

Washington State Marine Industry Employment & Compensation: Manufacturers & Repairers

Northwest Center of Excellence for
Marine Manufacturing & Technology
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Outline



- Introduction & methodology
- Employer characteristics
- Employment
- Wages & benefits
- Conclusions
- Next steps

Introduction & Methodology



Introduction & Methodology



- Purpose of the study
- Methodology
 - Web-based survey of marine manufacturers and repairers in Washington State
 - 10 key occupations
 1. Marine carpenters
 2. Marine electricians
 3. Marine mechanics
 4. Welders
 5. Fiberglass laminators
 6. Composite laminators
 7. Riggers
 8. Assemblers
 9. Patch & repair
 10. Painters



Survey Response

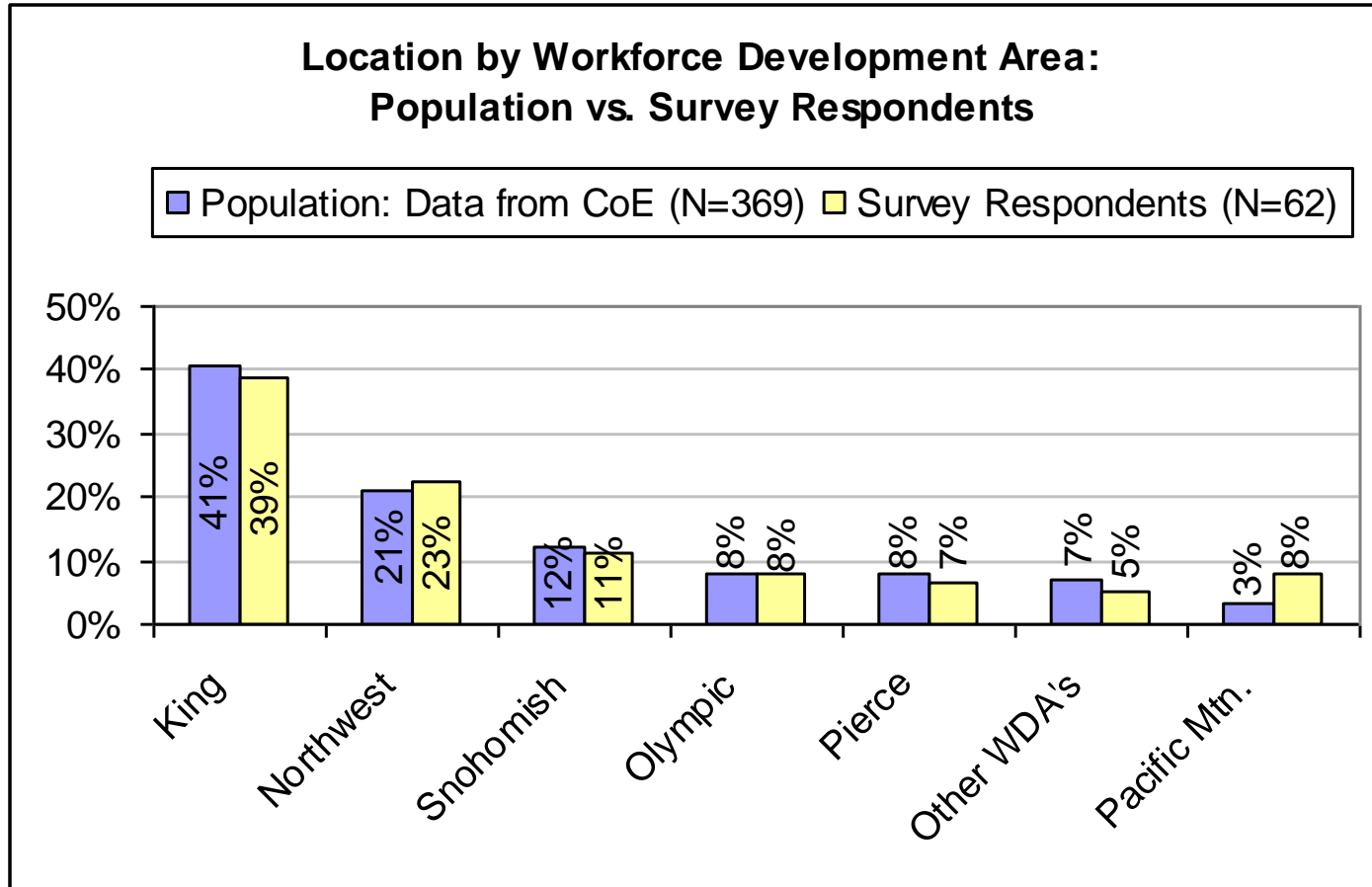
- Survey open January-February 2007
- Response rate: 22% (70/316)
 - Is this a good response rate?
 - Do the results represent the industry?

Employer Characteristics

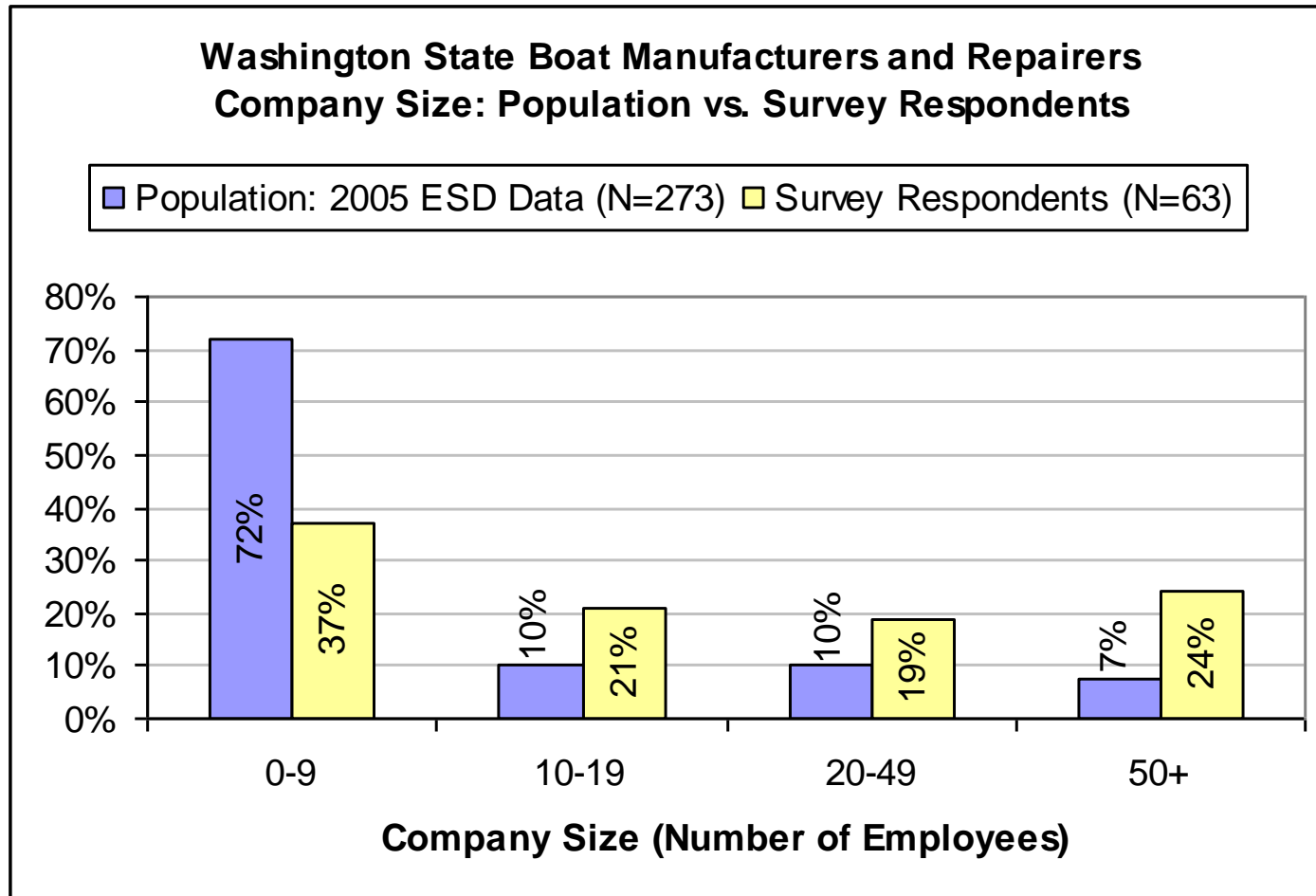
Company Location
Company Size
Primary Focus



