

# REGIONAL ECONOMIC STRATEGY



Puget Sound Regional Council

ADOPTED DECEMBER, 2021





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## Introduction

The central Puget Sound region is one of the most dynamic metropolitan areas in the country and has high hopes for the future. Longtime residents and newcomers alike value the region's stunning natural environment, cultural diversity, quality of life, and growing economic opportunities.

The Regional Economic Strategy supports these values and provides a strategic blueprint for regional collaboration. The strategy fosters a resilient future, building on our strengths and shoring up weaknesses to help the region be successful for the long term and expand economic opportunity to all people who live here. We are all in this together.

## New Challenges

The central Puget Sound region was an early epicenter of the COVID-19 pandemic in the U.S. and has led the way in responding. Leadership at all levels of government and actions by businesses and individuals across the region have made a profound difference and saved lives.

Researchers in the region's life sciences sector and at the University of Washington continue to serve an essential role in understanding the virus and providing data to decision makers who shape the nation's public health response. Despite having one of the first recorded outbreaks of COVID-19, today our region remains healthier than other parts of the country because of early public health measures and higher than average vaccination rates.

While the region has much to be proud of in its response to the pandemic, we still must confront the same unprecedented challenges that many other regions face. Health care workers and first responders are under enormous strain. Business closures and churn, worker shortages and supply chain problems are hindering recovery. Working parents have struggled to find childcare and manage virtual schooling. The virus has had a heavier impact on the health and finances of many people of color, making existing racial disparities worse.

The region also experienced unique impacts. The strength of the local tech industry allowed many office workers the flexibility to shift to virtual formats and work from home. The Information Technology sector actually gained jobs during the pandemic and Amazon deliveries soared.

The region's Tourism industry shed nearly half its jobs. Aerospace was also particularly hard hit as planes were grounded worldwide. Maritime and Transportation Logistics industries also suffered. These industries have restarted, but they need continued support.

The large numbers of people working from home also meant that many workplaces stood vacant for months. Small businesses in job centers such as downtown Seattle lost most of their foot traffic and many have permanently closed. Public safety concerns and a lack of mental health services and housing options for unhoused people are continuing obstacles to a full-scale recovery of the region's urban centers. This has implications for the future of the Tourism industry and attracting workers back to downtown offices.



## The Strategy and Expanded Focus Areas

The Regional Economic Strategy uses a dual approach. First, it aims to address the near-term challenges of the COVID-19 pandemic faced by the region's workers and businesses. Second, it identifies ways to continue to advance the long-term success of the region's economy.

Several new and expanded regional challenges were identified through the stakeholder engagement process. These new and expanded focus areas are highlighted alongside key long-term strategic areas that have been carried forward from the last adopted strategy.

### Equity

The region faces historical inequities regarding economic opportunities and outcomes for the region's Black, Indigenous, and people of color (BIPOC) residents, including income, generational wealth and levels of business ownership. COVID-19 has exacerbated these challenges, disproportionately impacting the populations that already had the least access to opportunity.

BIPOC workers were more at risk for unemployment or health effects during the pandemic because they are disproportionately represented in lower wage jobs without an option to work remotely and have contracted the virus at higher rates. In the region's education system, BIPOC students face larger challenges to educational success that lead to gaps in graduation rates based upon racial, ethnic, and income characteristics. More than a year of virtual learning will likely expand the disparity in outcomes for these students, potentially widening the existing wealth gap. Women were more likely to drop out of the workforce to educate and care for children during remote instruction.

The strategy includes support for implementation items such as PSRC's Regional Equity Strategy, Greater Seattle Partner's Forward Together framework, the workplan of the Washington State's Office of Equity, and calls for the examination of challenges of women in the workforce due to COVID-19.

### Health

COVID-19 has made it clear that the success of an economy depends on the health of its residents. Attention to equitable health outcomes based on economic, planning, and infrastructure decisions can improve quality of life for residents, reduce health care costs, and lessen impacts from lost productivity.

The strategy calls for building on the public health response to the impacts of COVID-19 and working to address health inequities in the region.

### Childcare

The pandemic has called out the critical nature of childcare availability for both individual families' economic outcomes as well as the overall performance of the region's economy. Recent analysis shows that lack of access to affordable childcare keeps over 133,000 potential workers out of Washington's labor force, particularly working mothers, and has significant negative impacts on overall state earnings, business output, and tax revenues.

The strategy includes implementation of the Washington Child Care Collaborative Task Force's Child Care Access Plan, increased public-private sector collaboration around childcare access, and other efforts to grow the region's childcare availability.



## **Job Distribution**

The COVID-19 pandemic has created uncertainty about where people will live and work in the future. The region continues to plan to support major job centers. If workers continue to work from home or in remote locations, this may provide opportunities for some communities throughout the region to expand their economic base, while creating challenges for others.

The strategy calls for monitoring and analyzing the ongoing impacts of COVID-19 on job distribution and work from home trends in the region. It also calls for supporting for local jurisdictions in their economic development planning to prepare for 2024 Comprehensive Plan updates.

## **Broadband**

COVID-19 has accelerated work from home and online education trends, further clarifying the need for greater broadband access across the region. This access is critical to connecting the region's residents to educational and economic opportunities wherever they live and has significant implications for improving equitable outcomes.

The strategy calls for expansion of broadband access through increased public sector investment and leveraging federal infrastructure opportunities.

## **Housing**

The region's housing stock has not kept up with job and population growth, increasing housing costs. The region has a backlog of 45-50,000 housing units just to accommodate recent growth and will need approximately 800,000 new housing units by the year 2050. Challenges in housing supply have contributed to rising, chronic homelessness in the region. The extent of these challenges, especially in the region's urban centers, can be a determining factor for new talent and businesses considering locating in this region.

The strategy calls for the implementation of PSRC's Regional Housing Strategy and other efforts to expand housing options in the region.

## **Business Recovery**

COVID-19 has had a major negative impact on many regional industries, especially on travel, tourism, hospitality, arts, and culture businesses. State and local governments and a network of support organizations have been working to provide financial and technical assistance to small businesses across the region that are struggling, while working to leverage federal recovery funding. As COVID-19 restrictions continue to ease and businesses work to fully reopen, the region will need to continue to work to help these struggling businesses and their critical contributions to both the economy and the region's high quality of life.

The strategy calls for continuing to leverage pandemic-related economic development funding efforts to support business recovery in the region.

## **Industry Resilience**

Historic industries such as trade, maritime, aerospace and manufacturing have long defined the region's economy. These industries continue to evolve, with new subsectors emerging while others



have lower employment and impact over time. Working to foster diversity in the region's industries will help ensure resiliency and viability into the future. COVID-19 demonstrated a risk to current and future competitiveness: global supply chain disruptions. Supply chain disruptions and the strain on international relationships have negatively impacted regional businesses that export goods and services around the world.

The strategy calls for identification of new industry growth opportunities and development of analysis and strategies to support this growth.



## List of Strategies

### Expanding Economic Opportunity

#### Economic Opportunity for the Region's Residents

- E1: Expand equity focus throughout economic development efforts
- E2: Expand the region's childcare ecosystem
- E3: Expand support for small and medium sized businesses and businesses owned by marginalized communities

#### Economic Opportunity Throughout the Region

- E4: Advance economic development within small cities and rural communities
- E5: Encourage economic growth across all parts of the region

#### Public Education

- E6: Provide adequate support for pre-K through 12 education systems that serve all students

#### Higher Education & Workforce Development

- E7: Coordinate and expand programs in higher education and training to address workforce gaps and advance economic opportunity for all

#### Regional Culture & Diversity

- E8: Embrace, celebrate, and promote the diversity of the region's people

### Global Competitiveness

#### Business Climate & Competitiveness

- G1: Strengthen the region's regulatory and industry competitiveness framework
- G2: Build resiliency into the region's export-focused industries

#### Research, Commercialization & Entrepreneurship

- G3: Sustain and evolve the conditions necessary for innovation

#### Recruitment & Retention of Businesses & Talent

- G4: Strengthen and coordinate recruitment, retention, and investment efforts

#### Trade Development

- G5: Support and promote international trade and tourism

#### Ports, Airports, Maritime Sites, Military Installations & Industrial Lands

- G6: Preserve, protect, and support ports, industrial lands, military installations, and maritime sites
- G7: Build up and sustain ports and other infrastructure to support trade, logistics, and freight mobility
- G8: Sustain and grow commercial air travel connections domestically and globally

### Quality of Life

#### Regional Growth

- Q1: Focus new growth in urban areas, regional centers, and cities
- Q2: Ensure a diversity of housing stock that is affordable and connected to jobs
- Q3: Improve the region's transportation system

#### Environment & Health

- Q4: Preserve, enhance, and improve the region's environmentally critical lands
- Q5: Ensure the region is a healthy place to live, work, and play for all residents
- Q6: Protect the global environment

#### Arts, Culture & Tourism

- Q7: Build resiliency into, and increase access to, the region's arts, culture, and tourism industries



## Purpose

The Regional Economic Strategy serves as the Comprehensive Economic Development Strategy (CEDS) for the central Puget Sound region. The Central Puget Sound Economic Development District (EDD) is responsible for updating the region's CEDS every five years, under the guidance of the U.S. Economic Development Administration. A CEDS is designed to build capacity and guide the economic prosperity and resiliency of a region, building off other regional planning efforts.

Implementation of the CEDS is accomplished by a broad set of regional stakeholders, highlighting important ongoing economic development programs and initiatives as well as identifying new opportunities for implementation. The CEDS is used as the framework for establishing the EDD's economic development workplan over the five-year period.

The Regional Economic Strategy is designed to establish a strategic blueprint for regional collaboration as well as enabling local jurisdictions and eligible organizations to qualify for funding under U.S. Economic Development Association programs. In response to the pandemic, the CARES Act and the American Rescue Plan have included billions of dollars in investment for EDA funding opportunities.

The strategy is organized around three main goal areas that drive the region's economic success:

- Expanding Economic Opportunity
- Maintaining Global Competitiveness
- Sustaining Quality of Life

It builds upon the work of the previous strategy adopted in 2017, carrying forward key long-term strategies, while also expanding to address the new challenges that the region is facing.

Under the three goal areas, key strategies are identified and organized around topic areas that identify the challenges and opportunities the region faces, and the strategic direction for addressing them. An implementation plan was developed to identify near-term actions to implement the strategies.



## Update Process

The EDD facilitated the development of this new economic strategy. The EDD Board began the work to update the strategy in mid-2020, as the COVID-19 pandemic was taking hold of the region's economy. During this time, the board and PSRC staff engaged with and supported the economic recovery and business support efforts underway throughout the region. These efforts have helped inform the board's economic development efforts in 2021 and have been leveraged in this updated economic strategy.

Throughout the summer of 2021, staff facilitated a robust outreach plan to engage regional stakeholders in the development of the strategy. Staff coordinated a series of individual and group stakeholder meetings to document the challenges and opportunities that the region faces, identify the strategic direction needed to address them, and to establish an implementation plan for taking action.

Staff also employed an online engagement website that has allowed stakeholders and the public to have a direct voice to inform the development of the Regional Economic Strategy.

## Realizing the Strategy

The Regional Economic Strategy lays out the blueprint for the region's economic recovery and resiliency efforts, but much of the work lies ahead. It identifies a total of 23 broad strategies, and more than 160 detailed implementation actions. These implementation actions represent both existing and future efforts, to be accomplished by various regional partners, highlighted in the strategy's Implementation Matrix.

The Economic Development District has an important role to play in the region's economic success. In conjunction with the adoption of this strategy, the EDD Board adopted a set of 2022 Focus Areas to reflect its workplan for the first year of implementation. The EDD's implementation work addresses the following areas:

- Analysis & Strategy Development: Analyzing the regional economy, identifying new industry opportunities, and developing strategies to support growth of jobs in the region.
- Technical Assistance: Providing technical assistance to efforts aimed at growing the regional economy and to support partners pursuing federal economic development funding.
- Amplifying Regional Efforts: Supporting efforts by regional partners to implement policies and programs that grow the regional economy.

Over the next five years, the EDD board will update its workplan annually to help the region continue to collaborate and reach its goals on these important areas.

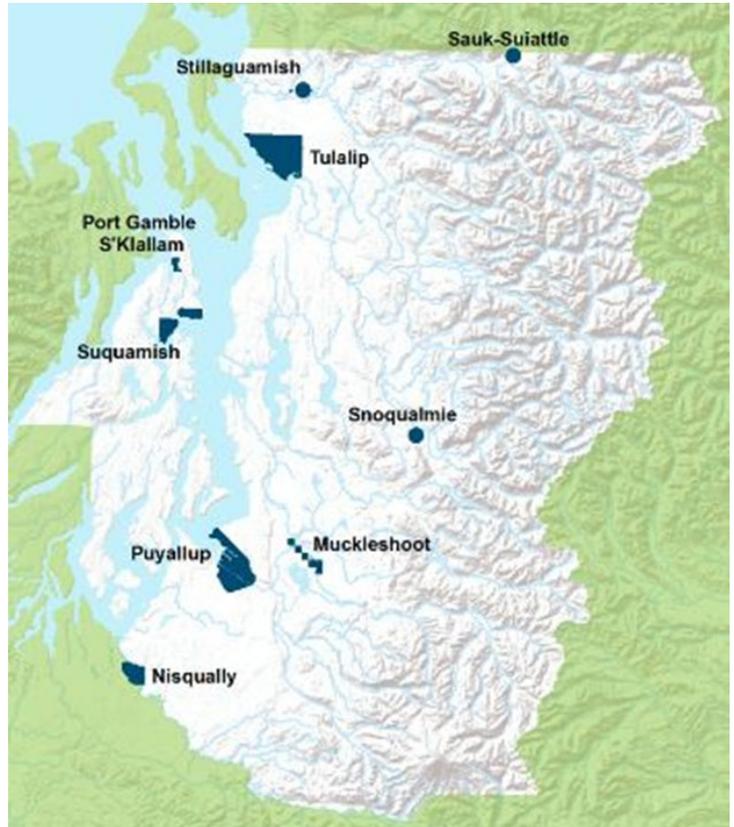
Looking forward, the region recognizes the continued uncertainty inherent in the economic situation that the world faces. The Regional Economic Strategy lays the foundation for addressing these challenges while being flexible enough to respond to conditions as they evolve. The region's future success relies on the ability of leaders to mobilize together to act on what's inside this strategy to turn its challenges into strengths.



## Regional Profile

The central Puget Sound region is one of the principal metropolitan regions in the Pacific Northwest of the United States. It includes King, Kitsap, Pierce, and Snohomish counties and their 82 cities and towns, covering an area of nearly 6,300 square miles (16,300 square kilometers). The region includes nine federally recognized sovereign Tribal Nations. The region’s geography is diverse and includes urban, rural, and resource lands. Numerous hills, mountains, and lakes provide significant variety to the topography of the region which ranges in elevation from sea level at Puget Sound to over 14,000 feet (more than 4,000 meters) at Mount Rainier.

The region is home to nearly 4.3 million people and 2.3 million jobs. While each county has experienced considerable growth over the past decade, King County continues to hold the majority of the region’s residents and jobs. Pierce and Snohomish counties have similar levels of residents and jobs, and Kitsap County remains the least populated in the region.



