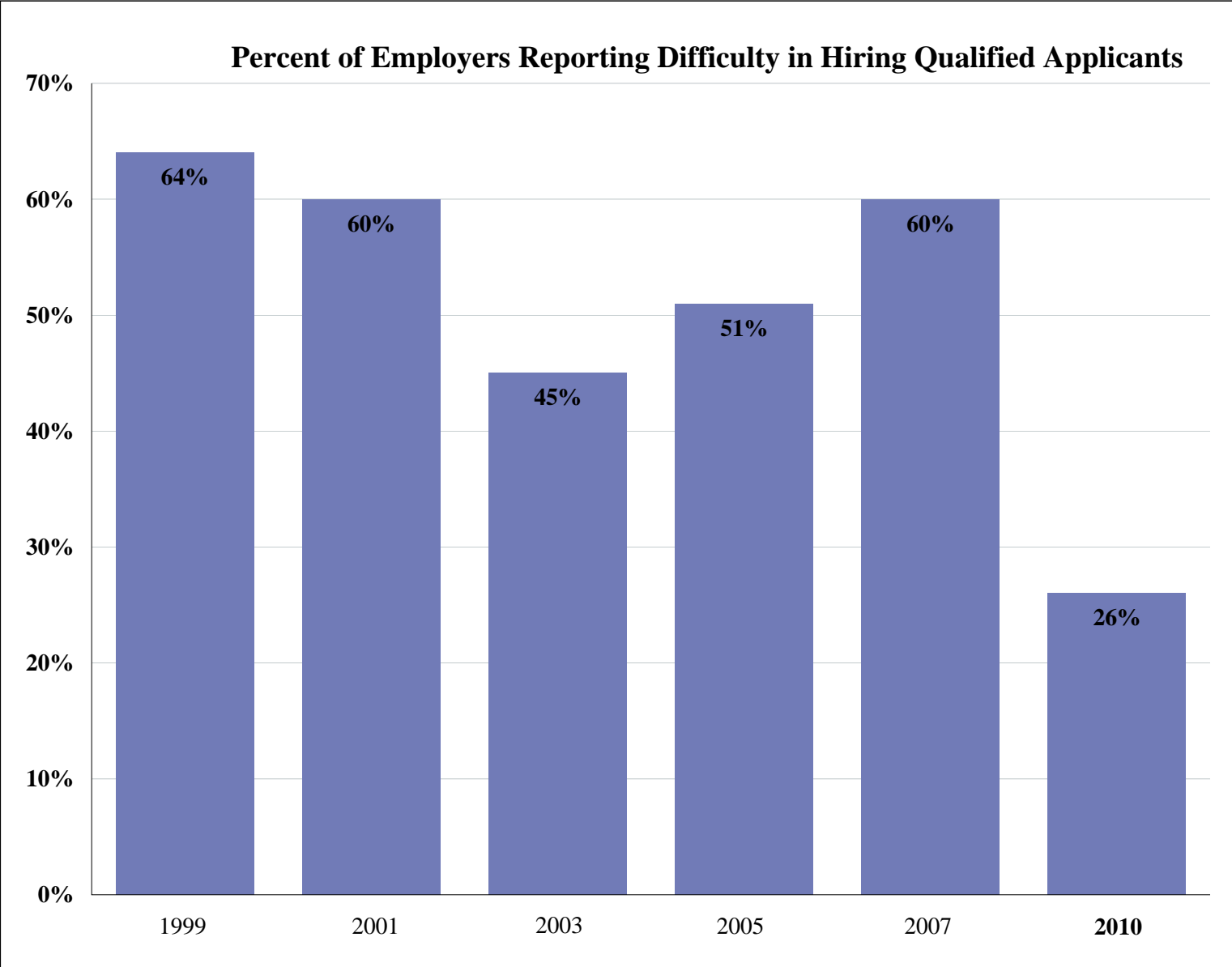
Question 2

**In the last 12 months, did your firm/organization have any difficulty finding qualified applicants for any jobs you were trying to fill?**

| WDA              | Employers with Difficulty (Among Those Attempting to Hire) |            | All Employers  |            |
|------------------|--|------------|----------------|------------|
|                  |  |            | N              | Percent    |
| Olympic          | 1,500  | 33%        | 9,050          | 21%        |
| Pacific Mountain | 1,930  | 24%        | 11,650         | 18%        |
| Northwest        | 1,730  | 28%        | 11,000         | 18%        |
| Snohomish        | 3,810  | 36%        | 14,900         | 26%        |
| King             | 10,520   | 27%        | 63,600         | 17%        |
| Pierce           | 1,950  | 18%        | 18,400         | 13%        |
| Southwest        | 1,020  | 13%        | 12,000         | 10%        |
| North Central    | 1,150  | 34%        | 5,700          | 23%        |
| South Central    | 1,170  | 32%        | 6,900          | 18%        |
| Eastern          | 600  | 26%        | 4,100          | 17%        |
| Benton-Franklin  | 1,320  | 37%        | 5,200          | 27%        |
| Spokane          | 1,390  | 17%        | 13,350         | 13%        |
| <b>Statewide</b> | <b>28,090</b>  | <b>26%</b> | <b>175,850</b> | <b>17%</b> |

| Industry         | Employers with Difficulty (Among Those Attempting to Hire) |            | All Employers  |            |
|------------------|--|------------|----------------|------------|
|                  |  |            | N              | Percent    |
| Ag_Food          | 740  | 27%        | 5,220          | 17%        |
| Construction     | 850  | 13%        | 13,300         | 9%         |
| High-Tech        | 500  | 24%        | 3,690          | 17%        |
| Manufacturing    | 770  | 29%        | 5,140          | 16%        |
| Services         | 12,780   | 28%        | 71,820         | 19%        |
| Trade            | 5,990  | 19%        | 46,680         | 13%        |
| Other            | 6,470  | 37%        | 29,960         | 24%        |
| <b>Statewide</b> | <b>28,100</b>  | <b>26%</b> | <b>175,810</b> | <b>17%</b> |

| Size             | Employers with Difficulty (Among Those Attempting to Hire) |            | All Employers  |            |
|------------------|--|------------|----------------|------------|
|                  |  |            | N              | Percent    |
| Micro            | 11,790   | 26%        | 94,340         | 14%        |
| Small            | 10,210   | 24%        | 58,810         | 19%        |
| Medium           | 5,380  | 31%        | 19,210         | 28%        |
| Large            | 860  | 26%        | 3,460          | 25%        |
| <b>Statewide</b> | <b>28,240</b>  | <b>26%</b> | <b>175,820</b> | <b>17%</b> |



Question 3

**How did your firm respond to the difficulty finding qualified applicants?**

|  | <b>Employers With Difficulty (Among Those Attempting to Hire)</b> |     | <b>Percent of All Employers</b> |
|--|---|-----|---------------------------------|
| Did not fill the job opening           | 10,900  | 39% | 6%                              |
| Hired a less qualified applicant       | 14,100  | 50% | 9%                              |
| Increased overtime for current workers | 13,500  | 48% | 8%                              |
| Increased recruiting efforts           | 19,100  | 68% | 12%                             |
| Increased wages to attract applicants  | 6,500   | 23% | 4%                              |
| Outsourced the work/service            | 6,200   | 22% | 4%                              |

Question 4

**Please indicate the occupation for which your firm/organization had the most difficulty finding qualified applicants in the last 12 months.**

*Among those with difficulty hiring*

|  |     |
|--|-----|
| Service Occupations  | 21% |
| Production, Construction, Operation, Maintenance and Material-handling | 19% |
| Technical and Paraprofessional Occupations                             | 16% |
| Clerical and Administrative Support Occupations                        | 13% |
| Professional Occupations   | 10% |
| Marketing and Sales  | 9%  |
| Managerial and Administrative Occupations                              | 8%  |
| Agricultural, Forestry, Fishing and Related Occupations                | 3%  |

Respondents could not find qualified applicants, or applicants with the specific skills needed for the job. Qualifications specifically mentioned were heavy equipment handling, medical billing, technology and a CDL.

Respondents had difficulty finding people in their geographic area; mainly in rural areas. Applicants had no desire to work, a bad attitude or work ethic. Applicants couldn't pass a background check or a drug test that was required for a position.

A limited number of respondents had to search out of state to find qualified applicants.

Question 5

**How much difficulty has your firm/organization experienced in the last 12 months finding qualified applicants with the following education levels?**

|  | Employers With Difficulty (Among Those Attempting to Hire) |     | Percent of All Employers |
|--|--|-----|--------------------------|
| Neither a high school diploma or GED     | 3,120  | 11% | 1.8%                     |
| High school diploma or GED               | 6,940  | 25% | 3.9%                     |
| Some college course work                 | 10,200   | 36% | 5.8%                     |
| Vocational certificate                   | 11,400   | 41% | 6.5%                     |
| Vocational associate degree              | 7,360  | 26% | 4.2%                     |
| Academic associate degree (A.A. or A.S.) | 6,940  | 25% | 3.9%                     |
| Bachelor's degree (B.A. or B.S.)         | 6,290  | 22% | 3.6%                     |
| Master's degree (M.A. or M.S.)           | 6,120  | 22% | 3.5%                     |
| Doctoral or Professional degree          | 4,240  | 15% | 2.4%                     |



Question 6

**How much difficulty has your firm/organization had finding employees with the following skills?**

|   | <b>Employers With Difficulty (Among Those Attempting to Hire)</b> |     | <b>Percent of All Employers</b> |
|---|---|-----|---------------------------------|
| Occupation specific skills                | 23,960  | 85% | 14%                             |
| Communication skills                      | 21,210  | 76% | 12%                             |
| Ability to adapt to changes in duties and | 20,980  | 75% | 12%                             |
| Problem solving or critical thinking      | 19,490  | 69% | 11%                             |
| Positive work habits and attitudes        | 19,190  | 68% | 11%                             |
| Team work skills                          | 17,130  | 61% | 10%                             |
| Ability to accept supervision             | 16,180  | 58% | 9%                              |
| Computer skills                           | 11,570  | 41% | 7%                              |
| Writing skills                            | 10,200  | 36% | 6%                              |
| Math skills                               | 10,200  | 36% | 6%                              |
| English as a Second Language              | 10,140  | 36% | 6%                              |
| Reading skills                            | 5,670   | 20% | 3%                              |

Question 7

**Which of the following has resulted from your firm's difficulty finding qualified applicants?**

|   | <b>Employers With Difficulty (Among Those Attempting to Hire)</b> |     | <b>Percent of All Employers</b> |
|---|---|-----|---------------------------------|
| Lowered overall productivity                          | 15,340  | 55% | 9%                              |
| Reduced product or service quality                    | 11,600  | 41% | 7%                              |
| Reduced production output or sales                    | 13,010  | 46% | 7%                              |
| Prevented firm from expanding its facilities          | 10,420  | 37% | 6%                              |
| Prevented firm from developing new products/services  | 8,370   | 30% | 5%                              |
| Caused firm to move some operations out of Washington | 2,610   | 9%  | 1%                              |

Question 8

How much difficulty has your firm/organization experienced with entry-level workers demonstrating the following skills?

|  | Employers With Difficulty (Among Those Attempting to Hire) |     | Percent of All Employers |
|--|--|-----|--------------------------|
| <b>Speaks so others can understand</b>               | 7,300  | 26% | 4%                       |
| <b>Listen actively</b>                               | 10,280   | 37% | 6%                       |
| <b>Read with understanding</b>                       | 9,690  | 35% | 6%                       |
| <b>Observe critically</b>                            | 10,670   | 38% | 6%                       |
| <b>Cooperate with others</b>                         | 10,980   | 39% | 6%                       |
| <b>Resolve conflict and negotiate</b>                | 11,660   | 42% | 7%                       |
| <b>Use math to solve problems and communicate</b>    | 7,220  | 26% | 4%                       |
| <b>Solve problems and make decisions</b>             | 13,370   | 48% | 8%                       |
| <b>Take responsibility for learning</b>              | 13,370   | 48% | 8%                       |
| <b>Use information and communications technology</b> | 11,150   | 40% | 6%                       |

Question 9

**How will your firm's/organization's need for employees with each of the types of education listed below change in the next five years?**

|   | Increase | Stay About the Same | Decrease | Not Needed |
|---|----------|---------------------|----------|------------|
| <b>Neither a high school diploma or GED</b>     | 7%       | 43%                 | 5%       | 45%        |
| <b>High school diploma or GED</b>               | 12%      | 63%                 | 1%       | 22%        |
| <b>Some college course work</b>                 | 19%      | 55%                 | 1%       | 24%        |
| <b>Vocational certificate</b>                   | 19%      | 48%                 | 1%       | 32%        |
| <b>Vocational associate degree</b>              | 15%      | 47%                 | 1%       | 37%        |
| <b>Academic associate degree (A.A. or A.S.)</b> | 16%      | 45%                 | 1%       | 37%        |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 17%      | 38%                 | 2%       | 42%        |
| <b>Master's degree (M.A. or M.S.)</b>           | 6%       | 30%                 | 2%       | 60%        |
| <b>Doctoral or Professional degree</b>          | 6%       | 29%                 | 2%       | 62%        |

Question 9 by Education Level

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Neither a high school diploma or GED</b> |            |                     |           |            |
|---|------------|---------------------|-----------|------------|
|   | Increase   | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                                | <b>7%</b>  | <b>43%</b>          | <b>5%</b> | <b>45%</b> |
| Micro                                       | 6%         | 40%                 | 4%        | 51%        |
| Small                                       | 8%         | 46%                 | 6%        | 39%        |
| Medium                                      | 8%         | 47%                 | 2%        | 36%        |
| Large                                       | 6%         | 60%                 | 6%        | 30%        |
| Ag_Food                                     | 7%         | 49%                 | 3%        | 41%        |
| Construction                                | 5%         | 57%                 | 8%        | 30%        |
| High-Tech                                   | 9%         | 36%                 | 3%        | 51%        |
| Manufacturing                               | 11%        | 50%                 | 4%        | 36%        |
| Services                                    | 7%         | 53%                 | 7%        | 33%        |
| Trade                                       | 7%         | 53%                 | 7%        | 33%        |
| Other                                       | 5%         | 36%                 | 6%        | 53%        |
| <b>High school diploma or GED</b>           |            |                     |           |            |
|   | Increase   | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                                | <b>12%</b> | <b>63%</b>          | <b>1%</b> | <b>22%</b> |
| Micro                                       | 10%        | 56%                 | 1%        | 33%        |
| Small                                       | 14%        | 74%                 | 1%        | 10%        |
| Medium                                      | 20%        | 64%                 | 2%        | 5%         |
| Large                                       | 11%        | 80%                 | 2%        | 6%         |
| Ag_Food                                     | 8%         | 67%                 | 2%        | 23%        |
| Construction                                | 17%        | 68%                 | 0%        | 14%        |
| High-Tech                                   | 18%        | 50%                 | 1%        | 31%        |
| Manufacturing                               | 18%        | 61%                 | 4%        | 16%        |
| Services                                    | 9%         | 57%                 | 0%        | 31%        |
| Trade                                       | 14%        | 73%                 | 1%        | 13%        |
| Other                                       | 16%        | 63%                 | 2%        | 18%        |

## Question 9 by Education Level (continued)

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Some college course work</b> |            |                     |           |            |
|---------------------------------|------------|---------------------|-----------|------------|
|                                 | Increase   | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                    | <b>19%</b> | <b>55%</b>          | <b>1%</b> | <b>24%</b> |
| Micro                           | 16%        | 52%                 | 1%        | 32%        |
| Small                           | 23%        | 59%                 | 1%        | 16%        |
| Medium                          | 20%        | 58%                 | 2%        | 13%        |
| Large                           | 19%        | 68%                 | 1%        | 13%        |
| Ag_Food                         | 13%        | 51%                 | 0%        | 36%        |
| Construction                    | 23%        | 48%                 | 1%        | 28%        |
| High-Tech                       | 24%        | 48%                 | 2%        | 26%        |
| Manufacturing                   | 25%        | 50%                 | 2%        | 22%        |
| Services                        | 16%        | 56%                 | 1%        | 26%        |
| Trade                           | 17%        | 58%                 | 1%        | 23%        |
| Other                           | 26%        | 55%                 | 0%        | 19%        |

| <b>Vocational certificate</b> |            |                     |           |            |
|-------------------------------|------------|---------------------|-----------|------------|
|                               | Increase   | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                  | <b>19%</b> | <b>48%</b>          | <b>1%</b> | <b>32%</b> |
| Micro                         | 18%        | 46%                 | 0%        | 36%        |
| Small                         | 20%        | 52%                 | 1%        | 27%        |
| Medium                        | 15%        | 40%                 | 1%        | 36%        |
| Large                         | 20%        | 65%                 | 1%        | 15%        |
| Ag_Food                       | 15%        | 40%                 | 0%        | 44%        |
| Construction                  | 26%        | 46%                 | 0%        | 28%        |
| High-Tech                     | 23%        | 45%                 | 0%        | 32%        |
| Manufacturing                 | 27%        | 47%                 | 1%        | 25%        |
| Services                      | 17%        | 48%                 | 0%        | 33%        |
| Trade                         | 15%        | 55%                 | 0%        | 29%        |
| Other                         | 23%        | 39%                 | 1%        | 36%        |

Question 9 by Education Level (continued)

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Vocational associate degree</b> |            |                     |           |            |
|------------------------------------|------------|---------------------|-----------|------------|
|                                    | Increase   | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                       | <b>15%</b> | <b>47%</b>          | <b>1%</b> | <b>37%</b> |
| Micro                              | 15%        | 43%                 | 1%        | 42%        |
| Small                              | 14%        | 54%                 | 1%        | 30%        |
| Medium                             | 14%        | 41%                 | 1%        | 37%        |
| Large                              | 14%        | 65%                 | 1%        | 19%        |
| Ag_Food                            | 8%         | 43%                 | 1%        | 49%        |
| Construction                       | 15%        | 45%                 | 1%        | 39%        |
| High-Tech                          | 18%        | 44%                 | 1%        | 35%        |
| Manufacturing                      | 17%        | 51%                 | 1%        | 31%        |
| Services                           | 14%        | 47%                 | 1%        | 36%        |
| Trade                              | 12%        | 52%                 | 0%        | 36%        |
| Other                              | 21%        | 38%                 | 1%        | 40%        |

| <b>Academic associate degree (A.A. or A.S.)</b> |            |                     |           |            |
|---|------------|---------------------|-----------|------------|
|   | Increase   | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                                    | <b>16%</b> | <b>45%</b>          | <b>1%</b> | <b>37%</b> |
| Micro   | 17%        | 38%                 | 1%        | 44%        |
| Small   | 14%        | 54%                 | 2%        | 30%        |
| Medium  | 13%        | 47%                 | 1%        | 30%        |
| Large   | 15%        | 66%                 | 1%        | 19%        |
| Ag_Food   | 5%         | 39%                 | 1%        | 55%        |
| Construction                                    | 13%        | 36%                 | 2%        | 50%        |
| High-Tech                                       | 19%        | 44%                 | 0%        | 36%        |
| Manufacturing                                   | 10%        | 47%                 | 1%        | 42%        |
| Services  | 18%        | 41%                 | 2%        | 37%        |
| Trade   | 11%        | 53%                 | 1%        | 36%        |
| Other   | 20%        | 47%                 | 2%        | 30%        |

## Question 9 by Education Level (continued)

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Bachelor's degree (B.A. or B.S.)</b> |            |                     |           |            |
|---|------------|---------------------|-----------|------------|
|   | Increase   | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                            | <b>17%</b> | <b>38%</b>          | <b>2%</b> | <b>42%</b> |
| Micro                                   | 17%        | 33%                 | 1%        | 49%        |
| Small                                   | 16%        | 43%                 | 2%        | 39%        |
| Medium                                  | 17%        | 45%                 | 5%        | 25%        |
| Large                                   | 24%        | 56%                 | 1%        | 19%        |
| Ag_Food                                 | 10%        | 33%                 | 1%        | 56%        |
| Construction                            | 12%        | 34%                 | 2%        | 52%        |
| High-Tech                               | 36%        | 36%                 | 0%        | 28%        |
| Manufacturing                           | 14%        | 40%                 | 2%        | 43%        |
| Services                                | 24%        | 34%                 | 1%        | 40%        |
| Trade                                   | 10%        | 41%                 | 2%        | 46%        |
| Other                                   | 12%        | 46%                 | 4%        | 39%        |

| <b>Master's degree (M.A. or M.S.)</b> |           |                     |           |            |
|---------------------------------------|-----------|---------------------|-----------|------------|
|                                       | Increase  | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                          | <b>6%</b> | <b>30%</b>          | <b>2%</b> | <b>60%</b> |
| Micro                                 | 3%        | 25%                 | 2%        | 70%        |
| Small                                 | 9%        | 36%                 | 3%        | 49%        |
| Medium                                | 10%       | 32%                 | 6%        | 45%        |
| Large                                 | 12%       | 46%                 | 1%        | 37%        |
| Ag_Food                               | 1%        | 30%                 | 1%        | 68%        |
| Construction                          | 2%        | 25%                 | 3%        | 71%        |
| High-Tech                             | 18%       | 37%                 | 0%        | 45%        |
| Manufacturing                         | 5%        | 32%                 | 2%        | 61%        |
| Services                              | 7%        | 27%                 | 2%        | 61%        |
| Trade                                 | 6%        | 32%                 | 3%        | 59%        |
| Other                                 | 6%        | 35%                 | 3%        | 55%        |



