San Juan County Economic Profile

2025 Update using data from 2024

CENTER FOR ECONOMIC AND BUSINESS RESEARCH | WESTERN WASHINGTON UNIVERSITY

About this Report

The following report is intended to give a basic overview of the local economy while illustrating factors that may impact it. Unless otherwise stated, the data in this report is the most recent complete annual data for the region, which at the time of publication includes mostly data from 2024. Some data from 2025 is included, when noted. Counties in the table below are often used throughout this report for comparison.

County Demographics				
	San Juan	King	Island	Skagit
Population				
Population estimates, July 1, 2024	18,668	132,736	86,478	2,340,211
Population, percent change - April 1, 2020 (estimates base) to July 1, 2023	4.9%	2.5%	-0.4%	3.1%
Population, Census, April 1, 2020	17,788	129,523	86,857	2,269,675
Population, Census, April 1, 2010	15,769	116,901	78,506	1,931,249
Economy				
In civilian labor force, total, percent of population age 16 years+, 2023	53.30%	57.5%	47.6%	70.0%
In civilian labor force, female, percent of population age 16 years+, 2023	49.90%	52.9%	46.8%	64.1%
Income and Poverty				
Median household income (in 2023 dollars), 2023	$83,682	$91,234	$88,358	$122,148
Per capita income in past 12 months (in 2023 dollars), 2023	$63,173	$43,158	$46,226	$71,062
Persons in poverty	10.5%	11.6%	7.0%	8.4%
Persons without health insurance, under age 65	6.8%	6.6%	4.1%	5.2%
Housing				
Owner-Occupied housing unit rate, 2023	77.8%	70.6%	74.6%	56.1%
Age & Sex				
Persons under 5 years, percent	2.9%	5.4%	4.9%	5.3%
Persons under 18 years, percent	12.8%	21.1%	17.6%	19.8%
Persons 65 years and over, percent	35.0%	22.1%	26.1%	13.8%

Source: US Census Bureau

Demographics

County demographics provide important context for interpreting the data in this profile. San Juan County, a rural island cluster in northwest Washington, is compared here with King County (a highly urban county that includes Seattle), Island County (a more urban island cluster that includes Whidbey and Camano Islands), and Skagit County (a nearby rural inland county).

San Juan County's population has grown relatively quickly since 2020, increasing 4.9 percent overall, including a 0.55 percent gain in the last year. By contrast, the other counties grew more slowly, with increases of less than 3 percent since 2020 . Although San Juan's total population is smaller, making changes appear more pronounced, the county is also one of the state's smallest by land area, ranking 39th at just 173.9 square miles (WA State Employment Security Department).

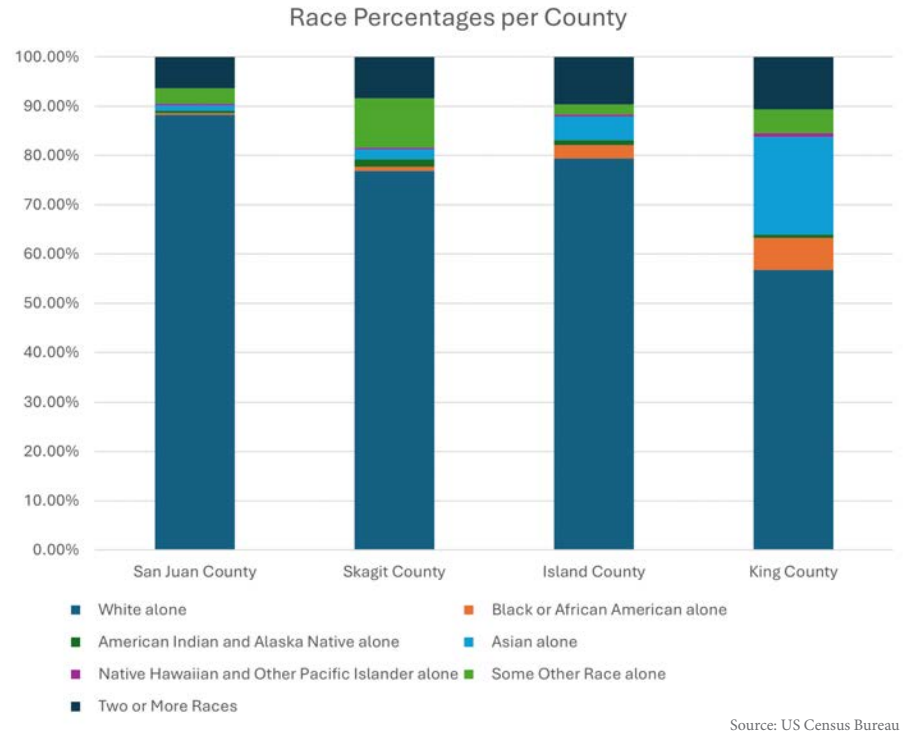
San Juan has the highest share of residents over age 65, about 8.9 percent higher than the next county, and the lowest share of children under five and under eighteen (2.9 percent). In fact, older adults outnumber children, giving San Juan the highest combined share of residents under 18 and over 65, at 50.7 percent. Despite this smaller working-age population, the county does not report the lowest civilian labor force participation rate.

