

LEWIS COUNTY

Data and Trends

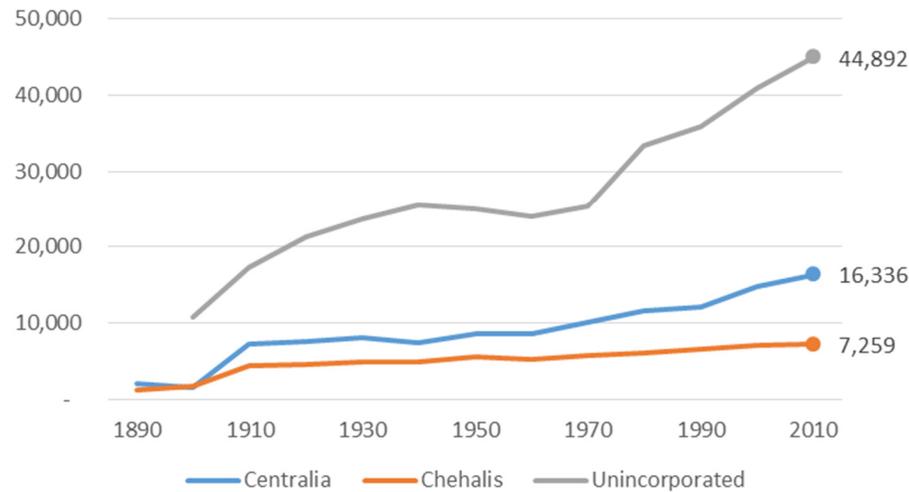
POPULATION

The population of Lewis County was 75,455 in 2010 (and was estimated to be 76,660 in 2015). Of this population, roughly 59 percent lived in unincorporated Lewis County, 22 percent lived in Centralia, and 10 percent lived in Chehalis.

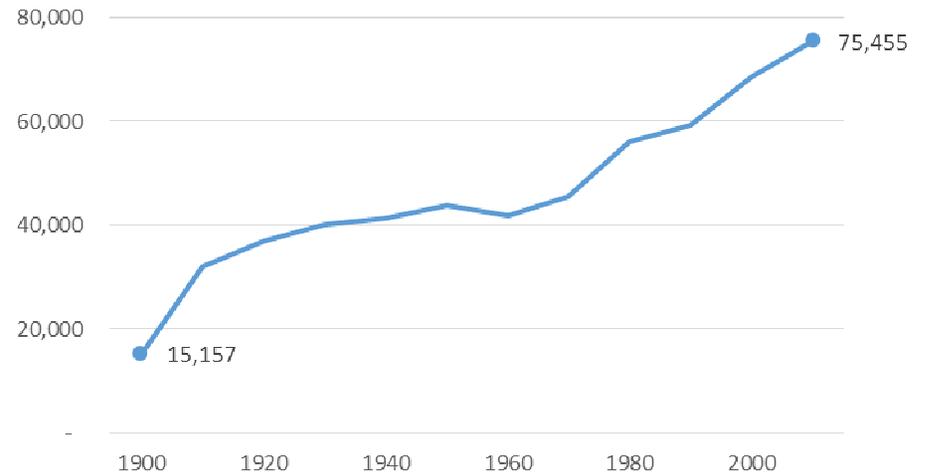
Over the past 15 years (from 2000 to 2015), the population of the County grew at an average annual rate of 0.7 percent. Mossyrock was the fastest growing community over that period (though much of this increase occurred as a result of the annexation of land into the community).

When not including population increases associated with annexation, Napavine grew by 1.6 percent annually, Winlock and Mossyrock grew by 0.9 percent, Centralia grew by 0.7 percent and Chehalis grew by 0.3 percent. PeEll experienced a population decline from 2000 to 2015.

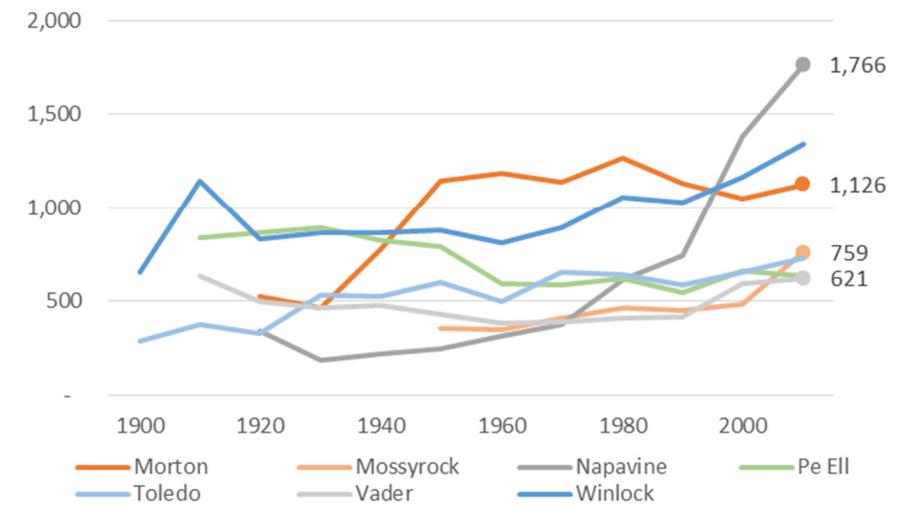
Population - Large Jurisdictions (1890 to 2010)