Company Location



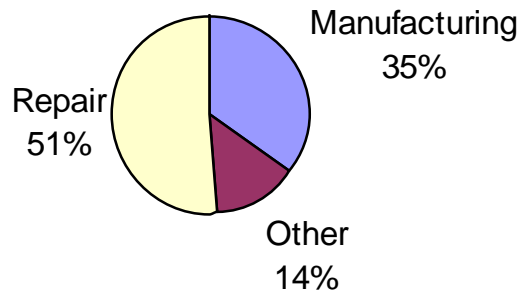
Company Size



Primary Focus: Manufacturing/Repair



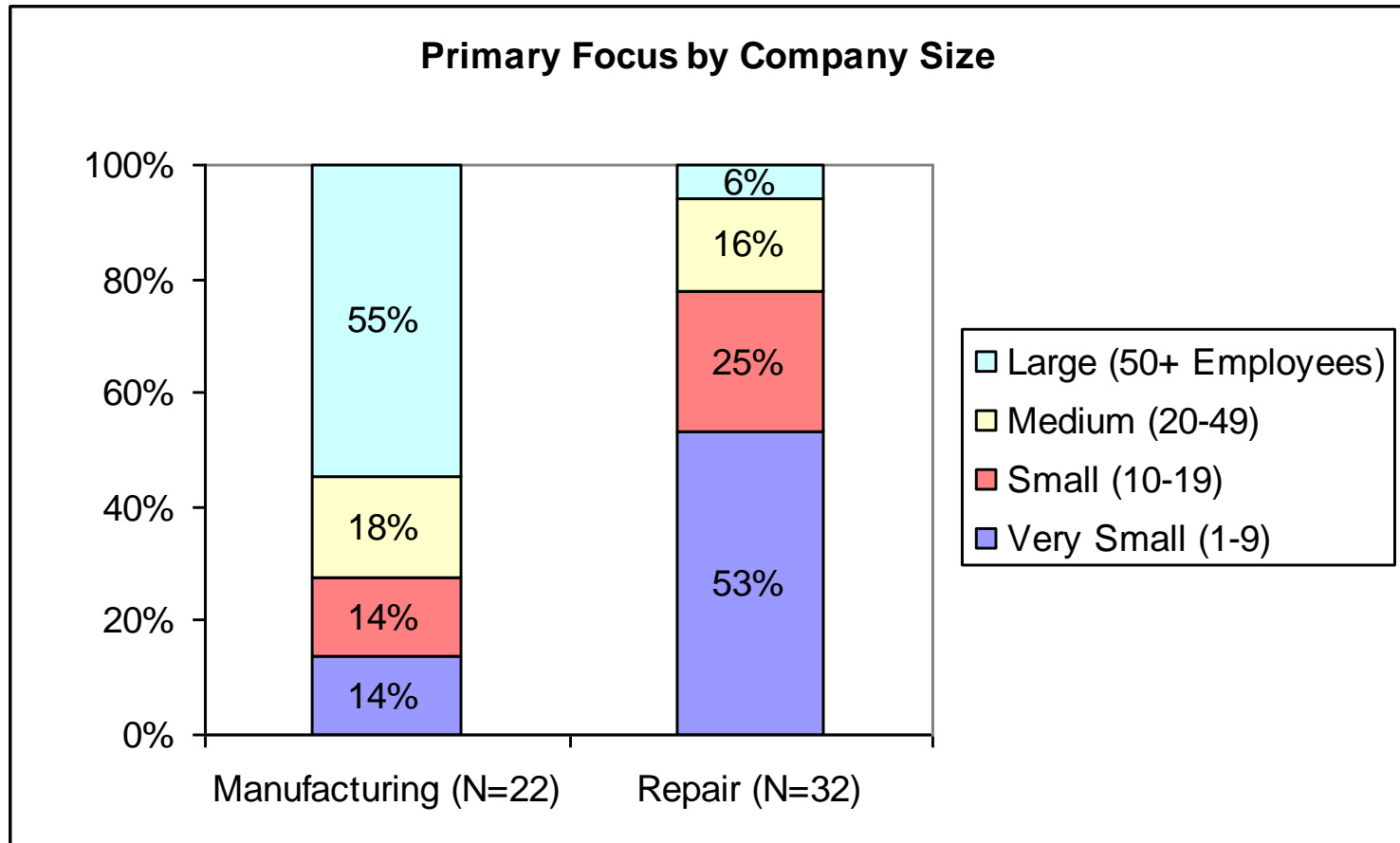
Primary Company Focus
(N=63)



“Other” Primary Focus:

- Marine Construction
- Sales: engines, sails, etc.
- Dealership
- Moorage and fuel