Question 9 by Education Level (continued)

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Doctoral or Professional degree</b> |           |                     |           |            |
|--|-----------|---------------------|-----------|------------|
|  | Increase  | Stay About the Same | Decrease  | Not Needed |
| <b>Total</b>                           | <b>6%</b> | <b>29%</b>          | <b>2%</b> | <b>62%</b> |
| Micro                                  | 8%        | 25%                 | 2%        | 66%        |
| Small                                  | 3%        | 33%                 | 3%        | 58%        |
| Medium                                 | 4%        | 33%                 | 1%        | 55%        |
| Large                                  | 8%        | 42%                 | 1%        | 48%        |
| Ag_Food                                | 7%        | 28%                 | 1%        | 64%        |
| Construction                           | 1%        | 21%                 | 2%        | 75%        |
| High-Tech                              | 13%       | 31%                 | 1%        | 55%        |
| Manufacturing                          | 1%        | 29%                 | 3%        | 67%        |
| Services                               | 9%        | 29%                 | 1%        | 57%        |
| Trade                                  | 3%        | 29%                 | 1%        | 66%        |
| Other                                  | 3%        | 63%                 | 3%        | 61%        |

Question 9 by business size

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Micro (2-4)</b>                              | <b>Increase</b> | <b>Stay About the Same</b> | <b>Decrease</b> | <b>Not Needed</b> |
|---|-----------------|----------------------------|-----------------|-------------------|
| <b>Neither a high school diploma or GED</b>     | 6%              | 40%                        | 4%              | 51%               |
| <b>High school diploma or GED</b>               | 10%             | 56%                        | 1%              | 33%               |
| <b>Some college course work</b>                 | 16%             | 52%                        | 1%              | 32%               |
| <b>Vocational certificate</b>                   | 18%             | 46%                        | 0%              | 36%               |
| <b>Vocational associate degree</b>              | 15%             | 43%                        | 1%              | 42%               |
| <b>Academic associate degree (A.A. or A.S.)</b> | 17%             | 38%                        | 1%              | 44%               |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 17%             | 33%                        | 1%              | 49%               |
| <b>Master's degree (M.A. or M.S.)</b>           | 3%              | 25%                        | 2%              | 70%               |
| <b>Doctoral or Professional degree</b>          | 8%              | 25%                        | 2%              | 66%               |

| <b>Small (5-19)</b>                             | <b>Increase</b> | <b>Stay About the Same</b> | <b>Decrease</b> | <b>Not Needed</b> |
|---|-----------------|----------------------------|-----------------|-------------------|
| <b>Neither a high school diploma or GED</b>     | 8%              | 46%                        | 6%              | 39%               |
| <b>High school diploma or GED</b>               | 14%             | 74%                        | 1%              | 10%               |
| <b>Some college course work</b>                 | 23%             | 59%                        | 1%              | 16%               |
| <b>Vocational certificate</b>                   | 20%             | 52%                        | 1%              | 27%               |
| <b>Vocational associate degree</b>              | 14%             | 54%                        | 1%              | 30%               |
| <b>Academic associate degree (A.A. or A.S.)</b> | 14%             | 54%                        | 2%              | 30%               |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 16%             | 43%                        | 2%              | 39%               |
| <b>Master's degree (M.A. or M.S.)</b>           | 9%              | 36%                        | 3%              | 49%               |
| <b>Doctoral or Professional degree</b>          | 3%              | 33%                        | 3%              | 58%               |

Question 9 by business size (continued)

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| Medium (20-99)                           | Increase | Stay About the Same | Decrease | Not Needed |
|--|----------|---------------------|----------|------------|
| Neither a high school diploma or GED     | 8%       | 47%                 | 2%       | 36%        |
| High school diploma or GED               | 20%      | 64%                 | 2%       | 5%         |
| Some college course work                 | 20%      | 58%                 | 2%       | 13%        |
| Vocational certificate                   | 15%      | 40%                 | 1%       | 36%        |
| Vocational associate degree              | 14%      | 41%                 | 1%       | 37%        |
| Academic associate degree (A.A. or A.S.) | 13%      | 47%                 | 1%       | 30%        |
| Bachelor's degree (B.A. or B.S.)         | 17%      | 45%                 | 5%       | 25%        |
| Master's degree (M.A. or M.S.)           | 10%      | 32%                 | 6%       | 45%        |
| Doctoral or Professional degree          | 4%       | 33%                 | 1%       | 55%        |

| Large (100+)                             | Increase | Stay About the Same | Decrease | Not Needed |
|--|----------|---------------------|----------|------------|
| Neither a high school diploma or GED     | 6%       | 60%                 | 6%       | 30%        |
| High school diploma or GED               | 11%      | 80%                 | 2%       | 6%         |
| Some college course work                 | 19%      | 68%                 | 1%       | 13%        |
| Vocational certificate                   | 20%      | 65%                 | 1%       | 15%        |
| Vocational associate degree              | 14%      | 65%                 | 1%       | 19%        |
| Academic associate degree (A.A. or A.S.) | 15%      | 66%                 | 1%       | 19%        |
| Bachelor's degree (B.A. or B.S.)         | 24%      | 56%                 | 1%       | 19%        |
| Master's degree (M.A. or M.S.)           | 12%      | 46%                 | 1%       | 37%        |
| Doctoral or Professional degree          | 8%       | 42%                 | 1%       | 48%        |

Question 9 by Industry

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Ag Food</b>                                  |          |                     |          |            |
|---|----------|---------------------|----------|------------|
|   | Increase | Stay About the Same | Decrease | Not Needed |
| <b>Neither a high school diploma or GED</b>     | 7%       | 49%                 | 3%       | 41%        |
| <b>High school diploma or GED</b>               | 8%       | 67%                 | 2%       | 23%        |
| <b>Some college course work</b>                 | 13%      | 51%                 | 0%       | 36%        |
| <b>Vocational certificate</b>                   | 15%      | 40%                 | 0%       | 44%        |
| <b>Vocational associate degree</b>              | 8%       | 43%                 | 1%       | 49%        |
| <b>Academic associate degree (A.A. or A.S.)</b> | 5%       | 39%                 | 1%       | 55%        |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 10%      | 33%                 | 1%       | 56%        |
| <b>Master's degree (M.A. or M.S.)</b>           | 1%       | 30%                 | 1%       | 68%        |
| <b>Doctoral or Professional degree</b>          | 7%       | 28%                 | 1%       | 64%        |

| <b>Construction</b>                             |          |                     |          |            |
|---|----------|---------------------|----------|------------|
|   | Increase | Stay About the Same | Decrease | Not Needed |
| <b>Neither a high school diploma or GED</b>     | 5%       | 57%                 | 8%       | 30%        |
| <b>High school diploma or GED</b>               | 17%      | 68%                 | 0%       | 14%        |
| <b>Some college course work</b>                 | 23%      | 48%                 | 1%       | 28%        |
| <b>Vocational certificate</b>                   | 26%      | 46%                 | 0%       | 28%        |
| <b>Vocational associate degree</b>              | 15%      | 45%                 | 1%       | 39%        |
| <b>Academic associate degree (A.A. or A.S.)</b> | 13%      | 36%                 | 2%       | 50%        |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 12%      | 34%                 | 2%       | 52%        |
| <b>Master's degree (M.A. or M.S.)</b>           | 2%       | 25%                 | 3%       | 71%        |
| <b>Doctoral or Professional degree</b>          | 1%       | 21%                 | 2%       | 75%        |

Question 9 by Industry (continued)

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>High-Tech</b>                                |          |                     |          |            |
|---|----------|---------------------|----------|------------|
|   | Increase | Stay About the Same | Decrease | Not Needed |
| <b>Neither a high school diploma or GED</b>     | 9%       | 36%                 | 3%       | 51%        |
| <b>High school diploma or GED</b>               | 18%      | 50%                 | 1%       | 31%        |
| <b>Some college course work</b>                 | 24%      | 48%                 | 2%       | 26%        |
| <b>Vocational certificate</b>                   | 23%      | 45%                 | 0%       | 32%        |
| <b>Vocational associate degree</b>              | 18%      | 44%                 | 1%       | 35%        |
| <b>Academic associate degree (A.A. or A.S.)</b> | 19%      | 44%                 | 0%       | 36%        |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 36%      | 36%                 | 0%       | 28%        |
| <b>Master's degree (M.A. or M.S.)</b>           | 18%      | 37%                 | 0%       | 45%        |
| <b>Doctoral or Professional degree</b>          | 13%      | 31%                 | 1%       | 55%        |

| <b>Manufacturing</b>                            |          |                     |          |            |
|---|----------|---------------------|----------|------------|
|   | Increase | Stay About the Same | Decrease | Not Needed |
| <b>Neither a high school diploma or GED</b>     | 11%      | 50%                 | 4%       | 36%        |
| <b>High school diploma or GED</b>               | 18%      | 61%                 | 4%       | 16%        |
| <b>Some college course work</b>                 | 25%      | 50%                 | 2%       | 22%        |
| <b>Vocational certificate</b>                   | 27%      | 47%                 | 1%       | 25%        |
| <b>Vocational associate degree</b>              | 17%      | 51%                 | 1%       | 31%        |
| <b>Academic associate degree (A.A. or A.S.)</b> | 10%      | 47%                 | 1%       | 42%        |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 14%      | 40%                 | 2%       | 43%        |
| <b>Master's degree (M.A. or M.S.)</b>           | 5%       | 32%                 | 2%       | 61%        |
| <b>Doctoral or Professional degree</b>          | 1%       | 29%                 | 3%       | 67%        |

Question 9 by Industry (continued)

How will your firm's need for employees with each of the types of education listed below change in the next five years?

| <b>Other</b>                             |          |                     |          |            |
|--|----------|---------------------|----------|------------|
|  | Increase | Stay About the Same | Decrease | Not Needed |
| Neither a high school diploma or GED     | 5%       | 36%                 | 6%       | 53%        |
| High school diploma or GED               | 16%      | 63%                 | 2%       | 18%        |
| Some college course work                 | 26%      | 55%                 | 0%       | 19%        |
| Vocational certificate                   | 23%      | 39%                 | 1%       | 36%        |
| Vocational associate degree              | 21%      | 38%                 | 1%       | 40%        |
| Academic associate degree (A.A. or A.S.) | 20%      | 47%                 | 2%       | 30%        |
| Bachelor's degree (B.A. or B.S.)         | 12%      | 46%                 | 4%       | 39%        |
| Master's degree (M.A. or M.S.)           | 6%       | 35%                 | 3%       | 55%        |
| Doctoral or Professional degree          | 3%       | 63%                 | 3%       | 61%        |

| <b>Services</b>                          |          |                     |          |            |
|--|----------|---------------------|----------|------------|
|  | Increase | Stay About the Same | Decrease | Not Needed |
| Neither a high school diploma or GED     | 7%       | 53%                 | 7%       | 33%        |
| High school diploma or GED               | 9%       | 57%                 | 0%       | 31%        |
| Some college course work                 | 16%      | 56%                 | 1%       | 26%        |
| Vocational certificate                   | 17%      | 48%                 | 0%       | 33%        |
| Vocational associate degree              | 14%      | 47%                 | 1%       | 36%        |
| Academic associate degree (A.A. or A.S.) | 18%      | 41%                 | 2%       | 37%        |
| Bachelor's degree (B.A. or B.S.)         | 24%      | 34%                 | 1%       | 40%        |
| Master's degree (M.A. or M.S.)           | 7%       | 27%                 | 2%       | 61%        |
| Doctoral or Professional degree          | 9%       | 29%                 | 1%       | 57%        |

Question 9 by Industry (continued)

**How will your firm's need for employees with each of the types of education listed below change in the next five years?**

| <b>Trade</b>                                    |                 |                            |                 |                   |
|---|-----------------|----------------------------|-----------------|-------------------|
|   | <b>Increase</b> | <b>Stay About the Same</b> | <b>Decrease</b> | <b>Not Needed</b> |
| <b>Neither a high school diploma or GED</b>     | 7%              | 53%                        | 7%              | 33%               |
| <b>High school diploma or GED</b>               | 14%             | 73%                        | 1%              | 13%               |
| <b>Some college course work</b>                 | 17%             | 58%                        | 1%              | 23%               |
| <b>Vocational certificate</b>                   | 15%             | 55%                        | 0%              | 29%               |
| <b>Vocational associate degree</b>              | 12%             | 52%                        | 0%              | 36%               |
| <b>Academic associate degree (A.A. or A.S.)</b> | 11%             | 53%                        | 1%              | 36%               |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 10%             | 41%                        | 2%              | 46%               |
| <b>Master's degree (M.A. or M.S.)</b>           | 6%              | 32%                        | 3%              | 59%               |
| <b>Doctoral or Professional degree</b>          | 3%              | 29%                        | 1%              | 66%               |

Question 10

**In the last three years, have the skills required to adequately perform production or support jobs (primary or front-line services or support jobs) increased, decreased or remained the same?**

|                       | Increased |        | Stay Same |        | Decreased |        | Don't Know |       | Total   |
|-----------------------|-----------|--------|-----------|--------|-----------|--------|------------|-------|---------|
| <b>Micro (2-4)</b>    | 35%       | 33,190 | 54%       | 51,300 | 5%        | 4,900  | 5%         | 5,000 | 94,300  |
| <b>Small (5-19)</b>   | 38%       | 22,170 | 57%       | 33,630 | 5%        | 2,650  | 0%         | -     | 58,800  |
| <b>Medium (20-99)</b> | 24%       | 4,510  | 64%       | 12,290 | 12%       | 2,300  | 0.50%      | 96    | 19,200  |
| <b>Large (100+)</b>   | 37%       | 1,310  | 57%       | 2,010  | 3%        | 110    | 2%         | 80    | 3,500   |
| <b>All</b>            | 35%       | 61,882 | 56%       | 99,151 | 6%        | 10,021 | 3%         | 4,922 | 175,800 |

|                         | Increased |        | Stay Same |        | Decreased |        | Don't Know |       | Total   |
|-------------------------|-----------|--------|-----------|--------|-----------|--------|------------|-------|---------|
| <b>Olympic</b>          | 26%       | 2,350  | 60%       | 5,450  | 11%       | 980    | 3%         | 260   | 9,050   |
| <b>Pacific Mountain</b> | 45%       | 5,280  | 49%       | 4,430  | 6%        | 510    | 0%         | -     | 11,650  |
| <b>Northwest</b>        | 35%       | 3,850  | 59%       | 5,320  | 6%        | 540    | 0%         | -     | 11,000  |
| <b>Snohomish</b>        | 32%       | 4,720  | 62%       | 5,570  | 7%        | 620    | 0%         | -     | 14,900  |
| <b>King</b>             | 38%       | 23,850 | 50%       | 4,560  | 6%        | 520    | 6%         | 570   | 63,600  |
| <b>Pierce</b>           | 39%       | 7,160  | 53%       | 4,780  | 8%        | 680    | 0%         | -     | 18,400  |
| <b>Southwest</b>        | 24%       | 2,930  | 72%       | 6,470  | 3%        | 270    | 0%         | -     | 12,000  |
| <b>North Central</b>    | 36%       | 2,070  | 58%       | 5,220  | 6%        | 530    | 0%         | -     | 5,700   |
| <b>South Central</b>    | 35%       | 2,420  | 59%       | 5,300  | 4%        | 390    | 2%         | 180   | 6,900   |
| <b>Eastern</b>          | 35%       | 1,450  | 58%       | 5,220  | 3%        | 280    | 3%         | 310   | 4,100   |
| <b>Benton-Franklin</b>  | 29%       | 1,510  | 67%       | 6,060  | 3%        | 240    | 1%         | 120   | 5,200   |
| <b>Spokane</b>          | 27%       | 3,640  | 67%       | 6,040  | 3%        | 260    | 3%         | 270   | 13,350  |
| <b>All</b>              | 35%       | 61,899 | 56%       | 99,151 | 6%        | 10,021 | 3%         | 4,922 | 175,850 |

|                      | Increased |        | Stay Same |        | Decreased |        | Don't Know |       | Total   |
|----------------------|-----------|--------|-----------|--------|-----------|--------|------------|-------|---------|
| <b>Ag_Food</b>       | 22%       | 1,130  | 67%       | 3,510  | 9%        | 470    | 1%         | 40    | 5,220   |
| <b>Construction</b>  | 31%       | 4,140  | 58%       | 7,690  | 11%       | 1,460  | 0%         | -     | 13,300  |
| <b>High-Tech</b>     | 40%       | 1,480  | 54%       | 2,000  | 4%        | 150    | 2%         | 60    | 3,690   |
| <b>Manufacturing</b> | 32%       | 1,620  | 62%       | 3,190  | 6%        | 300    | 0%         | -     | 5,140   |
| <b>Services</b>      | 44%       | 31,600 | 45%       | 32,390 | 4%        | 3,160  | 6%         | 4,520 | 71,820  |
| <b>Trade</b>         | 20%       | 9,290  | 73%       | 34,170 | 6%        | 2,660  | 1%         | 330   | 46,680  |
| <b>Other</b>         | 40%       | 11,920 | 54%       | 16,270 | 6%        | 1,740  | 0%         | 30    | 29,960  |
| <b>All</b>           | 35%       | 61,885 | 56%       | 99,151 | 6%        | 10,021 | 3%         | 4,922 | 175,810 |