County	Area (square miles)	Population (2020)	Employment (2020)*
King	2,115.6	2,260,800	1,430,940
Kitsap	394.9	272,200	91,734
Pierce	1,669.5	900,700	318,856
Snohomish	2,087.3	830,500	292,958
<b>Region</b>	<b>6,267.3</b>	<b>4,264,200</b>	<b>2,134,488</b>

Source: WA OFM

\*Estimates are for total employment, including uniformed military personnel





The central Puget Sound region is part of a larger area that has been the traditional aboriginal territory of the Coast Salish peoples.



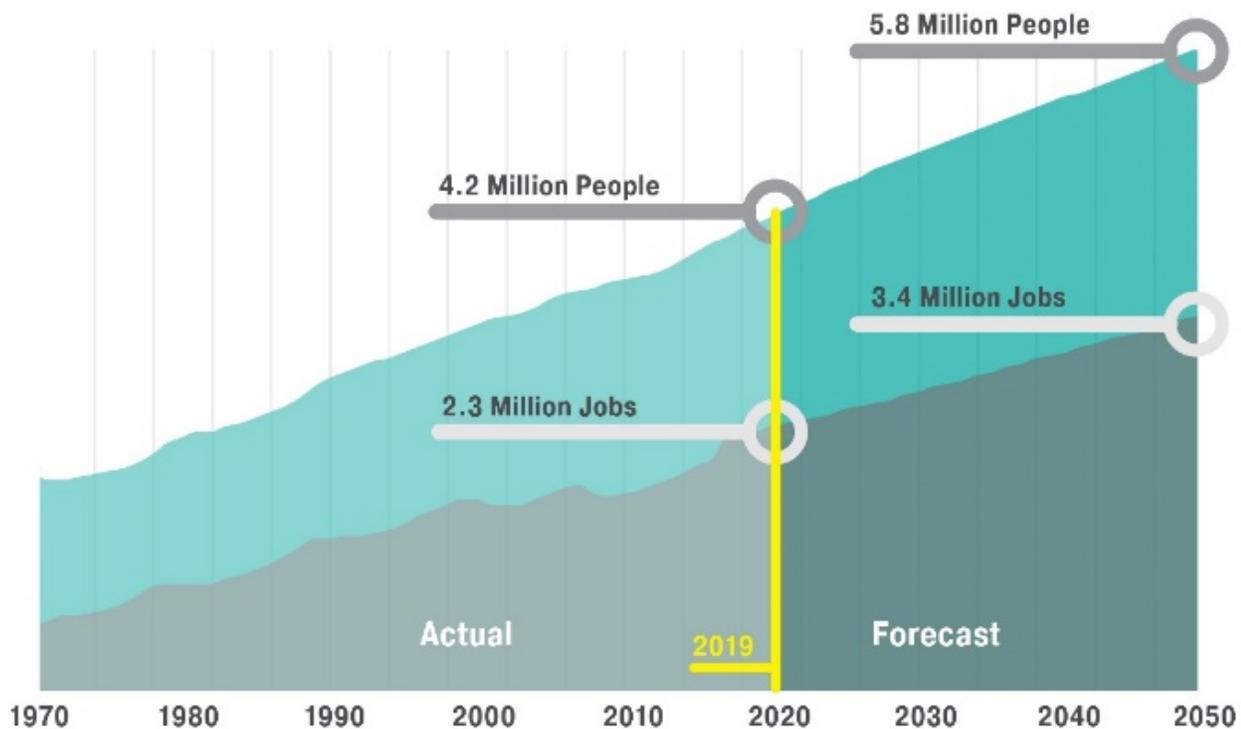
## Regional Demographics

### Nearly 6 million people are expected to call the central Puget Sound region home by 2050

The region is expected to grow by 1.6 million people over the next 30 years, reaching a total population of 5.8 million and continuing the fast pace of growth seen throughout the entire region over the past decade. More than one million jobs are also anticipated by 2050, bringing more opportunities but also challenges in terms of keeping up with the demands of a growing population.

The past decade has seen many of the region's smaller cities and neighborhoods transform into denser urban areas. Suburban cities such as Redmond and Lynnwood have added thousands of residents and jobs oriented around compact, walkable neighborhoods. As cities throughout the region see similar demands for growth, creating walkable and transit-oriented communities can help ensure growth is sustainable.

#### PSRC Regional Forecast



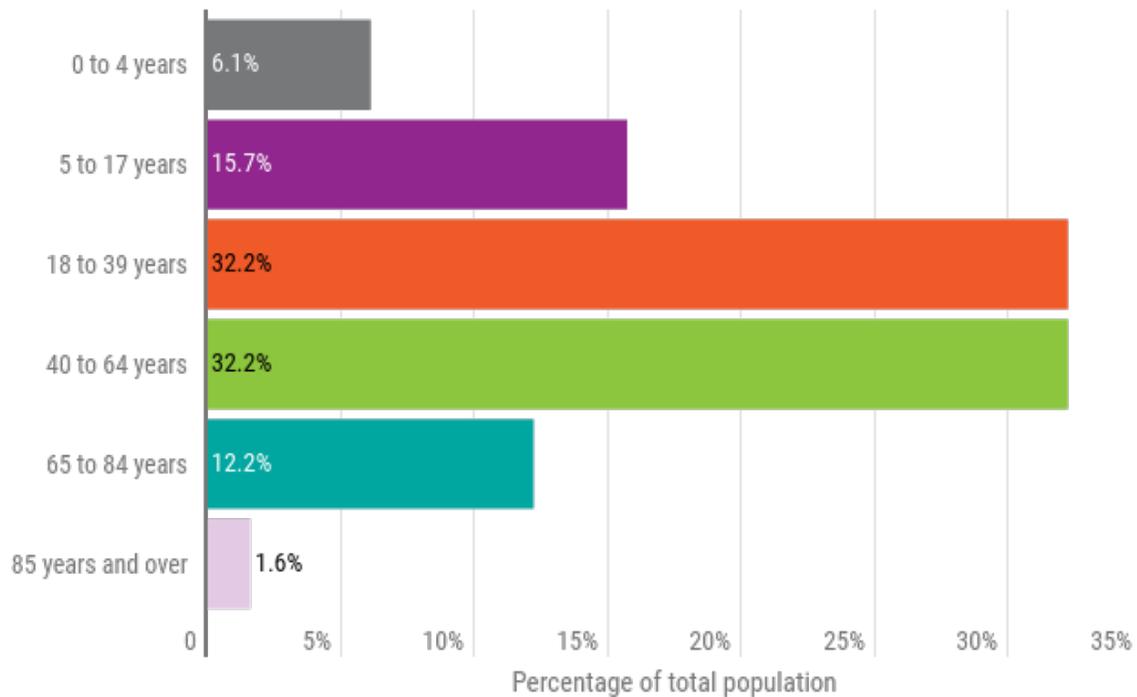
Source: PSRC Regional Macroeconomic Forecast



## The region's population is aging

Age distribution remains consistent with figures from 2015, continuing a regional and national trend of an older population as the baby-boomer generation ages. Between 2015 and 2018, most age groups in the central Puget Sound region remained constant, with the proportion of residents aged 65 and older rising by one percentage point. Over the same period, the regional share of residents between 40-64 declined by just over 1 percent.

### Total Regional Population by Age, 2018



Source: U.S. Census Bureau, WA State Office of Financial Management

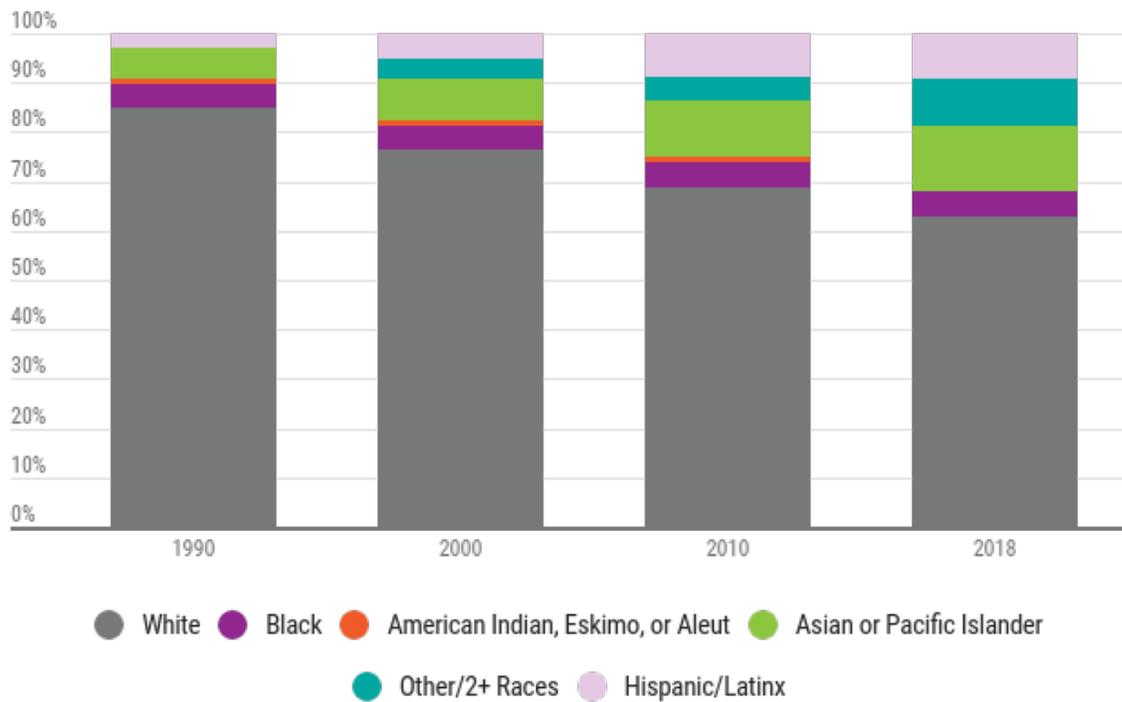


## The region is home to more people of color today than in past decades

While all populations in the central Puget Sound region have grown since 1990, the rate of growth has differed sharply among different races and ethnicities. The number of white residents in the region grew from 230,000 to 290,000 from 1990 to 2018, but the share of white residents compared to the total population decreased from 85 percent to 62 percent. Since 2000, the number of people of color in the region has doubled, increasing by 774,000 residents and representing 83 percent of the region's population growth.

The largest growth is seen in Asian or Pacific Islander populations, which grew from 167,000 to 605,000, and Hispanic/Latinx populations, which grew from 82,000 to 424,000, from 1990 to 2018. The number of Black residents has doubled, though the share of total population has remained steady at 5 percent.

### Regional Population by Race/Hispanic Origin, 1990-2018



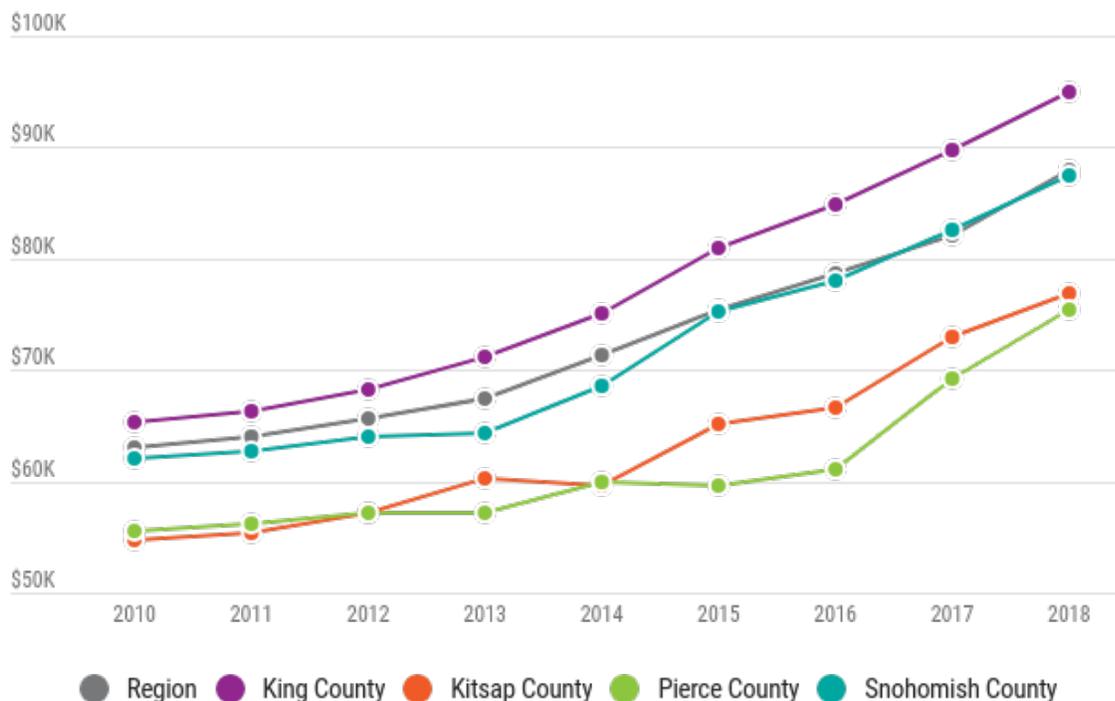
Source: American Community Survey 5-Year Estimates



## Household income across the region continues to rise, but with significant differences between counties

Median household income in the region is now nearing \$90,000 as it continues a steady decade-long rise. However, there are significant differences in household income among the four counties of the region. King County households now earn a median income of \$95,000 annually and Snohomish County is on pace with the regional average of \$87,000, but Kitsap and Pierce are much lower with both counties below \$77,000.

### Median Household Income by County, 2010-2018



\*values have not been adjusted for inflation

\*\*regional value is for Seattle-Tacoma-Bellevue MSA

Source: American Community Survey 5-Year Estimates

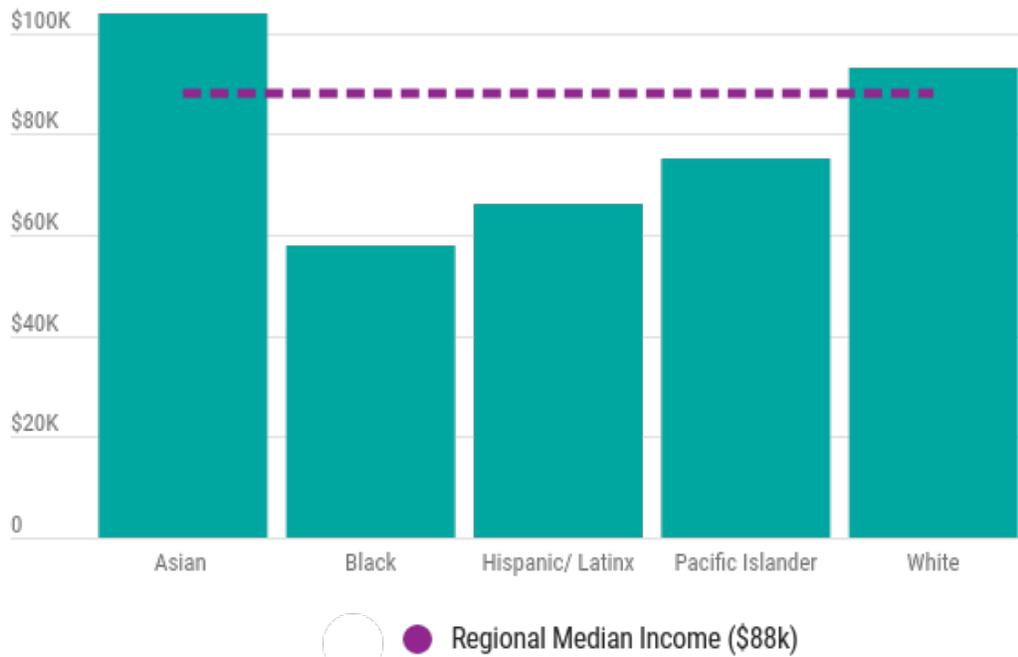


## There are profound gaps in household income by race and ethnicity

While household income continues to grow in the region, economic prosperity is not shared equally across racial and ethnic groups. In 2018, only white and Asian households were above the regional average of \$88,000. Asian households were the region's highest earners at an average of \$104,000 each year, with white households earning \$93,000.