Primary Focus by Company Size



Employment

Current number of employees

Forecasted employment

Vacancies

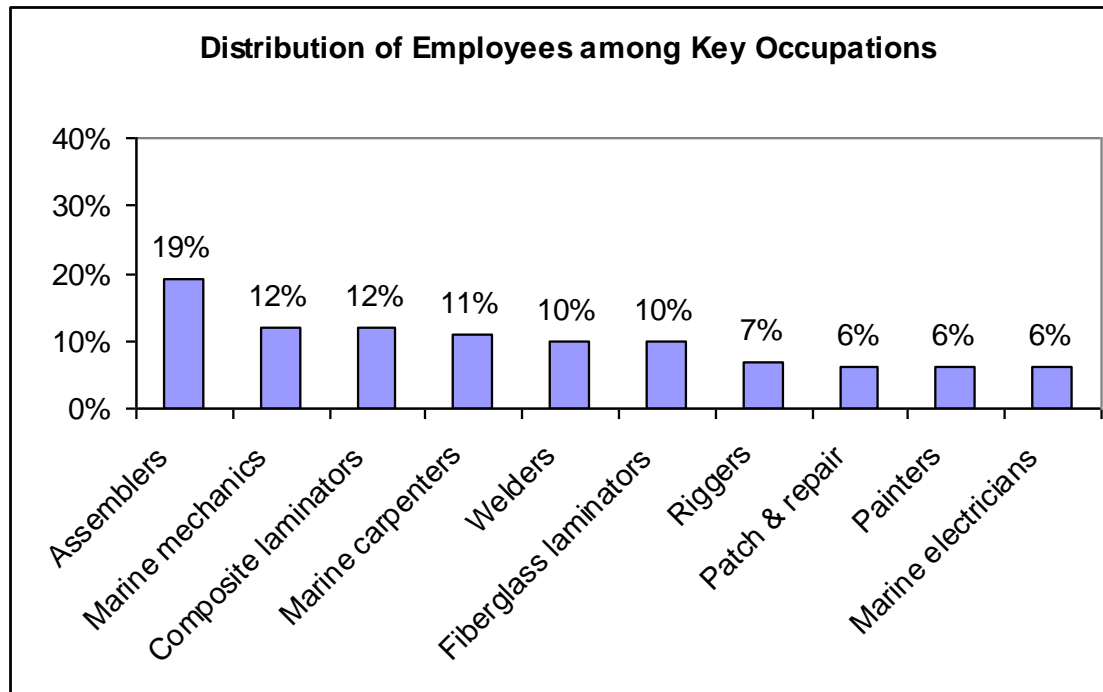
Retirements



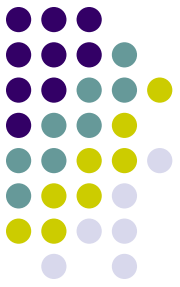


Current Employment

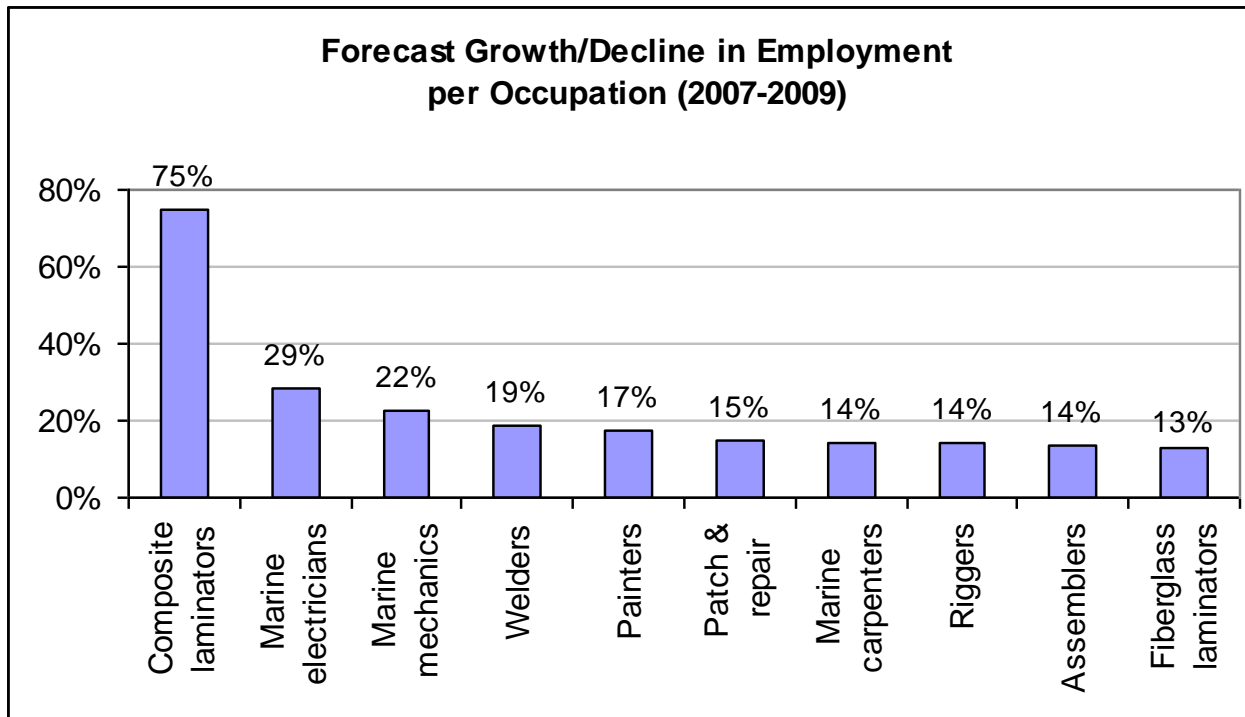
- 2,277 employees in the key occupations
- Fairly even distribution among occupations
- Roughly 1/3 = repair, 2/3 = manufacturing



Forecast Employment (by 2009)



- Overall, 24% growth estimated in key occupations
- Most dramatic growth: composite laminators
- Lowest rate of growth: fiberglass laminators