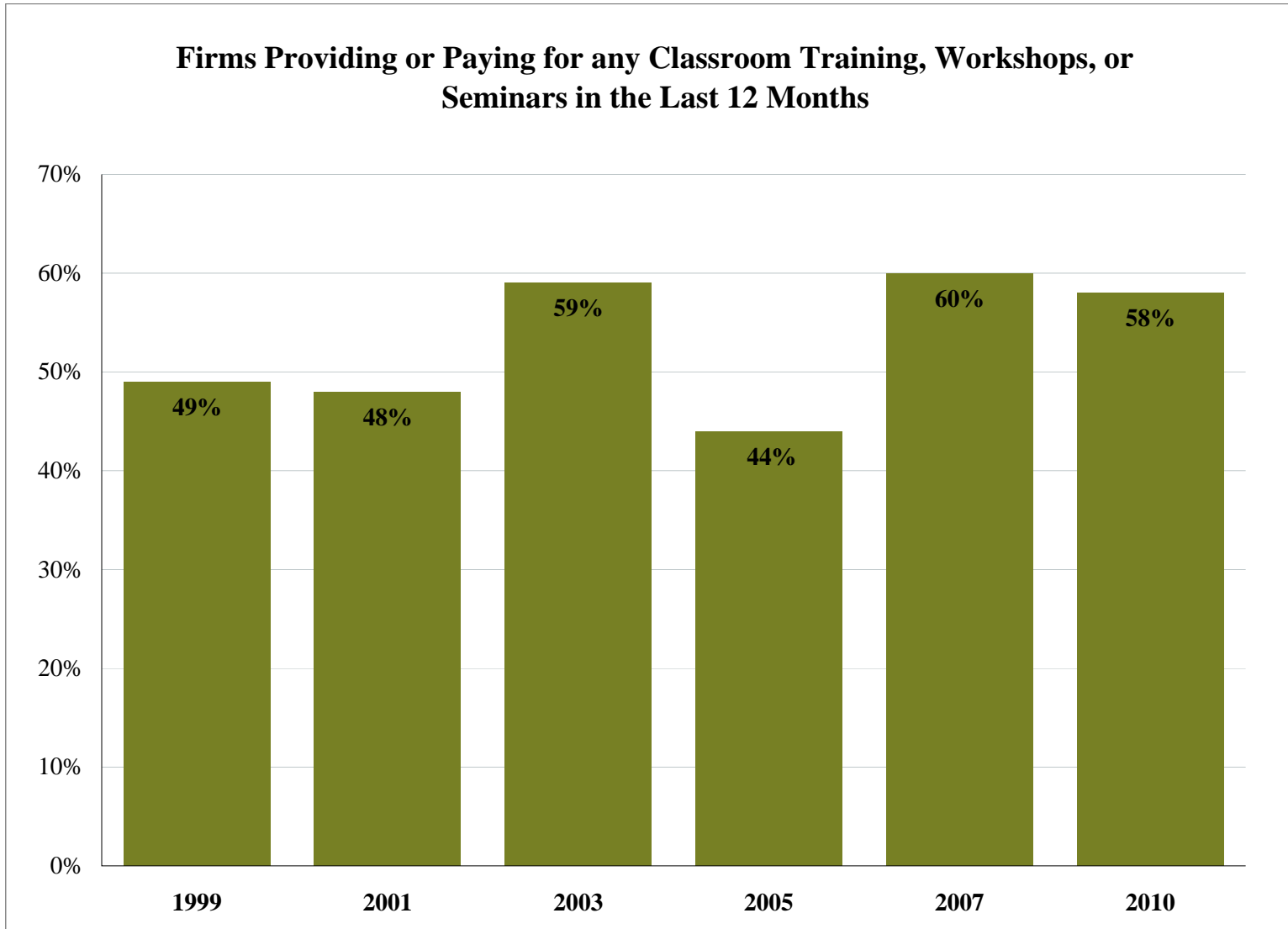
Question 11

**Did your firm/organization provided or pay for any classroom training, workshops, or seminars (lasting at least four hours) for any employees in the last 12 months?**

|                       | Yes        |                | No         |               | Total          |
|-----------------------|------------|----------------|------------|---------------|----------------|
| <b>Micro (2-4)</b>    | 49%        | 45,830         | 51%        | 48,280        | 94,300         |
| <b>Small (5-19)</b>   | 66%        | 38,750         | 34%        | 19,820        | 58,800         |
| <b>Medium (20-99)</b> | 75%        | 14,300         | 25%        | 4,860         | 19,200         |
| <b>Large (100+)</b>   | 85%        | 2,960          | 15%        | 530           | 3,500          |
| <b>All</b>            | <b>58%</b> | <b>101,800</b> | <b>42%</b> | <b>73,700</b> | <b>175,800</b> |

| by industry   | Yes        |                | No         |               | Total          |
|---------------|------------|----------------|------------|---------------|----------------|
| Ag Food       | 42%        | 2,172          | 58%        | 3,028         | 5,220          |
| Construction  | 57%        | 7,594          | 43%        | 5,692         | 13,300         |
| High-Tech     | 55%        | 2,018          | 45%        | 1,661         | 3,690          |
| Manufacturing | 40%        | 2,071          | 60%        | 3,058         | 5,140          |
| Services      | 65%        | 46,468         | 35%        | 25,065        | 71,820         |
| Trade         | 44%        | 20,539         | 56%        | 26,001        | 46,680         |
| Other         | 69%        | 20,762         | 31%        | 9,168         | 29,960         |
| <b>All</b>    | <b>58%</b> | <b>101,788</b> | <b>42%</b> | <b>73,660</b> | <b>175,800</b> |

Question 11



Question 12

**What percentage received classroom training, workshops, or seminars (lasting at least 4 hours) did each type of employee received in the last 12 months?**

| <b>Major Occupational Group</b>   | <b>Percent</b> |
|---|----------------|
| Managerial and administrative occupations   | 60%            |
| Professional occupations  | 45%            |
| Technical and paraprofessional occupations  | 41%            |
| Marketing and sales-related occupations   | 35%            |
| Clerical and administrative support occupations                                     | 36%            |
| Service occupations   | 38%            |
| Production, construction, operation, maintenance, and material-handling occupations | 37%            |
| Agricultural, forestry, fishing, and related occupations                            | 6%             |

Question 13

**What percent of your current employees would you say need further training in a formal program in order to reach the current level of productivity and competence that your company needs?**

| Percent                              |       |
|--------------------------------------|-------|
| At a community or technical college  | 13.9% |
| At a four-year college or university | 5.4%  |

Question 14

**In the last three years, has the percentage of your employees who receive classroom training, workshops, or seminars of some kind increased, decreased, or stayed the same?**

|                | Increased  | Stayed Same | Decreased |
|----------------|------------|-------------|-----------|
| Small (5-19)   | 26%        | 69%         | 5%        |
| Medium (20-99) | 30%        | 63%         | 7%        |
| Large (100+)   | 28%        | 61%         | 9%        |
| <b>All</b>     | <b>27%</b> | <b>67%</b>  | <b>6%</b> |

Question 15**Which of the following are reasons for your increase in training?***Among those who increased training in the last 12 months.*

|   | Yes        | No         | N/A       |
|---|------------|------------|-----------|
| Changes in products or services you provide                       | 58%        | 41%        | 0%        |
| Changes in technology   | 60%        | 40%        | 0%        |
| Changes in the organization of work                               | 56%        | 44%        | 0%        |
| <b>Need to improve the quality of your output</b>                 | <b>74%</b> | <b>26%</b> | <b>0%</b> |
| Need to improve worker productivity                               | 56%        | 44%        | 0%        |
| New hires did not have necessary skills                           | 56%        | 43%        | 0%        |
| To help employees develop more positive attitudes and work habits | 62%        | 38%        | 0%        |
| To keep up with competition from foreign countries                | 11%        | 88%        | 0%        |
| To keep up with competitors at home                               | 56%        | 44%        | 0%        |
| To improve the morale of employees                                | 61%        | 39%        | 0%        |
| To develop a more flexible and versatile workforce                | 68%        | 29%        | 0%        |
| <b>To promote the personal or career development of employees</b> | <b>81%</b> | <b>19%</b> | <b>0%</b> |
| Legal requirements forced us to increase training                 | 53%        | 46%        | 1%        |

**Are there any other reasons for your increase in training?**

Safety and changing government regulations were the most cited reasons for increased training. This included ISO certification, OSHA, WISHA, and teacher certification. Other reasons include professional development, risk management and more time available for training because there is less work coming in

Question 16

**Has your firm/organization ever had an arrangement with a community of technical college to provide education and training services to your employees?**

|     |     |
|-----|-----|
| Yes | 16% |
| No  | 82% |

Question 17

**Why did you select a community or technical college to conduct training?**

|  | Yes | No  | N/A | Don't Know | Refused |
|--|-----|-----|-----|------------|---------|
| Cost-effective value for money   | 64% | 28% | 2%  | 2%         | 4%      |
| Quality of instruction   | 75% | 22% | 0%  | 0%         | 3%      |
| Community or technical college customized the training program for our needs         | 74% | 22% | 0%  | 0%         | 4%      |
| Convenient location  | 87% | 11% | 0%  | 0%         | 2%      |
| Training programs referred to us by other businesses                                 | 31% | 62% | 0%  | 3%         | 4%      |
| Contracted with community or technical college in the past with satisfactory results | 77% | 20% | 1%  | 0%         | 2%      |

| <b>Why select a community or technical college to conduct training?</b>  |
|--|
| The community colleges offer specific training (Boeing certification, blueprint reading, RN, marine technical program, electronics.) |
| The school selected was the only option in the area.   |
| There is a federal, state or company mandate for training.   |
| The respondent was given a grant.  |

Question 18

**In the last 12 months, did your firm provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in work-place practices for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|-----------------------|-------------|-------------|-------------|-------------|
| Ag_Food               | 63%         | 69%         | 61%         | 52%         |
| Construction          | 59%         | 69%         | 55%         | 73%         |
| High-Tech             | 49%         | 39%         | 28%         | 48%         |
| Manufacturing         | 68%         | 66%         | 44%         | 58%         |
| Services              | 68%         | 73%         | 39%         | 68%         |
| Trade                 | 60%         | 66%         | 45%         | 65%         |
| Other                 | 78%         | 68%         | 72%         | 73%         |
| <b>All Industries</b> | <b>67%</b>  | <b>67%</b>  | <b>50%</b>  | <b>67%</b>  |

Question 19

**In the past 12 months, did your firm/organization provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in basic skills for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|-----------------------|-------------|-------------|-------------|-------------|
| Ag Food               | 15%         | 13%         | 10%         | 8%          |
| Construction          | 7%          | 5%          | 24%         | 12%         |
| High-Tech             | 12%         | 21%         | 29%         | 15%         |
| Manufacturing         | 10%         | 12%         | 25%         | 7%          |
| Services              | 8%          | 22%         | 8%          | 25%         |
| Trade                 | 18%         | 21%         | 21%         | 16%         |
| Other                 | 18%         | 20%         | 23%         | 38%         |
| <b>All Industries</b> | <b>13%</b>  | <b>19%</b>  | <b>16%</b>  | <b>23%</b>  |



Question 20

**In the past 12 months, did your firm/organization provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in job-specific skills for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|-----------------------|-------------|-------------|-------------|-------------|
| Ag_Food               | 85%         | 91%         | 78%         | 69%         |
| Construction          | 84%         | 79%         | 73%         | 80%         |
| High-Tech             | 78%         | 97%         | 92%         | 73%         |
| Manufacturing         | 74%         | 70%         | 79%         | 58%         |
| Services              | 80%         | 91%         | 64%         | 85%         |
| Trade                 | 56%         | 90%         | 70%         | 61%         |
| Other                 | 85%         | 82%         | 85%         | 84%         |
| <b>All Industries</b> | <b>74%</b>  | <b>88%</b>  | <b>72%</b>  | <b>77%</b>  |

Question 21

**Did your firm/organization have a tuition reimbursement program for any employee during the past 12 months?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|-----------------------|-------------|-------------|-------------|-------------|
| <b>Ag_Food</b>        | 41%         | 38%         | 42%         | 44%         |
| <b>Construction</b>   | 29%         | 41%         | 41%         | 41%         |
| <b>High-Tech</b>      | 63%         | 59%         | 39%         | 43%         |
| <b>Manufacturing</b>  | 53%         | 35%         | 53%         | 43%         |
| <b>Services</b>       | 34%         | 65%         | 24%         | 49%         |
| <b>Trade</b>          | 32%         | 48%         | 39%         | 24%         |
| <b>Other</b>          | 37%         | 49%         | 65%         | 54%         |
| <b>All Industries</b> | <b>35%</b>  | <b>50%</b>  | <b>39%</b>  | <b>44%</b>  |

Question 22

**Was your tuition reimbursement program restricted to job-related training only?**

*Among those who have a tuition reimbursement program (Q21=Yes)*

|                       | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|-----------------------|-------------|-------------|-------------|-------------|
| Ag_Food               | 86%         | 92%         | 83%         | 97%         |
| Construction          | 92%         | 77%         | 94%         | 89%         |
| High-Tech             | 81%         | 90%         | 80%         | 71%         |
| Manufacturing         | 82%         | 56%         | 53%         | 80%         |
| Services              | 92%         | 98%         | 81%         | 89%         |
| Trade                 | 65%         | 96%         | 79%         | 83%         |
| Other                 | 77%         | 77%         | 77%         | 71%         |
| <b>All Industries</b> | <b>80%</b>  | <b>91%</b>  | <b>79%</b>  | <b>83%</b>  |

Question 23

**Did your firm/organization provide at least 4 hours of on the job training that was described in a written plan or agreement for any employee in the last 12 months?**

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 42%        | 45%        | 46%        | 40%        |
| Construction          | 40%        | 34%        | 32%        | 38%        |
| High-Tech             | 53%        | 36%        | 29%        | 41%        |
| Manufacturing         | 27%        | 39%        | 33%        | 34%        |
| Services              | 45%        | 40%        | 49%        | 33%        |
| Trade                 | 56%        | 54%        | 55%        | 47%        |
| Other                 | 53%        | 46%        | 57%        | 54%        |
| <b>All Industries</b> | <b>49%</b> | <b>47%</b> | <b>50%</b> | <b>41%</b> |

Question 24

**For each type of employee listed below, approximately what percentage received on-the-job training in the last 12 months?**

|   | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|---|-------------|-------------|-------------|-------------|
| Managerial and administrative occupations   | 43%         | 38%         | 28%         | 52%         |
| Professional occupations  | 33%         | 26%         | 16%         | 38%         |
| Technical and paraprofessional occupations  | 31%         | 25%         | 21%         | 36%         |
| Marketing and sales-related occupations   | 35%         | 33%         | 18%         | 34%         |
| Clerical and administrative support occupations                                     | 40%         | 37%         | 34%         | 41%         |
| Service occupations   | 40%         | 23%         | 20%         | 49%         |
| Production, construction, operation, maintenance, and material-handling occupations | 29%         | 32%         | 28%         | 35%         |
| Agricultural, forestry, fishing, and related occupations                            | 11%         | 6%          | 9%          | 5%          |

Question 11, 18-23

Percent of Employers that provided various trainings for at least four hours, or had a tuition reimbursement program or a written plan for on the job training. (in the last 12 months)

|               | Classroom Training, Workshop or Seminar |                               |                        |                              | Tuition Reimbursement  |   | Training was in a Written Plan or Agreement (Q23) |
|---------------|---|-------------------------------|------------------------|------------------------------|------------------------|---|---|
|               | for Any Employee (Q11)                  | in Work-Place Practices (Q18) | for Basic Skills (Q19) | in Job Specific Skills (Q20) | for Any Employee (Q21) | Restricted to Job-Related Training Only (Q22) |   |
| Ag Food       | 42%                                     | 52%                           | 8%                     | 69%                          | 44%                    | 97%   | 40%   |
| Construction  | 57%                                     | 73%                           | 12%                    | 80%                          | 41%                    | 89%   | 38%   |
| High-Tech     | 55%                                     | 48%                           | 15%                    | 73%                          | 43%                    | 71%   | 41%   |
| Manufacturing | 40%                                     | 58%                           | 7%                     | 58%                          | 43%                    | 80%   | 34%   |
| Services      | 65%                                     | 68%                           | 25%                    | 85%                          | 49%                    | 89%   | 33%   |
| Trade         | 44%                                     | 65%                           | 16%                    | 61%                          | 24%                    | 83%   | 47%   |
| Other         | 69%                                     | 73%                           | 38%                    | 84%                          | 54%                    | 71%   | 54%   |
| <b>All</b>    | <b>58%</b>                              | <b>67%</b>                    | <b>23%</b>             | <b>77%</b>                   | <b>44%</b>             | <b>83%</b>                                    | <b>41%</b>  |

Question 25

**What percent of your firm's current employees are in jobs that require each of the educational levels listed below.**

|  | <b>Percent</b> |
|--|----------------|
| Neither a high school diploma or GED     | 20%            |
| High school diploma or GED               | 44%            |
| Some college course work                 | 8%             |
| Vocational certificate                   | 6%             |
| Vocational associate degree              | 2%             |
| Academic associate degree (A.A. or A.S.) | 3%             |
| Bachelor's degree (B.A. or B.S.)         | 14%            |
| Master's degree (M.A. or M.S.)           | 2%             |
| Doctoral or Professional degree          | 1%             |

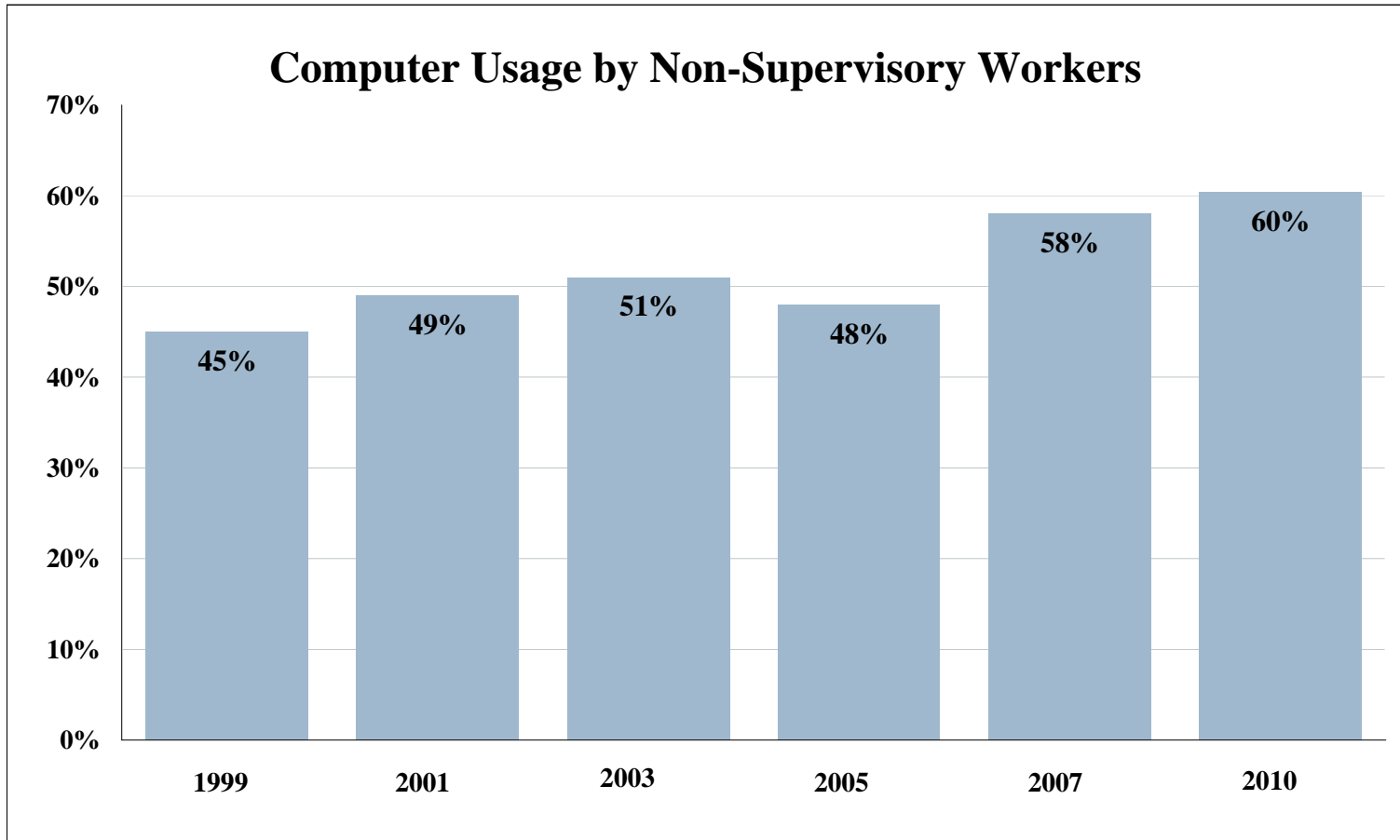
Question 26

**What percentage of your non-supervisory employees use computers in their jobs?**

|                         | <b>Ag_Food</b> | <b>Const-<br/>ruction</b> | <b>High-Tech</b> | <b>Manu-<br/>facturing</b> | <b>Services</b> | <b>Trade</b> | <b>Other</b> | <b>Total</b> |
|-------------------------|----------------|---------------------------|------------------|----------------------------|-----------------|--------------|--------------|--------------|
| <b>Olympic</b>          | 37%            | 22%                       | 84%              | 53%                        | 59%             | 47%          | 83%          | <b>55%</b>   |
| <b>Pacific Mountain</b> | 38%            | 29%                       | 87%              | 50%                        | 69%             | 59%          | 77%          | <b>60%</b>   |
| <b>Northwest</b>        | 61%            | 28%                       | 73%              | 38%                        | 58%             | 52%          | 78%          | <b>56%</b>   |
| <b>Snohomish</b>        | 47%            | 32%                       | 75%              | 35%                        | 60%             | 69%          | 89%          | <b>59%</b>   |
| <b>King</b>             | 53%            | 26%                       | 77%              | 55%                        | 64%             | 67%          | 76%          | <b>60%</b>   |
| <b>Pierce</b>           | 43%            | 31%                       | 68%              | 49%                        | 64%             | 50%          | 79%          | <b>55%</b>   |
| <b>Southwest</b>        | 43%            | 25%                       | 68%              | 50%                        | 57%             | 68%          | 76%          | <b>56%</b>   |
| <b>North Central</b>    | 31%            | 14%                       | 65%              | 51%                        | 64%             | 59%          | 73%          | <b>54%</b>   |
| <b>South Central</b>    | 34%            | 16%                       | 59%              | 45%                        | 69%             | 49%          | 76%          | <b>52%</b>   |
| <b>Eastern</b>          | 50%            | 39%                       | 84%              | 33%                        | 65%             | 51%          | 78%          | <b>60%</b>   |
| <b>Benton-Franklin</b>  | 29%            | 18%                       | 80%              | 64%                        | 62%             | 60%          | 83%          | <b>56%</b>   |
| <b>Spokane</b>          | 41%            | 13%                       | 66%              | 48%                        | 61%             | 56%          | 78%          | <b>52%</b>   |
| <b>Total</b>            | <b>42%</b>     | <b>24%</b>                | <b>74%</b>       | <b>48%</b>                 | <b>63%</b>      | <b>57%</b>   | <b>79%</b>   | <b>56%</b>   |