Pacific Islander, Hispanic/Latinx, and Black households were all well below the regional average. Pacific Islander households earned \$75,000, Hispanic/Latinx households earned \$66,000, and Black households earned \$58,000, a figure \$30,000 lower than the regional average.

### Median Household Income by Race/Ethnicity, 2018



\*Regional value is for Seattle-Tacoma-Bellevue MSA  
Source: American Community Survey 5-Year Estimates



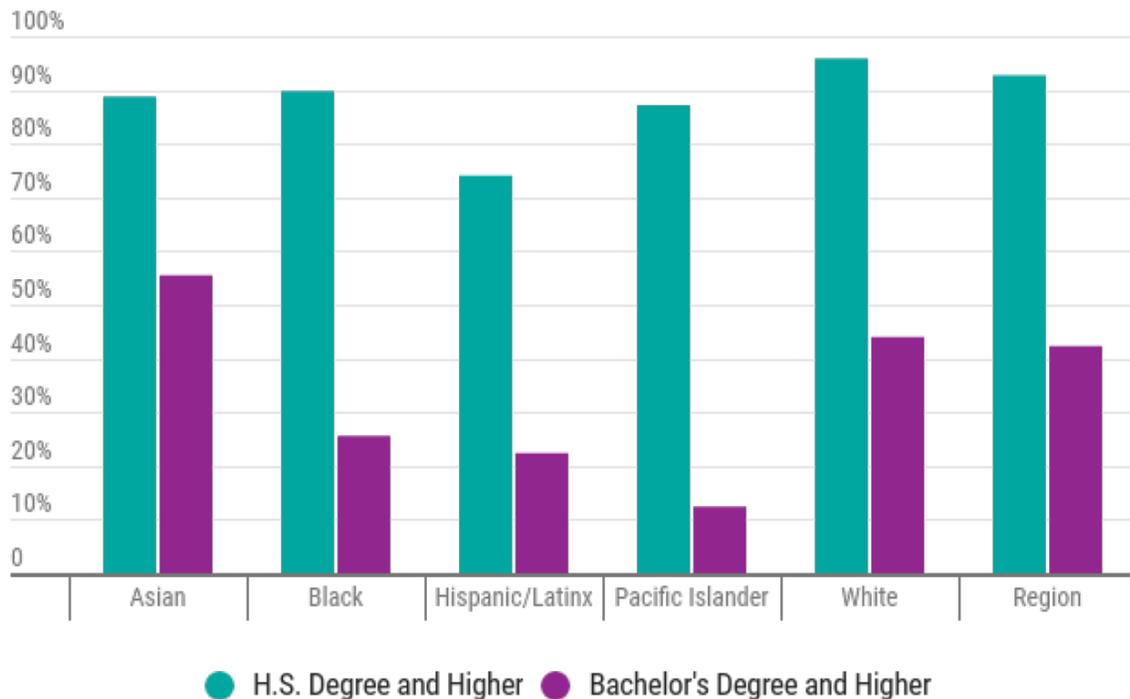
## The region is highly educated, but people of color face barriers to attainment and readiness

The central Puget Sound region is among the most educated regions in the nation with 42 percent of residents over the age of 25 holding a bachelor's degree or higher. However, examining education by race and ethnicity reveals considerable gaps. White and Asian residents have higher college graduation rates than the average, with more than 50 percent of Asian residents holding bachelor's degrees. Meanwhile, Black, Hispanic/Latinx, and Native Hawaiian/Pacific Islander residents graduate at a rate more than 20 percentage points lower than the regional average.

Gaps in education by race and ethnicity are also apparent when examining kindergarten readiness. More white and Asian students entering kindergarten in 2019 showed greater readiness across the six skill levels measured compared to the regional benchmark of 57 percent, while less than half of Black, Hispanic/Latinx, and Pacific Islander students are prepared for kindergarten.

High school diplomas and bachelor's degrees provide significant economic value to students, taxpayers, and the community at large. Gaps in educational attainment by race perpetuate inequities and reduce opportunities to participate in the economy and reap the benefits of the region's growth.

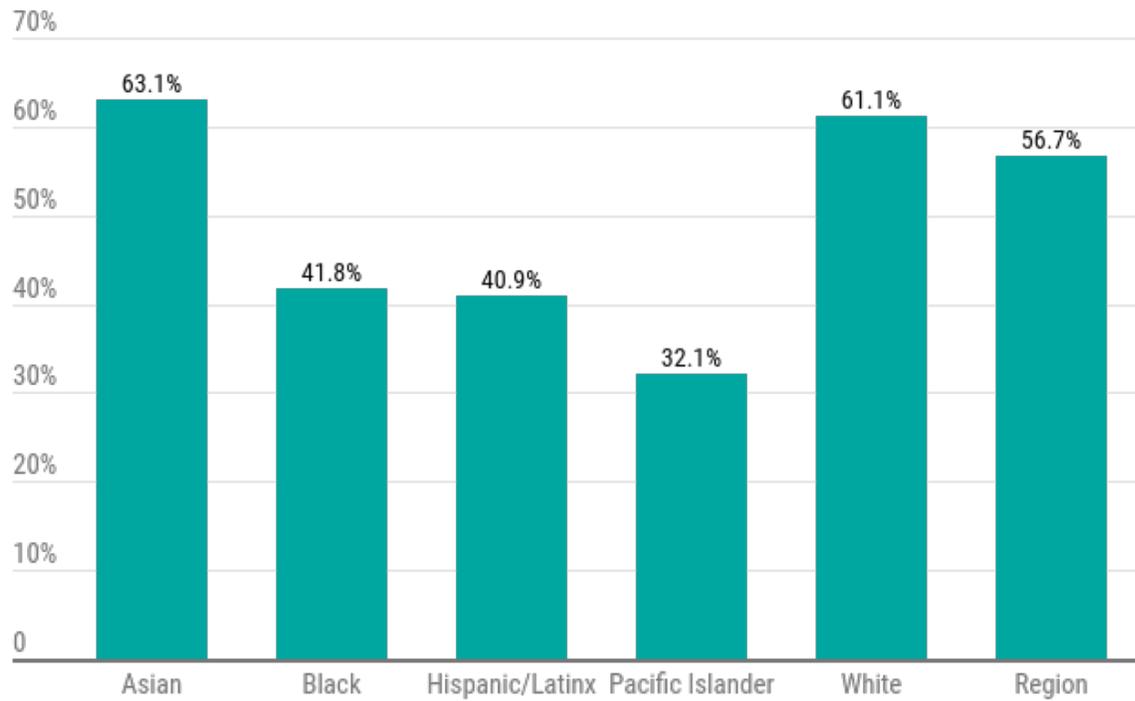
### Educational Attainment by Race/Ethnicity, 2019



Source: American Community Survey 5-Year Estimates  
\*Figures are for people 25 years or older



## Kindergarten Readiness by Race/Ethnicity, 2019



Source: Office of the Superintendent of Public Instruction

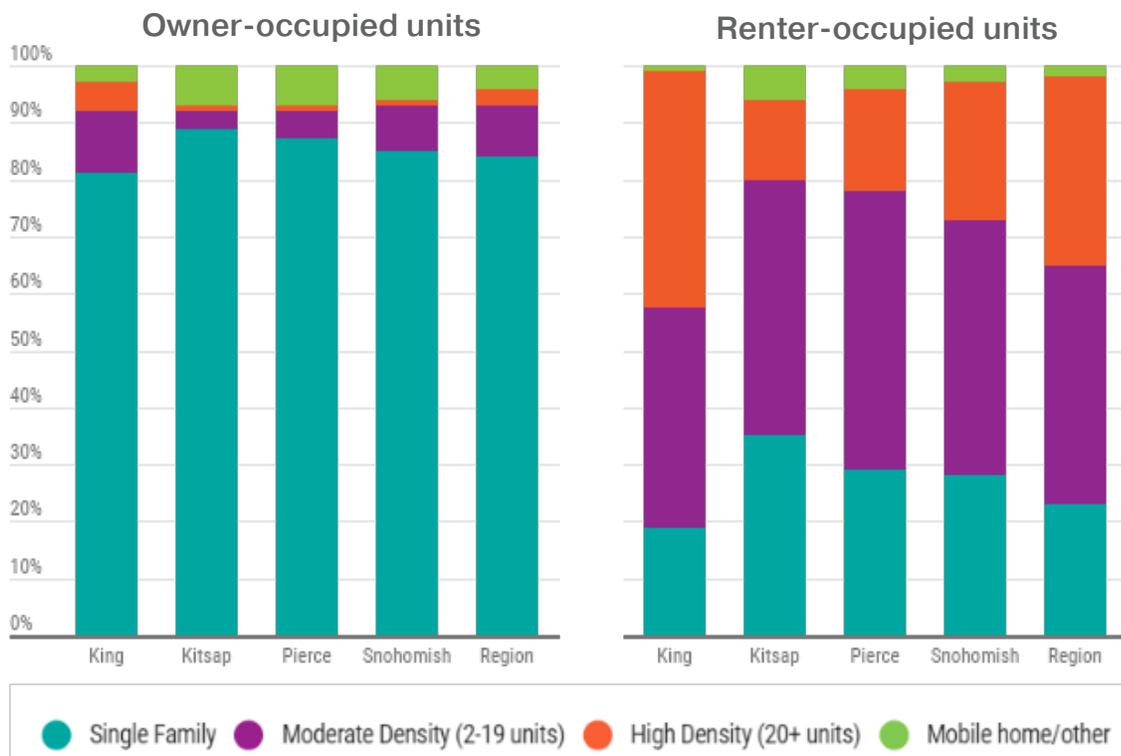


## There are few opportunities for home ownership besides detached single-family

Housing types occupied by owners and renters differ dramatically across the four counties. Owners overwhelmingly live in single-family housing, constituting more than 80 percent of all owner-occupied housing. For renters, meanwhile, single-family housing comprises just over 20 percent of stock, while moderate and high-density makes up 75 percent. Comparing counties, King County has the largest share of moderate and high-density housing (as well as the most total housing units), while Kitsap has the lowest share and lowest total stock.

Moderate and high-density housing tends to be more affordable than single-family, and the lack of moderate and high-density housing for sale has led to limited opportunities for homeownership, especially for first-time home buyers and people with lower incomes.

### Owner vs. Renter Occupied Housing by Units in Structure, 2018



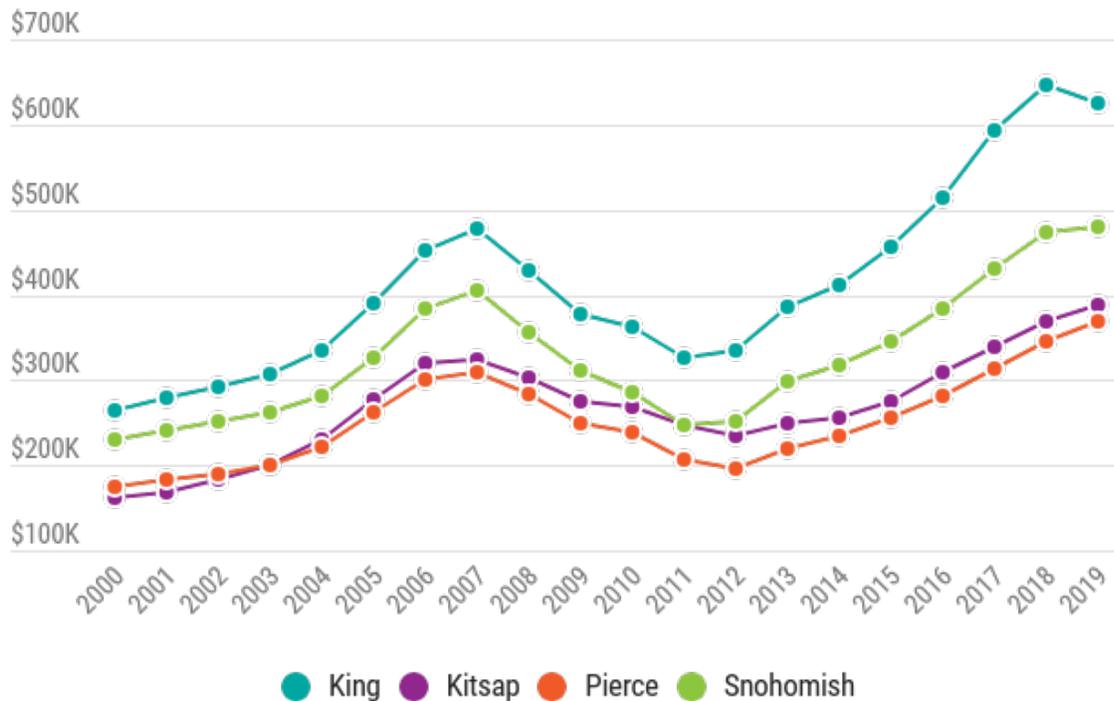
Source: American Community Survey 5-Year Estimates



## Home values have recovered from the 2000s housing bubble, but gaps are widening between counties

The central Puget Sound region has seen explosive growth in home values since 2011. Prices have fully recovered from the collapse of the housing market following the 2008 recession, though gaps are widening between King County and Snohomish, Kitsap, and Pierce counties. As of 2019, home values in King County are almost double the value of homes in Kitsap and Pierce counties.

### Median Home Value, 2000-2019



Source: Zillow



## Key Regional Export Industries

The region is home to an important set of key export focused industries that make it unique. These industries include Aerospace, Information & Communication Technology, Maritime, Military & Defense, Life Sciences & Global Health, Clean Technology, Tourism, Transportation & Logistics, and Business Services.

The region's leading industries fuel job growth and are made up of one or more specialized industry clusters, many of which are tied to the international economy. Many of the key companies driving this growth are technology related, including Aerospace, Maritime, and Life Sciences & Global Health. Like the economy itself, industries evolve over time and having a diverse set of industry clusters can help sustain a resilient economy as some clusters shrink in employment while others grow.

