PUGET SOUND
VITAL SIGNS

VITAL Sign
ECONOMIC VITALITY

Natural resource-based industries have a long-standing history in the region and their existence is important to residents of the area as they provide jobs, income, a sense of identity, and cultural heritage. The Economic Vitality Vital Sign tells us how well natural resource industries (aquaculture, agriculture, fishing, forestry, and recreation and tourism) are doing economically over time, as well as compared to non-natural resource industries. Many communities in Puget Sound depend on healthy, sustainable, natural resource-based industries for job stability and satisfaction, and connection to nature and place.



Fishing is an important natural resource industry in Puget Sound.

VITAL SIGN > INDICATOR	PROGRESS	STATUS
Economic Vitality		
Percent of employment in natural resource industries	NO TREND	
Employment in natural resource industries	MIXED RESULTS	
Natural resource industry output	MIXED RESULTS	

Related Strategies

- Awareness of Effects of Climate Change
- Climate Adaptation & Resilience
- Economic Benefits
- Education Partnerships
- Funding
- Invasive Species
- Research & Monitoring
- Responsible Boating
- Salmon Recovery
- Stewardship & Motivating Action
- Stormwater Runoff & Legacy Contamination
- Strategic Leadership & Collaboration
- Wastewater Systems
- Water Pollution Source Identification & Correction
- Working Lands

Vital Sign Reporter

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Last Updated

06/26/2025

KEY VITAL SIGN MESSAGES

Based on data through 2021 for indicators of natural resource industry employment, percent employment, and output (2021 is the latest year of availability of some critical data needed to update these indicators):

- The region is making progress with overall growth in natural resource industries. This is largely driven by growth in the recreation and tourism sector which represents almost 71% of natural resource employment and about 77% of natural resource wages. This proportion declined in 2020 compared to 2019 due to the effects of COVID-19 pandemic on recreation and tourism, especially the hospitality sector. However, signs of recovery in this industry and overall in the natural resource industries is evident in 2021.
- Employment in natural resource industries increased by almost 13% from an estimated 75,603 jobs in 2005 to 85,354 jobs in 2021. At the same time, wages improved from approximately $1.3 billion ($2021) in 2005 to over $2.4 billion ($2021) in 2021, an increase of over 85% while inflation increased just 39%.
- Wages in fishing have declined in real terms, while aquaculture, agriculture, and recreation each have increased by approximately 4% to 6% per year since 2005. Timber wages have only increased by about 0.4% since 2005.
- Roughly 3% of Puget Sound jobs are in natural resource industries. However, people working in these jobs receive just 1.3% of total wages in Puget Sound. This implies that natural resource industry jobs are lower paying relative to other sectors.
- The percentage of natural resource industry employment and wages compared to all employment and wages varies across counties from approximately 1 to 21%. Natural resource industries tend to account for a higher percentage of wage and employment in rural counties with more recreational opportunities, such as San Juan, Clallam, Whatcom, Jefferson, Mason, Island, Kitsap, and Skagit Counties.
- GDP in recreation and tourism has also increased consistently each year beginning in 2010, except for 2020. In 2010, this indicator was $3.4 billion ($2021), increasing to $4.7 billion ($2021) in 2021, a growth of 51% during a period where inflation only increased 24%. This is despite the sharp decline in recreation and tourism GDP in 2020 due to the effects of COVID-19 pandemic on this industry.
- Combined product value, or prices paid to producers for unprocessed timber, fish, shellfish, crops, and livestock from 2005 through 2021 averaged about $1.8 billion ($2021) annually. Since 2005, the combined value of natural resource industry products has increased and decreased over the years, with the most recent decrease in 2020.
- Commercial fishing value (finfish and shellfish) declined significantly from $122 million ($2021) in 2017 to about $86 million ($2021) in 2021, with a sharp decline between 2017 and 2018. This was driven by a decrease in finfish numbers resulting in part from low coho returns and resulting fishery closures.

While economics is a component of all the Vital Signs to varying degrees (through funding, costs, benefits, and incentives), the indicators for the Economic Vitality Vital Sign are linked to other Vital Signs in more specific ways. For example,

- Employment in resource-based industries contributes to a Sense of Place where residents' strong connections to nature partly stem from cultural and outdoor activities, including fishing, shellfish gathering, and boating.
- Sustainable natural resource industries can contribute to, and also depend on, the health of Thriving Species and Food Webs, or alternately, can have a negative impact related to over-harvesting or poor practices.
- Poor conditions related to Toxics in Aquatic Life and Water Quality can negatively impact fishing and aquaculture resources, and forestry harvesting practices can impact water quality.
- Land development pressures can impact the forestry, fishing, shellfish, and agricultural industries.

BACKGROUND DOCUMENTS

- Leadership Council Resolution 2015-02, Human Health and Quality of Life Vital Signs and Indicators
- Human Wellbeing Vital Signs and Indicators for Puget Sound Recovery (2015), technical report describing the recommended portfolio of Puget Sound Human Health and Quality of Life Vital Signs and indicators

OTHER RESOURCES

- Articles related to ecosystem services and quality of life in the Encyclopedia of Puget Sound
- Economic Impact of Killer Whales in the Salish Sea, by Earth Economics, supported by the Seadoc Society

CONTRIBUTING PARTNERS

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