Question 26



Question 27

**Was anyone in your firm who was hired in the last 12 months attended, or was trained by, one of the following institutions or programs?**

|   | Yes | No  | N/A | Don't Know | Refused |
|---|-----|-----|-----|------------|---------|
| High school vocational education programs   | 18% | 74% | 1%  | 0%         | 8%      |
| Community or technical colleges vocational training programs                              | 31% | 62% | 1%  | 0%         | 6%      |
| Workforce Investment Act (WIA) Workforce Development Council (WDC) or WorkSource Programs | 8%  | 83% | 2%  | 0%         | 6%      |
| Private vocational/technical schools  | 12% | 81% | 1%  | 0%         | 6%      |
| Apprenticeship programs   | 8%  | 86% | 1%  | 0%         | 5%      |
| Adult basic skills classes such as GED and English as a Second Language                   | 8%  | 85% | 1%  | 0%         | 6%      |
| Four-year college or universities   | 35% | 61% | 1%  | 0%         | 4%      |

**Definition of Industry Sectors Used in the Survey**

| <b>SIC</b> | <b>INDUSTRY NAME</b> | <b>MAJOR SUB GROUPS (at 2 Digit SIC)</b> |
|------------|----------------------|--|
| 01         | Agriculture-Food     | AGRICULTURAL PRODUCTION CROPS            |
| 02         | Agriculture-Food     | AGRICULTURAL PRODUCTION LIVESTOCK        |
| 07         | Agriculture-Food     | AGRICULTURAL SERVICES                    |
| 08         | Agriculture-Food     | FORESTRY                                 |
| 09         | Agriculture-Food     | FISHING, HUNTING AND TRAPPING            |
| 20         | Agriculture-Food     | FOOD AND KINDRED PRODUCTS                |
| 10         | Construction         | METAL MINING                             |
| 12         | Construction         | COAL MINING                              |
| 13         | Construction         | OIL AND GAS EXTRACTION                   |
| 14         | Construction         | NONMETALLIC MINERALS, EXCEPT FUELS       |
| 16         | Construction         | HEAVY CONSTRUCTION, EX. BUILDING         |
| 17         | Construction         | SPECIAL TRADE CONTRACTORS                |
| 28         | High Tech            | CHEMICALS AND ALLIED PRODUCTS            |
| 35         | High Tech            | INDUSTRIAL MACHINERY AND EQUIPMENT       |
| 36         | High Tech            | ELECTRONIC AND OTHER ELECTRIC EQUIPMENT  |
| 38         | High Tech            | INSTRUMENTS AND RELATED PRODUCTS         |
| 48         | High Tech            | COMMUNICATION                            |
| 73         | High Tech            | BUSINESS SERVICES                        |
| 87         | High Tech            | ENGINEERING AND MANAGEMENT SERVICES      |
| 22         | Manufacturing        | TEXTILE MILL PRODUCTS                    |
| 23         | Manufacturing        | APPAREL AND OTHER TEXTILE PRODUCTS       |
| 24         | Manufacturing        | LUMBER AND WOOD PRODUCTS                 |
| 25         | Manufacturing        | FURNITURE AND FIXTURES                   |
| 26         | Manufacturing        | PAPER AND ALLIED PRODUCTS                |
| 27         | Manufacturing        | PRINTING AND PUBLISHING                  |
| 28         | Manufacturing        | CHEMICALS AND ALLIED PRODUCTS            |
| 29         | Manufacturing        | PETROLEUM AND COAL PRODUCTS              |
| 30         | Manufacturing        | RUBBER AND MISC PLASTICS PRODUCTS        |
| 31         | Manufacturing        | LEATHER AND LEATHER PRODUCTS             |
| 32         | Manufacturing        | STONE, CLAY, AND GLASS PRODUCTS          |
| 33         | Manufacturing        | PRIMARY METAL INDUSTRIES                 |
| 34         | Manufacturing        | FABRICATED METAL PRODUCTS                |
| 35         | Manufacturing        | INDUSTRIAL MACHINERY AND EQUIPMENT       |
| 37         | Manufacturing        | TRANSPORTATION EQUIPMENT                 |
| 39         | Manufacturing        | MISCELLANEOUS MANUFACTURING INDUSTRIES   |
| 41         | Other                | LOCAL AND INTERURBAN PASSENGER TRANSIT   |
| 42         | Other                | TRUCKING AND WAREHOUSING                 |

Note: Boeing was grouped in Manufacturing rather than Hi-tech.

| <b>SIC</b> | <b>MAJOR SUB GROUPS (at 2 Digit SIC)</b> |  |
|------------|--|--|
| 44         | Other                                    | WATER TRANSPORTATION                   |
| 45         | Other                                    | TRANSPORTATION BY AIR                  |
| 46         | Other                                    | PIPELINES, EXCEPT NATURAL GAS          |
| 47         | Other                                    | TRANSPORTATION SERVICES                |
| 49         | Other                                    | ELECTRIC, GAS, AND SANITARY SERVICES   |
| 60         | Other                                    | DEPOSITORY INSTITUTIONS                |
| 61         | Other                                    | NONDEPOSITORY INSTITUTIONS             |
| 62         | Other                                    | SECURITY AND COMMODITY BROKERS         |
| 63         | Other                                    | INSURANCE CARRIERS                     |
| 64         | Other                                    | INSURANCE AGENTS, BROKERS, & SERVICE   |
| 65         | Other                                    | REAL ESTATE                            |
| 67         | Other                                    | HOLDING AND OTHER INVESTMENT OFFICES   |
| 70         | Services                                 | HOTELS AND OTHER LODGING PLACES        |
| 72         | Services                                 | PERSONAL SERVICES                      |
| 73         | Services                                 | BUSINESS SERVICES                      |
| 75         | Services                                 | AUTO REPAIR SERVICES AND PARKING       |
| 76         | Services                                 | MISCELLANEOUS REPAIR SERVICES          |
| 78         | Services                                 | MOTION PICTURES                        |
| 79         | Services                                 | AMUSEMENT AND RECREATION SERVICES      |
| 80         | Services                                 | HEALTH SERVICES                        |
| 81         | Services                                 | LEGAL SERVICES                         |
| 82         | Services                                 | EDUCATIONAL SERVICES                   |
| 83         | Services                                 | SOCIAL SERVICES                        |
| 84         | Services                                 | MUSEUMS, BOTANICAL, ZOOLOGICAL GARDENS |
| 86         | Services                                 | MEMBERSHIP ORGANIZATIONS               |
| 87         | Services                                 | ENGINEERING AND MANAGEMENT SERVICES    |
| 89         | Services                                 | SERVICES, NEC                          |
| 50         | Trade                                    | WHOLESALE TRADE DURABLE GOODS          |
| 51         | Trade                                    | WHOLESALE TRADE NONDURABLE GOODS       |
| 52         | Trade                                    | BUILDING MATERIALS & GARDEN SUPPLIES   |
| 53         | Trade                                    | GENERAL MERCHANDISE STORES             |
| 54         | Trade                                    | FOOD STORES                            |
| 55         | Trade                                    | AUTO DEALERS AND SERVICE STATIONS      |
| 56         | Trade                                    | APPAREL AND ACCESSORY STORES           |
| 57         | Trade                                    | FURNITURE AND HOME FURNISHING STORES   |
| 58         | Trade                                    | EATING AND DRINKING PLACES             |
| 59         | Trade                                    | MISCELLANEOUS RETAIL                   |

# 2010 Employer Survey

## With openings down, every job matters

### Tracking employer practices over time

As the only comprehensive survey of its kind in Washington, the 2010 Employer Survey sheds light on how well our workforce is meeting the needs of business, and the ongoing challenges we face in preparing Washington's workers for existing and future jobs. Since 1999, the Workforce Training and Education Coordinating Board has surveyed employers statewide six times.

### Boom times vs. recession: A chance to compare

The 2007 Employer Survey captured employer opinions during a high-growth economy. In contrast, the latest survey was taken during the spring and summer of 2010, deep in our current recession. The numbers tell the story:

- **20 percent fewer firms** – The total number of Washington firms operating in 2010 was 175,800 –down 43,000 from 2007.
- **38 percent fewer firms hiring** – In 2007, 80 percent of the firms surveyed said they had hired new employees in the last 12 months—indicating that 175,000 firms were hiring back then. The most recent survey results indicate that 66,000 fewer firms were hiring in 2010.
- **Plenty of good workers to choose from** – In 2007, 60 percent of firms who were hiring had difficulty finding suitable candidates. That percent dropped to 26 percent in 2010.

The 2010 Employer Survey confirms what many of the 300,000 unemployed Washington residents understand too well. Job openings were infrequent while competition for the few jobs that were available was stiff. Until this year's survey, the percentage of employers reporting difficulty in hiring had never dropped below 45 percent.

### Certain occupational skills still in demand

Results of the 2010 Employer Survey indicate that over 28,000 employers statewide had difficulty hiring. Over 11,000 of those employers, or 41 percent, had difficulty finding potential employees with vocational certificates. Almost 24,000 employers said they had difficulty hiring employees with occupation-specific skills. Looking to their future hiring, the percentage of employers who expect their demand for workers with vocational degrees and certifications will grow or at least stay the same in the next three years increased by 10 percent over 2007.



### Hiring difficulties translate into lost opportunities

The Workforce Board projects how the survey results translate into numbers of employers statewide. While only 17 percent of employers experienced difficulty hiring in 2010, that percentage indicates that 28,000 employers had difficulty finding good candidates for at least some of their job openings. Employers' reports of the consequences of those hiring difficulties indicate that:

- 15,000 firms had lower productivity.
- 11,000 firms left at least one position unfilled.
- 8,000 firms did not develop new products or services.
- 6,000 firms outsourced more.
- 2,500 firms moved some part of their operation out of state.

More details are available at:  
[www.wtb.wa.gov/EmployerSurvey.asp](http://www.wtb.wa.gov/EmployerSurvey.asp)

## Employer Survey goes directly to the source

Every two years, the Workforce Board invites business and industry across Washington to participate in a survey that features detailed questions about everything from hiring challenges to employee skill gaps to company training practices. It's the only comprehensive statewide survey of its kind, and shines a light on common workforce issues across a wide range of industries.

By listening closely to local companies, the Workforce Board is able to advocate for workforce education and training programs that meet the needs of business and industry in every corner of the state.

Conducted in collaboration with the Washington Chamber of Commerce Executives and the Association of Washington Business, the survey received approximately 3,000 employer responses.

### Some areas see steeper drop in hiring than others

While the percentage of firms hiring in 2010 declined substantially from 2007, some of the steepest drops occurred in Northwest Washington and the Olympic Peninsula. The only area not to experience a decline in percentage of firms hiring was Tri-Cities (Benton-Franklin counties) where there was no change. In the 2007 survey, Tri-Cities had the lowest percentage of firms hiring than of any other region.

### Occupation and Employment Skills Hard to Find

Employers reported the greatest difficulty finding workers with occupation-specific skills, such as those required of an emergency room nurse. Employers also had a hard time finding employees with general workplace, or soft skills.

- **Occupation-specific skills**—85 percent of those reporting difficulty hiring.
- **Communication skills**—76 percent.
- **Ability to adapt** to changes in duties—75 percent.

### Wanted: Workers with Vocational Training

As has been the case since the Employer Survey launched in 1999, the largest shortage of skilled workers continues to be middle-skill employees who have gone beyond high school to obtain a vocational certificate. About 11,400 firms are estimated to have had difficulty finding employees with an appropriate vocational certificate.

### Employers Continue to Invest in Employee Training

Despite the downturn, employers continued to provide training to their employees. Nearly 60 percent of Washington employers paid for educational opportunities for at least some of their workforce during 2009-2010.

- **Large employers** with 100-plus employees—85 percent.
- **Medium employers** with 20 to 100 employees—75 percent.
- **Small employers** with 2 to 19 employees—55 percent.

#### Board Members:

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##### Labor

Rick Bender

Beth Thew

##### Business

Creigh H. Agnew

Mike Hudson

Lutz Ziob

##### Government

Randy Dorn

*Office of Superintendent of Public Instruction*

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##### Target Populations

Tony Lee

##### Participating Officials

Susan Dreyfus

Mark Mattke

Rogers Weed

*Executive Director*

Eleni Papadakis

*Workforce Board*



#### Workforce Training and Education Coordinating Board

128 - 10th Avenue SW,  
PO Box 43105,  
Olympia, WA 98504-3105

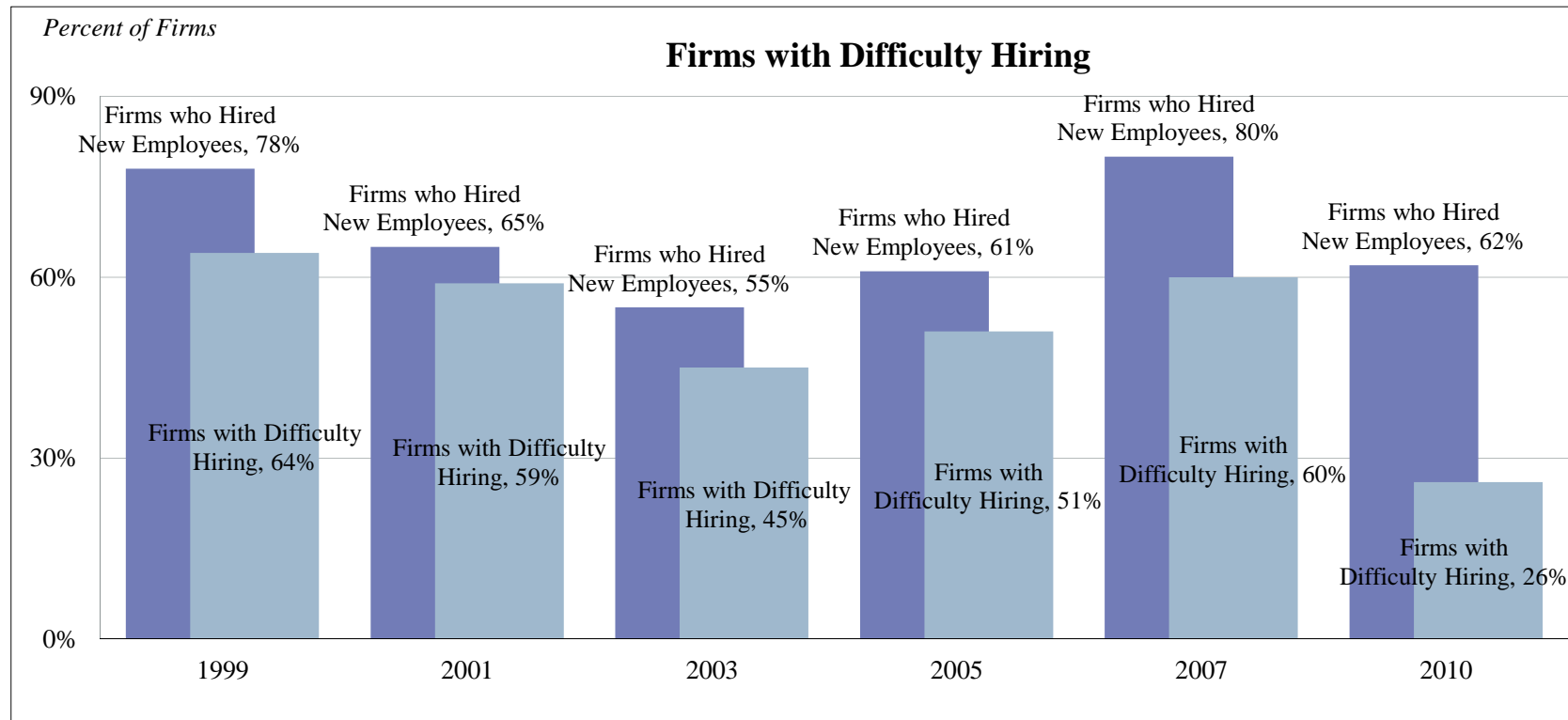
360-753-5662, Fax 360-586-5862

[www.wtb.wa.gov](http://www.wtb.wa.gov)

E-mail: [wtecb@wtb.wa.gov](mailto:wtecb@wtb.wa.gov)

Workforce Training and Education Coordinating Board  
Employer Needs Survey  
2007-2010





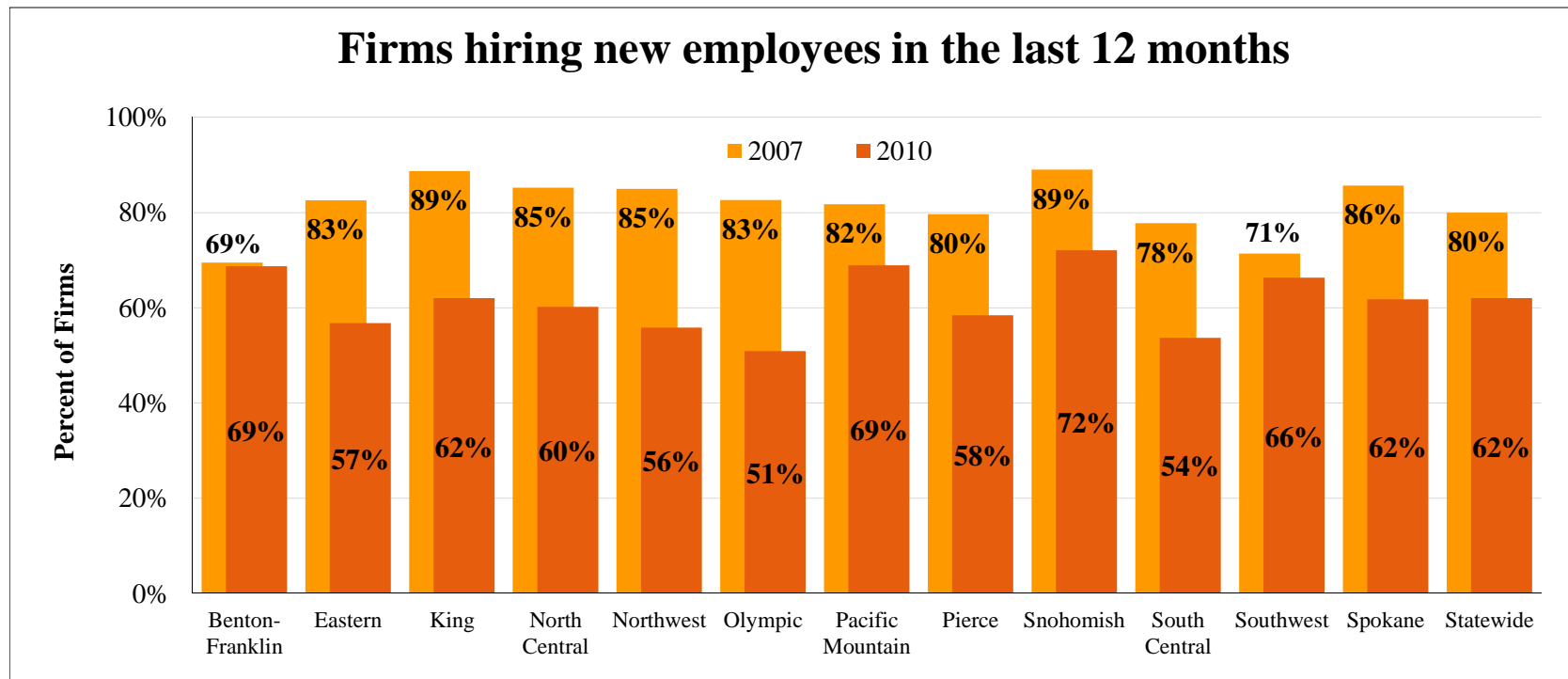
**Has your firm hired any new employees in the last 12 months?**