The central Puget Sound region is also home to more specialized industry clusters that build on the region's economic history and character, including wood products, recreational gear, food and beverage, and architecture and engineering. The region's materials manufacturing companies help keep the region on the cutting edge of Aerospace, Life Sciences & Global Health, Military & Defense, and other export industries.

The new economic strategy is designed to support these key strategic clusters, grow jobs and opportunity, and look for ways to continue to diversify and build resiliency into the regional economy. The most recently available industry data is from early 2020 and reflects pre-COVID employment levels in the region. This highlights longer term trends in our industry growth but does not capture the effects of the pandemic on our industries, particularly those most impacted such as Tourism and Transportation & Logistics.

### Aerospace

The Aerospace industry in the central Puget Sound region is one of the most competitive in the world. The Boeing Company was founded in Seattle over a century ago, and since that time the central Puget Sound region's Aerospace industry has grown into a large and diverse supply chain that is driving innovation across clusters, including space, advanced composite materials and aerospace biofuels.

The industry employs people across a variety of skillsets – working in design, engineering, materials, production, and others. The success of this industry is bolstered by footholds in related regional expertise in architecture and engineering, information technology, and military and defense. Export of aerospace equipment has a major impact on the movement of air cargo in the region, served by the region's ports and transportation and logistics industry. In total, the Aerospace industry employed an estimated 121,000 workers in 2020 and accounted for almost 6 percent of all jobs in the region, a concentration more than three times the national average. The significant decrease in air travel during the COVID-19 pandemic disrupted the Aerospace workforce. Statewide Aerospace jobs declined by nearly 9 percent between Quarter 2 of 2019 and Quarter 2 of 2020.



The Boeing Company continues to be a cornerstone of both the Aerospace industry and the regional



workforce. The majority of Boeing’s regional workforce is employed in Snohomish County around Everett, but Boeing also has a major impact in King County. Jobs are concentrated around King County International Airport or “Boeing Field” and the Renton Production Facility, which has produced more than 14,500 commercial airplanes or 30 percent of the worldwide fleet flying today.

The central Puget Sound region is increasingly recognized as a hub of private sector space companies and employment, helping to diversify the aerospace industry and make it more resilient. Much of this growth is driven by expanding companies including Blue Origin, Vulcan Aerospace, and SpaceX. PSRC’s 2018 Washington State Space Economy report showed that business activities tied to direct, indirect, and induced impacts of the industry provide and estimated \$1.8 billion in economic activity annually and 6,200 jobs.

## Information & Communication Technology

The region is home to a highly diverse Information & Communication Technology industry. This includes business in traditional software publishing, computer services, interactive media, and others. In total, the Information & Communication Technology industry is a major employer in the region, providing more than 260,000 jobs to the regional economy in 2020.



Information & Communication Technology is both the largest industry in the region and the fastest growing, increasing by 10.6 percent annually between 2015 and 2020 for a net increase of more than 90,000 jobs. This is fueled in large part by sustained growth in the software publishing and computer services subindustries. With 77,100 regional jobs, software publishers are concentrated in the region 10 times the national average, with a high concentration in King County. Moreover, this industry was well-insulated from the effects of the COVID-19 pandemic, and even showed modest growth as much of the regional workforce transitioned to remote work. Statewide, the Information & Communication Technology cluster grew 5.4 percent between Quarter 2 of 2019 and Quarter 2 of 2020.

Regional software companies like Microsoft, the largest software company in the world, form the backbone of this industry cluster. Microsoft’s world headquarters are in Redmond, and the company employs more than 58,000 workers in Washington state.

Amazon continues to grow and add jobs in the region. In September 2021, the company announced plans to hire 12,500 corporate and tech employees to the region, adding to an existing workforce of approximately 75,000 workers in the central Puget Sound region when including warehouse distribution employees<sup>1</sup>.

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<sup>1</sup> Source: Amazon, Seattle Times, 02 September 2021



Regional businesses and institutions are advancing the future of work through innovations in artificial intelligence and cloud computing. New platforms, such as Microsoft’s Azure and Amazon’s AWS, are making companies across the globe faster and more productive while limiting capital expenses. As this technology expands and streamlines manual work processes, workforce development entities, local universities, and other economic development organizations are focusing on how to better prepare the workforce for jobs requiring higher skills.

The presence of a strong Information & Communications Technology sector also creates opportunities for collaboration across sectors. Businesses in aerospace, maritime, finance, agriculture, and the life sciences have all benefitted from the region’s strength in Information & Communication Technology. In July 2021, Washington State University announced a \$20 million federal grant to develop artificial intelligence solutions to challenges such as labor, water, weather, and climate change.

## Maritime

The region has leveraged its close proximity to Asia, Alaska, and Canada into a thriving Maritime industry. In 2020, more than 39,000 workers were employed in the sector across boat building and repair, fishing and fishing products, and water passenger and cargo transportation, resulting in significantly higher regional employment concentrations than the national average. Between 2015 and 2020 employment in this sector has held steady but was impacted by the COVID-19 pandemic as statewide jobs in the Maritime industry declined by more than 7 percent between Quarter 2 of 2019 and Quarter 2 of 2020.



Jobs tied to boat building and repair represent the bulk of the Maritime sector with 16,800 jobs regionally. This cluster has shown steady growth, increasing at 4.1 percent annually since 2015. These jobs are heavily concentrated in Kitsap County, which has nearly 129 times the concentration of these jobs compared to the national average. Kitsap County is also home to Naval Base Kitsap, which employs nearly 20,000 civilians in addition to more than 11,000 active-duty military members.

Other maritime clusters are facing challenges in maintaining growth and workforce. While water passenger transportation employment has stayed level with 2015 figures, water cargo transportation and fishing and fishing products jobs have both declined by at least 5 percent during that time frame.

Communities, ports, and other partners are planning for the future of the region’s maritime industry. In 2019, Washington Maritime Blue published a strategy for the Blue Economy in Washington state, finding that the global ocean economy is expected to double by 2030 to \$3 trillion. This strategy helps guide the development of the Maritime economy in the region by establishing goals for a thriving, low carbon industry, global innovation, growing trade gateways, developing the maritime workforce, and strengthening cluster coordination.



## Military and Defense

Military installations in the region play a critical role in national defense, while providing significant economic benefits to the region. The central Puget Sound region hosts several major military installations, including Joint Base Lewis-McChord, Naval Base Kitsap, and Naval Station Everett. The industry supports myriad private defense contractors and subcontractors which bolster the regional Maritime and Aerospace industries.



Naval Station Everett is an important contributor to the economy of Snohomish County and the region. Six thousand sailors and civil service personnel are assigned to commands located there, and 9,200 jobs are supported by defense contracts generated at the station. In total, these contracts have an estimated economic value of \$2,640 per capita in Snohomish County.

Naval Base Kitsap provides \$4 billion annually in economic impact and employs more than 33,000 workers – 25,000 of whom are civilians or defense contractors. The South Sound Military & Communities Partnership recently found that JBLM is the fourth largest employer in Washington, providing 34,000 jobs statewide and 25,500 jobs in the South Sound. In total, JBLM provides \$14 billion in statewide economic impact.

## Life Sciences & Global Health

The region plays host to a thriving Life Sciences & Global Health industry that is advancing health in communities across the globe. Regional businesses and organizations are pushing advancements in biotechnology, diagnostics, bio-agriculture, veterinary medicine, biofuels, medical devices, research, and digital health/health IT. Several major universities and research organizations anchor this industry sector and have created an ecosystem for cross-sector collaboration and start-ups. These include Washington State University, University of Washington, Fred Hutchinson Cancer Research Center, the Allen Institute for Brain Science, and the Infections Disease Research Institute.



The region has higher than average concentrations of jobs two key industry clusters: research organizations and medical apparatus manufacturing. The Life Sciences & Global Health industry accounted for approximately 26,000 jobs in 2020 in the region, growing nearly 5 percent each year since 2015. Research organizations make up the largest cluster within the industry, providing 15,800 jobs for the central Puget Sound region, 1.3 times more concentrated than the national average. Medical apparatus manufacturing jobs are over 2.5 times as concentrated regionally as they are nationally, accounting for 3,600 jobs to the regional economy.



The Life Sciences & Global Health industry is one of the fastest growing in the region and has a potential to continue a high rate of growth due to the region's millennial workforce, higher-education R&D funding, and proximity to the Asian market. The sector contributes \$16 billion in economic impact value added to Washington's GDP. Much of this growth has been cultivated through cross-sector partnerships with other industries, notably Information & Communication Technology, aiding in expanding the medical device manufacturing cluster.

The region's strengths in virology and immunology research played a vital role in responding to the COVID-19 pandemic through testing, treatment, and vaccine development. These efforts also helped sustain jobs during the pandemic. Early clinical trials for the Moderna vaccine occurred in regional hospitals, helping pave the way to FDA approval and distribution across the globe. Additionally, in the summer of 2021 two biotech startups initiated trials for new COVID-19 vaccine candidates that could speed up manufacturing timelines and expand distribution.

## **Clean Technology**

The region is home to thriving businesses that are on the leading edge of clean technology developments. Washington state has set a goal of having a 100 percent non-carbon emitting energy portfolio by the year 2045. As of 2018, 69 percent of Washington's energy came from hydroelectric sources, with natural gas, wind, biomass, and nuclear rounding out the state's clean energy portfolio. State funding sources and incentives are also helping to grow and develop innovation in the Clean Energy Sector. Since 2013, Washington's Clean Energy Fund has allocated more than \$150 million to organizations and researchers developing new technologies in energy production, storage, management, and conservation.

Clean Technology is making inroads across several significant industry sectors in the region. Transportation & Logistics industries are reducing carbon emissions by transitioning to all-electric or hybrid fleets. The Aerospace industry is on the leading edge of researching sustainable aviation technologies such as electric aircrafts and hydrogen fuels. Information & Communication Technology businesses are developing energy efficient data processing models. The materials manufacturing sector produces solar panels, batteries, and other clean materials. Innovative wood product companies are developing woody biomass as a sustainable energy source and new building technologies such as Cross Laminated Timber. Washington Maritime Blue has made a thriving, low-carbon industry one of the five strategic goals for their Blue Economy strategy. This goal includes strategies such as ferry electrification, charging infrastructure, emissions tracking, and infrastructure planning.



## Tourism

The Tourism industry accounted for approximately 147,000 jobs in the central Puget Sound region in 2020. While Tourism jobs increased 2 percent annually between 2015 and 2020, this industry was heavily impacted by the COVID-19 pandemic. Statewide, Tourism jobs declined 45.5 percent between Quarter 2 of 2019 and Quarter 2 of 2020. The Economic Development District Board is working with regional partners to focus recovery efforts on this and other heavily impacted industries.



The industry's historical success has been driven by a set of diverse areas of natural beauty and cultural assets unlike any other region. As a result, the region is rich with recreational activities, entertainment, and amenities that draw visitors from around the world and contribute to a high quality of life for residents. The regional tourism industry is home to a number of industry clusters with higher than average job concentrations in the region, including businesses in attractions and entertainment, performing arts, gambling establishments, and water passenger transportation. Each of these clusters shows concentrations of jobs in the region that are higher than the national average, with gambling establishment jobs being nearly five times the national average, and more than 10 times the jobs in water passenger transportation regionally compared to the nation.

The central Puget Sound region continues to be a strong hub for arts, entertainment, and cultural events. In the past five years, the jobs in the attractions and entertainment and performing arts clusters both grew at roughly 7 percent annually. As of 2020, their combined workforce in the region accounted for just under 30,000 jobs.

The COVID-19 pandemic affected the Tourism sector significantly. An ArtsFund study found that arts organizations' total earned income budget for 2020 was 39 percent less than in 2019, and 65 percent less than in 2018. Furthermore, the region saw a 21 percent decrease in organizations' contributed income distributed income budget for 2020.

Public and private investment in the arts prevented permanent closures at a large scale. Private philanthropy was up 23 percent compared to prior years, and several stimulus packages from federal, state, and local governments helped keep venues from shuttering. The first round of Paycheck Protection Program loans from the Small Business Administration (SBA) contributed \$5 billion directly to the arts, entertainment, and recreation sectors. The Shuttered Venue Operators Grant (also from the SBA) contributed \$16 billion, and Governor Inslee dedicated \$27 million in American Rescue Plan Act (ARPA) funds.



## Transportation & Logistics

The central Puget Sound region has a strong Transportation & Logistics industry due to its deep-water ports, road and rail connections, internationally significant airports, and proximity to Pacific Rim markets. In total, more than 71,000 residents in our region are employed in this industry across wholesaling and storage, and ground, air and water transportation. In the past five years, this industry has grown by 4 percent annually, with most of the growth coming in air and ground transportation and wholesaling.



Because of geography, the region has a disproportionately high concentration of jobs in water cargo and passenger transportation. While these job concentrations remain high compared to the national average, the total number of jobs in these clusters have declined over the past five years, particularly for water cargo transportation, which has seen a 5 percent annual decline since 2015.

During that same timeframe, the air transportation cluster has shown strong and steady growth, corresponding with strong growth in commercial and cargo activity at Sea-Tac International Airport. The Port of Seattle estimates that Sea-Tac drives more than 87,000 direct jobs which includes both direct airport activities and visitor impacts.

The region is also home to the four large deep-water ports of Seattle, Tacoma, Everett, and Bremerton which are the foundation of the region's Transportation & Logistics industry. The Northwest Seaport Alliance, a joint venture by the Port of Seattle and Port of Tacoma, is the fourth largest container gateway in North America and supports over 58,000 jobs and drives \$12.4 billion in economic activity in Washington state. This includes \$136 million in state tax revenue generation.

The Port of Everett is a substantial economic contributor to Snohomish County and the region. More than 39,000 direct, induced, and indirect jobs are supported by Port activity, leading to \$7.9 billion in economic value to the region. The Port of Everett also plays a role in strengthening the region's Aerospace industry supply chain. The Port handles all the oversized aerospace parts for Boeing's 747, 767, 777, and 777X airplane programs.

The Port of Bremerton also plays a large role in the region's Transportation & Logistics industry. More than 8,000 direct and indirect jobs are supported by activities at the Port. These jobs generate more than \$1.4 billion in economic output across Washington, \$424 million of which is direct labor income.



## Business Services

The Business Services industry provides many well-paying jobs for the region across the corporate headquarters, insurance services, and marketing, design, and publishing clusters. The total industry footprint in the region was nearly 112,000 workers in 2020, a steady 1.2 percent annual increase from 2015.

Much of the job growth in this industry has come from the marketing, design, and publishing sector. While corporate headquarters employment remained stable and insurance services had a modest decline, marketing, design, and publishing jobs were added to the region at a rate of 13.5 percent annually between 2015 and 2020. This cluster is now concentrated in the region at a rate two times the national average.

While jobs in the Business Services industry are continuing to grow in the region, it remains to be seen how these increases will affect real estate as many of these jobs have shifted to remote work as a result of the COVID-19 pandemic. An analysis by the Seattle Times in September 2020 found that nearly half of all working adults in the Seattle metropolitan area were working from home. This was one of the highest rates in the country and can be attributed to the region's high levels of education and median household income that correspond with professional and office jobs that are more easily converted to remote settings.



