

Washington State Marine Industry Employment and Compensation: Manufacturers and Repairers

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EXECUTIVE SUMMARY

Washington State Marine Industry Employment and Compensation: Manufacturers and Repairers

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The primary purpose of this survey was to gain a better understanding of trends in employment and compensation within the marine industry in Washington State. The survey covered current employment and vacancies, forecasted employment and retirements, as well as wages and employment benefits. Within these topics, survey questions focused on ten key hourly occupations among boat manufacturers and repairers¹:

Employers contributed information through a web survey in January and February of 2007. Seventy companies responded to the web survey, for a response rate of 22 percent (70/316).² A brief summary of the findings and themes are provided below:

Employer Characteristics

Survey results were analyzed by primary company focus (manufacturing/repair), company size (number of employees), and location (selected Workforce Development Areas). These three factors interacted in ways that affected the survey results.

Not surprisingly, the companies that primarily focused on manufacturing tended to be larger than those focused on repair. For instance, over half of the manufacturers (55%) had 50 employees or more, compared to only 6 percent of the repairers. In general, the survey results that apply to the large companies also apply to the manufacturers, and the findings for the repairers mirror those of the smaller companies.

There were also regional trends. While summary survey results include employers from eight of the 12 Workforce Development Areas (WDA's), the breakdowns focused on the three largest: King (24 employers), Northwest (14), and the combined WDA's of Olympic/Pacific Mountain (10).

¹ The ten key occupations were marine carpenters, marine electricians, marine mechanics, welders, fiberglass laminators, composite laminators, riggers, assemblers, patch and repair, and painters.

² Seven respondents did not report any employees in the 10 key occupations so they were removed from the analysis and results.

These selected WDA's can be described as follows:

- The King WDA primarily consisted of smaller companies that focused mainly on repair.
- The Northwest WDA was more heavily weighted towards larger companies that focused on manufacturing.
- The combined WDA's of Olympic/Pacific Mountain were more mixed, containing a large proportion of small companies but a fairly even mixture of manufacturing and repair.

The composition of each WDA (by company size and primary focus) influenced the findings. For instance, the King WDA results are similar to those for the smaller companies and the repair organizations.

Please note that the survey results appeared to accurately represent the industry in terms of geographic distribution. However, the survey respondents may over-represent the larger employers. This is not surprising since large companies have more staff to help respond to surveys than small employers. While reviewing the survey results, please keep in mind that the viewpoints of the larger employers may be over-represented.

Employment

The survey explored the number of employees at the time of the survey, the predicted change in employment by occupation over the next 2 years, vacancies, anticipated retirements in the next 5 years, and unionization.

1. **Staffing:** The 63 responding companies reported a total of 2,277 employees in the 10 key occupations at the time of the survey. The employees were fairly evenly distributed between the occupations, with each occupation accounting for between 6 and 19 percent of the reported employment.
2. **Vacancies:** A total of 228 vacancies were reported by the respondents, for a vacancy rate of 9 percent.³ The greatest numbers of vacancies were among marine mechanics (42), welders (31), and composite laminators (31). Positions for marine mechanics were also reported as the most difficult to fill. The occupation that was reported as being the easiest to fill was assemblers.

Repairers were more likely than manufacturers to report that it was “very difficult” to fill vacancies. Likewise, smaller organizations found recruiting more difficult than larger organizations. Among manufacturers, the occupations with the most vacancies were welding (29) and composite lamination (27). Within the repair organizations, the occupation with the most vacancies was marine mechanic (26).

3. **Projected Growth:** Overall, employers anticipated 24 percent growth in the key occupations by 2009. The most dramatic growth was expected among composite

³ The vacancy rate was computed as the number of vacancies divided by the total desired employment (current employment plus vacancies).

laminators, an increase of 75 percent (199 additional employees among surveyed employers). This high rate of growth was anticipated across both manufacturers and repairers and by companies of all sizes.

Forecasted growth of employment in fiberglass lamination was the lowest, at 13 percent (29 additional employees). These results support anecdotal reports that many companies are transitioning from fiberglass to composite lamination.

Examined by location, the Northwest WDA anticipated the highest rate of growth (45%, 272 additional employees), followed by the combined Olympic/Pacific Mountain WDA (30%, 49 additional employees), and the King WDA (15%, 121 additional employees).

4. Anticipated Retirements: Overall, respondents indicated that they expect 10 percent of their employees in the key occupations to retire within five years (by 2012). The largest percentage of retirements was anticipated to be within marine electricians (16%, 20 employees retiring among 10 companies).