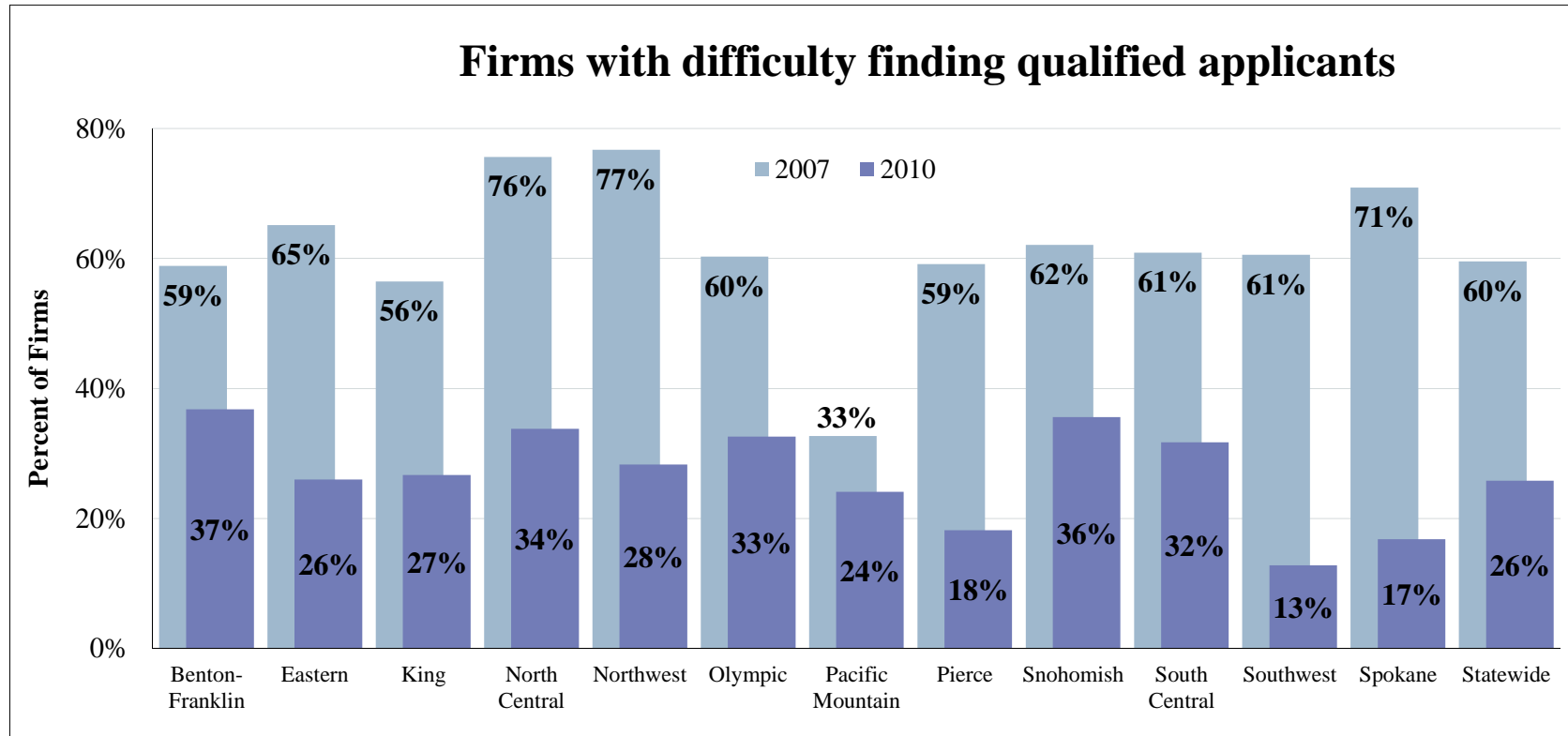
| WDA              | All Employers |            |
|------------------|---------------|------------|
|                  | 2007          | 2010       |
| Benton-Franklin  | 69%           | 69%        |
| Eastern          | 83%           | 57%        |
| King             | 89%           | 62%        |
| North Central    | 85%           | 60%        |
| Northwest        | 85%           | 56%        |
| Olympic          | 83%           | 51%        |
| Pacific Mountain | 82%           | 69%        |
| Pierce           | 80%           | 58%        |
| Snohomish        | 89%           | 72%        |
| South Central    | 78%           | 54%        |
| Southwest        | 71%           | 66%        |
| Spokane          | 86%           | 62%        |
| <b>Statewide</b> | <b>80%</b>    | <b>62%</b> |

**In the last 12 months, did your firm have any difficulty finding qualified applicants for any jobs you were trying to fill?**

| WDA              | Among those attempting to hire |            | All Employers |            |
|------------------|--------------------------------|------------|---------------|------------|
|                  | 2007                           | 2010       | 2007          | 2010       |
| Benton-Franklin  | 59%                            | 37%        | 42%           | 27%        |
| Eastern          | 65%                            | 26%        | 52%           | 17%        |
| King             | 56%                            | 27%        | 50%           | 17%        |
| North Central    | 76%                            | 34%        | 64%           | 23%        |
| Northwest        | 77%                            | 28%        | 66%           | 18%        |
| Olympic          | 60%                            | 33%        | 50%           | 21%        |
| Pacific Mountain | 33%                            | 24%        | 27%           | 18%        |
| Pierce           | 59%                            | 18%        | 47%           | 13%        |
| Snohomish        | 62%                            | 36%        | 55%           | 26%        |
| South Central    | 61%                            | 32%        | 47%           | 18%        |
| Southwest        | 61%                            | 13%        | 43%           | 10%        |
| Spokane          | 71%                            | 17%        | 61%           | 13%        |
| <b>Statewide</b> | <b>60%</b>                     | <b>26%</b> | <b>50%</b>    | <b>17%</b> |







Q1.) Did you hire any new employees in the last 12 months.

|                  | Projected Number of Firms Hired 2007 | Projected Number of Firms Hired 2010 | Decline from 2007-2010 |
|------------------|--------------------------------------|--------------------------------------|------------------------|
| Benton-Franklin  | 4,000                                | 3,600                                | 10%                    |
| Eastern          | 5,000                                | 2,300                                | 54%                    |
| King             | 63,600                               | 39,400                               | 38%                    |
| North Central    | 7,300                                | 3,400                                | 53%                    |
| Northwest        | 12,400                               | 6,100                                | 51%                    |
| Olympic          | 9,500                                | 4,600                                | 52%                    |
| Pacific Mountain | 13,000                               | 8,000                                | 38%                    |
| Pierce           | 16,600                               | 10,700                               | 36%                    |
| Snohomish        | 12,700                               | 10,700                               | 16%                    |
| South Central    | 8,100                                | 3,700                                | 54%                    |
| Southwest        | 10,400                               | 8,000                                | 23%                    |
| Spokane          | 12,600                               | 8,300                                | 34%                    |
| <b>Statewide</b> | <b>175,100</b>                       | <b>108,800</b>                       | <b>38%</b>             |

Q2.) Did you have difficulty finding qualified applicants for the jobs you were trying to fill?

*Among those who attempted to hire*

|                  | Projected Number with Difficulty 2007 | Projected Number with Difficulty 2010 | Decline from 2007-2010 |
|------------------|---------------------------------------|---------------------------------------|------------------------|
| Benton-Franklin  | 2,400                                 | 1,320                                 | 45%                    |
| Eastern          | 3,200                                 | 600                                   | 81%                    |
| King             | 35,800                                | 10,520                                | 71%                    |
| North Central    | 5,500                                 | 1,150                                 | 79%                    |
| Northwest        | 9,500                                 | 1,730                                 | 82%                    |
| Olympic          | 5,700                                 | 1,500                                 | 74%                    |
| Pacific Mountain | 4,300                                 | 1,930                                 | 55%                    |
| Pierce           | 9,700                                 | 1,950                                 | 80%                    |
| South Central    | 5,000                                 | 1,170                                 | 77%                    |
| Snohomish        | 7,700                                 | 3,810                                 | 51%                    |
| Southwest        | 6,200                                 | 1,020                                 | 84%                    |
| Spokane          | 8,900                                 | 1,390                                 | 84%                    |
| <b>Statewide</b> | <b>104,100</b>                        | <b>28,090</b>                         | <b>73%</b>             |

| <b>In the last 12 months, did your firm have any difficulty finding qualified applicants for any jobs you were trying to fill?</b> |                |               |                |
|--|----------------|---------------|----------------|
| Employers with Difficulty (Among Those Attempting to Hire)   |                |               |                |
|  | <b>2007</b>    | <b>2010</b>   | <b>Decline</b> |
| Ag_Food  | 3,000          | 740           | 75%            |
| Construction   | 10,400         | 850           | 92%            |
| High-Tech  | 1,300          | 500           | 62%            |
| Manufacturing  | 3,100          | 770           | 75%            |
| Other  | 23,100         | 6,470         | 72%            |
| Services   | 36,200         | 12,780        | 65%            |
| Trade  | 27,000         | 5,990         | 78%            |
| <b>Statewide</b>   | <b>104,100</b> | <b>28,100</b> | <b>73%</b>     |

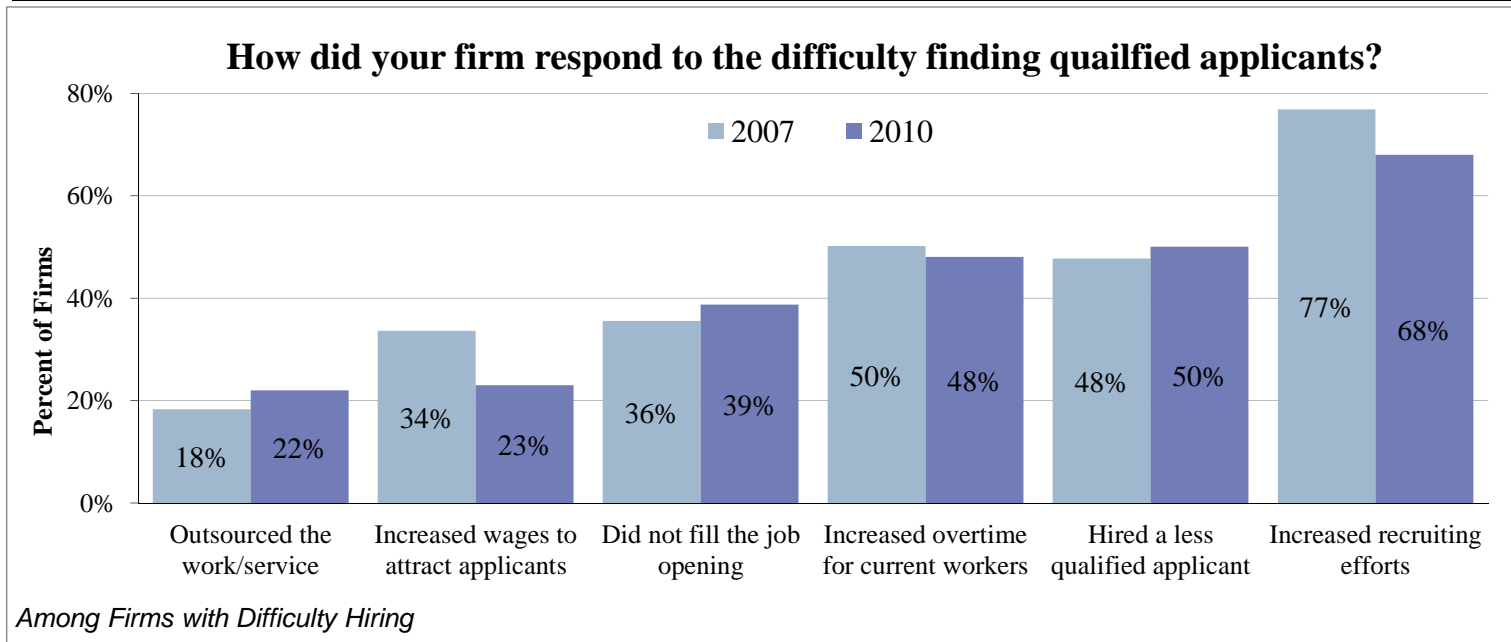
| <b>In the last 12 months, did your firm have any difficulty finding qualified applicants for any jobs you were trying to fill?</b> |                |               |                |
|--|----------------|---------------|----------------|
| Employers with Difficulty (Among Those Attempting to Hire)   |                |               |                |
|  | <b>2007</b>    | <b>2010</b>   | <b>Decline</b> |
| Micro  |                | 11,790        |                |
| Small  | 75,200         | 10,210        | 71%            |
| Medium   | 22,200         | 5,380         | 76%            |
| Large  | 6,600          | 860           | 87%            |
| <b>Statewide</b>   | <b>104,100</b> | <b>28,240</b> | <b>73%</b>     |

Question 3

**How did your firm respond to the difficulty finding qualified applicants?**

*Among those with difficulty hiring*

|  | Among Those Attempting to Hire |      | Percent of All Employers |      | Projected Number of Employers |        |
|--|--------------------------------|------|--------------------------|------|-------------------------------|--------|
|  | 2007                           | 2010 | 2007                     | 2010 | 2007                          | 2010   |
| Outsourced the work/service            | 18%                            | 22%  | 9%                       | 4%   | 19,100                        | 6,200  |
| Increased wages to attract applicants  | 34%                            | 23%  | 17%                      | 4%   | 35,000                        | 6,500  |
| Did not fill the job opening           | 36%                            | 39%  | 19%                      | 6%   | 37,060                        | 10,900 |
| Increased overtime for current workers | 50%                            | 48%  | 26%                      | 8%   | 52,300                        | 13,500 |
| Hired a less qualified applicant       | 48%                            | 50%  | 25%                      | 9%   | 49,700                        | 14,100 |
| Increased recruiting efforts           | 77%                            | 68%  | 39%                      | 12%  | 80,030                        | 19,100 |

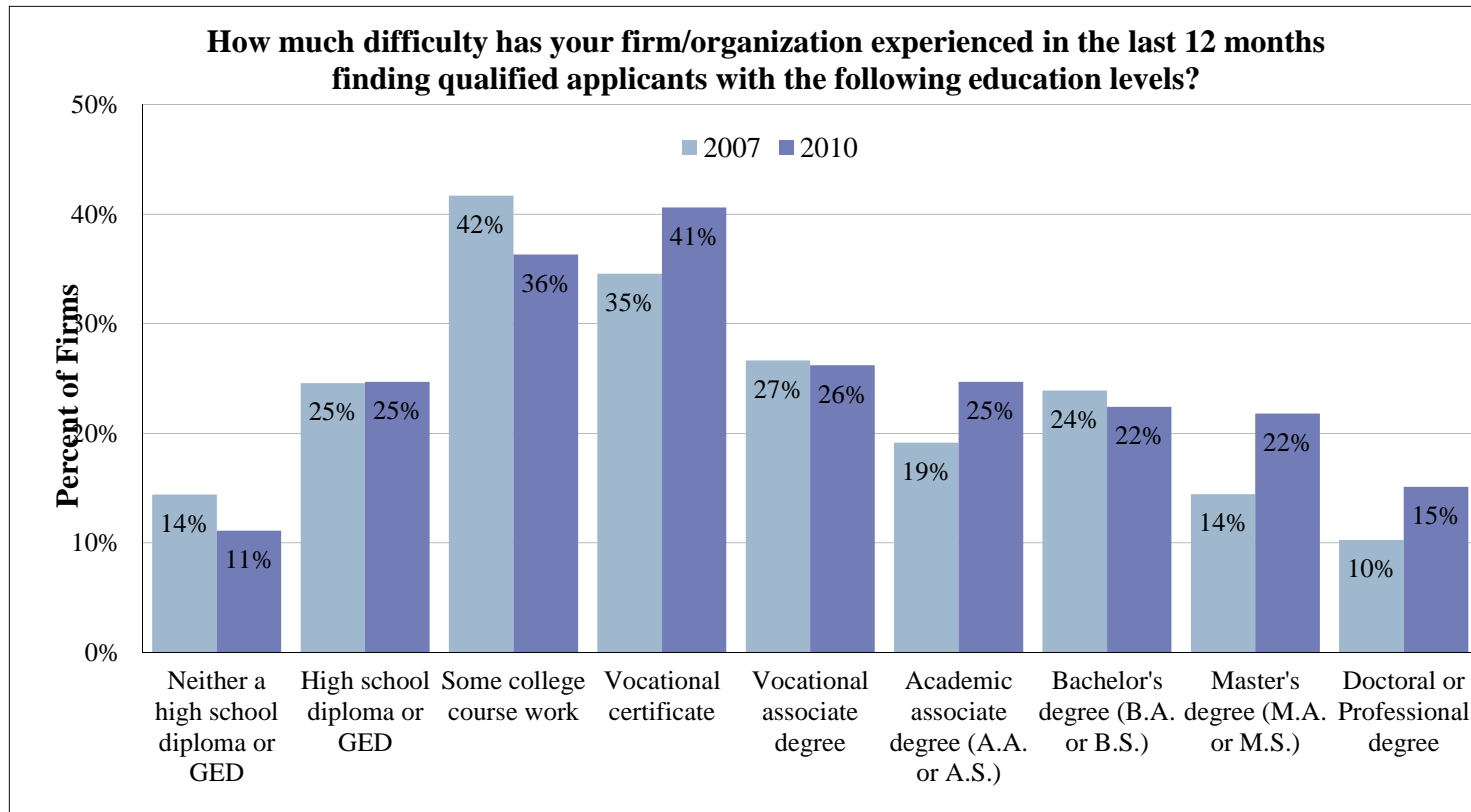


Question 5

**How much difficulty has your firm/organization experienced in the last 12 months finding qualified applicants with the following education levels?**

*Among firms with difficulty hiring*

|  | 2007 | 2010 |
|--|------|------|
| Neither a high school diploma or GED     | 14%  | 11%  |
| High school diploma or GED               | 25%  | 25%  |
| Some college course work                 | 42%  | 36%  |
| Vocational certificate                   | 35%  | 41%  |
| Vocational associate degree              | 27%  | 26%  |
| Academic associate degree (A.A. or A.S.) | 19%  | 25%  |
| Bachelor's degree (B.A. or B.S.)         | 24%  | 22%  |
| Master's degree (M.A. or M.S.)           | 14%  | 22%  |
| Doctoral or Professional degree          | 10%  | 15%  |



Question 6

**How much difficulty has your firm/organization had finding employees with the following skills?**

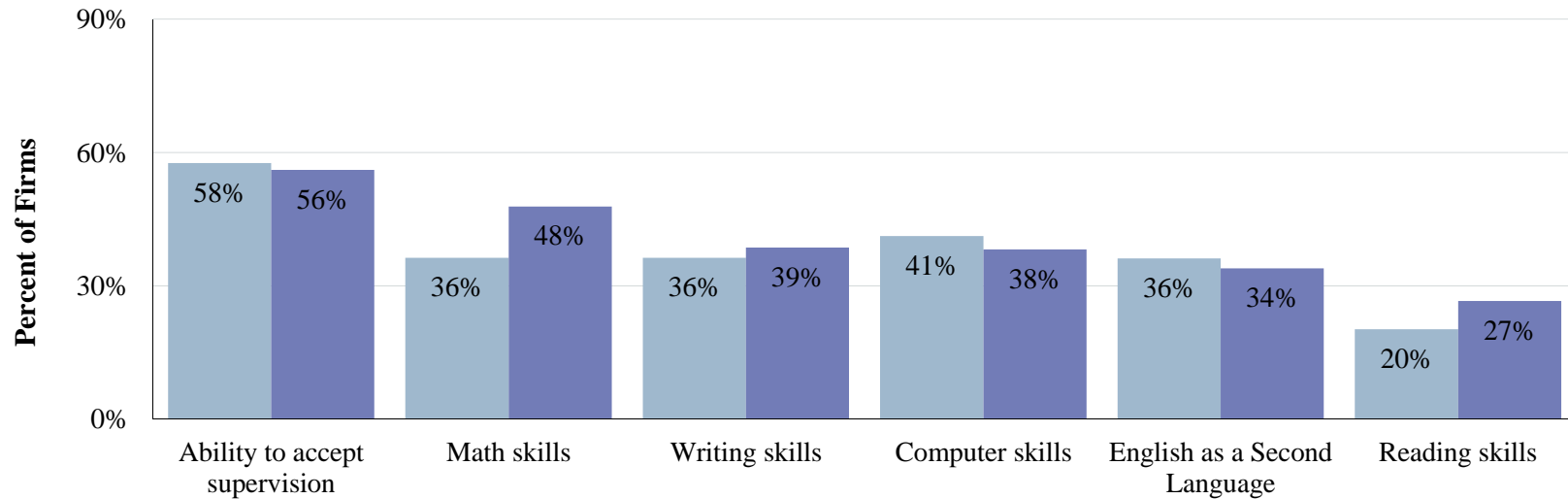
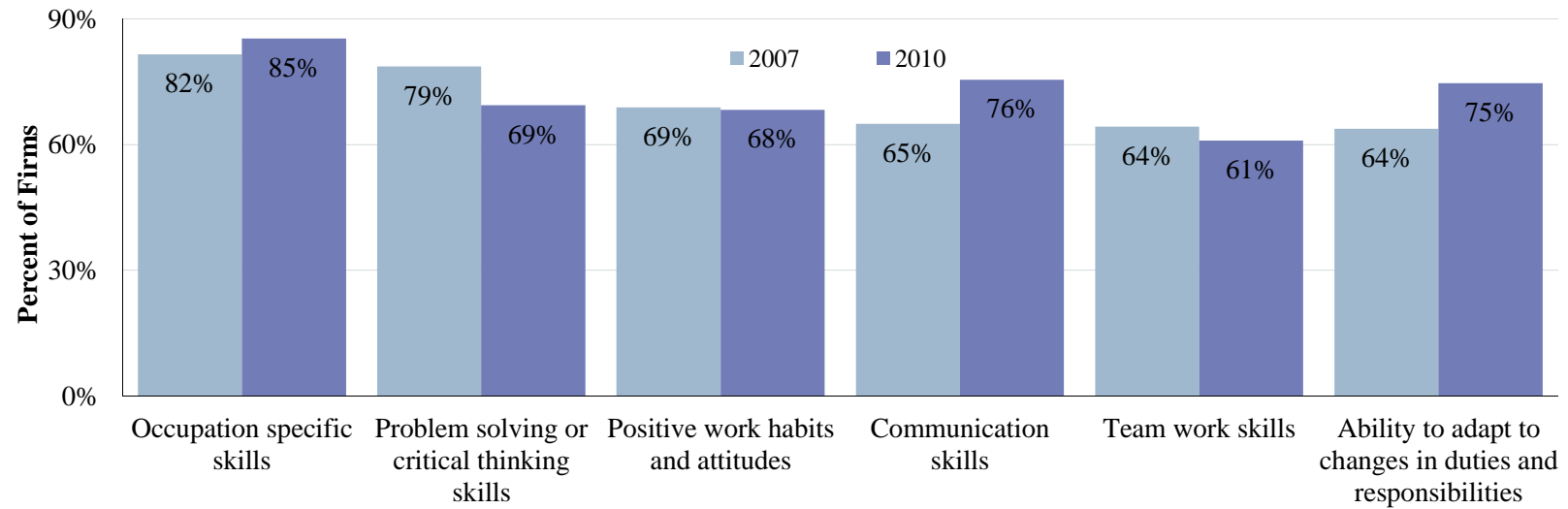
*Among those with difficulty hiring*

|  | <b>2007</b> | <b>2010</b> |
|--|-------------|-------------|
| Occupation specific skills                                 | 82%         | 85%         |
| Problem solving or critical thinking skills                | 79%         | 69%         |
| Positive work habits and attitudes                         | 69%         | 68%         |
| Communication skills                                       | 65%         | 76%         |
| Team work skills   | 64%         | 61%         |
| Ability to adapt to changes in duties and responsibilities | 64%         | 75%         |
| Ability to accept supervision                              | 56%         | 58%         |
| Math skills  | 48%         | 36%         |
| Writing skills   | 39%         | 36%         |
| Computer skills  | 38%         | 41%         |
| English as a Second Language                               | 34%         | 36%         |
| Reading skills   | 27%         | 20%         |