San Juan also stands out with the highest owner-occupied housing rate among the comparison counties, alongside one of the highest poverty rates and the highest share of residents without health insurance.

Image: Lummi Artwork, Source: visitsanjuans.com

Demographics Cont.

San Juan County's population is predominantly white, comprising 88.3 percent of residents. The next largest group is those identifying as "Two or more races" at 6.34 percent, followed by "Some other race alone" at 3.16 percent. All other racial and ethnic groups each make up less than 1.14 percent of the population, making San Juan County the least diverse among the counties compared.



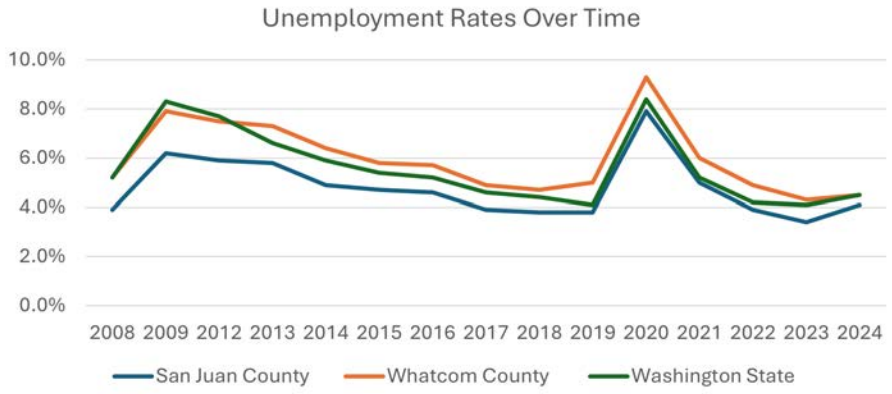
Source: US Census Bureau

Source: visitsanjuans.com

Employment

Average annual unemployment in San Juan County remains lower than both Whatcom County and Washington State. In 2024, the county's unemployment rate was 4.1 percent, up 0.7 percent from 2023 . This increase reflects broader trends seen in Whatcom County and statewide.

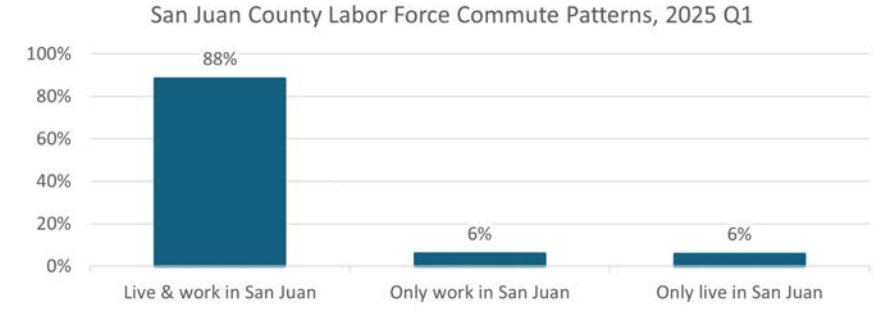
Employment in many San Juan County sectors is highly seasonal, largely due to tourism and construction. The following section will examine the seasonality of employment and the substantial share of residents working in tourism-related industries.



Source: FRED Economic Data

Job Flow

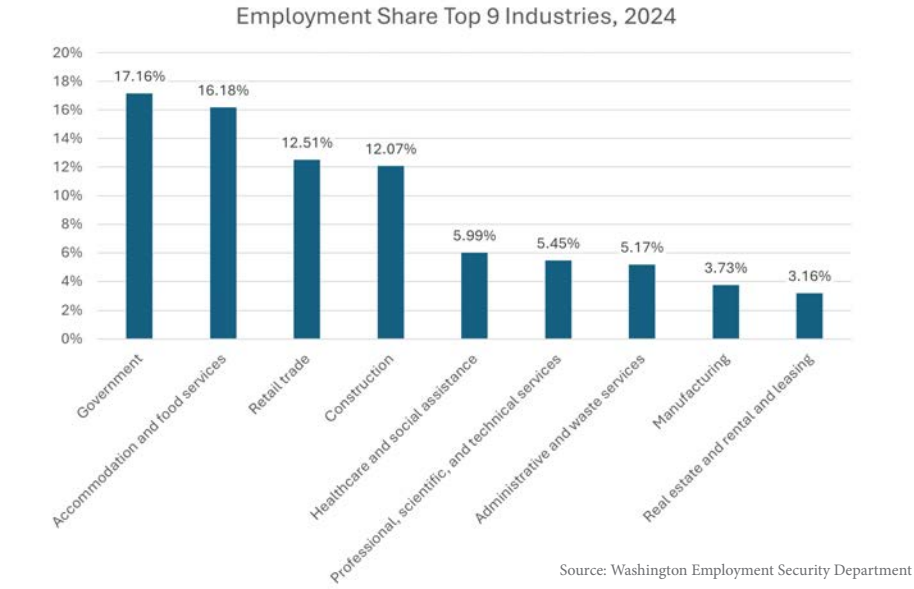
As of the first quarter of 2025, a total of 7,574 people either work in or commute from Whatcom County. Approximately 88 percent of this workforce both lives and works within San Juan County. About 6 percent live in the county but commute elsewhere for work, while another 6 percent reside outside the county and commute into San Juan for employment.