# Strategic Direction & Action Plan

## Expanding Economic Opportunity

Expanding economy opportunity in the region is a key focus area of the Regional Economic Strategy. This section sets the strategic direction for expanding economic opportunity to residents and places across the region. It addresses the region’s public education system as well as higher education and workforce development programs. It also identifies ways to leverage the region’s culture and diversity to expand economic opportunity.

Amongst these areas, the strategy highlights top issues that emerged from the strategy development process: equity, childcare, job distribution, and broadband access.

### Economic Opportunity for the Region’s Residents



The region faces historical inequities regarding economic opportunities and economic outcomes for the region’s residents. COVID-19 has exacerbated these challenges, disproportionately impacting the populations that already had lower access to opportunity. The region must address these systematic inequities to increase economic opportunity and to fully reach economic recovery. To do this, the region needs to integrate an **equity** focus across all economic recovery efforts.

PSRC defines equity as “All people have the resources and opportunities to improve the quality of their lives and reach their full potential. Differences in life outcomes cannot be predicted by race, class, or any other identity. Those affected by poverty, communities of color, and historically marginalized communities are engaged in decision-making processes, planning, and policy making.

The pandemic has called out the critical nature of **childcare** availability for both individual families’ economic outcomes as well as the overall performance of the region’s economy. A recent report by the Washington Child Care Collaborative Task Force determined that lack of access to affordable childcare keeps more than 133,000 potential workers out of Washington’s labor force. and has significant negative impacts on overall state earnings, business output, and tax revenues. According to the report, lack of childcare has resulted in a loss of an estimated \$14.7 billion in personal earnings,



\$34.8 billion in Gross State Product, and over \$1 billion in tax revenue on an annual basis. Over the summer, the task force is expected to release an implementation plan to achieve accessible, affordable childcare for all Washington families by 2025.

Starting and running a business is a pathway to economic opportunity for many individuals and families. The economic shutdown has had a major negative impact on many small businesses, and these impacts exacerbate the unique challenges that women and minority business owners face. The region is home to a network of organizations that provide financial and technical assistance to new and existing small businesses, including programs targeted to support women- and minority-owned businesses. COVID-19 has greatly expanded the need for these services and the region should work to expand these programs to aid in regional economic recovery and to meet regional equity goals.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

### Inequities exist in economic opportunity

People of color in the region face disproportionate and unique barriers to economic success.

### COVID-19 exacerbated existing inequities in the workforce New/Expanded\*

COVID-19 has exacerbated existing inequities, disproportionately impacting women, people of color and people with low incomes.

### Lack of childcare options is keeping workers out of the labor force New/Expanded\*

A lack of access to affordable childcare keeps workers out of the labor force, resulting in loss of personal earnings, business output and tax revenues.

### Small and medium sized businesses need greater support due to COVID-19 New/Expanded\*

The impact of COVID-19 is straining the regional network of support which helps individuals start, run, and finance their businesses.

### Expand opportunities to Women and Minority-Owned Businesses

Women and minority-owned businesses face unique barriers to realizing their full potential and economic contribution.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:



## E1: Expand equity focus throughout economic development efforts New/Expanded\*

The region should focus on identifying and implementing strategies that close the sex, race, and ethnicity gap in earnings, wealth, unemployment, health, and other measures of economic success.

Identified near-term actions:

- Convene regional leaders to develop strategies to address challenges related to the impacts of COVID-19 on women in the workplace.
- Leverage PSRCs' newly formed Equity Advisory Committee to begin implementation of the Regional Equity Strategy.
- Support efforts of the recently established state Office of Equity to work with agencies to increase access to opportunities in order to bridge gaps and reduce disparities.
- Develop an Evidence Based Hiring Academy to provide cohorts of mid-sized, high-growth companies with a structured process and consulting services to help them institute evidence-based hiring processes that are designed to eliminate bias in hiring. (*Initiative of Forward Together*)
- Meaningfully engage and empower the underserved and historically marginalized in formulating economic development plans and actions.
- Expand the use of community workforce agreements and priority hire programs to expand job access and job quality for underrepresented communities.

## E2: Expand the region's childcare ecosystem New/Expanded\*

The region needs to work to build a sustainable childcare model with expanded facilities, and a subsidy model that supports workers, families, and childcare providers.

Identified near-term actions:

- Coordinate discussions between the public and private sectors on strategies to expand childcare capacity in the region.
- Support implementation of the Washington Child Care Collaborative Task Force's Child Care Access Plan.
- Support Childcare Expansion by providing a full suite of services, loans, and grants to fuel the creation and expansion of childcare centers in childcare deserts across the region. (*Initiative of Forward Together*)
- Expand access to childcare subsidies and offer support to providers participating in the state's childcare subsidy program.
- Determine sustainable childcare business models that leverage public and private resources to cover the costs of service.



- Support efforts to stabilize the childcare workforce through improved benefits, healthcare, and living wages.

### E3: Expand support for small and medium sized businesses and businesses owned by marginalized communities New/Expanded\*

The region should work to create and expand programs and funding to support small business recovery from COVID-19 and to create a level playing field for women and minority-owned business to create more jobs and add to the diversity of the regional economy.

Identified near-term actions:

- Develop a Minority Business Accelerator that connects existing BIPOC- and women-owned scaleup businesses to consulting services and corporate partners. (*Initiative of Forward Together*)
- Ensure that existing Corporate Racial Equity Coalitions have the dedicated staff capacity they need to succeed and support other key industries as they create similar coalitions. (*Initiative of Forward Together*)
- Develop an Equity Loan Fund for Scale-Up Firms to provide a source of funding tailored to the needs of scale-up firms and focused on BIPOC- and women-owned businesses. (*Initiative of Forward Together*)
- Facilitate support for local businesses with financing and technical assistance to recover from the impacts of COVID-19.
- Integrate opportunities and set goals for supporting BIPOC, women and immigrant-owned businesses into regional economic development efforts.
- Develop partnerships and programs to support small, local, women or minority-owned businesses and entrepreneurs to navigate community resources.
- Expand training and certification opportunities to increase small, minority and women-owned business participation in government projects and procurement opportunities.
- Document how entrepreneurs access capital, and map barriers to entrepreneurial success for historically marginalized entrepreneurs.



## Economic Opportunity Throughout the Region

Even during periods of economic growth, some parts of the region do not experience the degree of job growth and investment that other parts do. In some areas, increased infrastructure investments are needed to help support economic growth. In addition, while a regional perspective can illuminate common challenges and opportunities, a one-size-fits-all approach to economic development does not work for the diversity of the regional economy. The region has a strong network of



organizations at the local level that work to identify the challenges and opportunities faced by each submarket, develop strategies to tackle their unique challenges, and take advantage of opportunities at hand.

The COVID-19 pandemic has created uncertainty about **job distribution** trends in the region, and where people will live and work in the future. The region continues to plan for and support major job centers. However, if more workers continue to work from home or in remote locations, this may provide opportunities for communities throughout the region to expand their economic base.

COVID-19 has called attention to the need for greater **broadband access** across the region. This connectivity is critical to connecting the region's residents to educational and economic opportunities wherever they live. In 2021, the Washington State Legislature passed bills that expand the role of Public Utility Districts in providing retail service to customers, and many state and federal organizations have funding opportunities to expanding connectivity. This includes the Economic Development Administration, United States Department of Agriculture, and National Telecommunications and Information Administration at the federal level, and the Community Economic Revitalization Board and Public Works Board in Washington state.

Prior to the pandemic, some areas struggled to take advantage of the region's economic growth. In other areas, growth and redevelopment, especially near transit hubs, has driven up demand and costs for commercial space, leading to displacement of important local businesses.

### Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

#### Expanding broadband connectivity throughout the region New/Expanded\*

COVID-19 has put into focus that broadband access is critical to connecting people, places and business to economic opportunity.



## Investing in communities for job growth

Many communities throughout the region need increased infrastructure investments, including transportation, utilities, and housing to support job growth targets.

## Strong localized economic development planning

Economic development activities in the region consist of multiple levels, with regional, county, and local plans providing a focus on the strengths and opportunities of each submarket of the regional economy.

## Preparing the region for a decentralized workforce New/Expanded\*

The region needs to be prepared for the possible shifts in trends of decentralized work in the region prompted by COVID-19.

## Challenges in affordability and availability of commercial space

Growth and redevelopment, especially in areas near existing and future transit, have pushed commercial rents up, forcing many longtime small and local businesses to close or relocate. Challenges also exist in the region's warehousing space and industrial land to accommodate increased goods demand and the ensuing supply chain congestion.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### E4: Advance economic development within small cities and rural communities

Support economic activity in small cities and rural communities that is uniquely situated for these communities at a size and scale that is appropriate.

Identified near-term actions:

- Provide technical assistance and data to support economic development planning at the local level.
- Support funding mechanisms for redevelopment in small cities that is to scale with regional growth expectations.
- Restore and complete major trail systems identified within regional plans.
- Encourage recreational use in rural areas that is compatible with environmental interests and local culture.
- Support economic development strategies that recognize agriculture and other industries that drive the economies in small cities and rural communities.



- Support transportation improvements in small cities and rural areas that connect regional residents safely to recreational and economic opportunities and are designed and operated in a way that fits local context.
- Support development of Cross Laminated Timber production and emerging market opportunities uniquely situated for rural communities.

#### E5: Encourage economic growth across all parts of the region New/Expanded\*

Identify the economic challenges and opportunities that each sub-region faces and develop strategies and investments to address them.

Identified near-term actions:

- Expand access to broadband internet access in all parts of the region through investments in public sector infrastructure, while leveraging federal infrastructure opportunities.
- Monitor the ongoing impacts to regional job distribution and work from home due to COVID-19.
- Support local jurisdictions with technical assistance and data as they develop Economic Development elements of their comprehensive plans due in 2024.
- Combat geographic economic disparities in the region by identifying and supporting growth of Job Hubs throughout the region. (*Initiative of Forward Together*)
- Develop industry cluster analysis of sub-regions to provide data to support targeted economic development.
- Support investment in areas of the region that are operating under their potential and that have strong opportunities for growth.
- Support efforts to grow jobs in proximity to housing.
- Target economic development efforts that support additional industries that will benefit targeted communities.
- Encourage economic development that supports job opportunities throughout the region to help reduce the impact on the region's transportation system.
- Support local jurisdictions in the development of strategies and zoning codes to reduce pressures of business displacement.



## Public Education

Children growing up in the region require world class educational opportunities to compete in a global labor market for jobs in their own communities. However, students in Washington are falling behind on basic education and graduate high school at lower rates than the national average. Students of color face disproportionate



challenges to educational success. Within the region's population, there are variations in graduation rates based upon racial, ethnic, and income characteristics. Similar to median income levels, white and Asian American students graduate at higher rates than the regional average. Students from all other racial and ethnic groups graduate at lower rates, with American Indian/Alaskan Native students graduating at a rate more than 20 points lower than the regional average.

Prioritizing early learning is a key to the region's economic success. Despite this, only half of all kindergarteners in Washington are prepared for learning. Of kindergarten students entering school in the fall of 2019, 52 percent showed readiness across all the six skill levels measured. In addition, not all groups of students demonstrated readiness equally. Incoming Black/African American kindergarteners had readiness rates of 44 percent, and American Indian/Alaskan Native, Hispanic/Latino, and Native Hawaiian/Other Pacific Islander students had readiness rates at 35 percent or less.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

### Half of all kindergarten students are not prepared for learning

Many of the region's incoming kindergarten students are entering school without the desired skill levels. Students of color showed lower readiness.

### The region is trailing the nation on basic education

Washington is behind the national average in student achievement in math and high school graduation rate. The impact of COVID-19 may exacerbate these gaps.

### Racial disparities exist in measures of educational success for the region's students

Students of color and low-income students face lower educational and economic prospects than white students.



## Virtual learning may exacerbate inequities in the education system New/Expanded\*

More than a year of virtual learning will likely expand the disparity in outcomes for students.

### Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

#### **E6: Provide adequate support for pre-K through 12 education systems that serve all students**

Improve the system of basic education to improve school readiness, boost student achievement and graduation rates, and prepare students for post-secondary education and careers, with a focus on addressing the performance of disadvantaged communities and addressing historical inequities.

Identified near-term actions:

- Ensure the Washington Roundtable's Pathways to Great Jobs in Washington State key cradle-to-career steps are implemented.
- Continue to support the Road Map Project and draw best practices from that program to support other parts of the region, connecting a full range of social services to help kids succeed.
- Encourage state leaders to make policy decisions to improve educational outcomes.
- Promote investments in public schools to bring funding up to nationally competitive standards.
- Understand the connection between pre-K, K-12, and economic opportunity, furthering efforts by local school systems to prepare kids to compete in a global labor market.
- Invest in schools and early learning programs as an asset to local and regional economies and encourage city and county leaders to continue to make investments in schools and early learning programs as part of an investment in economic opportunity.



## Higher Education & Workforce Development

Continued success of the region's economy relies on a trained and talented workforce. The region has a strong network of education and training institutions that produce world-class talent. However, the regional economy has a demand for talent that outstrips the region's capacity to produce that talent. The central Puget Sound region is among the most educated regions in the nation with 42 percent of residents holding a bachelor's degree or higher. However, each year the region imports highly trained workers from around the world to fill open positions. Even during the COVID-19 recession, regional employers struggled to find workers for high demand jobs, constraining opportunities for these regional sectors to expand and compete.



Recessions and recoveries add new challenges to the demand and supply of workers. Some of the jobs lost during a recession don't come back, with later job gains in other types of work. These occupational shifts can leave trained workers with fewer employment opportunities, and employers challenged with filling open positions. Regional workforce development programs are challenged with meeting the needs of local employers as well as working to supplement the training and education of dislocated workers.

### Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

#### Workforce gaps exists in high demand occupations and industry sectors

Each industry faces different challenges in meeting demand for workers, and a lack of qualified candidates has resulted in unfilled jobs because of skills gaps.

#### A network of workforce development organizations to meet the needs of the region's workers

Government, local employers, training providers, educational institutions, service and advocacy groups, and other local organizations work to make sure the regional workforce system succeeds in strengthening the talent pool, expanding economic opportunity, and serving displaced workers.



## COVID-19 related recession is accelerating employment shifts New/Expanded\*

Economic recessions and recoveries accelerate shifts in employment trends, increasing the need to identify and prepare for future workforce needs.

### Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

#### E7: Coordinate and expand programs in higher education and training to address workforce gaps and advance economic opportunity for all New/Expanded\*

Develop and expand education and workforce training programs that target the needs of regional employers, as well as improving equitable outcomes for those that the workforce systems serve.