Population - Countywide (1900 to 2010)



Population - Small Jurisdictions (1900 to 2010)



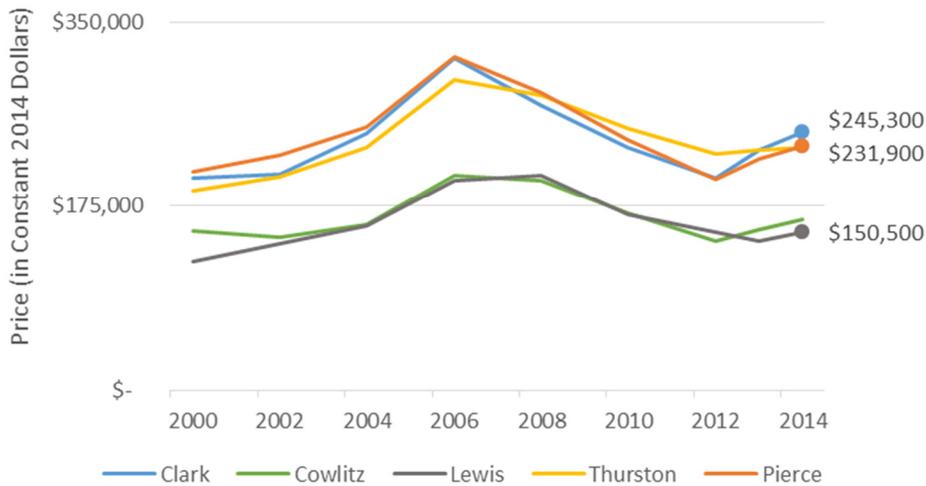
HOUSING

The median price of homes increased over \$28,000 in Lewis County from 2000 to 2014 (when adjusted for inflation), though a span of significant declines in housing values were seen during the period. Median housing values peaked at \$205,069 in 2008 and ended 2014 with a median price of \$150,500.

Existing home sales also declined significantly as a result of the Great Recession, though sales did pick up in 2013 and 2014 (similar to the levels of existing home sales seen pre-2007).

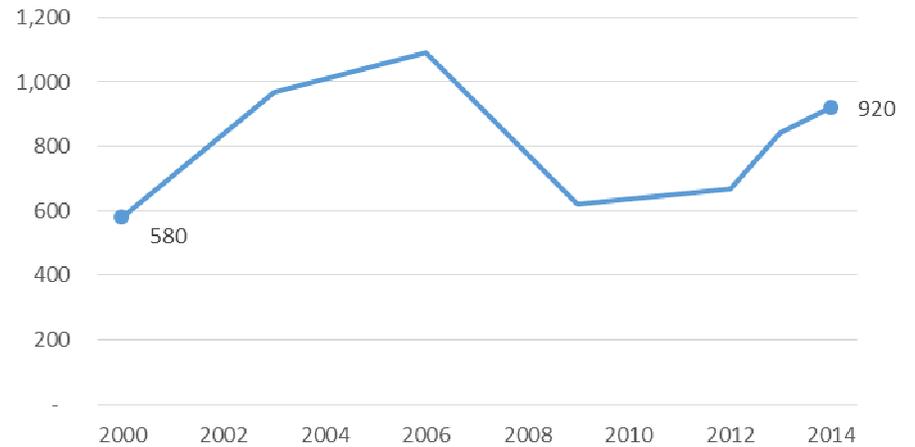
New housing starts remained low. In 2014, building permits were issued for 164 new units, a total which continued to be lower than the next lowest years over the past quarter century (1990—174 units and 2000—184 units). Permits nevertheless were up from the years since 2011.

Median Home Price (2000 to 2014)

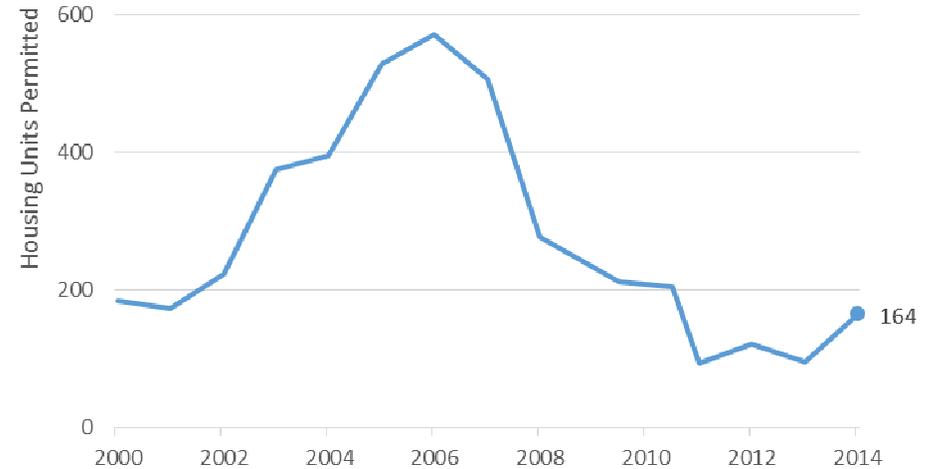


¹ Please note: This total is an estimate from the US Department of Commerce based on a survey of permits issued. A direct count of all permits issued may yield a different total.