Source: US Census Bureau

Industry Share

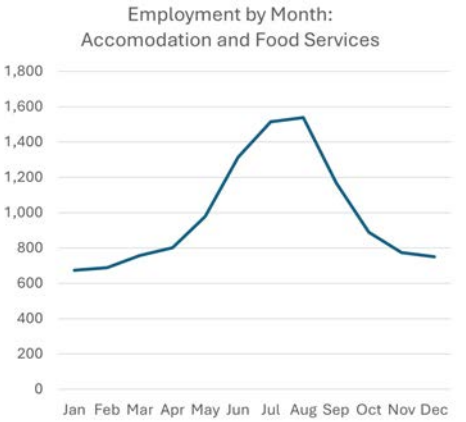
In 2024, the largest share of employed residents in San Juan County worked in government (17.16 percent), followed by accommodation and food services (16.18 percent) and retail trade (12.51 percent) . Other notable sectors included construction, healthcare and social assistance, professional, scientific, and technical services, administrative and waste services, manufacturing, and real estate and rental and leasing. The corresponding employment shares are shown in the graph below.



Source: Washington Employment Security Department

The high employment in accommodation and food services reflects the county's strong tourism industry in San Juan County. However, average annual employment in this sector declined 3.3 percent from 1,022 in 2023 to 988 in 2024 .

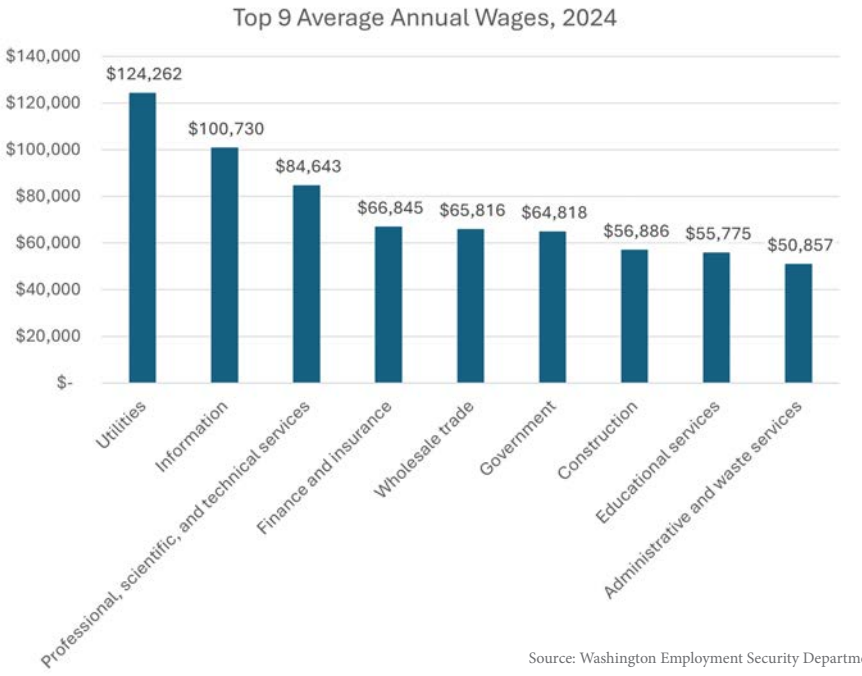
Despite this decline, the sector still experienced the typical summer surge, with 1,515 people employed in July and 1,538 in August, as illustrated in the graph.



Source: Washington Employment Security Department

Wages

In 2024, the average annual wage in San Juan County was $53,167, with an average of 6,107 filled jobs throughout the year. The highest-paying sector was utilities, with an average annual wage of $124,262, or $2,390 per week. The lowest-paying sector was agriculture, forestry, fishing, and hunting, averaging $34,557 annually, or $665 per week.



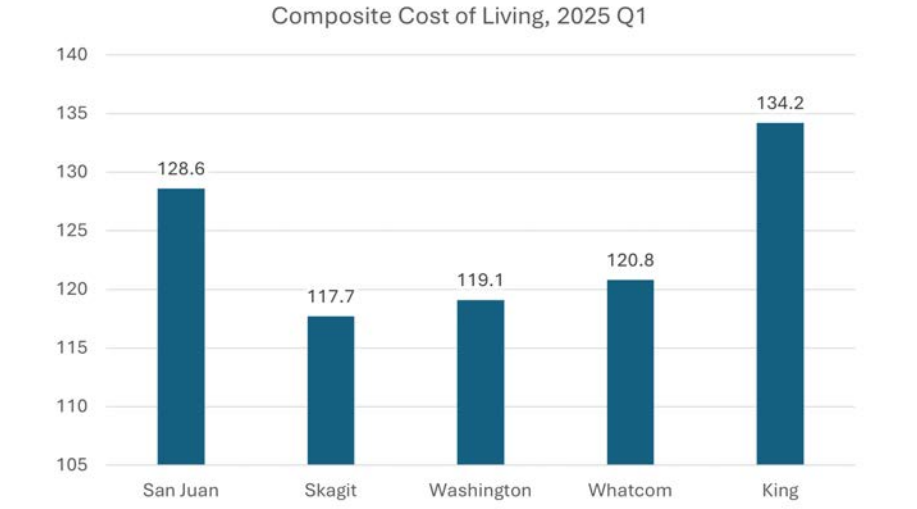
Source: Washington Employment Security Department

Source: visitsanjuans.com

Cost of Living Index

The cost-of-living composite consists of groceries, housing, utilities, transportation, health care, and miscellaneous goods and services. The national average is normalized at 100, and any value above 100 indicates an above-average cost of living.