Question 6

**How much difficulty has your firm/organization had finding employees with the following skills?**

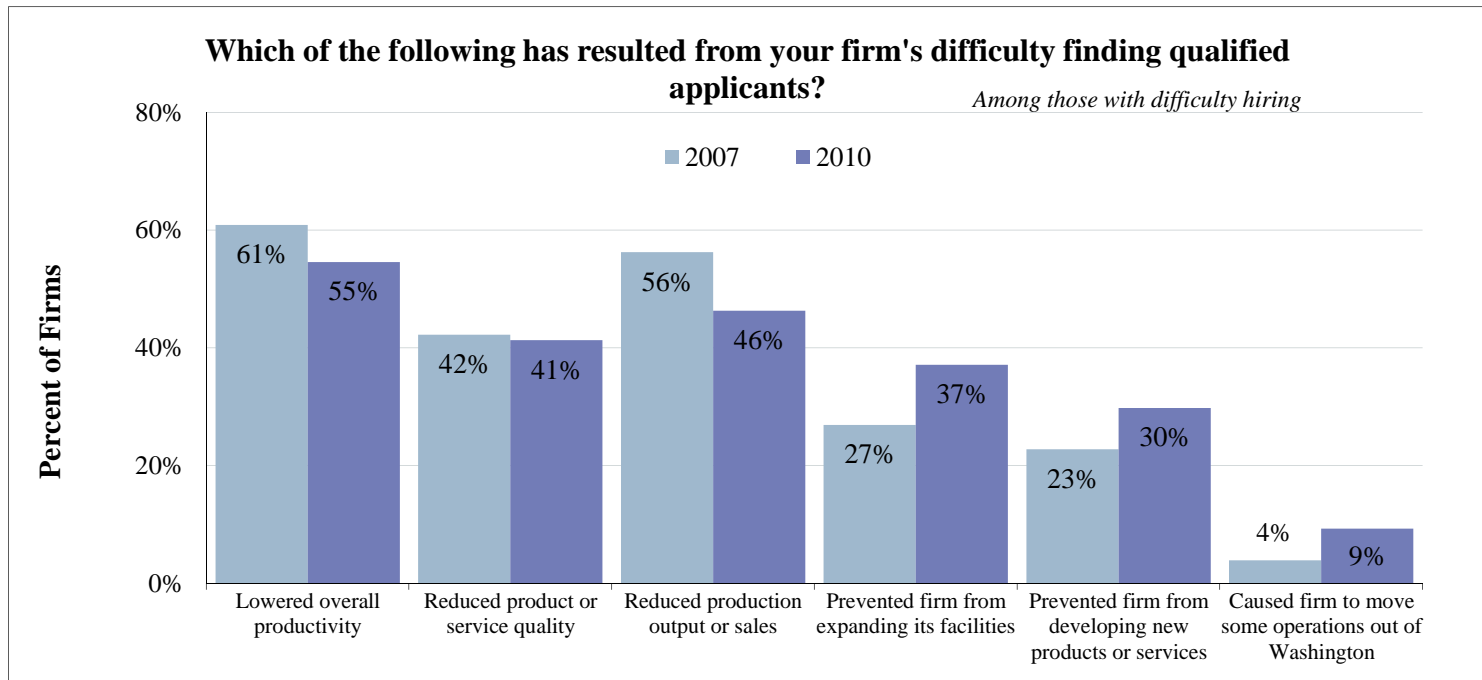


Question 7

**Which of the following has resulted from your firm's difficulty finding qualified applicants?**

*Among those with difficulty hiring*

|   | 2007 | 2010 | 2007   | 2010   |
|---|------|------|--------|--------|
| Lowered overall productivity                            | 61%  | 55%  | 63,300 | 15,340 |
| Reduced product or service quality                      | 42%  | 41%  | 44,000 | 11,600 |
| Reduced production output or sales                      | 56%  | 46%  | 58,600 | 13,010 |
| Prevented firm from expanding its facilities            | 27%  | 37%  | 28,000 | 10,420 |
| Prevented firm from developing new products or services | 23%  | 30%  | 23,700 | 8,370  |
| Caused firm to move some operations out of Washington   | 4%   | 9%   | 4,000  | 2,610  |

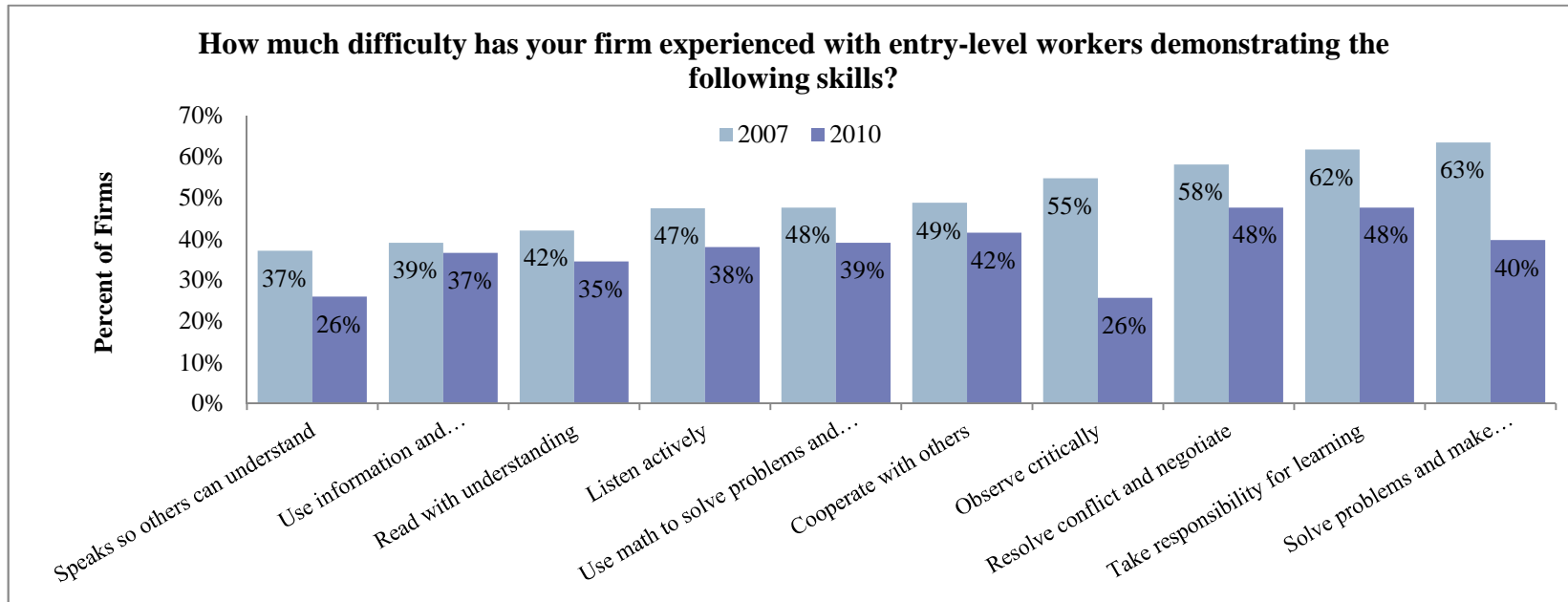


Question 8

**How much difficulty has your firm/organization experienced with entry-level workers demonstrating the following skills?**

*Among those with difficulty hiring*

|  | 2007 | 2010 |
|--|------|------|
| <b>Speaks so others can understand</b>               | 37%  | 26%  |
| <b>Use information and communications technology</b> | 39%  | 37%  |
| <b>Read with understanding</b>                       | 42%  | 35%  |
| <b>Listen actively</b>                               | 47%  | 38%  |
| <b>Use math to solve problems and communicate</b>    | 48%  | 39%  |
| <b>Cooperate with others</b>                         | 49%  | 42%  |
| <b>Observe critically</b>                            | 55%  | 26%  |
| <b>Resolve conflict and negotiate</b>                | 58%  | 48%  |
| <b>Take responsibility for learning</b>              | 62%  | 48%  |
| <b>Solve problems and make decisions</b>             | 63%  | 40%  |



Question 9

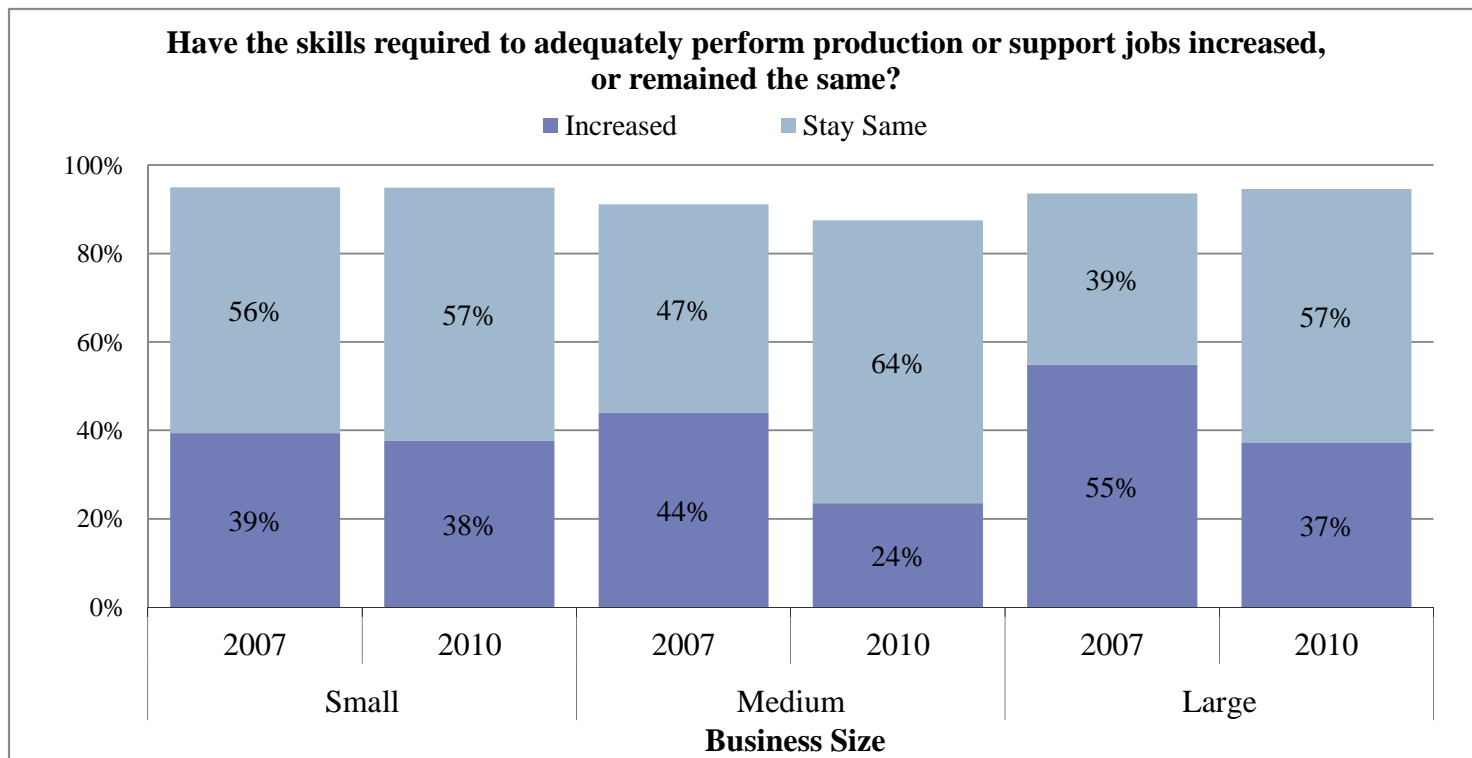
**How will your firm's/organization's need for employees with each of the types of education listed below change in the next five years?**

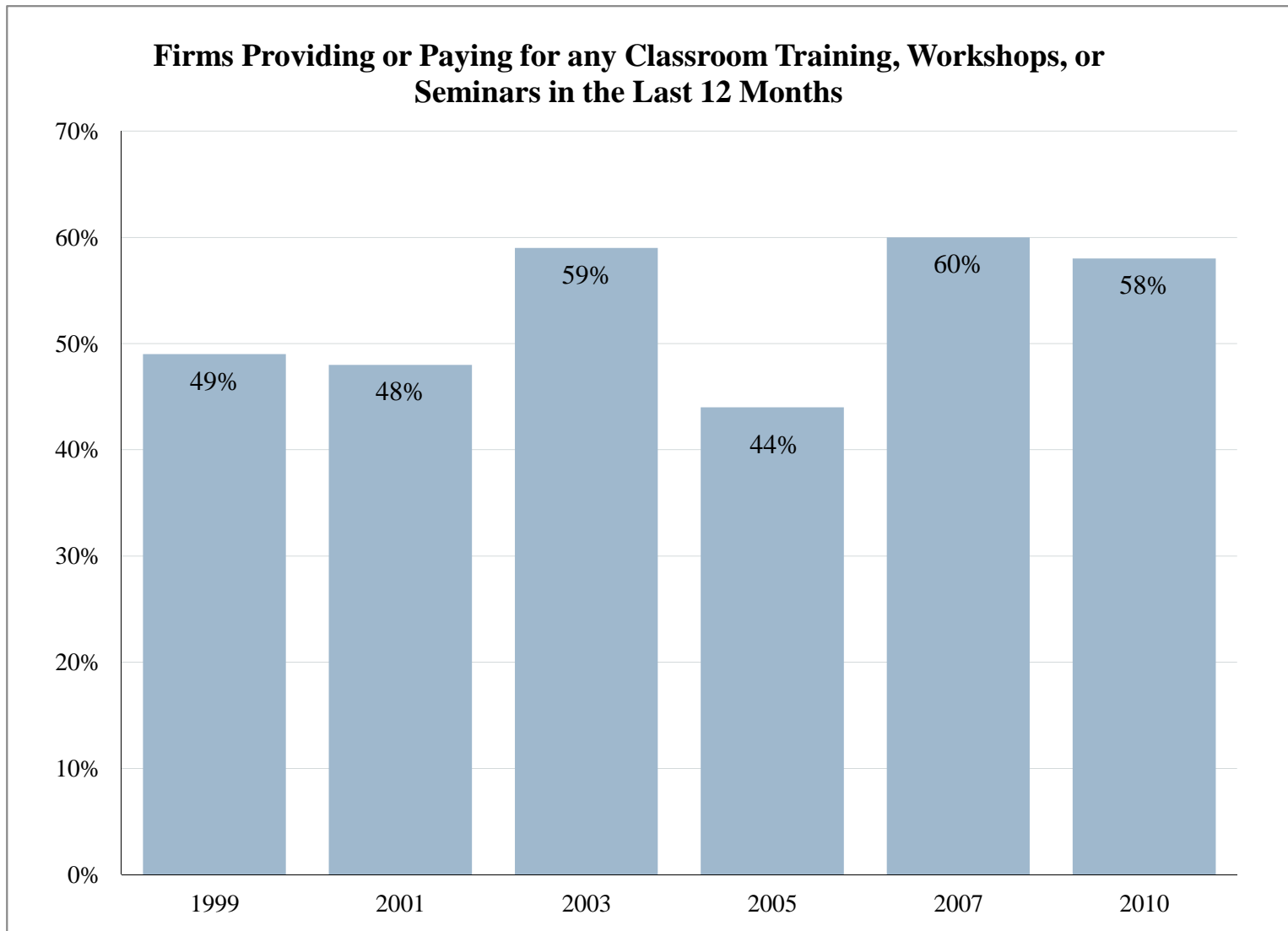
|   | Increase |      | Stay About the Same |      | Decrease |      | Not Needed |      |
|---|----------|------|---------------------|------|----------|------|------------|------|
|   | 2007     | 2010 | 2007                | 2010 | 2007     | 2010 | 2007       | 2010 |
| <b>Neither a high school diploma or GED</b>     | 12%      | 7%   | 45%                 | 43%  | 4%       | 5%   | 39%        | 45%  |
| <b>High school diploma or GED</b>               | 18%      | 12%  | 63%                 | 63%  | 2%       | 1%   | 17%        | 22%  |
| <b>Some college course work</b>                 | 27%      | 19%  | 46%                 | 55%  | 1%       | 1%   | 26%        | 24%  |
| <b>Vocational certificate</b>                   | 22%      | 19%  | 39%                 | 48%  | 1%       | 1%   | 39%        | 32%  |
| <b>Vocational associate degree</b>              | 17%      | 15%  | 39%                 | 47%  | 1%       | 1%   | 43%        | 37%  |
| <b>Academic associate degree (A.A. or A.S.)</b> | 10%      | 16%  | 41%                 | 45%  | 5%       | 1%   | 44%        | 37%  |
| <b>Bachelor's degree (B.A. or B.S.)</b>         | 18%      | 17%  | 35%                 | 38%  | 1%       | 2%   | 46%        | 42%  |
| <b>Master's degree (M.A. or M.S.)</b>           | 7%       | 6%   | 30%                 | 30%  | 5%       | 2%   | 58%        | 60%  |
| <b>Doctoral or Professional degree</b>          | 4%       | 6%   | 25%                 | 29%  | 5%       | 2%   | 66%        | 62%  |

Question 10

**In the last three years, have the skills required to adequately perform production or support jobs (primary or front-line services or support jobs) increased, decreased or remained the same?**

|               |      | Increased | Stay Same | Decreased | Don't Know |
|---------------|------|-----------|-----------|-----------|------------|
| <b>Small</b>  | 2007 | 39%       | 56%       | 1%        | 4%         |
|               | 2010 | 38%       | 57%       | 5%        | 0%         |
| <b>Medium</b> | 2007 | 44%       | 47%       | 6%        | 3%         |
|               | 2010 | 24%       | 64%       | 12%       | 1%         |
| <b>Large</b>  | 2007 | 55%       | 39%       | 4%        | 3%         |
|               | 2010 | 37%       | 57%       | 3%        | 2%         |