Existing Home Sales (2000 to 2014)



New Housing Starts ¹ (2000 to 2014)



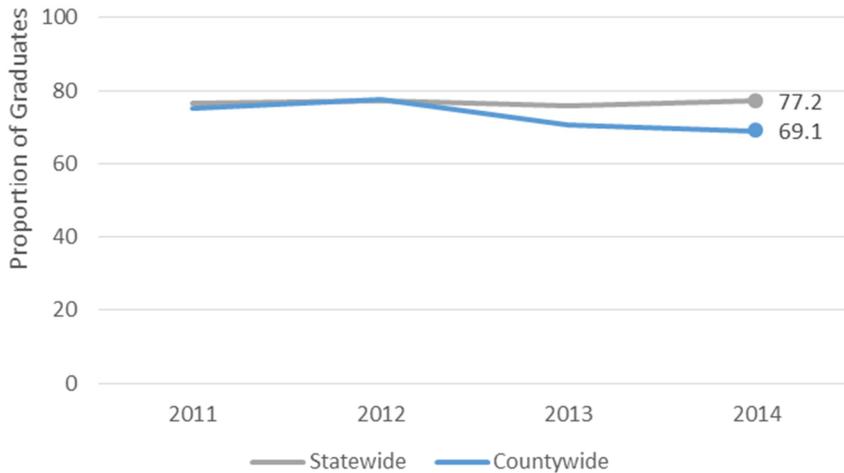
EDUCATION

Lewis County residents tend to have less formal education than neighboring counties. Approximately 14 percent of Lewis County residents (aged 25 and over) had a bachelor's degree or higher, and 86 percent had at least a high school education.

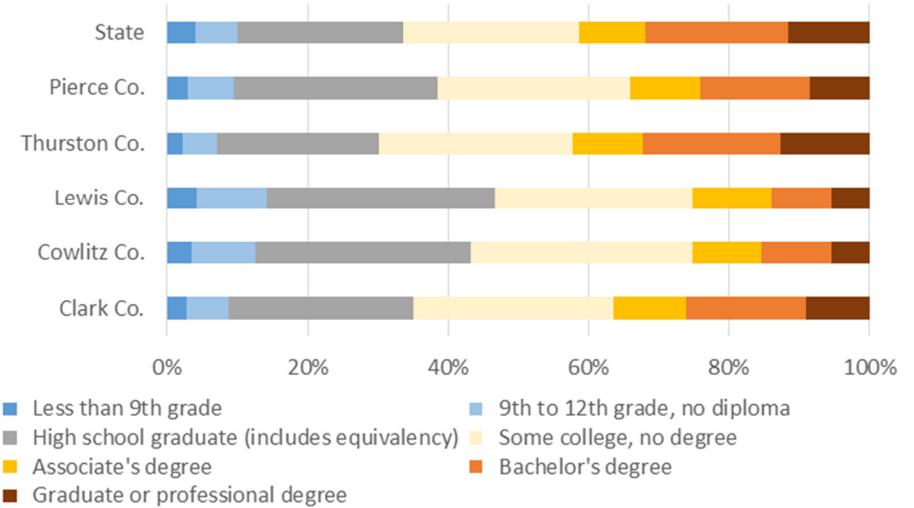
Over the past four years, graduation rates of Lewis County schools have declined from 75 to 69 percent¹, falling rather significantly below the state average over that period. 663 students graduated from high schools in Lewis County as part of the Class of 2014.

Of the schools in the county, the highest graduation rates among the Class of 2014 were at Winlock (100 percent of the class), Adna (90.0 percent) and the PeEll School (88.9 percent). The majority of traditional high schools averaged around a 10 percent drop out rate (and the rates tended to be higher at non-traditional schools). Of the districts, the Castle Rock school district (which includes a small portion of south Lewis County) had the highest drop out rate among the Class of 2014 (20.9 percent, up from 9.6 percent for the Class of 2013). Both White Pass and Centralia also had drop out rates over 14 percent.