In the first quarter of 2025, the cost-of-living composite in San Juan County was 128.6 indicating a high cost of living, compared to nearby Whatcom and Skagit Counties, with 120.8 and 117.7 , respectively. San Juan and King counties have the two highest median housing prices, which plays a role in the high cost of living in these counties. This is very likely influenced by San Juan's many waterfront properties and scenic locations.



Source: US Census Bureau

Source: visitsanjuans.com

Living Wage

Living wages are calculated by finding the point at which one-third of a worker's total income is allocated to housing costs. In the first quarter of 2025, the minimum living wage to afford a 1-bedroom apartment in San Juan County was $23.99 per hour, and $30.29 per hour for a two-bedroom apartment. For those paying a monthly mortgage, the minimum household wage required was $57.29 per hour, decreasing from $63.25 an hour in the first quarter of 2024.

The median rent for a 1-bedroom apartment was $1,386, and $1,750 for a 2-bedroom apartment. This represents an increase from the first quarter of 2024 rent values, which were $1,133 for a one-bedroom and $1,492 for a two-bedroom. The median home price was $866,700. This value has decreased since the first quarter of 2024, when the median home price was $941,700.

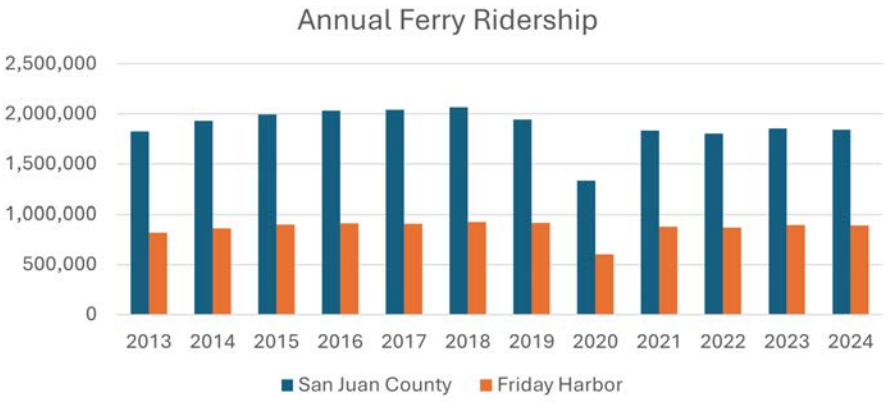
Housing Type	Rate	Required household wage (hourly)	Required household wage (weekly)	Required Salary
Rent 1 bedroom	$1,386.00	$23.99	$959.54	$49,896.00
Rent 2 bedroom	$1,750.00	$30.29	$1,211.54	$63,000.00
Median home mortgage	$3,310.21	$57.29	$2,291.68	$119,167.44

Source: Washington Center for Real Estate Research, UW Apartment and Housing Report, Q1 2025, and RentData.org

Image: San Juan Island Food Co-op, Source: visitsanjuans.com

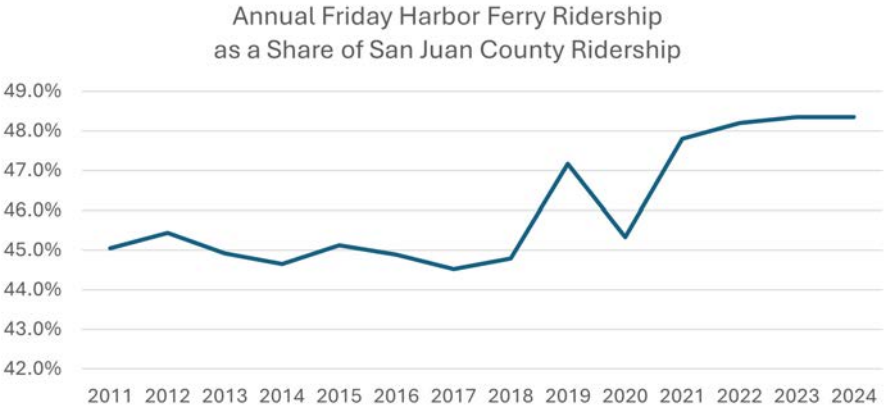
Ferry Ridership

From 2021 to 2024, total ferry ridership in San Juan County and Friday Harbor remained relatively stable, with slight declines in the past year. Between 2023 and 2024, countywide ridership fell by 0.85 percent to 1,839,636, while Friday Harbor ridership rose by 0.85 percent to 889,402 .After a steep drop in 2020, ridership rebounded in 2021 but has not yet returned to pre-pandemic levels, remaining about 87,000 below 2019. Since then, however, the county has experienced relatively steady annual gains.