Vacancies

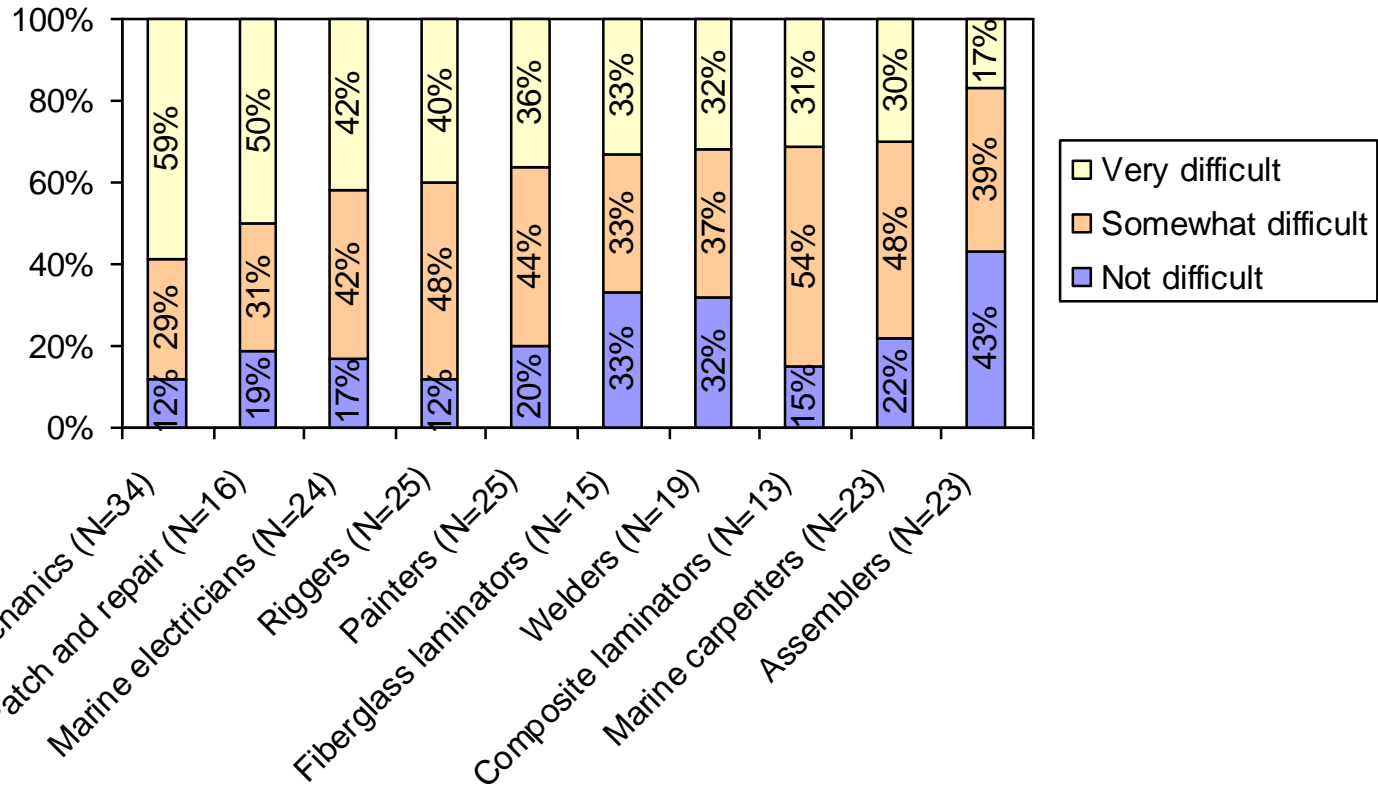
- Total vacancies: 228
- Vacancy rate: 9%
- Most vacancies:
 - Marine mechanics
 - Welders
 - Composite laminators

	Number of Companies with Vacancies	Current Vacancies
Marine mechanics	23	42
Welders	9	31
Composite laminators	5	31
Fiberglass laminators	7	24
Marine carpenters	12	22
Riggers	14	19
Painters	10	19
Marine electricians	11	16
Assemblers	7	14
Patch & repair	7	10
Total	45	228

Difficulty Filling Vacancies



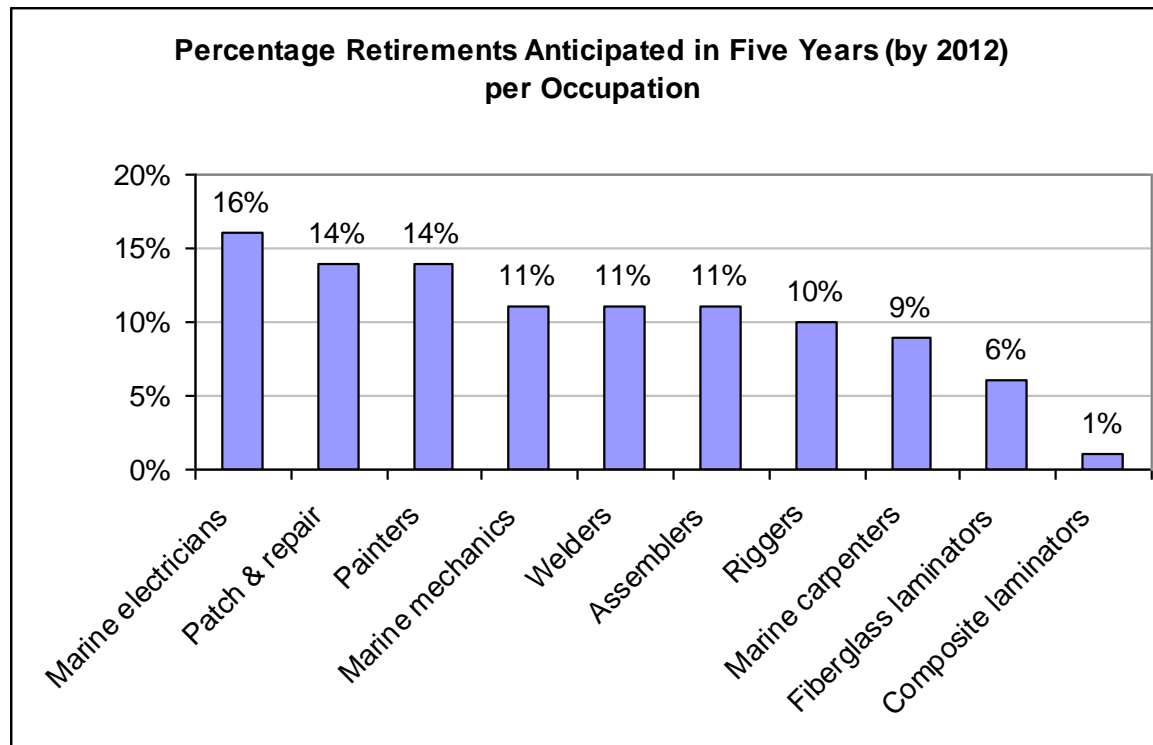
Difficulty in Filling Vacancies
(N=Number of Companies Reporting on Each Occupation)



Anticipated Retirements (by 2012)



- Overall, 10% anticipated retirements in key occupations
- Highest: marine electricians
- Lowest: composite laminators