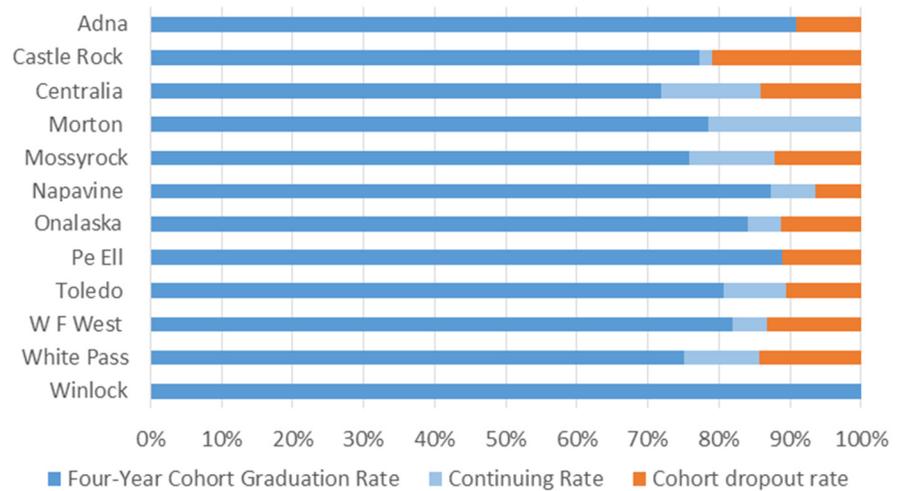
High School Graduation Rates² (2011 to 2014 - Based on Four-Year Adjusted Cohort)



Educational Attainment (2009 to 2013 Average)



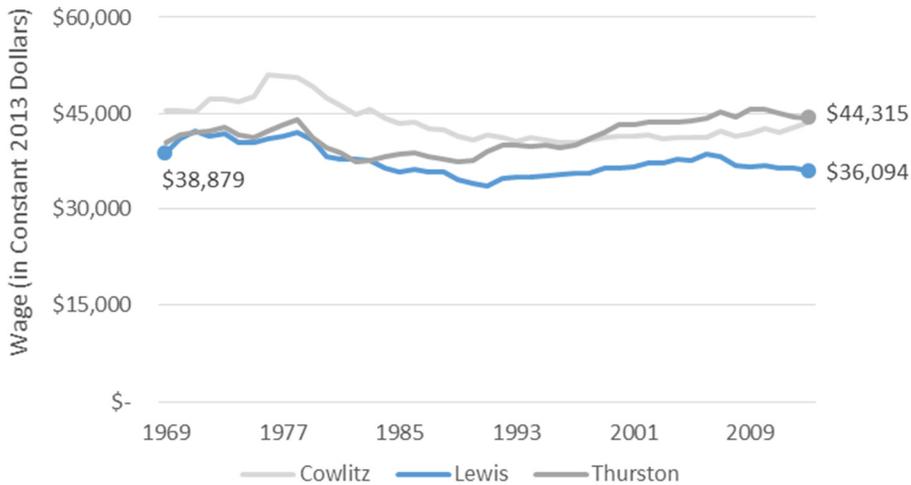
High School Graduation and Dropout Rates³ (2014 Graduating Class)



¹ This graduation rate is based on the four-year cohort. This method considers how many students graduated in four years among a group of students who started high school together. ² Includes alternative schools in graduation rate. ³ Does not include alternative high schools.

WAGES

Average Wage Per Job (1969 to 2013)

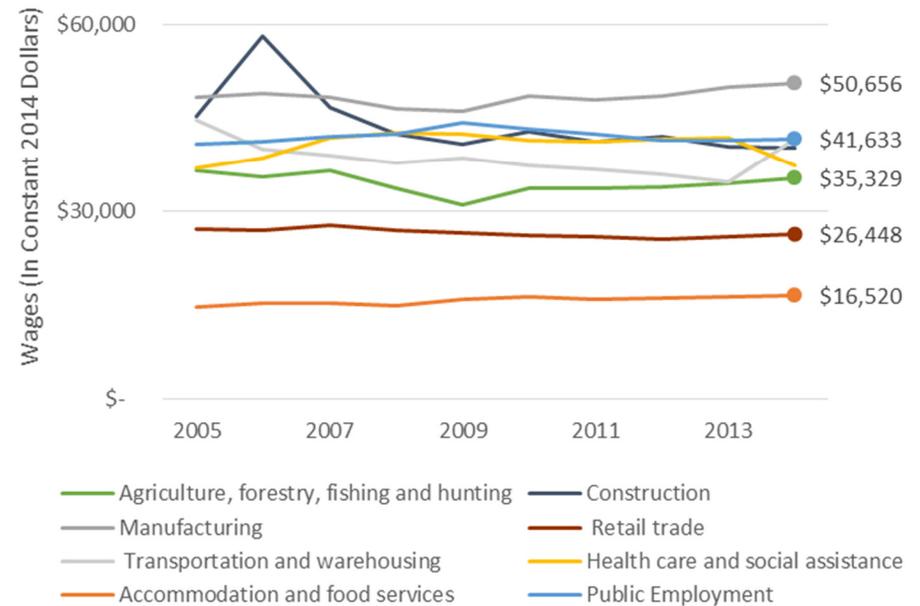


Average wages in Lewis County have decreased slightly since 1969 when adjusted for inflation (dropping from \$38,879 in 1969 to \$36,094 in 2014).

Cowlitz County—our neighbor to the south—also experienced a decline in wages over the period (from \$45,525 to \$43,563), though wages remain higher than Lewis County.

Thurston County—our neighbor to the north—saw steadily rising wages (from \$40,504 to \$44,315), though wages did decline as part of the recent recession.