Identified near-term actions:

- Compile and track regionwide data on occupations and skills needed across key industry sectors to develop the local workforce for current and future jobs.
- Develop Shared Supportive Services for Earn and Learn Programs that provide high-quality registered apprenticeships and internships in high-growth sectors and have an intentional focus on racial and gender equity. (*Initiative of Forward Together*)
- Expand Pre-Apprenticeship Training for recognized and new pre-apprenticeship programs, which are a top priority of workforce development organizations across the region. (*Initiative of Forward Together*)
- Support Apprenticeship Development for Mid-Sized Firms to enable more small and mid-sized businesses to create registered apprenticeship programs and hire apprentices. (*Initiative of Forward Together*)
- Examine the market demand and need for increased higher education capacity in the region.
- Help students, beginning in elementary school, develop better awareness of the careers that will be available, inspiring them to think about their futures, the skills necessary for the jobs that interest them, and the pathways to attaining those skills.
- Expand investment in recognized pre-apprenticeship and registered apprenticeship programs to help bridge expected workforce gaps to better fill job openings in the state and provide meaningful careers to the state's residents, including underserved communities.
- Expand efforts to equitably recruit potential students into workforce training programs.
- Embed racial equity goals in workforce development plans and programs and develop strategies to achieve these goals.



- Prioritize employment and training for those who face the most barriers to opportunity, prioritizing strategies and funding that promote racial equity.
- Work with regional employers and labor representatives to understand and prepare for current and future workforce needs.
- Expand benefits and wraparound supports to increase access to education resources.

## Regional Culture & Diversity

The central Puget Sound region is a diverse and welcoming place, home to workers, students, and business owners from around the world. This diversity is a major asset when looking to attract talent to the region, and a diversity of perspectives helps drive the region’s innovation economy. In addition, the region is home to nine federally recognized Tribes and other Native peoples who provide a foundation for the region’s culture. These regional Tribes contribute to economic prosperity in many ways beyond cultural enrichment, including direct employment, government revenue generation, land and resource management, and placemaking. Future economic success will require that the region continue to support and promote the strength of the region’s diverse people and the economic value that they bring.



## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region’s economy:

### A welcoming region that attracts global talent and investment

The region’s diversity is a major asset essential to making the economy thrive, helping globally competitive industries attract top talent from around the world.

### Diverse perspectives foster greater economic output

Cultural diversity is a strength and has a positive influence on economic development in the region, helping to fuel the region’s innovative economy.

### Regional Tribes play an important and unique role in the regional economy New/Expanded\*

The region is home to nine federally recognized Tribes and other Native peoples, each of which contribute to economic prosperity in many ways, including direct employment,



government revenue generation, land and resource management, cultural enrichment, and placemaking.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### E8: Embrace, celebrate, and promote the diversity of the region's people

Work to actively maintain and promote the region as a welcoming place, embracing and celebrating diversity and social justice as fundamental values, as an essential element to the region's economic success.

Identified near-term actions:

- Encourage federal immigration, foreign worker, and visitor policies that recognize the talent requirements and opportunities of regional businesses.
- Encourage regional leaders to support and defend protections against discrimination based on religion, ethnicity or national origin, sex, race, disability, and sexual orientation.
- Support policies and practices that promote tolerant, safe, inclusive, and equitable communities.
- Encourage dialogue on race and social justice that strengthens community policing and respects diverse community backgrounds and attitudes.
- Coordinate with regional Tribes to identify ways to support their economic development efforts including addressing housing, infrastructure, financing, education and workforce development, and energy and water sovereignty.
- Elevate stories of BIPOC, immigrant and women-owned businesses in the region to recruit entrepreneurs to start new businesses in the greater Seattle area.



## Global Competitiveness

The region competes with other areas around the globe for jobs, talent and investments. The Regional Economic Strategy identifies areas that the region needs to focus on to maintain its edge in the global economy. Included in this section is a strategic direction for addressing business climate and building upon the region's entrepreneurial spirit. Trade development is addressed, as well as support for key industrial sites including ports, maritime sites, and military installations.

Among these areas, the strategy highlights top issues that emerged from the strategy development process: business recovery and industry resilience.

## Business Climate & Competitiveness

The region competes with places around the world for new business and investments.

These businesses decide where to locate based upon a variety of factors tied to a region's business climate and local cost factors particular to their industry. A region's tax and regulatory environment can



play a major part in these decision-making processes, and the region must continue to look for ways to streamline and simplify the regulatory experience for businesses. Other states have a variety of financial incentives to help attract businesses that are not available in Washington. A bill enabling tax increment financing, a tool available in most other states, was signed into law in 2021.

One factor that influences location and expansion decisions is the overall competitiveness of the region's industries. The region's industries have continued to evolve, with new subsectors emerging while others decrease in employment and impact over time. Working to foster **industry resilience** through diversification will help ensure the region's long-term competitiveness and viability. The region is also tasked with managing **business recovery** due to the impacts of COVID-19. The pandemic demonstrated a risk to current and future competitiveness – global supply chain disruptions. The region's economy would be strengthened by identifying ways to make local supply chains more resilient and focusing on expanding these regional supply chains through targeted business attraction activities.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:



## The region has fewer financial incentives for economic development

Compared to other states, Washington has fewer tax and other financial incentives to attract companies and locate jobs.

## Coordinating to streamline regulations

Efforts at the state, regional and local levels are working to improve the regulatory experience for businesses.

## Evolving global industries for future resiliency New/Expanded\*

Fostering emerging industry opportunities is critical to help ensure the long-term viability of the region's unique export industries.

## Supply chains at risk of global disruptions New/Expanded\*

COVID-19 highlighted the challenges that regional industries face when supply chains that extend beyond local suppliers are disrupted by global events.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### G1: Strengthen the region's regulatory and industry competitiveness framework

Streamline and reduce regulatory barriers and expand tax and financing tools available to local governments and agencies to enable job growth.

Identified near-term actions:

- Support existing regulatory streamlining efforts and find ways to scale up those efforts.
- Support and expand Washington's limited financing tools for economic development, to attract and retain jobs and investment.
- Examine best practices for the tax increment financing tool recently enacted in the state.
- Preserve industry tax incentives that maintain and expand the region's strong industry clusters and promote the growth of new clusters.
- Protect and grow the Strategic Reserve Fund and deploy it in strategic ways to further economic development, including for workforce development.

### G2: Build resiliency into the region's export-focused industries New/Expanded\*

Support business recovery from COVID-19 and foster growth opportunities within major globally focused industries to ensure long-term competitiveness and resiliency.

Identified near-term actions:



- Leverage pandemic-related economic development funding efforts to support business recovery and build resiliency into regional industries.
- Identify, examine, and support new industry growth opportunities across the region, including the Washington State Department of Commerce’s Innovation Cluster Accelerator Program (ICAP).
- Support industry growth opportunities tied to the digitization of services, such as healthcare.
- Analyze the economic impact of the region’s expertise in artificial intelligence, cloud computing and cybersecurity to support growth of these sectors.
- Leverage the region’s life sciences and global health industries to support pandemic recovery and future health crisis resiliency.
- Strengthen critical supply, funding, and distribution links in the region’s clusters.
- Identify opportunities in regional supply chains for reshoring and target company supply chains for business attraction to create jobs and increase supply chain resiliency.

## Research, Commercialization & Entrepreneurship

The region is home to two of the top research universities in the nation – the University of Washington and Washington State University – which drive millions of dollars in research funding into the region. In addition, the region’s private sector companies continue to innovate and grow due to significant investments in research and development. The natural innovation involved in the region’s entrepreneurship and startup ecosystem also helps build new companies and industries. These activities help maintain the continued competitiveness of the region’s industries as well as supporting high wage jobs. The region must continue to sustain the conditions that drive this research and innovation.



## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region’s economy:

### Top research universities drive innovation in the region

The region is home to two top research universities in the nation – the University of Washington and Washington State University – that help drive the region’s innovation economy.



## A world leader in research and development

The region is a national leader in private and public sector research and development, supporting higher wage jobs and additional economic activity.

## Regional institutions support a robust entrepreneurship and startup ecosystem

A strong environment of entrepreneurship makes the regional economy more diversified and resilient, creating new markets and generating economic opportunity.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### G3: Sustain and evolve the conditions necessary for innovation

Sustain the conditions that have enabled the region's history of innovation in business, institutions, and government along with evolving to create more areas of cross-sector collaboration.

Identified near-term actions:

- Encourage investment in higher education and research institutions as a tool to maintain the region's strength in innovation.
- Support collaborations between industry and universities to drive innovation in both the public and private sectors.
- Support the Cascadia Innovation Corridor and the development of ultra-high-speed rail connecting the region to Portland, Oregon, and Vancouver, B.C.
- Promote the region's start-up economy and entrepreneurial spirit through development of entrepreneurial resources, mentorship programs, and support groups.
- Restore R&D tax credits to support broad-based economic development across many sectors of the economy, including clean technology, aerospace, life sciences and global health, and maritime.
- Support the development of research and development lab space to support the needs of a growing life sciences industry.
- Leverage the region's strengths in artificial intelligence to support growth opportunities in agriculture, life sciences and other industries.
- Leverage the region's engagement in the Joint Cyber Defense Collaborative to expand the region's strength in cybersecurity.



## Recruitment & Retention of Businesses & Talent

The region's economic success has long relied on attracting people and businesses to the area. Thriving industry sectors and businesses, world-class educational institutions, a high quality of life and vibrant



communities continue to draw workers and business owners. There exists a strong network of state, regional, and local organizations that work to help retain and grow regional businesses, while also working to recruit new businesses to the area. However, many other regions around the country and world invest more heavily in these critical areas. The region must continue to make investments, and further coordinate, recruitment, retention and investment efforts to ensure continued business and job growth.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

### The region has strong assets to attract businesses and talent

The region has a strong set of assets, including strong industry sectors, educational and research institutions, and thriving communities, to successfully recruit and retain businesses and talent from around the world.

### The region needs larger investments in business recruitment, retention, and expansion

Compared to other parts of the U.S. and the world, the region and state invest much less in business recruitment, retention, and expansion efforts.

### The region needs to capitalize on international investment opportunities

Opportunities have grown for foreign direct investment (FDI) with emerging markets increasingly interested in investing and locating companies overseas.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### G4: Strengthen and coordinate recruitment, retention, and investment efforts

Increase coordination and support for business retention and expansion, and efforts to attract businesses, investment, and talent.

Identified near-term actions:



- Support investment in economic development organizations that retain, expand, and recruit companies to the region, both from domestic and international sources.
- Improve regional support for and coordination among economic development entities working to retain regional businesses and recruit new businesses to the region.
- Target Business Attraction for Emerging Industry Clusters with data-driven marketing materials for emerging sectors that have considerable growth potential and offer opportunities to create middle-wage jobs across the region. (*Initiative of Forward Together*)
- Develop a marketing and branding effort for the region, targeted to both domestic and global markets to attract talent, business, and investment.
- Invest in regional data, business intelligence, and site selection information to empower regional organizations to respond to recruitment, retention, and expansion efforts.
- Identify talent needs in critical regional industries to inform talent attraction strategies.

## Trade Development

The region's economy is highly dependent on trade, with more than 40 percent of jobs tied to trade-related activities. Many world-famous companies call the region home, providing goods and services to communities around the world. However,



recent trade policies have strained international relationships and negatively impacted regional exporters. The region must focus on strengthening trade relationships to support the export of regional goods and services.

One way that regional businesses connect to markets around the world is through tourism. Visitors travel to the region to attend arts and cultural events, visit recreational sites, and buy local goods. Tourists and visitors help support thousands of regional jobs. COVID-19 has disrupted these activities, devastating the region's travel and tourism industry. In the first quarter after the onset of COVID-19, the state lost about half of tourism jobs compared the same period in 2019. Even before the pandemic, Washington was last in the nation for spending to promote tourism. To help regional businesses recover, state tourism marketing investments and efforts should be scaled up to meet this challenge.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:



## The most internationally trade-tied region

With over 40 percent of jobs in the region tied to international trade, no other U.S. region is more tied to the international economy.

## Branding regional companies

While there are many world-famous companies headquartered in the region, many people do not associate them with the region.

## Improving trade policies New/Expanded\*

Improved trade policies are needed to offset the damage of recent trade wars on Washington exports.

## Tourism suffering due to COVID-19 New/Expanded\*

COVID-19 has devastated the state and region's travel and tourism industry.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### G5: Support and promote international trade and tourism

Support robust connecting, marketing, and branding initiatives as well as trade policies that benefit the region's trade economy.

Identified near-term actions:

- Support efforts by the state Department of Commerce, regional ports, and others to connect the region and its companies to international markets.
- Work to better educate regional businesses about resources to help them export and encourage them to do so.
- Support continued public/private partnerships that expand international relations and increase the sharing of talent and information in the region.
- Expand state tourism marketing efforts to raise the region's profile for trade relationships and help recover from the impacts of COVID-19 on the regional tourism industry.
- Create destination development plans for communities throughout the region to promote visitor experiences and help support their unique sense of place.
- Promote understanding of international trade's importance to the region, while working to mitigate the trade-offs from international trade.



- Encourage federal leadership on trade policies and programs that benefit the region, including working to ensure that the U.S. Export-Import (EXIM) Bank operates at full capacity to support regional export businesses.

## Ports, Airports, Maritime Sites, Military Installations & Industrial Lands

The central Puget Sound region's variety of deep-water Pacific seaports and close connection to Asia positions the region as an important seaport for trade. The Northwest Seaport Alliance is the fourth largest container gateway in the United States. Industrial lands throughout the region support the movement of goods over land, sea, and air and are home to manufacturing businesses that support regional supply chains. In addition, each of the region's four counties hosts military installations that support national



defense goals, directly support thousands of regional jobs, and drive contracting dollars into the region. The Ports of Tacoma and Everett are part of the National Port Readiness Network, a cooperative designed to ensure readiness of commercial ports to support force deployment during contingencies and other national defense emergencies.

The region's continued growth is creating challenges for the economic production of these spaces. Growth is driving up pressures for encroachment of development around these industrial areas and for uses incompatible with their industrial nature. This could threaten the long-term viability of these economic assets. In addition, a growing regional population and jobs base is increasing congestion around the region's ports and industrial areas, impeding the movement of freight through and within the region.

Recent analysis forecasts that demand for the commercial, general aviation, and air cargo activities at regional ports will increase significantly in the coming decades. Demand for commercial aviation is projected to double by 2050, and regional airports such as Sea-Tac and Paine Field do not have the capacity to meet this demand.

### Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

#### A variety of industrial lands support the region's jobs

Core industrial spaces throughout the region are home to activities that account for a third of employment, supporting aerospace, maritime, military and defense, transportation and logistics, and other industries.



## Protecting against incompatible land use and encroachment

Preserving and protecting the long-term viability of the region's industrial spaces from incompatible uses and encroachment as the region grows is important to supporting regional industries. Natural geography and legacy public investment preclude major ports from relocating, making it imperative to protect the land they inhabit as well as the surrounding areas.

## Major regional military installations are economic engines

Major military installations serve important national defense goals and drive contracting and employment in the region.

## Maritime sites connect the region to the world

The region is home to one of largest transshipment ports on the west coast, with close proximity to Asia, connecting goods movement to and through the region.

## Easing freight mobility

Road traffic in the region is projected to grow, increasing congestion around regional ports and creating challenges for goods movement.

## Regional commercial aviation capacity will not meet future demand New/Expanded\*

Demand for commercial aviation service is forecast to double by 2050, outstripping current and planned airport capacity.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### G6: Preserve, protect, and support ports, industrial lands, military installations, and maritime sites

Continue to expand policies that promote and protect critical economic locations, such as ports, industrial lands, military installations, and maritime sites from the pressures of encroachment and incompatible use.