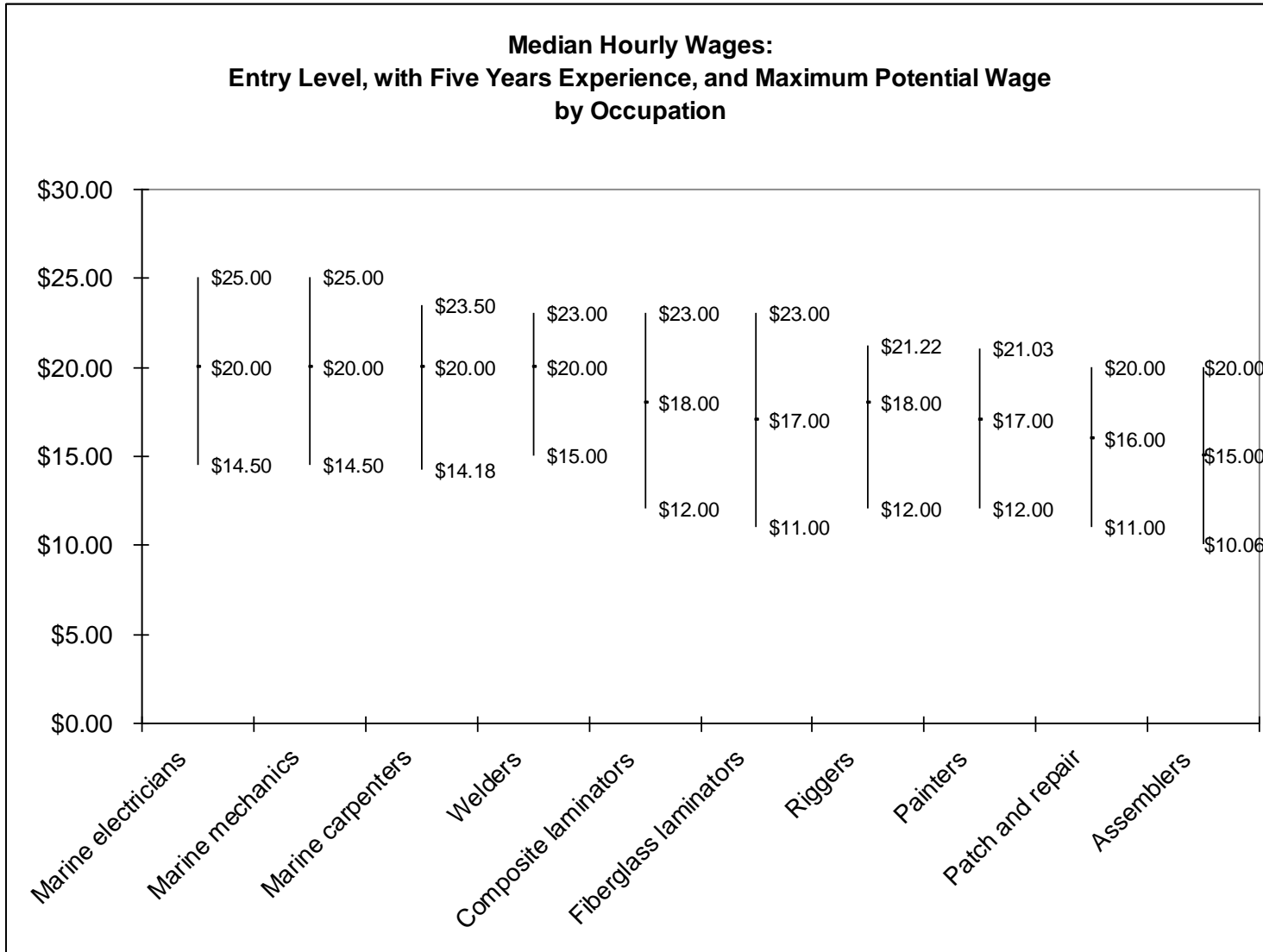


Wages & Benefits

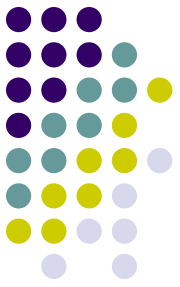
Hourly wages
Profit sharing
Stock options
401k programs
Health insurance
Paid leave