Wages by Selected Industry¹ (2005 to 2014)



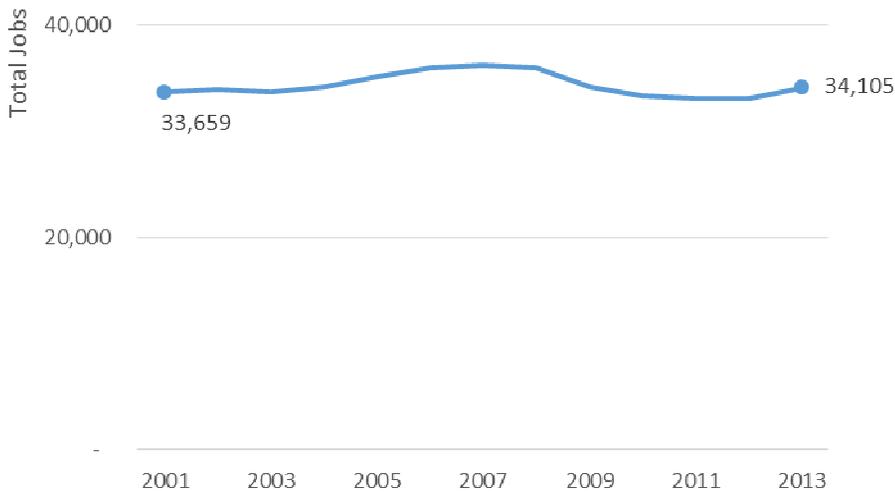
Industries in Lewis County have typically mirrored this relatively flat wage growth over the past ten years, though wage gains have been seen in industries such as manufacturing (+\$2,256), accommodation and food services (+\$1,790) and government (+\$814).

The construction sector experienced the biggest loss in average wage among major industries (-\$5,025 when adjusted for inflation) over the last decade. Transportation and warehousing (-\$3,066), agriculture, forestry, fishing and hunting (-\$1,246) and retail trade wages (-\$628) also saw declines in average annual wages from 2005 to 2014 (when adjusted for inflation).

¹“Wages by Selected Industries” are measured for covered employees. Covered employment measures all employed persons covered under the Unemployment Insurance Act. The measure accounts for approximately 75 percent of the total employment in Lewis County, and includes both part-time and temporary positions. Job categories not measured in the count include self-employed workers, proprietors, CEOs, military, and other non-insured workers. If a worker holds more than one job, each position is reported separately.

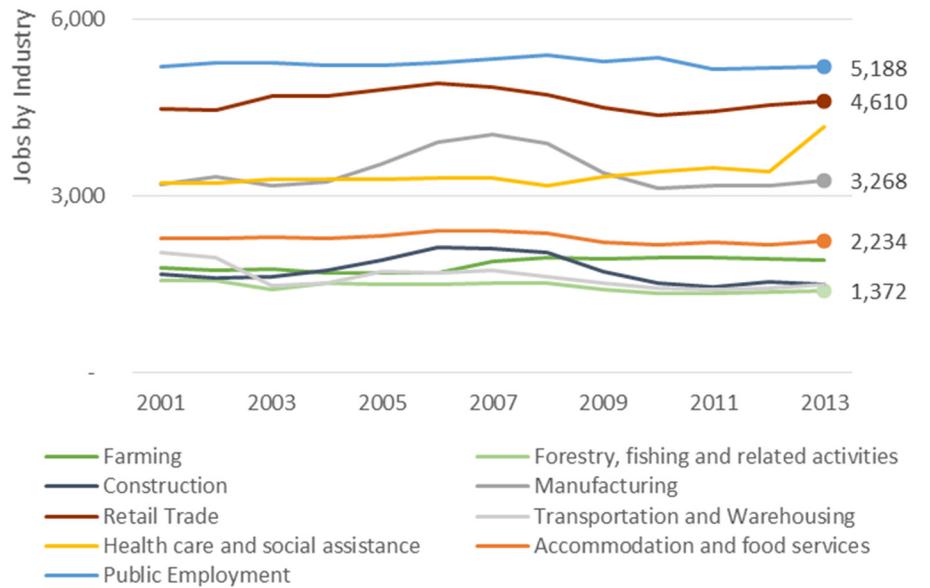
EMPLOYMENT

**Total Full and Part-Time Employment
(2001 to 2013)**



Total full and part-time employment grew slightly in Lewis County from 2001 to 2013, gaining 446 jobs over the period.

**Total Employment by Selected Industry
(2001 to 2013)**



The largest job gains occurred in health care and social assistance (+955 jobs), farming (+134 jobs), and retail (+120 jobs). Forestry, fishing and related activities and the construction industry experienced the largest declines in jobs (-172 and -163 jobs respectively).

¹Total employment represents estimates of the number of jobs, including full-time and part-time employment. Full-time and part-time jobs are counted at equal weight. Employees, sole proprietors, and active partners are included, but unpaid family workers and volunteers are not.