Source: WA DOT Traffic Statistics

The share of San Juan County ferry ridership occurring at Friday Harbor has generally trended upward since 2017, aside from the 2020 pandemic decline. In 2024, Friday Harbor accounted for 48.3 percent of all county ferry ridership. The largest gain occurred between 2018 and 2019, when its share rose from 44.8 percent to 47.2 percent.

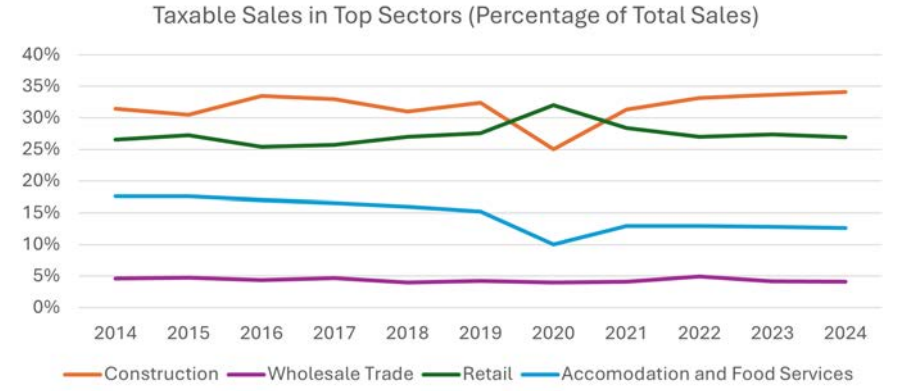


Source: WA DOT Traffic Statistics

Source: WA DOT

Taxable Retail Sales in Top Sectors

In several nearby counties, retail trade makes up the largest fraction of total taxable retail sales, but San Juan County has historically seen construction outpace retail trade. In 2020, this pattern switched as retail sales (32 percent) overtook construction (25 percent) as the sector generating the largest portion of taxable retail sales. However, in 2021, construction regained its position as the sector with the highest taxable retail sales. In 2024, the construction sector made up 34 percent of taxable retail sales, followed by retail trade (27 percent), lodging and food services (13 percent), and wholesale trade (4 percent) . These values are the same whole percentage as 2023, showing little change in the past year.

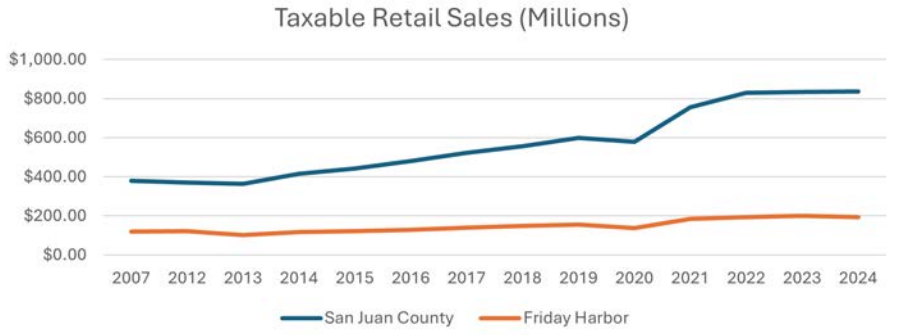


Source: Washington State Department of Revenue

Source: Discover North America

Total Taxable Retail Sales

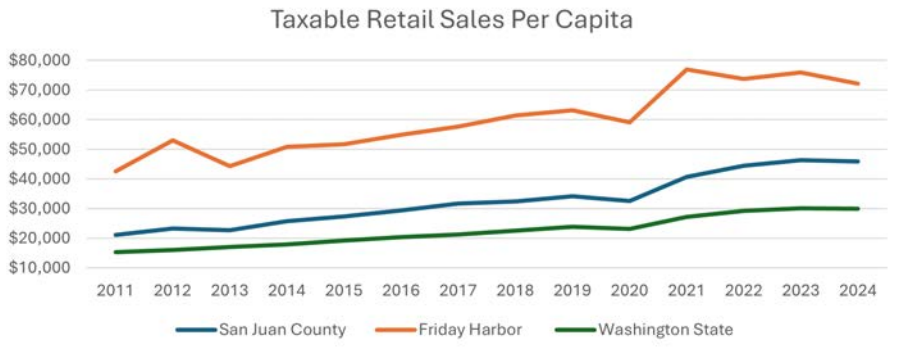
In 2023, Friday Harbor accounted for about 24.1 percent of total taxable retail sales in San Juan County. By 2024, this share had declined to 23.1 percent. The shift reflects a 3.6 percent decrease in Friday Harbor's taxable retail sales, falling from $201 million to $193 million, while countywide taxable retail sales remained relatively stable, edging up 0.37 percent from $834 million to $837 million.