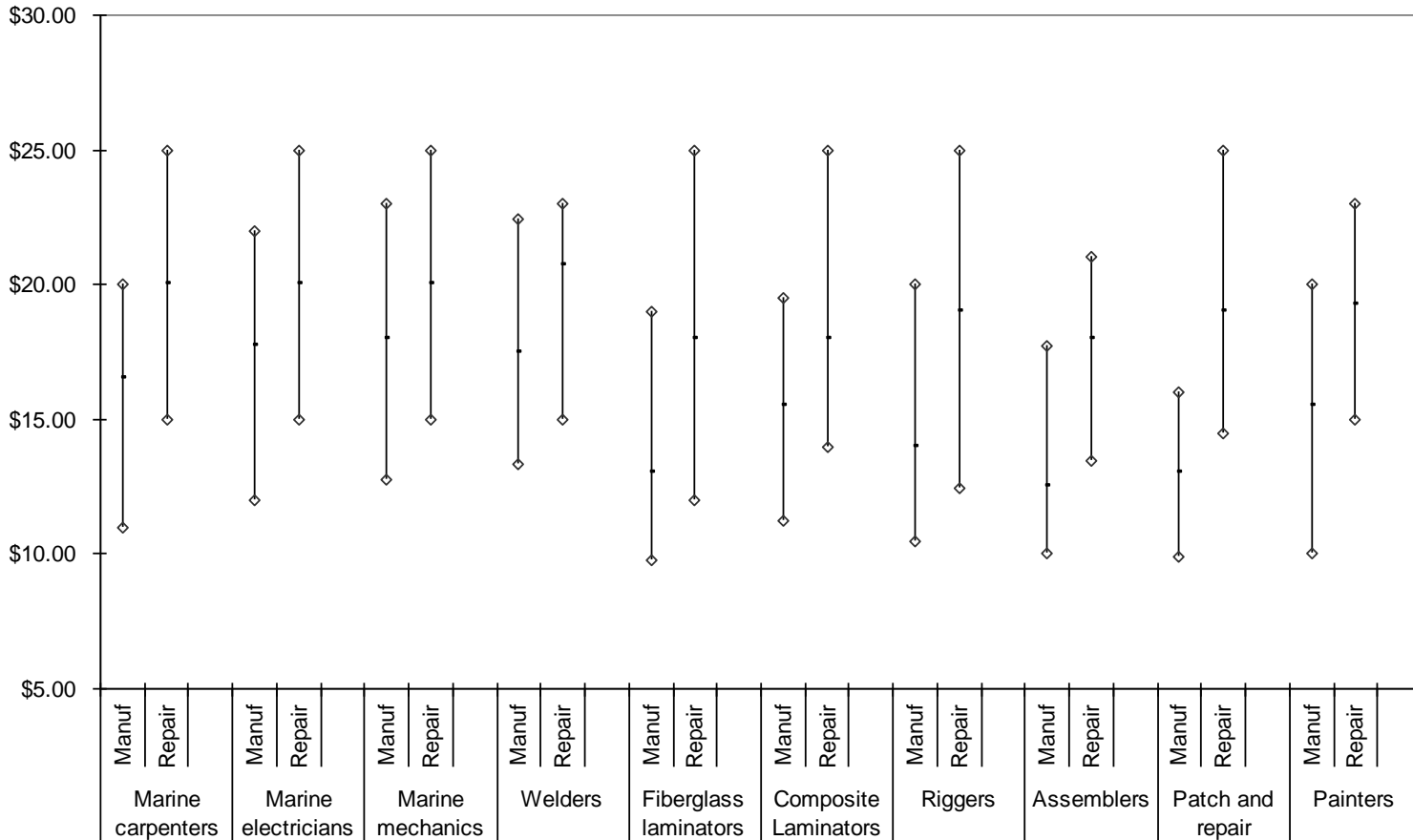
Median Hourly Wages



Wages by Manufacturing/Repair



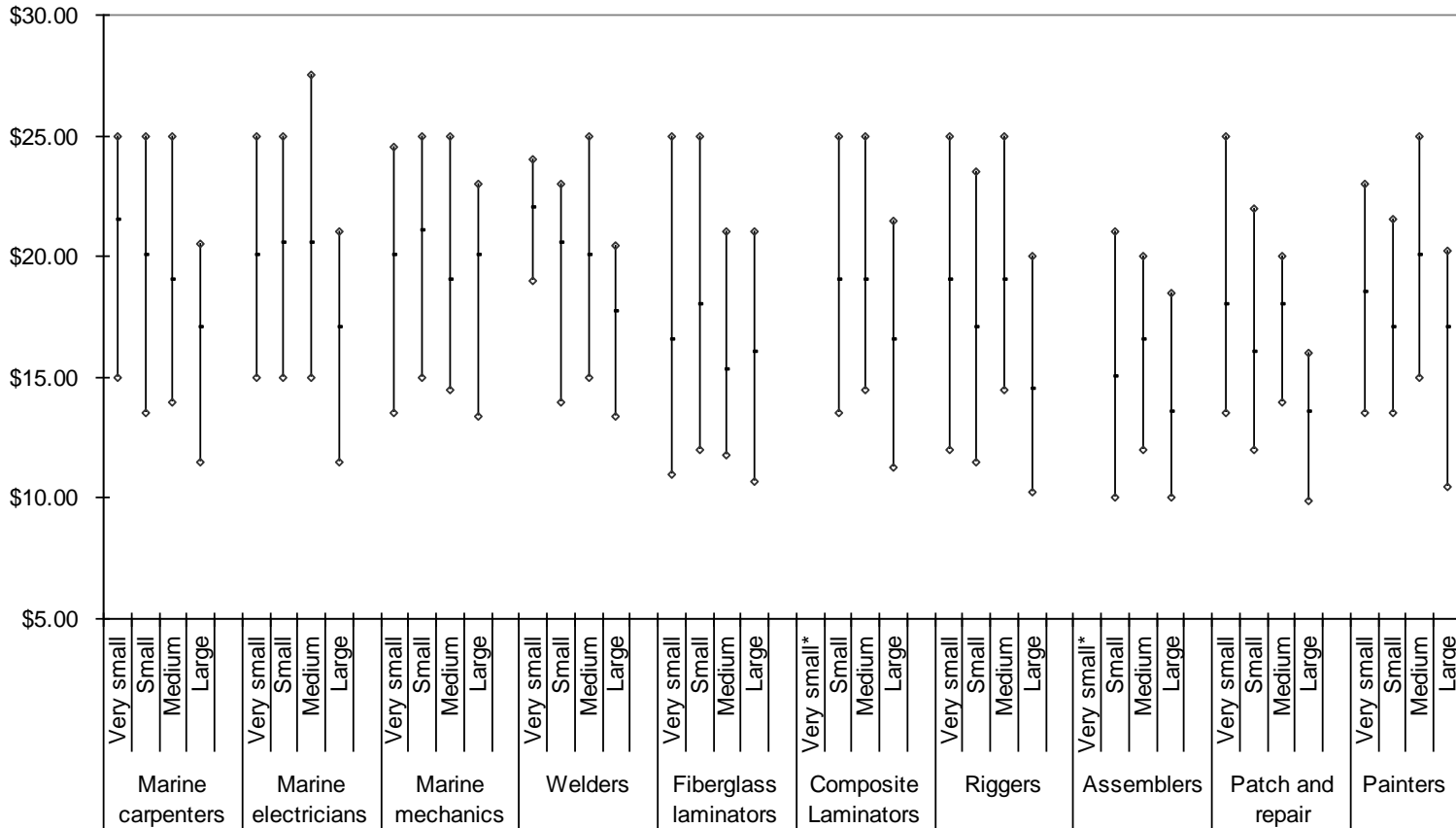
**Median Hourly Wages:
Entry Level, with Five Years Experience, and Maximum Potential Wage
by Occupation and Manufacturing/Repair**



Wages by Company Size



**Median Hourly Wages:
Entry Level, with Five Years Experience, and Maximum Potential Wage
by Occupation and Employer Size**