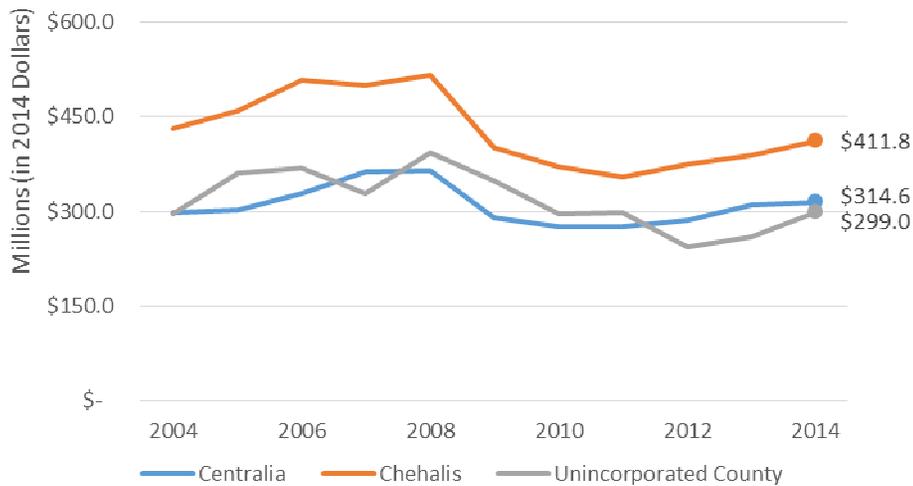
ECONOMIC ACTIVITY

Taxable retail sales in Lewis County have remained flat over the past 10 years (when adjusted for inflation). Taxable retail sales peaked in 2008, prior to the Great Recession, and have only recently rebounded to 2004 levels.

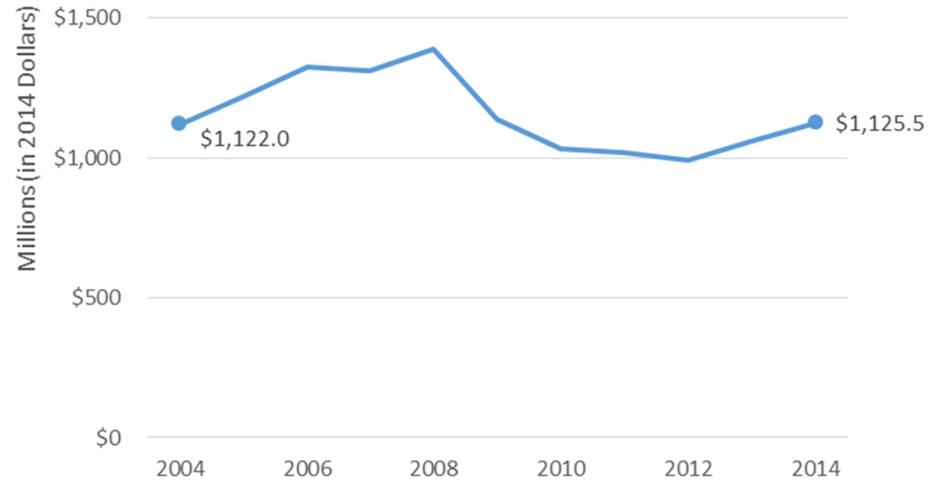
Of the incorporated jurisdictions in Lewis County, Chehalis had the highest taxable retail sales in 2014 (\$411.8 million), and the highest proportion of taxable retail sales per resident (\$55,872). Centralia had the second highest amount of taxable retail sales — \$314.6 million in 2014.

Of the smaller jurisdictions, Morton had the highest amount of taxable retail sales (\$30.2 million). Morton additionally had the second highest amount of taxable retail sales per capita in Lewis County (\$26,962), due in part to the high amount of visitor spending in the community. Napavine had the second highest amount of taxable retail sales among the smaller jurisdictions (\$29.9 million).

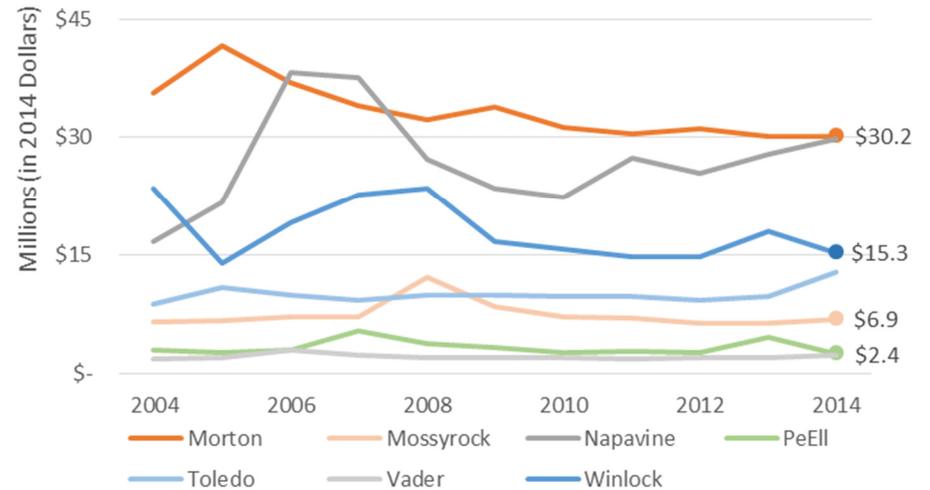
Taxable Retail Sales - Large Jurisdictions (2004 to 2014)