Question 12

**What percentage received classroom training, workshops, or seminars (lasting at least 4 hours) did each type of employee received in the last 12 months?**

|   | 2007      | 2010       |
|---|-----------|------------|
| Managerial and administrative occupations   | 49%       | <b>60%</b> |
| Professional occupations  | 32%       | <b>45%</b> |
| Technical and paraprofessional occupations  | 30%       | <b>41%</b> |
| Marketing and sales-related occupations   | 19%       | <b>35%</b> |
| Clerical and administrative support occupations                                     | 26%       | <b>36%</b> |
| Service occupations   | 24%       | <b>38%</b> |
| Production, construction, operation, maintenance, and material-handling occupations | 26%       | <b>37%</b> |
| Agricultural, forestry, fishing, and related occupations                            | <b>9%</b> | 6%         |

Question 13

**What percent of your current employees would you say need further training in a formal program in order to reach the current level of productivity and competence that your company needs?**

| 2010                                 | Percent |
|--------------------------------------|---------|
| At a community or technical college  | 13.9%   |
| At a four-year college or university | 5.4%    |

Question 14

**In the last three years, has the percentage of your employees who receive classroom training, workshops, or seminars of some kind increased, decreased, or stayed the same?**

| 2007 |                       | Increased  | Stayed Same | Decreased |
|------|-----------------------|------------|-------------|-----------|
|      | Small (5-19)          | 37%        | 53%         | 6%        |
|      | Medium (20-99)        | 49%        | 47%         | 2%        |
|      | Large (100+)          | 51%        | 43%         | 2%        |
|      | <b>All Industries</b> | <b>41%</b> | <b>51%</b>  | <b>5%</b> |

| 2010 |                | Increased  | Stayed Same | Decreased |
|------|----------------|------------|-------------|-----------|
|      | Small (5-19)   | 26%        | 69%         | 5%        |
|      | Medium (20-99) | 30%        | 63%         | 7%        |
|      | Large (100+)   | 28%        | 61%         | 9%        |
|      | <b>All</b>     | <b>27%</b> | <b>67%</b>  | <b>6%</b> |

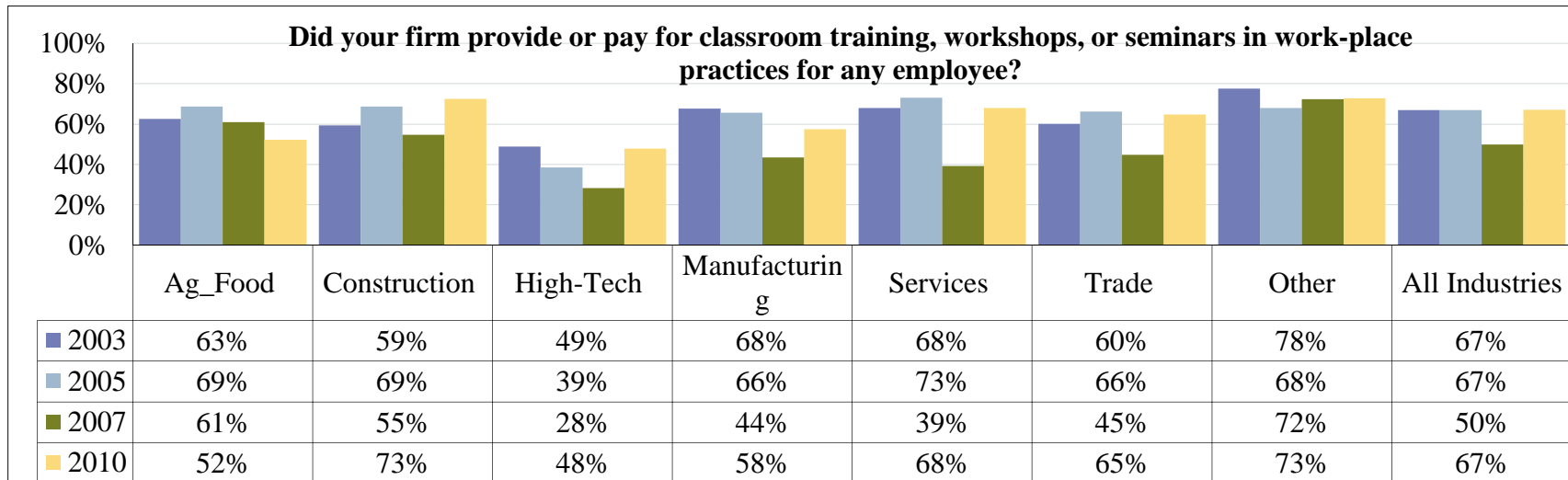
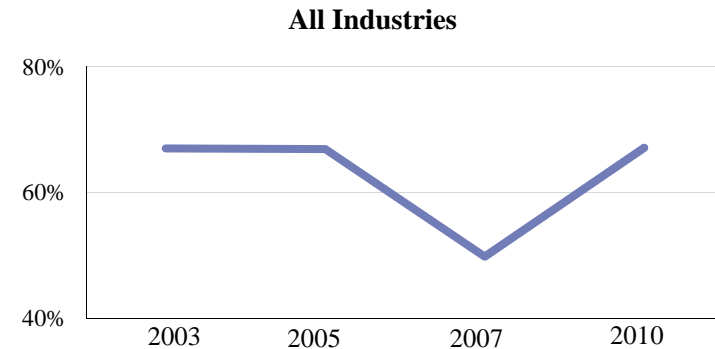


Question 18

**In the last 12 months, did your firm provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in work-place practices for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 63%        | 69%        | 61%        | 52%        |
| Construction          | 59%        | 69%        | 55%        | 73%        |
| High-Tech             | 49%        | 39%        | 28%        | 48%        |
| Manufacturing         | 68%        | 66%        | 44%        | 58%        |
| Services              | 68%        | 73%        | 39%        | 68%        |
| Trade                 | 60%        | 66%        | 45%        | 65%        |
| Other                 | 78%        | 68%        | 72%        | 73%        |
| <b>All Industries</b> | <b>67%</b> | <b>67%</b> | <b>50%</b> | <b>67%</b> |



Question 19

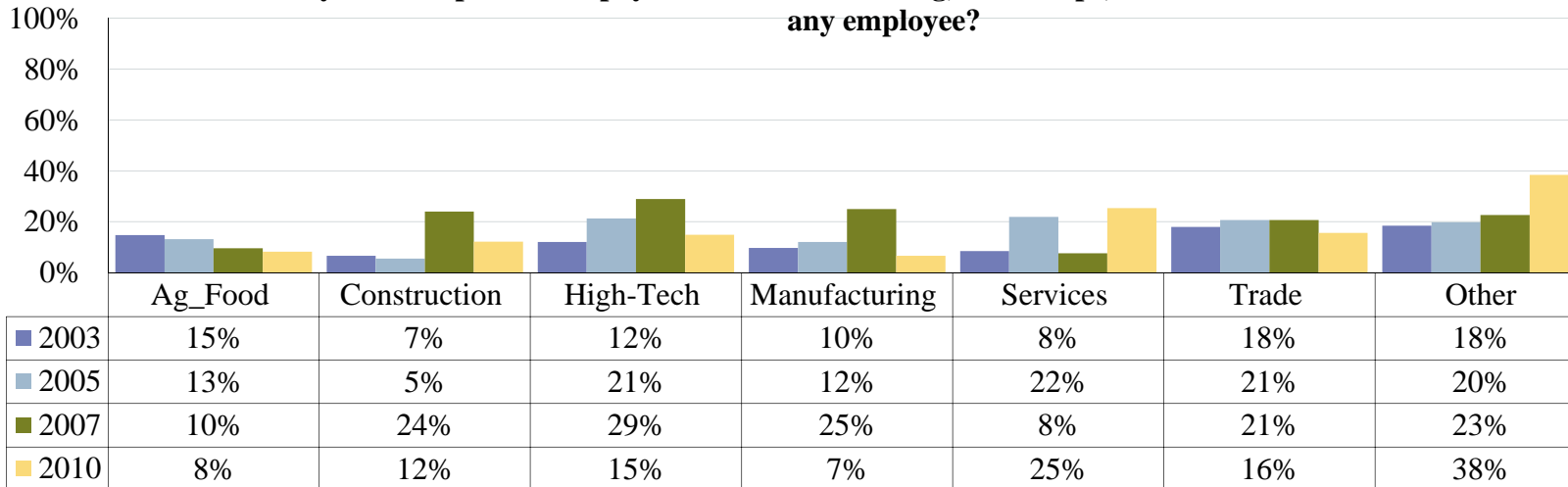
**In the past 12 months, did your firm/organization provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in basic skills for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 15%        | 13%        | 10%        | 8%         |
| Construction          | 7%         | 5%         | 24%        | 12%        |
| High-Tech             | 12%        | 21%        | 29%        | 15%        |
| Manufacturing         | 10%        | 12%        | 25%        | 7%         |
| Services              | 8%         | 22%        | 8%         | 25%        |
| Trade                 | 18%        | 21%        | 21%        | 16%        |
| Other                 | 18%        | 20%        | 23%        | 38%        |
| <b>All Industries</b> | <b>13%</b> | <b>19%</b> | <b>16%</b> | <b>23%</b> |



**Did your firm provide or pay for classroom training, workshops, or seminars in basic skills for any employee?**

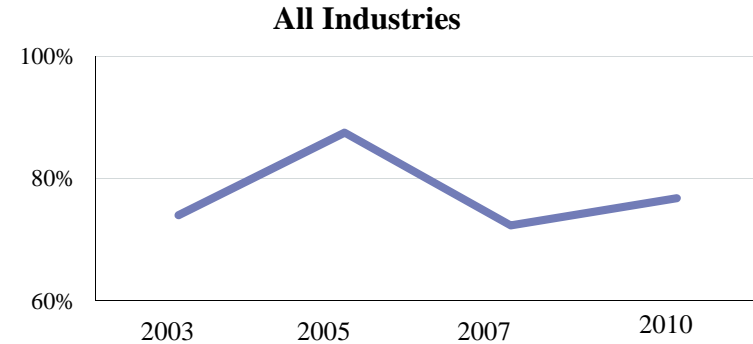


Question 20

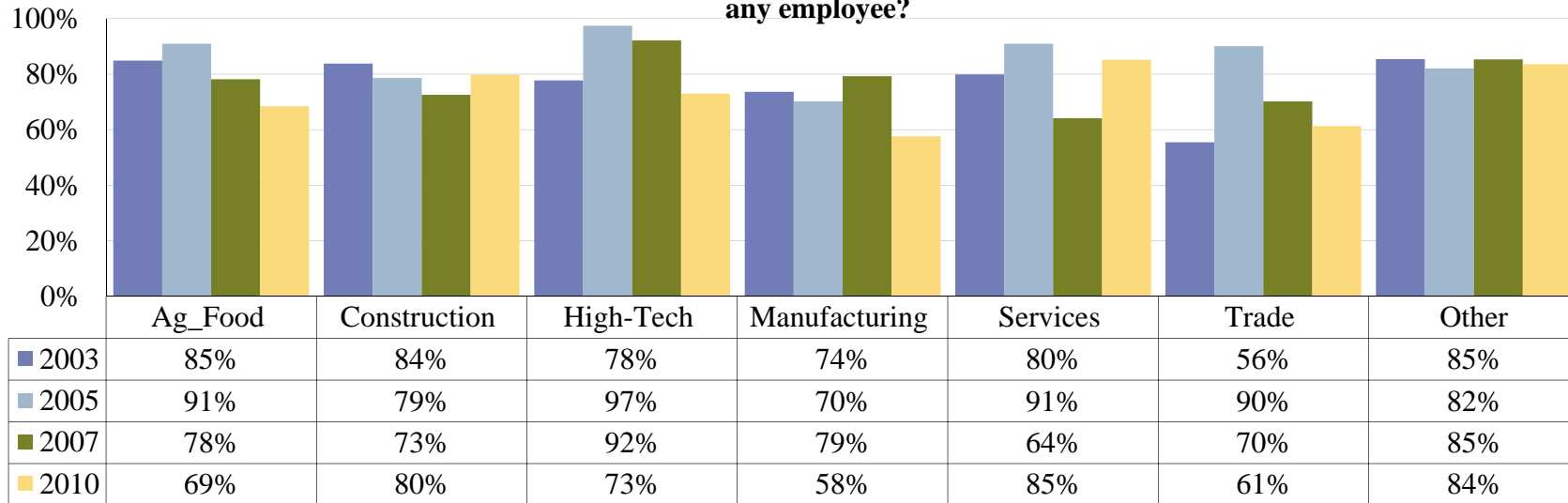
**In the past 12 months, did your firm/organization provide or pay for classroom training, workshops, or seminars (lasting at least four hours) in job-specific skills for any employee?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 85%        | 91%        | 78%        | 69%        |
| Construction          | 84%        | 79%        | 73%        | 80%        |
| High-Tech             | 78%        | 97%        | 92%        | 73%        |
| Manufacturing         | 74%        | 70%        | 79%        | 58%        |
| Services              | 80%        | 91%        | 64%        | 85%        |
| Trade                 | 56%        | 90%        | 70%        | 61%        |
| Other                 | 85%        | 82%        | 85%        | 84%        |
| <b>All Industries</b> | <b>74%</b> | <b>88%</b> | <b>72%</b> | <b>77%</b> |



**Did your firm provide or pay for classroom training, workshops, or seminars in job-specific skills for any employee?**



Question 21

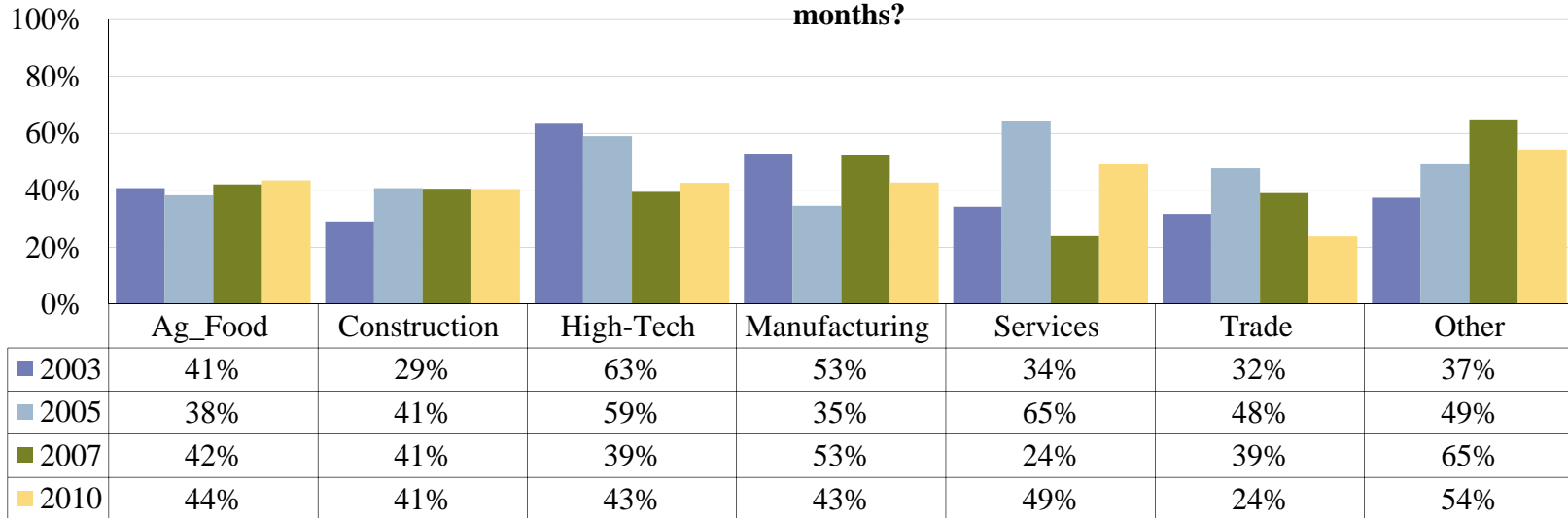
**Did your firm/organization have a tuition reimbursement program for any employee during the past 12 months?**

*Among those who provided classroom training in the last 12 months (Q11=Yes)*

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 41%        | 38%        | 42%        | 44%        |
| Construction          | 29%        | 41%        | 41%        | 41%        |
| High-Tech             | 63%        | 59%        | 39%        | 43%        |
| Manufacturing         | 53%        | 35%        | 53%        | 43%        |
| Services              | 34%        | 65%        | 24%        | 49%        |
| Trade                 | 32%        | 48%        | 39%        | 24%        |
| Other                 | 37%        | 49%        | 65%        | 54%        |
| <b>All Industries</b> | <b>35%</b> | <b>50%</b> | <b>39%</b> | <b>44%</b> |



**Did your firm have a tuition reimbursement program for any employee during the past 12 months?**

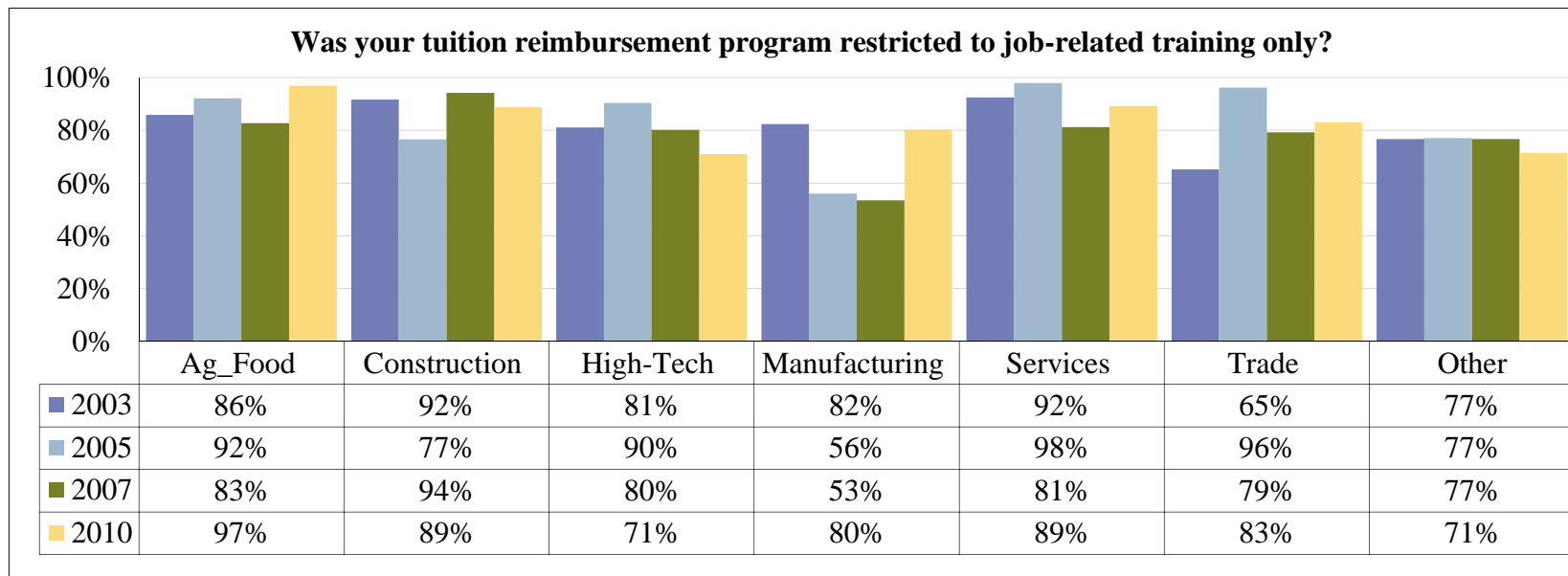
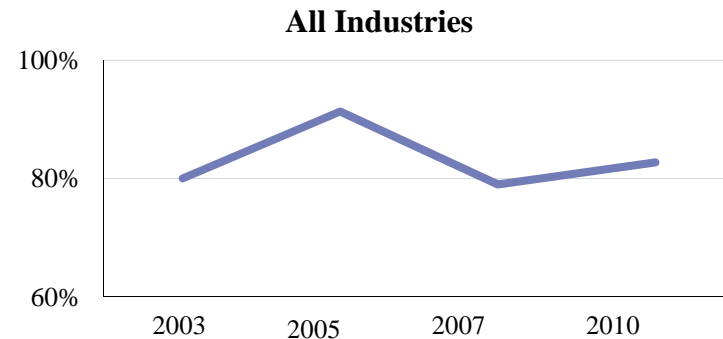