Source: Washington State Department of Revenue

All Taxable Retail Sales per Capita

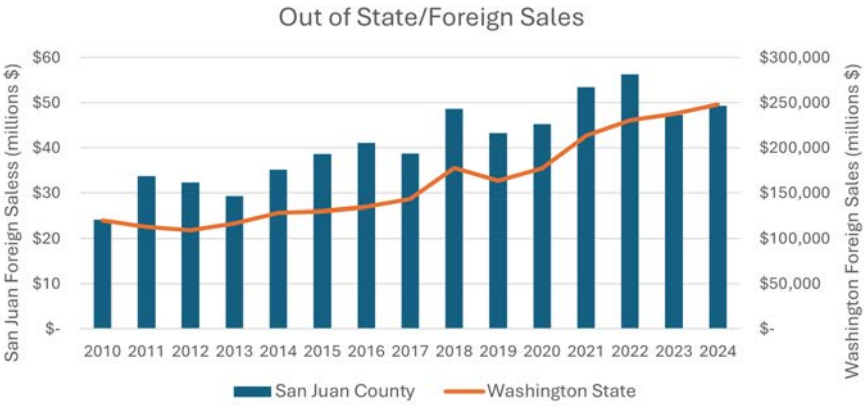
Friday Harbor continues to have significantly higher taxable retail sales per capita ($72,167) than San Juan County and Washington State ($45,842 and $29,958, respectively) . Most sales in San Juan County come from Friday Harbor, as it is uniquely dense and urban compared to the rest of the county. Tourism has a significant impact on San Juan County's taxable retail sales per capita. This sector saw a noticeable drop in sales during the coronavirus pandemic, which contributed to the decrease in taxable retail sales per capita. Friday Harbor likely took the brunt of this loss in sales, being a popular tourist destination in the county. Additionally, taxable retail sales per capita dropped in all 3 locations in 2024. Taxable retail sales per capita had previously been growing since 2020, with the exception of 2022 in Friday Harbor.



Source: Washington State Department of Revenue & US Census Bureau

Out-of-State and Foreign Sales

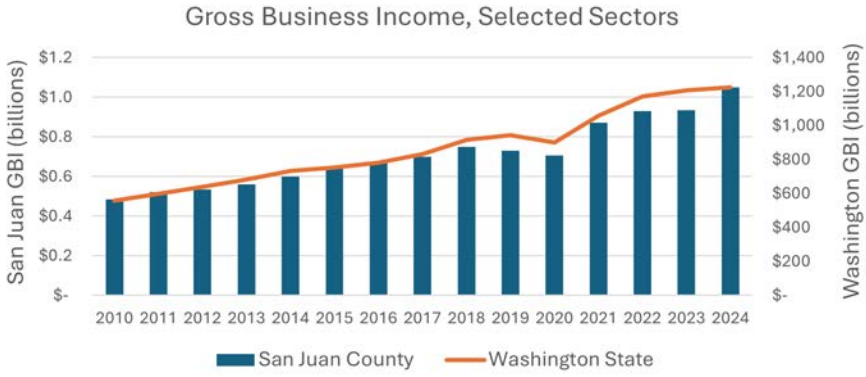
Foreign sales have been trending largely upward in Washington over the past 15 years, seeing a 4.4 percent increase between 2023 and 2024. San Juan County's Foreign sales have seen a similar trajectory, seeing a general upward trend. A large jump occurred between 2020 and 2021, with an 18.2 percent increase being seen in the county. Although this rapid growth lasted only until 2022, San Juan County continues to see increases in foreign sales, with a growth rate of 4.1 percent being reported in 2024.



Source: Washington State Department of Revenue

Gross Business Income

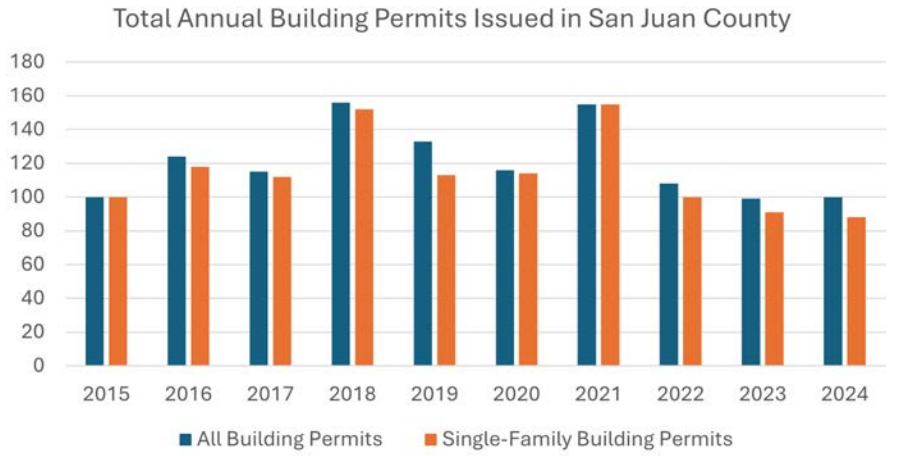
Gross business income (GBI) in selected sectors has trended upward, both in Washington State and San Juan County, over the past 15 years, with the most rapid increases occurring between 2020 and 2022. From 2023 to 2024, Washington State reported a 1.6 percent increase in GBI, going from $1,206 billion to $1,225 billion. San Juan County saw a 12.4 percent increase between 2023 and 2024, rising from $930,000 in 2023 to 1,050,000 in 2024.