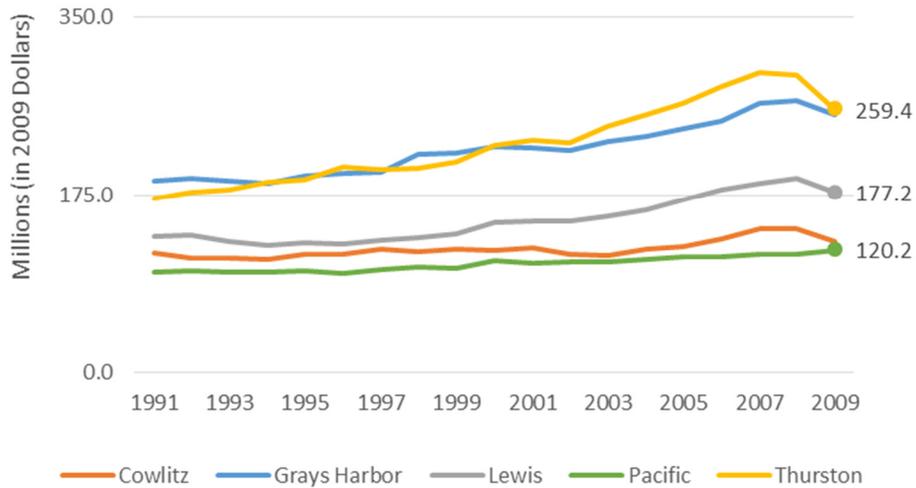
Taxable Retail Sales - Countywide (2004 to 2014)



Taxable Retail Sales - Small Jurisdictions (2004 to 2014)



Travel Spending by County (1991 to 2009)



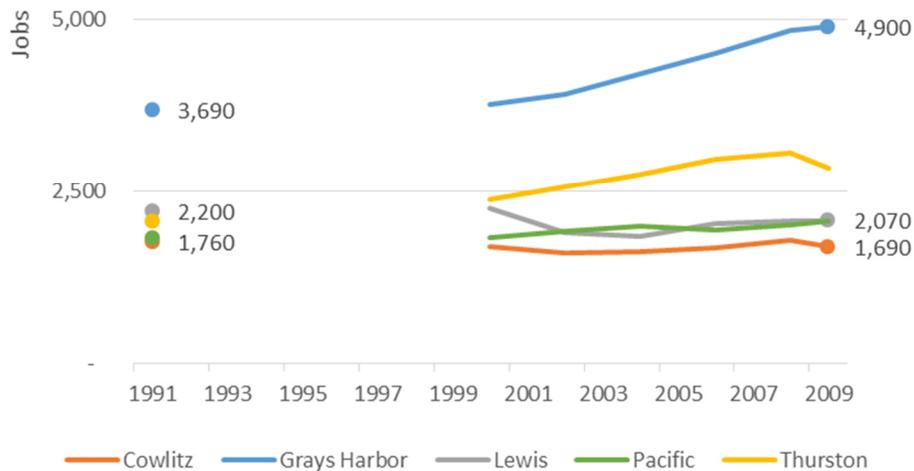
TOURISM

Tourism spending in Lewis County increased from 1991 to 2009 (by roughly 43.3 million dollars per year when adjusted for inflation). The average annual rate of this change exceeded state averages (1.49 percent compared with 1.45 percent), but lagged behind Thurston County (2.2 percent) and Grays Harbor County (1.6 percent) over the period.

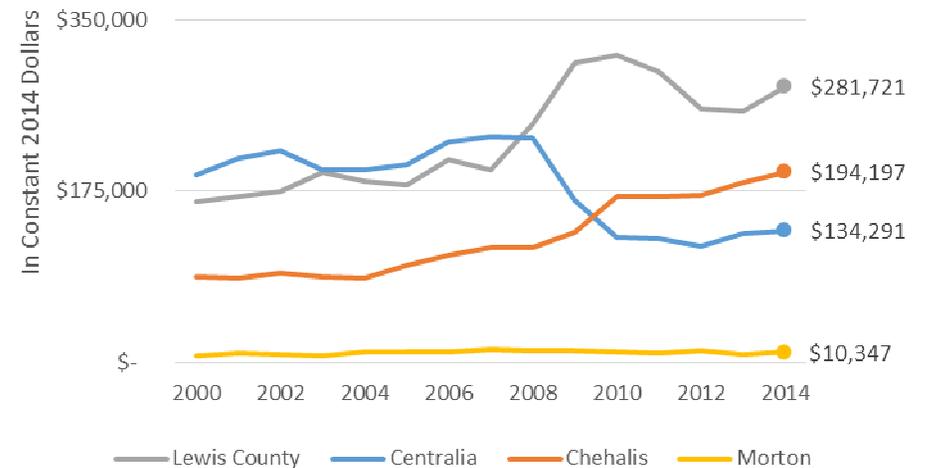
Interestingly, employment generated by travel spending dipped in the county from 1991 to 2009 (from 2,200 to 2,070 jobs) (according to Dean Runyan Associates, 2010). Cowlitz also experienced a decline (from 1,770 to 1,690 jobs), while Grays Harbor (+1,210), Thurston (+800), and Pacific (+240) saw gains.