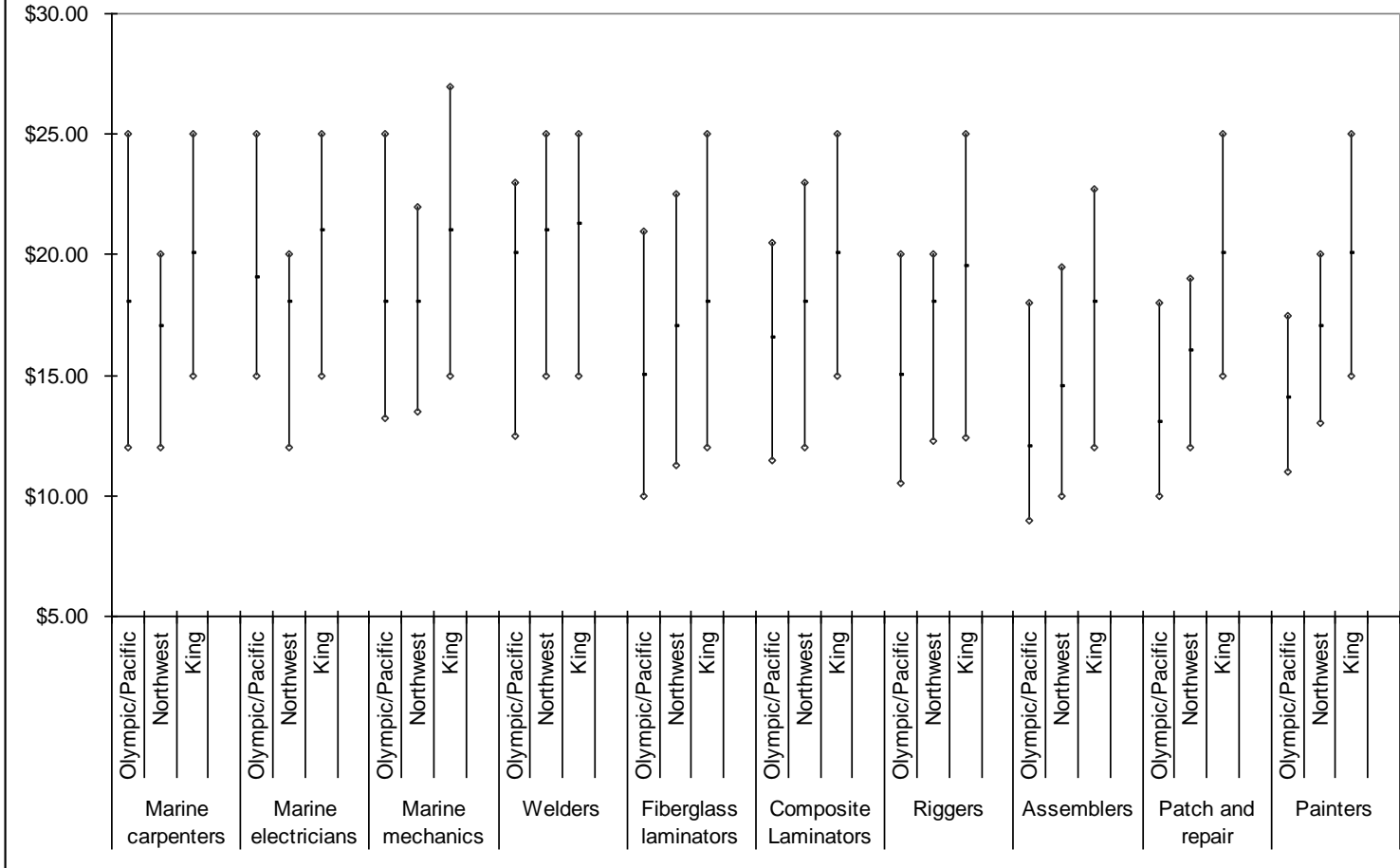


* Wages were suppressed due to an N of 1

Wages by WDA



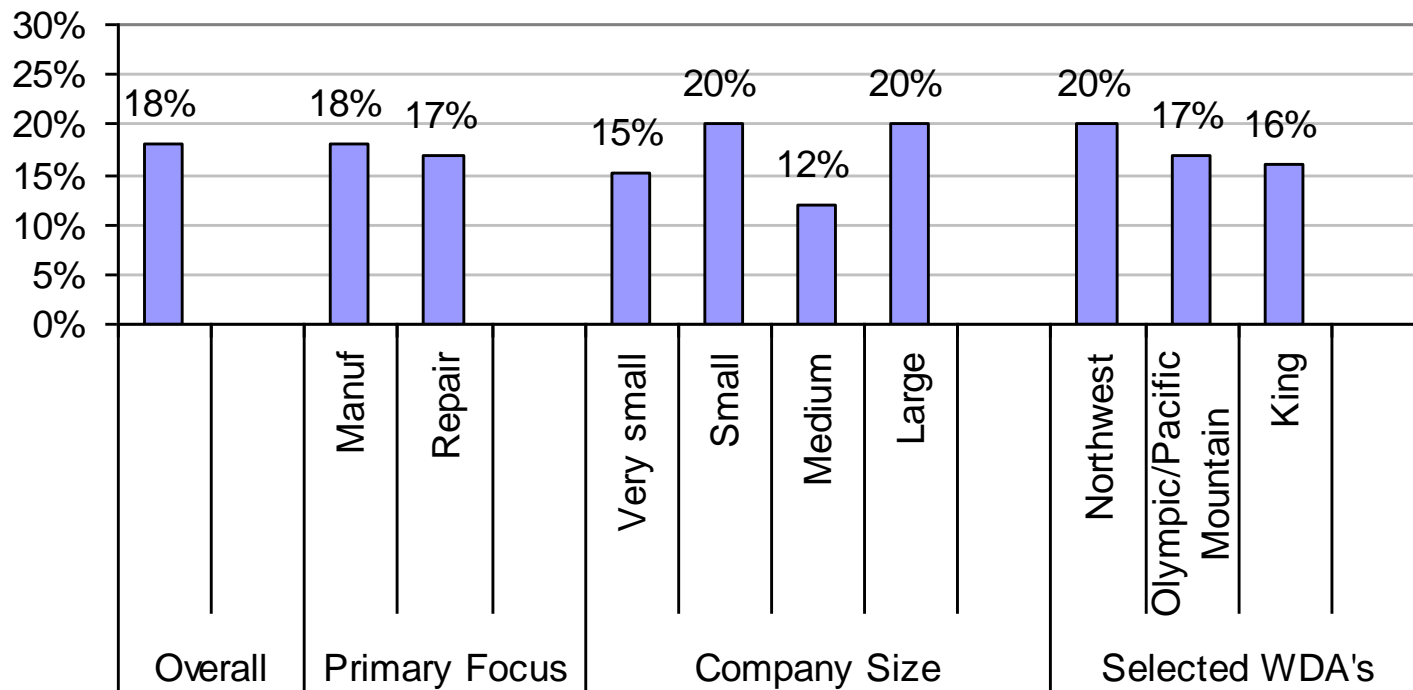
**Median Hourly Wages:
Entry Level, with Five Years Experience, and Maximum Potential Wage
by Occupation and Selected WDA**



Percentage that Benefits Add to the Cost per Employee



Median Percentage that Benefits Add to the Cost of each Employee by Manufacturing/Repair, Company Size, and Selected WDA's