Source: Washington State Department of Revenue

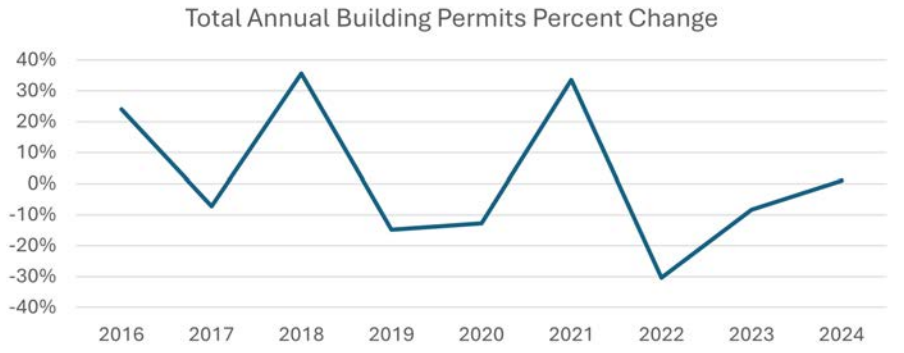
Building Permits

Building permits tend to fluctuate significantly throughout the year, so annual totals were used for this analysis. While the number of total permits declined between 2021 and 2023, activity stabilized in 2024, with 100 permits issued compared to 99 in 2023. Single-family dwellings, defined by wa.gov as "an independent and free-standing structure containing one dwelling unit and having a permanent foundation", saw a modest decline in permitting. Issuance fell by 3.3 percent, from 91 permits in 2023 to 88 in 2024.



Source: Washington Center for Real Estate Research

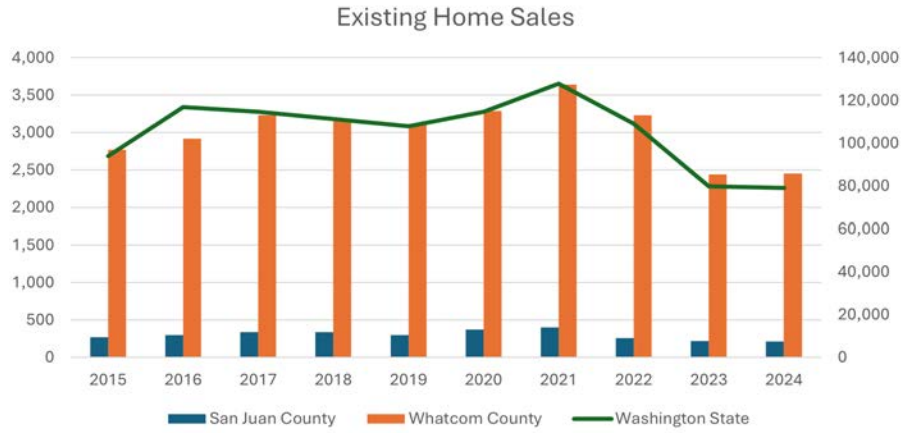
Overall, San Juan County has experienced considerable variation in permitting in recent years. Between 2021 and 2022, total permits dropped sharply by 30.3 percent, from 155 to 108. The downward trend continued into 2023, with an additional 8.3 percent decline to 99 permits, before leveling off in 2024.



Source: Washington Center for Real Estate Research

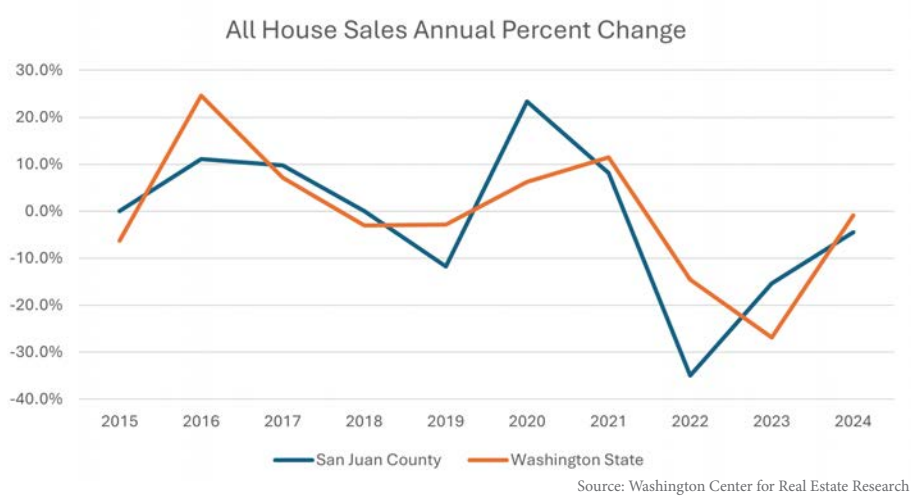
Home Sales

In San Juan County, existing home sales have continued a slight decline, dropping from 330 in 2023 to 210 in 2024. In contrast, Whatcom County saw a modest increase, with sales rising from 2,440 to 2,450 over the same period. Statewide, Washington experienced a slight dip in home sales, decreasing from 79,790 in 2023 to 79,060 in 2024.