Identified near-term actions:

- Support state, regional, and local policies that protect and buffer industrial, maritime, and military lands from encroachment and incompatible land uses.
- Collaborate within the region to support export-based and locally producing businesses operating on the region's industrially zoned land.
- Support policies within regional planning that strongly and specifically affirm the importance of military installations, training ranges, and supportive infrastructure.



- Invest in infrastructure that supports industrial areas, military facilities and maritime sites, and better connects them with their markets and workers.
- Support efforts to promote the importance of military and defense industries, retain and enhance military assets, and maximize opportunities presented by the military and defense sector including the 2022 Growth Coordination Plan (GCP) for Joint Base Lewis-McChord.
- Support the adoption of zoning and land use regulations in local jurisdictions that support the policy goals associated with container port elements contained in VISION 2050 and local comprehensive plans.
- Support the remediation and redevelopment of brownfield properties to diminish the need for greenfield development.

### **G7: Build up and sustain ports and other infrastructure to support trade, logistics, and freight mobility**

Make infrastructure investments to update and modernize regional ports and freight mobility infrastructure to connect with global markets and workers and meet environmental goals.

Identified near-term actions:

- Implement strategic investment plans for the region’s ports.
- Support efforts of regional ports to modernize infrastructure, including technologies to better use existing infrastructure.
- Support and implement the recommendations of the region’s Multimodal Freight Strategy such as prioritizing investments that enhance freight and goods mobility, including the expansion of intermodal connections.
- Support regional ports’ efforts to stay competitive in the face of major changes in the industry in the region’s transportation plans.
- Support demand management tools such as tolling to prioritize freight movements.
- Support the movement of high value air cargo.
- Support the ports’ roles as major distribution hubs for rural agricultural and natural resource products and promote the retention and expansion of the necessary infrastructure to bring those products to national and international markets.
- Support efforts to reform the Harbor Maintenance Tax to better support regional ports.

### **G8: Sustain and grow commercial air travel connections domestically and globally**

Continue to analyze and address regional commercial aviation and air cargo capacity challenges, including the movement of high value air cargo, that benefit the economy while minimizing community and environmental impacts.



Identified near-term actions:

- Participate in the WSDOT-coordinated Commercial Aviation Coordinating Commission, which is tasked with recommending ways to accommodate future aviation activity needs.
- Support efforts to modernize airport and aviation infrastructure to maintain efficiencies at the region's primary regional airport.
- Support efforts by regional airports to update their master plans to accommodate commercial, cargo and general aviation capacity while meeting community needs.
- Expand the development and use of electric and hybrid-electric aircraft in the region.
- Support efforts by the Port of Seattle to reduce greenhouse gas emissions at Sea-Tac Airport by 50 percent from 2005 levels by 2030.
- Support airlines that service Sea-Tac Airport for continued success as a connected region.



## Quality of Life

Quality of life has long been a major part of the region’s continuing competitive advantage for attracting people and jobs to the region. This section addresses some of the major areas that drive that quality of life and identifies areas that need to be addressed. This includes the region’s approach to managing growth, where jobs and housing are located, the transportation systems that connect people to their jobs, and the values of stewardship for the environment and health of the region’s population. It also recognizes the value that arts and culture institutions have on the region’s quality of life.

Among these areas, the strategy highlights top issues that emerged from the strategy development process: housing and affordability, and health.

## Regional Growth

Even with the near-term challenges of COVID-19, the region is expected to grow by more than 1.5 million people and 1 million jobs between 2020 and 2050. Managing that growth, while maintaining a high quality of life, will be a key to future economic resiliency. Challenges of **housing and affordability** have accelerated recently, made worse by the onset of the pandemic. Over the last decade, the region’s housing stock has not kept up with job and population growth, increasing housing costs. The region has a backlog of 45-50,000 housing units just to accommodate recent growth and will need approximately 800,000 new housing units by the year 2050.



These challenges in housing supply have contributed to rising homelessness, and the region needs to identify ways to address chronic homelessness. The challenges of housing and homelessness, especially in the region’s urban centers, is a determining factor for new talent and businesses considering locating here.

Over the past year, many of the region’s workers have been working from home. It is not yet clear what the long-term trends will be, but many workers and businesses in the region expect that there will be more remote work and work from home in the future compared to the pre-COVID economy. This could have a major impact on employment centers and have repercussions for the transportation system. The region must continue to monitor these trends and work to ensure that future transportation investments support a system that provides a variety of options for moving people and goods throughout the region.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region’s economy:



## The region has a VISION for managing growth

VISION 2050 contains multicounty planning policies, actions, and a regional growth strategy to sustain the region's healthy environment, thriving communities and a strong economy.

## Preserving and expanding the affordability and availability of the region's housing stock

New/Expanded\*

Housing stock in the region is not keeping up with job and population growth, contributing to low supply and housing costs that rank among the highest in the nation.

## Addressing chronic homelessness

New/Expanded\*

Rising chronic homelessness is a critical problem that impacts the region's residents as well as perceptions of regional attractiveness to tourists and businesses.

## Addressing the proximity of jobs to housing

The proximity of housing to job opportunities and community resources is a key quality of life issue for residents, and a determining factor for new talent considering the area.

## Making major investments in transportation

The region needs to continue to invest in a transportation system that moves people and goods throughout the region on roadways, transit, ferries, as well as bike and pedestrian infrastructure.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### Q1: Focus new growth in urban areas, regional centers, and cities

Increase coordination, planning and investment tools to help facilitate the accommodation of projected population and job growth into areas designated for that growth.

Identified near-term actions:

- Work with jurisdictions with centers to accept anticipated proportional growth and development and continue to support local comprehensive plans that focus growth in centers.
- Support jobs and housing growth in urban areas, regional centers, and cities with investments in infrastructure.
- Support coordination between counties and cities to move unincorporated urban areas to annexation or incorporation, where feasible.
- Concentrate industrial business activity within Manufacturing and Industrial Centers and industrially zoned areas regionwide.



- Encourage land use and transportation plans to support job retention and creation and economic development in all communities.
- Develop land use around transit stations and invest in transit corridors consistent with zoning that maximizes regional transit accessibility for a diverse and equitable mix of residents and businesses.

## Q2: Ensure a diversity of housing stock that is affordable and connected to jobs New/Expanded\*

Reduce barriers to the development of new housing and establish a more balanced distribution of employment and housing across the region, including more affordable housing near employment centers and job growth.

Identified near-term actions:

- Implement PSRC's Regional Housing Strategy to preserve, improve, and expand housing stock in the region.
- Encourage local policies, plans, and incentives that support the development of an adequate supply of workforce housing, housing of different sizes and for different incomes, and removal of barriers to housing production.
- Expand a sufficient supply of housing to meet the needs of low-income, moderate income, and people with special needs – connected to jobs and distributed equitably throughout the region.
- Work as a region to address homelessness in ways that allow for individuals and families to participate in the economy and communities.
- Coordinate with property managers, developers, and other housing advocates to identify ways to address affordability and expand housing options in the region.

## Q3: Improve the region's transportation system

Continue planned investments in road, transit, ferries, bikes and pedestrian facilities to meet growth, safety and resiliency goals while preparing for future transportation technologies.

Identified near-term actions:

- Manage new roadway, light rail, transit, and ferry projects to meet or beat projected delivery dates and coordinate timely delivery of transportation improvements to the region.
- Identify gaps in the transportation system and seismic retrofit plans to be addressed in updates to regional plans and secure funding to address those gaps.
- Recognize the importance of freight mobility within the region as integral to intraregional circulation needs.
- Encourage full funding of the Highway Trust Fund by the President and Congress.



- Continue exploration of potential transportation funding mechanisms at the state and local levels to meet regional transportation goals.
- Develop a Regional Transportation Plan to address how the region will meet transportation needs into the future, addressing existing needs and expected growth.
- Identify and reduce policy impediments to the adoption of emerging transportation technologies.
- Expand access to affordable transportation options in underserved neighborhoods to connect the underserved populations with jobs.
- Support private-sector freight transportation investments in rail, air and maritime to maintain competitiveness with other trade gateways.

## Environment & Health

COVID-19 has made it clear that the success of an economy is reliant on the **health** of its residents. The Washington State Department of Health has been [compiling data](#) on who has tested positive for COVID-19. This data shows that the virus has impacted some populations more than others. Hispanic Washingtonians make up 13 percent of the state population but have accounted for 29 percent of recorded COVID cases that include race and ethnicity data. According to the data, White and Asian residents have contracted COVID at rates lower than their makeup of the state population, while Black and American Indian or Alaska Native residents have contracted the virus at disproportionately higher rates.



### Cumulative COVID-19 Cases by Race/Ethnicity in Washington State (as of 8/1/21)

Race/Ethnicity	% of cases reported with race/ethnicity data	% of total WA Population
Hispanic	29%	13%
Non-Hispanic American Indian or Alaska Native	2%	1%
Non-Hispanic Asian	6%	9%
Non-Hispanic Black	6%	4%
Non-Hispanic White	51%	68%
Non-Hispanic Native Hawaiian or Other Pacific Islander	2%	1%
Non-Hispanic Multiracial	3%	4%
Non-Hispanic Other Race	2%	NA

Source: Washington State Department of Health



Attention to health as a consequence of economic, planning, and infrastructure decisions can improve quality of life for residents, reduce health care costs, and lessen impacts from lost productivity. More importantly, improving equity in health outcomes is critical to sustaining a productive region with a high quality of life. Regional efforts that improve the health outcomes of all residents across communities in the area elevate the region as a competitive destination for new talent and investment.

The region's natural environment is a priority in economic policy decisions to support the health of people and ensure growth is sustainable. The natural environment of the central Puget Sound region is a significant asset to the regional economy. Each year natural resource lands generate a conservative estimate of \$11.4 to \$25.2 billion to the region's economy. The regional open space network covers about 3 million acres of public and private land with 339 miles of trails, including natural lands, farmlands, working forests, aquatic systems, regional trails, and urban open space.

Climate change is a threat to the regional and global economy that will require technologies and services to mitigate and respond to these impacts. The region can leverage its innovative nature to address these challenges and to do so in a way that provides economic opportunities for regional businesses and workers.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

### A metropolis set within the wilderness

The region's thriving urban centers with easy access to natural spaces make it an increasingly desirable place to live, work, and visit.

### Preserving the region's environment & health

Regional efforts that improve the health outcomes of all residents across communities elevate the region as a competitive destination for new talent and investment.

### Addressing health inequities New/Expanded\*

Existing geographic health inequities and disparities have been exacerbated by the impacts of COVID-19.

### Addressing global climate challenges

Developing solutions to global climate challenges is an opportunity for the region to be a leader in providing the goods and services to respond to this challenge.

### The region's healthy environment provides economic opportunities

The region's natural environment and resource lands provide opportunities for jobs in fishing, farming, forestry, material extraction, tourism, and recreation.



## Strategic Response

The region has identified the following strategic focus areas for addressing the identified challenges and opportunities:

### Q4: Preserve, enhance, and improve the region's environmentally critical lands

Expand planning and funding efforts that safeguard the natural environment, preserve farmlands, waterways, wildlife corridors, and other environmentally critical areas.

Identified near-term actions:

- Preserve the beauty and natural ecological processes of the region through the conservation of natural resources and the environment through the regional planning policies within VISION 2050.
- Preserve and enhance open space, protect wildlife corridors, and preserve and restore native ecosystems.
- Develop a toolkit to aid county and city efforts to conserve open spaces in the region.
- Support conservation planning, project funding, landscape maintenance, and critical areas regulation at the local level.
- Continue efforts to protect, conserve, and recover working farms, forests, and waterways.
- Protect Model Toxics Control Act (MTCA) funding and preserve these funds for job creation, environmental, public health, and equity benefits for communities across Washington.

### Q5: Ensure the region is a healthy place to live, work, and play for all residents New/Expanded\*

Ensure a healthy population by strengthening public health systems, protecting the environment, and expanding access to the region's open spaces, with emphasis on addressing current and historical inequities.

Identified near-term actions:

- Build on the public health response to the impacts of COVID-19 and work to address health inequities in the region.
- Consider health and equity impacts of economic development plans and actions on vulnerable and underserved populations, including the possible use of health impact assessment and equity impact review.
- Improve access to open space, particularly for underserved populations, including completing gaps in regional trails.
- Continue to implement VISION 2050 policies that safeguard the region's natural environment and ensure that all residents live in healthy places.



- Implement policies and practices that help businesses and other organizations provide safe and healthy places to live, work and play.
- Build on lessons learned during fires, heat and smoke events and urban heat island research.
- Support built environment improvements identified in jurisdictions' Americans with Disabilities Act (ADA) Transition Plans.

#### Q6: Protect the global environment

Expand efforts to reduce the environmental impacts of the region's population and economy, while working to expand regional industries that provide goods and services that address climate change challenges.

Identified near-term actions:

- Encourage the development of established and emerging industries focused on resilience and climate change while increasing regional economic and environmental resilience to climate change, natural disasters, and other stressors.
- Decrease reliance on fossil fuels for the region's land, sea and air transportation systems through the development and adoption of alternative energy technologies, including electrification and electric vehicle infrastructure.
- Support the coordination of regional partners to expand the production of sustainable aviation fuels in the region.
- Develop common ground on the best approaches to reduce greenhouse gas emissions, including through encouraging federal action on greenhouse gas reduction measures and support for a global climate accord.
- Implement the Washington State Department of Commerce's green economy recommendations.
- Implement the Washington Maritime Blue Strategy to accelerate the Blue Economy and position the state as a leader in maritime clean tech innovation.
- Support efforts by regional ports to expand programs and investments that reduce environmental impacts and protect natural resources.
- Invest in sustainable infrastructure to support a green economy.

#### Arts, Culture & Tourism

Arts, culture, and entertainment are essential to quality of life and placemaking. These sectors help define communities, create educational opportunities, and promote a high quality of life for residents. Support for these unique community assets helps nurture, brand, and inform the region's creative economy.

The central Puget Sound region is the arts, culture, and entertainment capital of the Pacific Northwest



and is an epicenter for collegiate and professional sports. Arts and cultural offerings, and the tourism industry that they support, contribute to an important piece of the regional economy. In 2019, prior to the pandemic, Washington hosted 110 million visitors accounting for \$21.9 billion in direct spending.

The economic downturn spurred by the COVID-19 pandemic showed how many employees depend on the health of these industries, and how susceptible many businesses and organizations were to the public health crisis. The region should continue to support these organizations and help make them more resilient to future emergency events.

## Challenges and Opportunities

The region has identified the following key issues, opportunities, and challenges in sustaining the region's economy:

### A center of culture and creativity

The region is a hub for the creative class and is known worldwide for having a distinct sense of place that draws residents and employers alike.

### Arts and culture attract tourists and visitors

The region is home to diverse areas of natural beauty and cultural assets unlike any other place, which draw visitors from around the world and contribute to a high quality of life for residents.