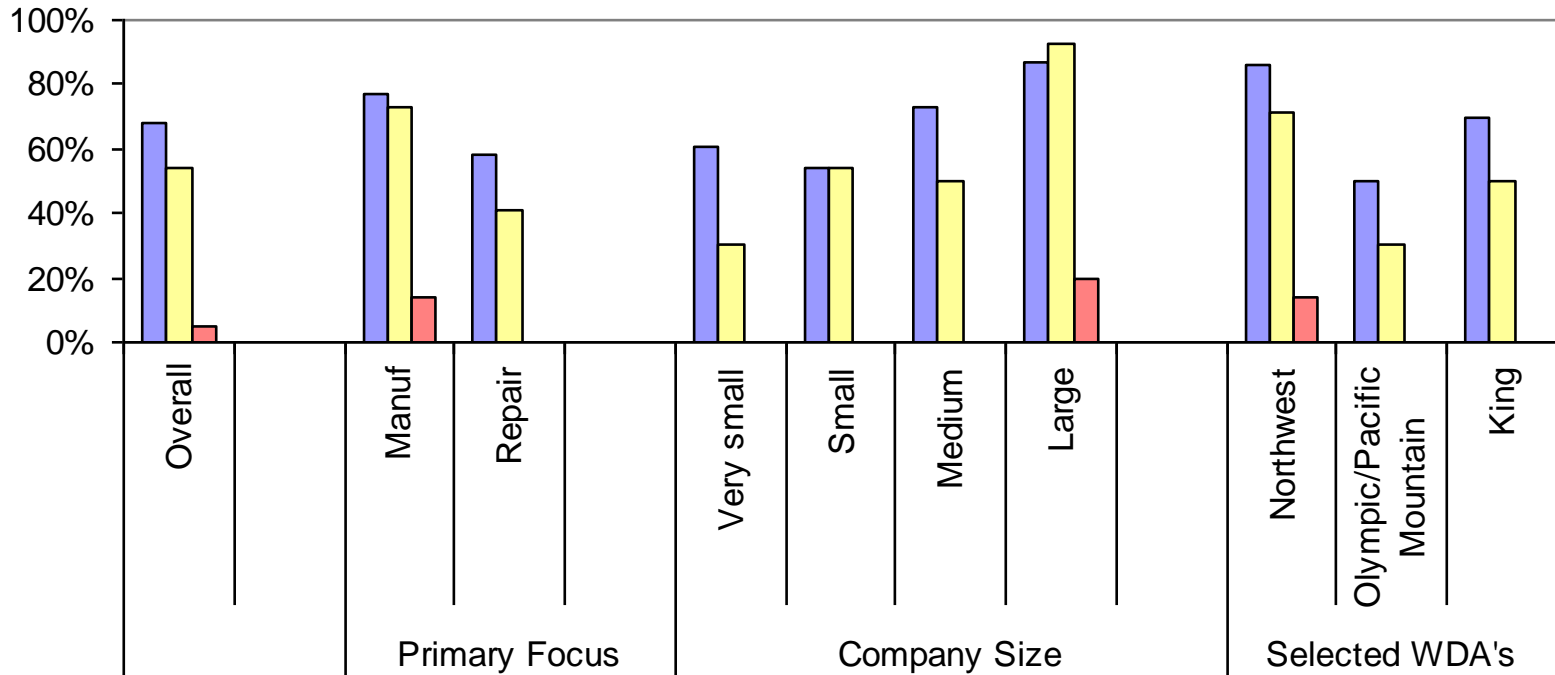


Bonus/Profit Sharing, 401k Programs, ESOPs



Percentage of Companies Offering Bonus/Profit Share, ESOP's and 401k Retirement Plans by Primary Focus, Company Size, and Selected WDA's

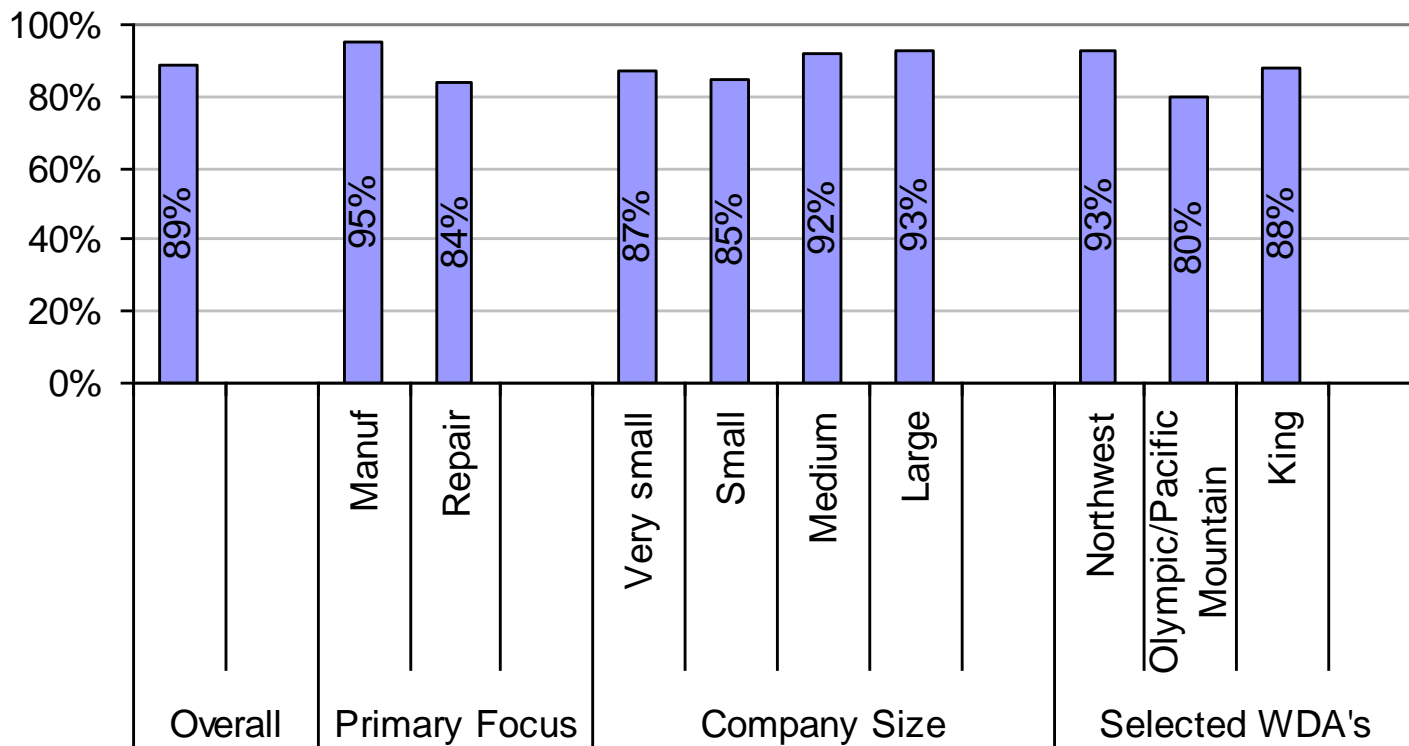
■ Bonus/Profit Share
 ■ 401k
 ■ ESOP



Health Insurance



Percentage of Respondents Offering Health Insurance by Manufacturing/Repair, Company Size, and Selected WDA's





Paid Leave

- 51 of the 63 companies offered at least 1 type of paid leave
- Median hours of paid vacation
 - Entry level: No differences by manufacturing/repair, company size or WDA
 - Maximum Level
 - Manufacturing/repair: No difference (80 hrs)
 - Company size: Large companies offered a higher maximum level (120 hrs) than smaller companies (80 hrs)
 - WDA: Northwest offered the highest maximum level (100 hrs), then King (90 hrs), then Olympic/Pacific Mountain (80 hrs).

	Paid Vacation		Sick Leave		Personal Time Off	
	Entry Level	Maximum Level	Entry Level	Maximum Level	Entry Level	Maximum Level
Number of Companies	49	46	12	12	13	12
Median	40 hours	80 hours	22 hours	27 hours	18 hours	23 hours
Minimum	0 hours	5 hours	0 hours	3 hours	0 hours	2 hours
Maximum	96 hours	256 hours	96 hours	120 hours	80 hours	200 hours

Conclusions



- Employers foresee growth in all key occupations
 - Composite lamination is especially hot
- Recruiting appears difficult for marine mechanics
- Retirements may be an upcoming issue
- Wages tend to be higher for companies focused on repair and for smaller companies
- More comprehensive benefits tend to be offered by larger companies and manufacturers

Future Research



- Repeat this survey on 2-3 year cycle
- Other areas of interest:
 - Explore the industry with greater breadth (i.e. wider range of occupations)
 - Select an area of the industry to explore with greater depth (i.e. examining skill levels within an occupation)
 - Investigate trends in topics such as subcontracting, vertical integration, training/education, skill sets, how the regional industry fits into the global economy, etc.

Questions?