Source: Washington Center for Real Estate Research

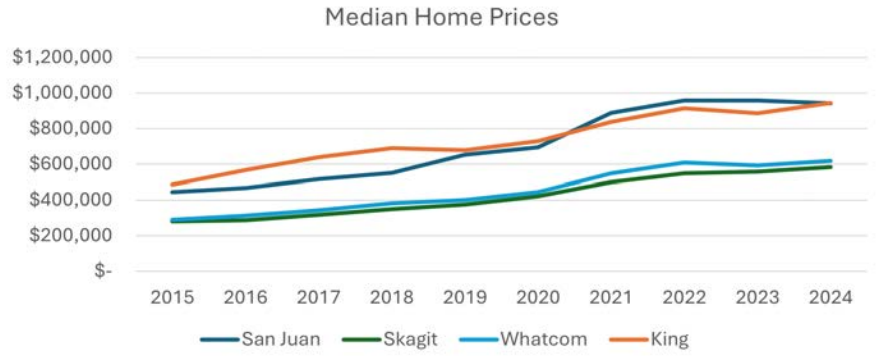
In San Juan County, there was a 4.5 percent decline in all house sales in 2024 after a 15.4 percent decline in 2023. This suggests a slight improvement in the local market compared to last year.



Source: Washington Center for Real Estate Research

Median Home Prices

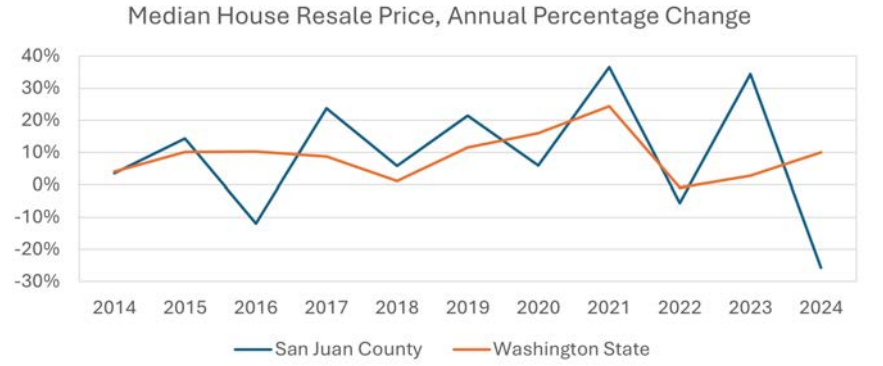
According to the Washington Center for Real Estate Research, King County led Washington state with the highest median price in 2024 at $943,100. Following closely, San Juan County had the second-highest median price at $941,700, marking a decrease from $956,800 in 2023. Statewide, the median house price also saw an increase from $613,000 in 2023 to $641,700 in 2023. Of the counties examined, Skagit reported the lowest median price, at $583,500.



Source: Washington Center for Real Estate Research

Median Home Resale Price

Median resale prices in San Juan County showed significant volatility, with a notable 25.7 percent decrease in 2024 following a 34.4 percent increase in 2023, and a 5.6 percent decline in 2022. This sharp drop suggests that the potential for recovery seen in the 2022 price increase was not a lasting trend in local housing market prices. Conversely, Washington state experienced a continued increase in median resale prices, recording a 10.0 percent increase in 2024 after a modest 2.8 percent increase in 2023 . This follows a slight decline of 0.9 percent in 2022, indicating stabilization and potential improvement in the broader real estate market.



Source: Washington Center for Real Estate Research

About the Authors

The Center for Economic and Business Research is an outreach center at Western Washington University located within the College of Business and Economics. The Center connects the resources found throughout the University to assist for-profit, non-profit, government agencies, quasi-government entities, and tribal communities in gathering and analyzing useful data. We use a number of collaborative approaches to help inform our clients so that they are better able to hold policy discussions and craft decisions.

The Center employs students, staff and faculty from across the University as well as outside resources to meet the individual needs of those we work with. Our work is based on academic approaches and rigor that not only provides a neutral analysis perspective but also provides applied learning opportunities. We focus on developing collaborative relationships with our clients and not simply delivering an end product.

The approaches we utilize are insightful, useful, and are all a part of the debate surrounding the topics we explore; however, none are absolutely fail-safe. Data, by nature, is challenged by how it is collected and how it is leveraged with other data sources; following only one approach without deviation is ill-advised. We provide a variety of insights within our work – not only on the topic at hand but the resources (data) that inform that topic.

The Center for Economic and Business Research is directed by Hart Hodges, Ph.D. and James McCafferty.

Dr. Fouzia Awan, Ph.D., served as the lead economic analyst for this project. Sureerath Auengpradijporn, Abby Murphy, Bergen Sorby, Margot Hunter, and Dylan Braund contributed to data collection, economic analysis, written content, and visual data representation. Tony Peterson finalized the report's layout and presentation for publication.

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