Question 22

**Was your tuition reimbursement program restricted to job-related training only?**

*Among those who have a tuition reimbursement program (Q21=Yes)*

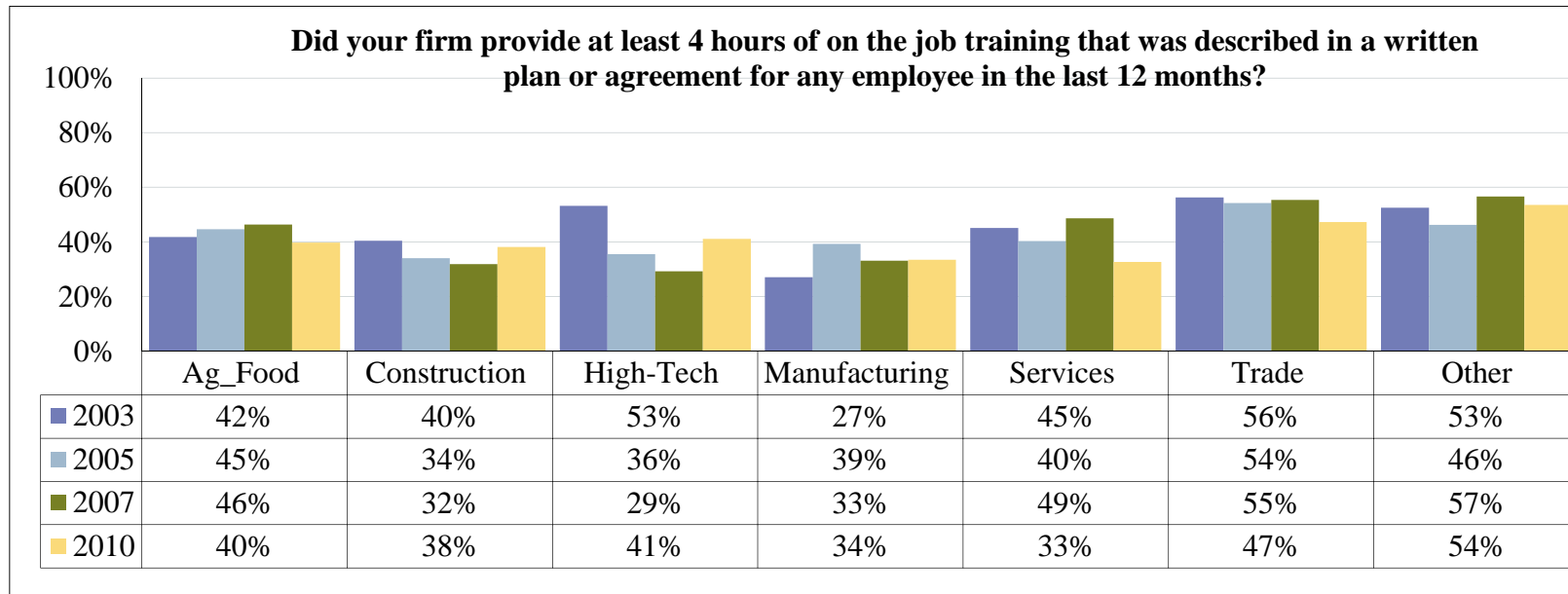
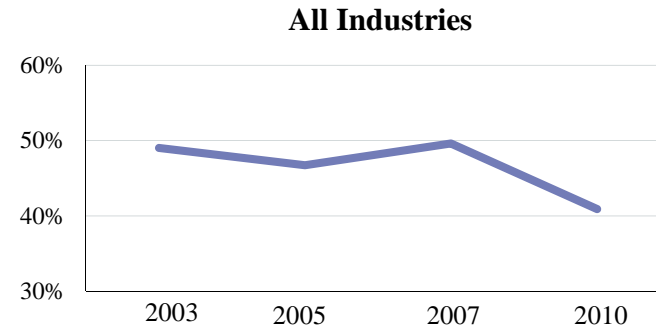
|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 86%        | 92%        | 83%        | 97%        |
| Construction          | 92%        | 77%        | 94%        | 89%        |
| High-Tech             | 81%        | 90%        | 80%        | 71%        |
| Manufacturing         | 82%        | 56%        | 53%        | 80%        |
| Services              | 92%        | 98%        | 81%        | 89%        |
| Trade                 | 65%        | 96%        | 79%        | 83%        |
| Other                 | 77%        | 77%        | 77%        | 71%        |
| <b>All Industries</b> | <b>80%</b> | <b>91%</b> | <b>79%</b> | <b>83%</b> |



Question 23

**Did your firm/organization provide at least 4 hours of on the job training that was described in a written plan or agreement for any employee in the last 12 months?**

|                       | 2003       | 2005       | 2007       | 2010       |
|-----------------------|------------|------------|------------|------------|
| Ag_Food               | 42%        | 45%        | 46%        | 40%        |
| Construction          | 40%        | 34%        | 32%        | 38%        |
| High-Tech             | 53%        | 36%        | 29%        | 41%        |
| Manufacturing         | 27%        | 39%        | 33%        | 34%        |
| Services              | 45%        | 40%        | 49%        | 33%        |
| Trade                 | 56%        | 54%        | 55%        | 47%        |
| Other                 | 53%        | 46%        | 57%        | 54%        |
| <b>All Industries</b> | <b>49%</b> | <b>47%</b> | <b>50%</b> | <b>41%</b> |



Question 24

**For each type of employee listed below, approximately what percentage received on-the-job training in the last 12 months?**

|   | <b>2003</b> | <b>2005</b> | <b>2007</b> | <b>2010</b> |
|---|-------------|-------------|-------------|-------------|
| Managerial and administrative occupations   | 43%         | 38%         | 28%         | 52%         |
| Professional occupations  | 33%         | 26%         | 16%         | 38%         |
| Technical and paraprofessional occupations  | 31%         | 25%         | 21%         | 36%         |
| Marketing and sales-related occupations   | 35%         | 33%         | 18%         | 34%         |
| Clerical and administrative support occupations                                     | 40%         | 37%         | 34%         | 41%         |
| Service occupations   | 40%         | 23%         | 20%         | 49%         |
| Production, construction, operation, maintenance, and material-handling occupations | 29%         | 32%         | 28%         | 35%         |
| Agricultural, forestry, fishing, and related occupations                            | 11%         | 6%          | 9%          | 5%          |

Question 25

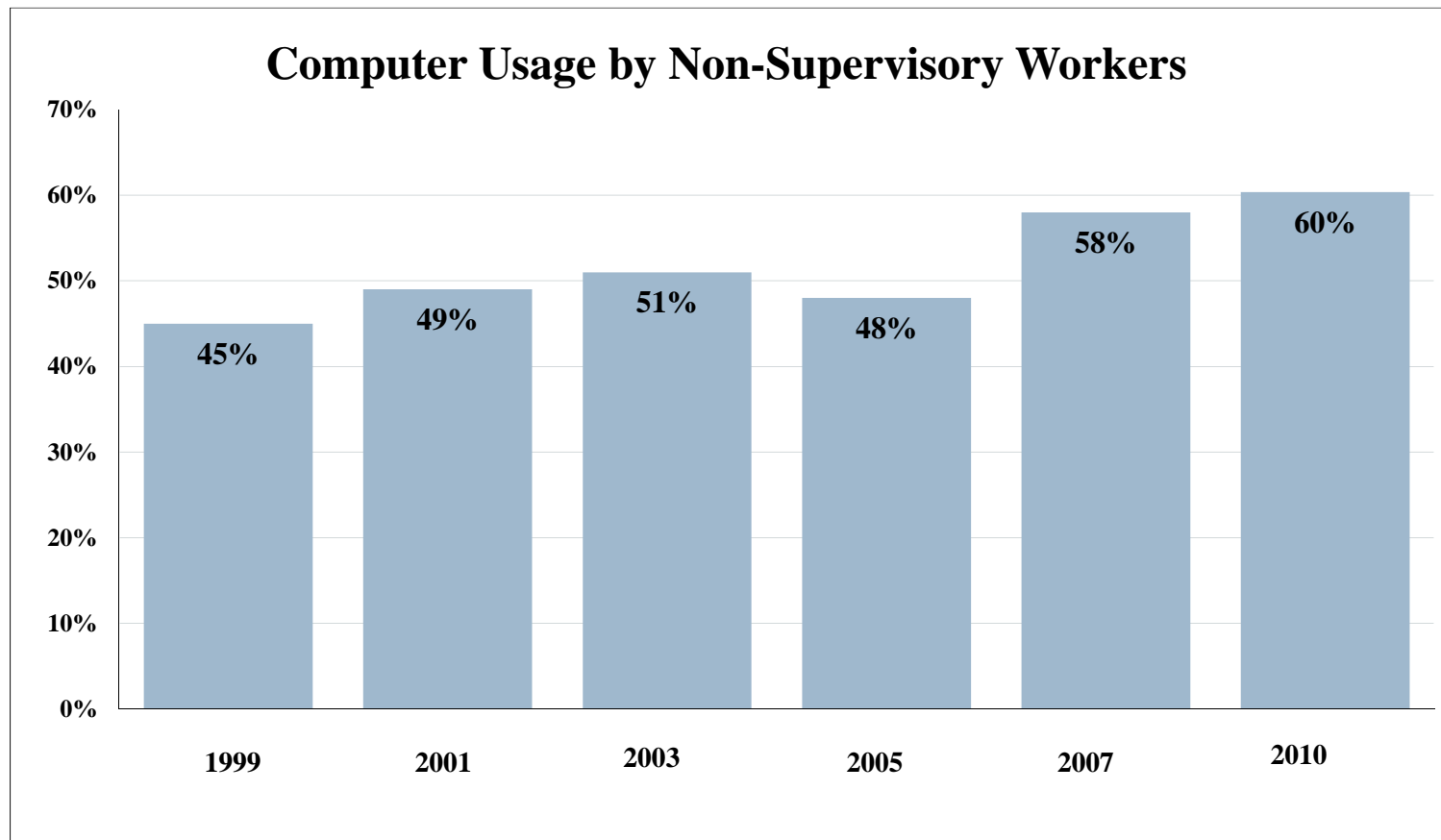
**What percent of your firm's current employees are in jobs that require each of the educational levels listed below.**

|  | <b>2007</b> | <b>2010</b> |
|--|-------------|-------------|
| Neither a high school diploma or GED     | 21.0%       | 19.9%       |
| High school diploma or GED               | 37.8%       | 43.7%       |
| Some college course work                 | 11.2%       | 7.7%        |
| Vocational certificate                   | 5.8%        | 5.9%        |
| Vocational associate degree              | 2.3%        | 2.3%        |
| Academic associate degree (A.A. or A.S.) | 4.5%        | 3.4%        |
| Bachelor's degree (B.A. or B.S.)         | 12.4%       | 13.5%       |
| Master's degree (M.A. or M.S.)           | 2.9%        | 2.0%        |
| Doctoral or Professional degree          | 1.5%        | 1.4%        |



Question 26

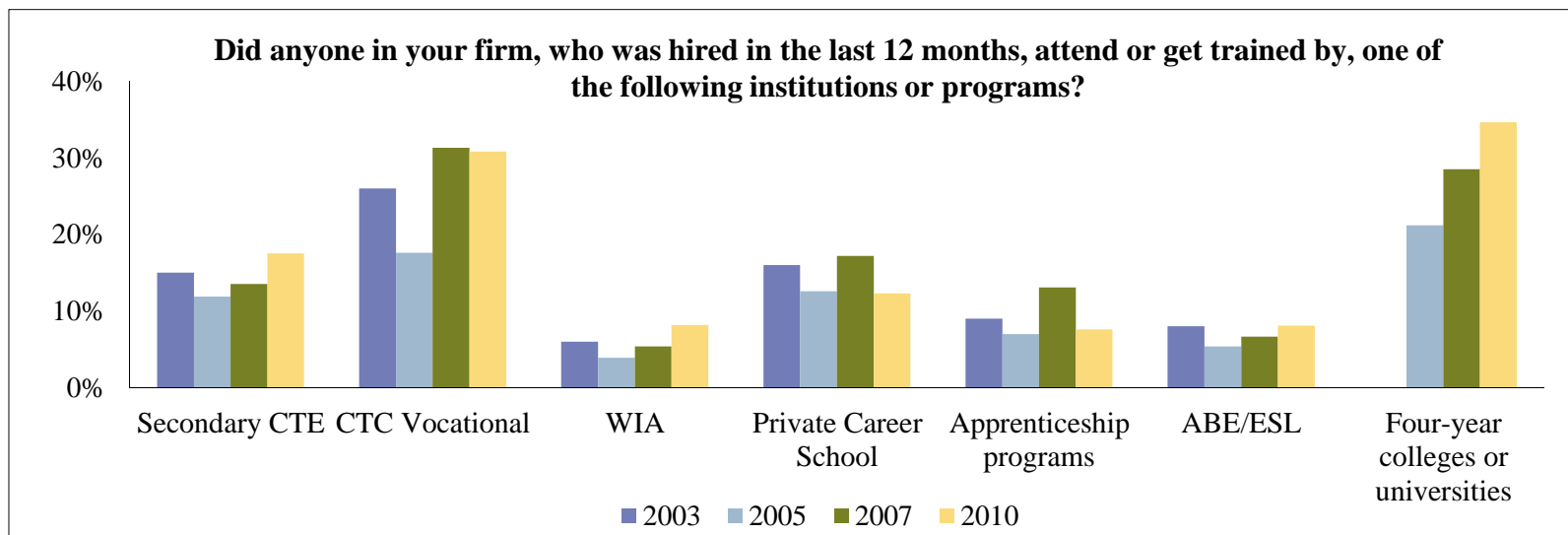
**What percentage of your non-supervisory employees use computers in their jobs?**



Question 27

**Did anyone in your firm, who was hired in the last 12 months, attend or get trained by, one of the following institutions or programs?**

|                                    | 2003 | 2005 | 2007 | 2010 |
|------------------------------------|------|------|------|------|
| Secondary CTE                      | 15%  | 12%  | 14%  | 18%  |
| CTC Vocational                     | 26%  | 18%  | 31%  | 31%  |
| WIA                                | 6%   | 4%   | 5%   | 8%   |
| Private Career School              | 16%  | 13%  | 17%  | 12%  |
| Apprenticeship programs            | 9%   | 7%   | 13%  | 8%   |
| ABE/ESL                            | 8%   | 5%   | 7%   | 8%   |
| Four-year colleges or universities | N/A  | 21%  | 29%  | 35%  |



**Definition of Industry Sectors Used in the Survey**

| <b>SIC</b> | <b>INDUSTRY NAME</b> | <b>MAJOR SUB GROUPS (at 2 Digit SIC)</b> | <b>SIC</b> | <b>MAJOR SUB GROUPS (at 2 Digit SIC)</b> |  |
|------------|----------------------|--|------------|--|--|
| 01         | Agriculture-Food     | AGRICULTURAL PRODUCTION CROPS            | 44         | Other                                    | WATER TRANSPORTATION                   |
| 02         | Agriculture-Food     | AGRICULTURAL PRODUCTION LIVESTOCK        | 45         | Other                                    | TRANSPORTATION BY AIR                  |
| 07         | Agriculture-Food     | AGRICULTURAL SERVICES                    | 46         | Other                                    | PIPELINES, EXCEPT NATURAL GAS          |
| 08         | Agriculture-Food     | FORESTRY                                 | 47         | Other                                    | TRANSPORTATION SERVICES                |
| 09         | Agriculture-Food     | FISHING, HUNTING AND TRAPPING            | 49         | Other                                    | ELECTRIC, GAS, AND SANITARY SERVICES   |
| 20         | Agriculture-Food     | FOOD AND KINDRED PRODUCTS                | 60         | Other                                    | DEPOSITORY INSTITUTIONS                |
| 10         | Construction         | METAL MINING                             | 61         | Other                                    | NONDEPOSITORY INSTITUTIONS             |
| 12         | Construction         | COAL MINING                              | 62         | Other                                    | SECURITY AND COMMODITY BROKERS         |
| 13         | Construction         | OIL AND GAS EXTRACTION                   | 63         | Other                                    | INSURANCE CARRIERS                     |
| 14         | Construction         | NONMETALLIC MINERALS, EXCEPT FUELS       | 64         | Other                                    | INSURANCE AGENTS, BROKERS, & SERVICE   |
| 16         | Construction         | HEAVY CONSTRUCTION, EX. BUILDING         | 65         | Other                                    | REAL ESTATE                            |
| 17         | Construction         | SPECIAL TRADE CONTRACTORS                | 67         | Other                                    | HOLDING AND OTHER INVESTMENT OFFICES   |
| 28         | High Tech            | CHEMICALS AND ALLIED PRODUCTS            | 70         | Services                                 | HOTELS AND OTHER LODGING PLACES        |
| 35         | High Tech            | INDUSTRIAL MACHINERY AND EQUIPMENT       | 72         | Services                                 | PERSONAL SERVICES                      |
| 36         | High Tech            | ELECTRONIC AND OTHER ELECTRIC EQUIPMENT  | 73         | Services                                 | BUSINESS SERVICES                      |
| 38         | High Tech            | INSTRUMENTS AND RELATED PRODUCTS         | 75         | Services                                 | AUTO REPAIR SERVICES AND PARKING       |
| 48         | High Tech            | COMMUNICATION                            | 76         | Services                                 | MISCELLANEOUS REPAIR SERVICES          |
| 73         | High Tech            | BUSINESS SERVICES                        | 78         | Services                                 | MOTION PICTURES                        |
| 87         | High Tech            | ENGINEERING AND MANAGEMENT SERVICES      | 79         | Services                                 | AMUSEMENT AND RECREATION SERVICES      |
| 22         | Manufacturing        | TEXTILE MILL PRODUCTS                    | 80         | Services                                 | HEALTH SERVICES                        |
| 23         | Manufacturing        | APPAREL AND OTHER TEXTILE PRODUCTS       | 81         | Services                                 | LEGAL SERVICES                         |
| 24         | Manufacturing        | LUMBER AND WOOD PRODUCTS                 | 82         | Services                                 | EDUCATIONAL SERVICES                   |
| 25         | Manufacturing        | FURNITURE AND FIXTURES                   | 83         | Services                                 | SOCIAL SERVICES                        |
| 26         | Manufacturing        | PAPER AND ALLIED PRODUCTS                | 84         | Services                                 | MUSEUMS, BOTANICAL, ZOOLOGICAL GARDENS |
| 27         | Manufacturing        | PRINTING AND PUBLISHING                  | 86         | Services                                 | MEMBERSHIP ORGANIZATIONS               |
| 28         | Manufacturing        | CHEMICALS AND ALLIED PRODUCTS            | 87         | Services                                 | ENGINEERING AND MANAGEMENT SERVICES    |
| 29         | Manufacturing        | PETROLEUM AND COAL PRODUCTS              | 89         | Services                                 | SERVICES, NEC                          |
| 30         | Manufacturing        | RUBBER AND MISC PLASTICS PRODUCTS        | 50         | Trade                                    | WHOLESALE TRADE DURABLE GOODS          |
| 31         | Manufacturing        | LEATHER AND LEATHER PRODUCTS             | 51         | Trade                                    | WHOLESALE TRADE NONDURABLE GOODS       |
| 32         | Manufacturing        | STONE, CLAY, AND GLASS PRODUCTS          | 52         | Trade                                    | BUILDING MATERIALS & GARDEN SUPPLIES   |
| 33         | Manufacturing        | PRIMARY METAL INDUSTRIES                 | 53         | Trade                                    | GENERAL MERCHANDISE STORES             |
| 34         | Manufacturing        | FABRICATED METAL PRODUCTS                | 54         | Trade                                    | FOOD STORES                            |
| 35         | Manufacturing        | INDUSTRIAL MACHINERY AND EQUIPMENT       | 55         | Trade                                    | AUTO DEALERS AND SERVICE STATIONS      |
| 37         | Manufacturing        | TRANSPORTATION EQUIPMENT                 | 56         | Trade                                    | APPAREL AND ACCESSORY STORES           |
| 39         | Manufacturing        | MISCELLANEOUS MANUFACTURING INDUSTRIES   | 57         | Trade                                    | FURNITURE AND HOME FURNISHING STORES   |
| 41         | Other                | LOCAL AND INTERURBAN PASSENGER TRANSIT   | 58         | Trade                                    | EATING AND DRINKING PLACES             |
| 42         | Other                | TRUCKING AND WAREHOUSING                 | 59         | Trade                                    | MISCELLANEOUS RETAIL                   |

Note: Boeing was grouped in Manufacturing rather than Hi-tech.