### COVID-19 has had a negative impact on tourism, arts, and culture and tourism New/Expanded\*

The global pandemic is having a major impact on arts and cultural activities and reduction in travel and tourism activities have exacerbated these challenges.

## Strategic Response

The region has identified the following strategic focus areas for addressing identified challenges and opportunities:

### Q7: Build resiliency into, and increase access to, the region's arts, culture, and tourism industries New/Expanded\*

Build resiliency into arts, culture, and tourism organizations, through increased facilities and offerings, while growing access to those experiences for regional residents.

Identified near-term actions:

- Identify best practices for arts, culture, and tourism organizations to offer digital offerings to diversify their funding streams and engage a broader community.
- Analyze the economic and cultural impacts of the COVID-19 shutdown on the region's arts, cultural, heritage, and science nonprofit organizations.



- Develop strategies to accelerate the recovery of regional tourism, travel, and hospitality businesses.
- Identify ways to increase private sector support for the cultural and creative economy.
- Complete development of a multi-purpose arena to support National Basketball Association and National Hockey League franchises and high-profile regional sporting events.
- Complete the expansion of the Washington State Convention Center.
- Support strategies focused on expanding access and activities for arts, cultural, and educational opportunities.
- Continue support for the use of public facilities district as a tool for arts, culture, sports, and entertainment.



## Implementation & Evaluation

The Regional Economic Strategy is the result of a locally based, regionally driven economic development planning process overseen by the Central Puget Sound Economic Development District (EDD) Board. The EDD Board is charged with the development of the strategy, built upon other regional plans and efforts. Together, the goals and strategies in the Regional Economic Strategy provide a strategic blueprint for sustaining the regional economy and building resiliency for the future.

### Implementing the Strategy

Never has the region been more focused on economic development and recovery, with a broad response by regional jurisdictions and organizations to the impacts of COVID-19. The Regional Economic Strategy builds upon these planning efforts, and many partners have programs and workplans already in place that help implement the strategies identified. The RES highlights many of the important efforts already underway in the region. It also identifies implementation opportunities that need to be developed. This collection of initiatives is included in the Strategic Direction & Action Plan.

The Economic Development District has an important part to play in the implementation of the Regional Economic Strategy. The broad makeup of the EDD Board puts it in a position to provide a broad regional perspective on economic development and economic recovery, with a focus on regional coordination, analysis, education, and strategy development. Each year, the EDD Board adopts a set of Focus Areas for implementation, which align with one or more strategies identified in the Regional Economic Strategy and direct board and staff efforts each year.

### Evaluation

Evaluation is essential to successful implementation of the Regional Economic Strategy. PSRC continually monitors the economic conditions of the region and reports progress to the EDD Board and the broader community. Ongoing evaluation takes place to measure progress on the adopted goals and strategies identified, analyzing regional economic trends, and benchmarking against other regions to identify opportunities for future work.

This ongoing evaluation will be integrated with other data analysis efforts at PSRC to ensure alignment and avoid duplication of efforts. Work by partner agencies to evaluate elements of the regional economy will be integrated into evaluation efforts when appropriate.

Each year, the EDD monitors and reports on the region's progress in implementing the Regional Economic Strategy through an annual update of this report. It highlights important implementation progress and provides data to reflect the impact of the work being done. Over time, new opportunities arise and new tactics will be needed to accomplish the goals identified in the Regional Economic Strategy. Over the next five years, the EDD board will update its workplan to help the region continue to collaborate on these important areas.



# Consolidated SWOT Analysis

## Expanding Economic Opportunity

### Economic Opportunity for the Region's Residents

- Inequities exist in economic opportunity
- COVID-19 exacerbated existing inequities in the workforce
- Lack of childcare options is keeping workers out of the labor force
- Small and medium sized businesses need greater support due to COVID-19
- Expand opportunities to Women and Minority-Owned Businesses

### Economic Opportunity Throughout the Region

- Expanding broadband connectivity throughout the region
- Investing in communities for job growth
- Strong localized economic development planning
- Preparing the region for a decentralized workforce
- Challenges in affordability and availability of commercial space

### Public Education

- Half of all kindergarten students are not prepared for learning
- The region is trailing the nation on basic education
- Racial disparities exist in measures of educational success for the region's students
- Virtual learning may exacerbate inequities in the education system

### Higher Education & Workforce Development

- Workforce gaps exists in high demand occupations and industry sectors
- A network of workforce development organizations to meet the needs of the region's workers
- COVID-19 related recession is accelerating employment shifts

### Regional Culture & Diversity

- A welcoming region that attracts global talent and investment
- Diverse perspectives foster greater economic output
- Regional Tribes play an important and unique role in the regional economy

## Global Competitiveness

### Business Climate & Competitiveness

- The region has fewer financial incentives for economic development
- Coordinating to streamline regulations
- Evolving global industries for future resiliency
- Supply chains at risk of global disruptions

### Research, Commercialization & Entrepreneurship

- Top research universities drive innovation in the region
- A world leader in research and development
- Regional institutions support a robust entrepreneurship and startup ecosystem

### Recruitment & Retention of Businesses & Talent

- The region has strong assets to attract businesses and talent
- The region needs larger investments in business recruitment, retention, and expansion
- The region needs to capitalize on international investment opportunities



## Trade Development

- The most internationally trade-tied region
- Branding regional companies
- Improving trade policies
- Tourism suffering due to COVID-19

## Ports, Airports, Maritime Sites, Military Installations & Industrial Lands

- A variety of industrial lands support the region's jobs
- Protecting against incompatible land use and encroachment
- Major regional military installations are economic engines
- Maritime sites connect the region to the world
- Easing freight mobility
- Regional commercial aviation capacity will not meet future demand

## Quality of Life

### Regional Growth

- The region has a VISION for managing growth
- Preserving and expanding the affordability and availability of the region's housing stock
- Addressing chronic homelessness
- Addressing the proximity of jobs to housing
- Making major investments in transportation

### Environment & Health

- A metropolis set within the wilderness
- Preserving the region's environment & health
- Addressing health inequities
- Addressing global climate challenges
- The region's healthy environment provides economic opportunities

### Arts, Culture & Tourism

- A center of culture and creativity
- Arts and culture attract tourists and visitors
- COVID-19 has had a negative impact on tourism, arts, and culture and tourism



## Strategy Development Process

The Central Puget Sound Economic Development District Board began the work to update the Regional Economic Strategy in June 2020. In preparation for the update, staff conducted a poll of the EDD Board in on the economic challenges and opportunities that the region faces.

At its July 2020 meeting, the EDD Board discussed findings from the poll, reviewed the adopted Regional Economic Strategy, and established a set of guiding principles for the update process. These included:

- Building on the Regional Economic Strategy adopted in 2017
- Targeting strategy updates to focus on changed conditions since adoption, informed by EDD Board discussions, recent economic recovery efforts, and stakeholder outreach
- Strengthening the recovery and resiliency aspects, including the integration of activities from current regional recovery work
- Focusing on updating implementation efforts, led by the EDD or other regional partners
- Streamline to strategy to focus on core economic data, priority strategies and implementation

### Strategy Review & Recovery Efforts

Through the strategy update period, the EDD led and collaborated on regional economic development and pandemic recovery efforts to help inform the strategy. Through its process to develop a set of 2021 Focus Areas, the board assessed economic conditions in the region and set strategic direction for its efforts.

In 2021, the Board facilitated a Broadband Working Session to discuss regional broadband needs as well as regional, state, and federal efforts to expand broadband access. It launched a Regional Workforce Recovery Planning project to help support recovery from COVID-19, meet future industry needs, and meet regional equity goals. The Board also engaged with staff on a project to develop technical assistance to support economic development planning in local jurisdictions.

The EDD worked to support important regional planning projects at PSRC that aligned with its 2021 Focus Areas. This included providing input on the development of PSRC's Regional Equity Strategy and discussing findings from PSRC's Regional Housing Needs Assessment and next steps for the agency's Regional Housing Strategy work. The EDD was also regularly engaged in other important economic development and recovery efforts. This included working with Greater Seattle Partners in the development of the Forward Together recovery framework, as well as efforts led by the Washington State Department of Commerce and the Washington Economic Development Association. During this time, staff reviewed regional plans and strategies that had been developed since the previous strategy was adopted in mid-2017 to identify new challenges, opportunities, and implementation efforts.

### Stakeholder Input & Partner Engagement

Staff facilitated individual and group discussions regarding the Regional Economic Strategy update



and the EDD's economic development work. Attendees of these meetings included representatives from organizations such as chambers of commerce, public health departments, arts and culture organizations, regional ports, labor, workforce development, equity organizations, broadband advocates and providers, and industry support and other economic development focused organizations. Through spring 2021, staff discussed the strategy update and its major themes with the EDD Board, PSRC's Executive Board, the Growth Management Policy Board, and the Regional Staff Committee. These discussions focused on validating the challenges and opportunities identified in the Regional Economic Strategy, validating the strategic direction, identifying additional implementation items to include, and gathering input on areas where PSRC and the EDD can focus economic development work. Input from these discussions were integrated into the updated Regional Economic Strategy.

### **Online Strategy Engagement Tool**

Information gathered during the scoping and economic recovery efforts were integrated into the adopted 2017 strategy as a new draft, which identified regional challenges and opportunities, the strategies to address them, and identified efforts to implement the strategies. PSRC established an online engagement tool to broadly share the draft strategy with stakeholders and the public. The online strategy engagement tool went live on June 24 and closed on September 15, for a total availability of 84 days. The engagement tool website received 831 visitors, 142 of whom provided a comment or response.

### **Communications**

The opportunity to contribute to the strategy was shared through agency communications channels, including email notifications to distribution lists, blog posts, and social media advertisements. The update of the Regional Economic Strategy and the summer outreach effort were featured on PSRC's blog 10 times or almost once a week between late June and early September. Each blog post was also shared on four social media platforms: Facebook, Instagram, LinkedIn and Twitter. To drive more traffic to the online engagement tool website, PSRC placed ads on Facebook and Instagram that ran for three weeks. The ad's reach was 18,165, it had 336 direct engagements and 290 link clicks. The update of the Regional Economic Strategy and the summer outreach effort were featured four times in PSRC's bimonthly newsletter from the Executive Director, which has a mailing list of 3,770. Each of these are also shared on the agency's Facebook and Twitter accounts. The EDD maintains an email list of interested parties, which currently consists of 119 recipients. In addition to receiving notifications about EDD Board meetings, two emails were sent to this group updating them on the opportunity to contribute to the Regional Economic Strategy update.

### **Steps to Finalize the Strategy**

A draft Regional Economic Strategy is being released for a 30-day public comment period running from mid-October to mid-November. At its December meeting, the EDD Board will have the opportunity to address public comments and adopt the Regional Economic Strategy. Also at its December meeting, the EDD Board will finalize its Economic Development Focus Areas for 2022, identifying key parts of the new Regional Economic Strategy for EDD implementation. Staff will



facilitate the submittal of the Regional Economic Strategy, as the region's Comprehensive Economic Development Strategy to the U.S. Economic Development Administration, for the January 2022 deadline.

## **Central Puget Sound Economic Development District Board of Directors**

The following individuals served on the EDD board during the strategy update process and served as Comprehensive Economic Development Strategy Committee

### **King County**

Executive Dow Constantine, King County  
Ashton Allison, King County  
Councilmember Reagan Dunn, King County  
Councilmember Tammy Morales, City of Seattle  
Mayor Jenny Durkan, City of Seattle  
Anisa Khoshbakhtian, City of Seattle  
Councilmember Conrad Lee, City of Bellevue  
Councilmember Jeremy Barksdale, City of Bellevue  
Councilmember Ed Prince, City of Renton  
Councilmember Lydia Assefa-Dawson, City of Federal Way  
Councilmember Lindsey Walsh, City of Issaquah  
Councilmember James Jeyaraj, City of Auburn

### **Pierce County**

Councilmember Dave Morell, Pierce County  
Councilmember Marty Campbell, Pierce County  
Deputy Mayor Keith Blocker, City of Tacoma  
Councilmember Robert Thoms, City of Tacoma  
CM Shannon Reynolds, City of Fircrest  
Deputy Mayor Jason Whalen, City of Lakewood

### **Snohomish County**

Councilmember Stephanie Wright, Snohomish County  
Councilmember Megan Dunn, Snohomish County  
Mayor Cassie Franklin, City of Everett  
Dan Earnissee, City of Everett  
Councilmember Tom King, City of Marysville  
Mayor Brett Gailey, City of Lake Stevens  
Councilmember Vivian Olson, City of Edmonds

### **Kitsap County**

Commissioner Charlotte Garrido, Kitsap County  
Commissioner Edward Wolfe, Kitsap County  
Mayor Greg Wheeler, City of Bremerton



Councilmember Kevin Gorman, City of Bremerton  
Councilmember Ed Stern, City of Poulsbo  
Councilmember Shawn Cucciardi, City of Port Orchard

## **Kitsap County**

Commissioner Charlotte Garrido, Kitsap County  
Commissioner Edward Wolfe, Kitsap County  
Mayor Greg Wheeler, City of Bremerton  
Councilmember Kevin Gorman, City of Bremerton  
Councilmember Ed Stern, City of Poulsbo  
Councilmember Shawn Cucciardi, City of Port Orchard

## **Tribal Representatives**

Chair Leonard Forsman, Suquamish Tribe  
Councilmember Jay Mills, Suquamish Tribe

## **Ports**

Commissioner Axel Strakeljahn, Port of Bremerton  
Commissioner Cary Bozeman, Port of Bremerton  
Commissioner Gary Anderson, Port of Bremerton  
Commissioner Tom Stiger, Port of Everett  
Commissioner Glen Bachman, Port of Everett  
Commissioner Sam Cho, Port of Seattle  
Eric Ffitch, Port of Seattle  
Joseph Meyer, Port of Seattle  
Commissioner Kristin Ang, Port of Tacoma  
Commissioner Deanna Keller, Port of Tacoma

## **Economic Development**

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Lisa Brown, Washington State Department of Commerce  
Andrea Reay, Seattle Southside Chamber of Commerce  
Rachel Smith, Seattle Metropolitan Chamber of Commerce  
Markham McIntyre, Seattle Metropolitan Chamber of Commerce  
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Kathy Cocus, Kitsap Economic Development Alliance  
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Bruce Kendall, Economic-Development Board for Tacoma-Pierce County  
Jacqueline Moffo, Economic-Development Board for Tacoma-Pierce County

## **Workforce Development Councils**

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Alissa Durkin, Olympic Workforce Development Council



Katie Condit, WorkForce Central  
Organized Labor  
Larry Brown, Washington State Labor Council  
Chelsea Mason-Placek, Washington State Labor Council  
Presidential Appointments  
Alex Pietsch, WSU Foundation  
Tom Florino, Amazon  
Tony To, HomeSight  
Terry Ryan, Snohomish County  
Brian McGowan, Greater Seattle Partners  
Non-Voting Members  
Bob Drewel, Emeritus Member  
Claudia Balducci, PSRC President  
Patricia Iolavera, US Navy, Navy Region Northwest

## Strategy Contributors

The following individuals contributed to the strategy update and economic recovery initiatives during the strategy update process:

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