Travel spending slowed as a whole as a result of the Great Recession, but hotel/motel stays (and the associated amount of Hotel/Motel Tax collected) remained higher than average for the County as a whole until 2011, when the amount of sales began to dip. Centralia experienced significant declines around the start of the Great Recession, and has not recovered to pre-Recession levels since that point.

Employment Generated by Travel Spending (1991, 2000 to 2009)

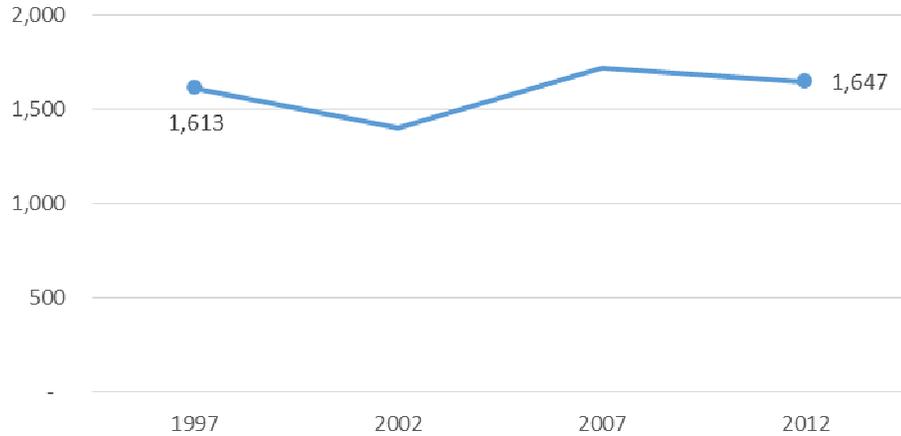


Hotel/Motel Tax Distribution (2000 to 2014)

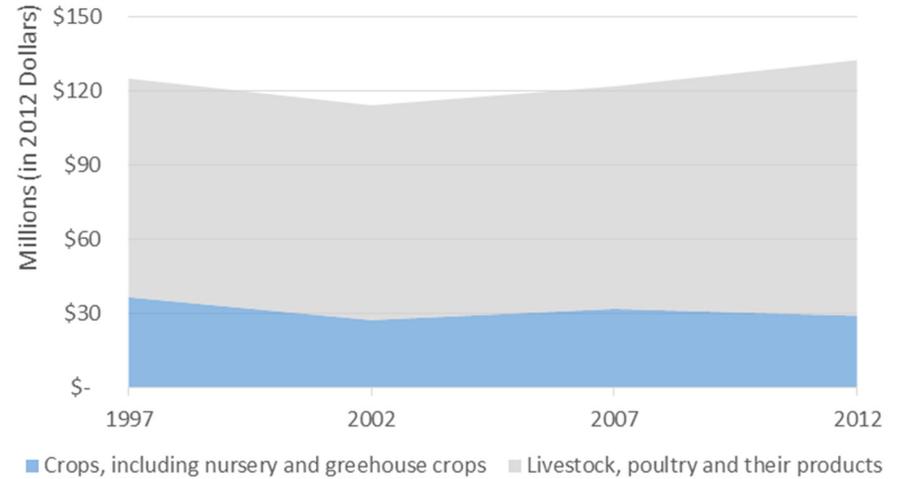


AGRICULTURE

**Farms in Lewis County
(1997 to 2012)**



**Market Value of Agricultural Products
(1997 to 2012)**



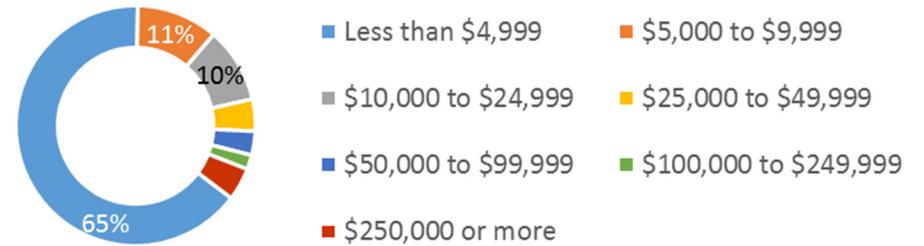
**Proportion of Farms by Acreage
(2012)**



The number of farms in Lewis County remained relatively flat from 1997 to 2012.

The bulk of farms in 2012 ranged between 1 and 180 acres (89 percent of all farms) with almost half of all farms being between 10 and 49 acres in size.

**Proportion of Farms by Value of Sales
(2012)**



The value of agricultural sales slightly increased from 1997 to 2012 (from roughly 125 million to 132 million when adjusted for inflation).

Only 24 percent of farms had sales greater than \$10,000 in 2012.