While composite lamination has the highest forecast growth, it has the lowest anticipated retirement rate (1%, 4 employees retiring among 4 companies). This low retirement rate is not surprising since resin infusion composite technology has not been fully utilized by all manufacturers of fiberglass boats and has likely attracted a younger workforce.

Repair organizations were expecting retirements at three times the rate of manufacturers (repair: 18% and 137 retirements, manufacturing: 6% and 79 retirements).

5. Unionization: Only three companies reported that their workers were represented by labor unions.

Wages and Benefits

The survey covered a variety of topics regarding wages and benefits. Specific employee benefit topics included profit sharing, stock options, 401k programs, health insurance, and paid leave.

Overall, one of the strongest findings was that large companies tended to offer lower wages than smaller companies, but they provided more comprehensive benefits. The same trends were present among manufacturing versus repair organizations since most repairers were small companies, and manufacturers tended to be large. Trends by WDA weren't quite as straightforward, although the King WDA tended to have the highest wages while companies in the Northwest WDA offered the most benefits.

1. Average Hourly Wage: Respondents provided the average hourly wage for each key occupation at the entry level, with five years of experience, and at the maximum potential wage. Welders had the highest entry-level median wages

(\$15.00/hr.), and marine electricians and marine mechanics earned the highest maximum potential median wages (\$25.00/hr.).

Median wages were higher at smaller companies and companies focusing on repair than larger companies and those focused on manufacturing. Wages at repairers were higher by an average of \$3.09 at the entry level, \$3.87 at the five-year level, and \$4.23 at the maximum potential wage (across all occupations). The wage disparity could be due to the fact that repair organizations tended to include greater proportions of the higher-paying occupations, such as marine mechanics.

Generally, median hourly wages at the five-year level were highest in the King WDA, mid-range in the Northwest WDA, and lowest in Pacific Mountain/Olympic WDA's

2. The Cost of Employment Benefits: In general, employment benefits added a median of 18 percent to the cost of each employee.
3. Bonus/Profit Sharing, Employee Stock Option Programs, 401k Programs: Over two-thirds of the companies participating in the survey (68%) offered bonuses or profit sharing. More than half of the respondents offered a 401k retirement program (54%), and over three-quarters of those with a 401k program (76%) matched employees' contributions. The maximum percentage of employees' contributions that the companies matched ranged from 2 to 50 percent, with a median of 4 percent. Only 5 percent of the respondents had Employee Stock Option Plans (ESOPs).

Manufacturers were more likely than repairers to offer bonuses/profit sharing, ESOP's, and 401k's. The likelihood that employers offered these benefits increased with company size. In general, more companies in the Northwest WDA offered benefits than the other WDA's. This is consistent with the fact that the Northwest WDA had more manufacturers and large companies.

4. Health Insurance: The vast majority of companies offered health insurance to their employees (89%), regardless of primary company focus, size, or location. Employees with health insurance paid a median of 5.5 percent of the cost of their own health care, not including dependents. Like the other benefits, health insurance was found more frequently among larger companies, those with a primary focus on manufacturing, and those in the Northwest WDA.
5. Paid Leave: The survey asked respondents how many hours of paid vacation, sick leave, or personal time off (PTO) they offered annually to entry-level employees (after any probationary period) as well as the maximum potential number of hours. Fifty-one of the 63 companies indicated that they offered at least one type of paid leave. Two companies indicated that they don't offer any of these benefits, and the other companies left the question blank. Forty-nine offered paid vacation, 12 offered sick leave, and 13 offered PTO.

Employees received a median of 40 hours of paid vacation annually at the entry level and 80 hours at the maximum level. Median annual sick leave was 22 hours at the entry level and 27 hours at the maximum level. Median entry-level PTO was 18 hours per year, and median PTO at the maximum level was 22.5 hours.

There were no differences in the median amount of paid vacation offered to entry-level employees by company size, primary focus, or location. However, large companies (those with 50 or more employees) offered a higher maximum potential number of hours of paid vacation (120 hours) than smaller companies (80 hours).

INTRODUCTION

The Northwest Center of Excellence (CoE) for Marine Manufacturing and Technology at Skagit Valley College is an alliance that brings together industry and educators. Their mission includes acting as a repository for industry information and supporting long-term planning.

In keeping with its mission, the CoE has had a longstanding interest in collecting and disseminating regionally-specific economic and workforce information about the marine industry. The difficulty is that little is known about the current status of this sector, including employers' forecasts for the future. Existing labor market and economic data is insufficient to explain the conditions facing various sub-sectors of the industry.

While general information about the industry is available, there are definite advantages to gathering information directly from employers:

- The population of potential respondents can be finely-tuned. (Available state-level data must be designated by NAIC code. Some employers who do boat repair are included in different NAIC codes, such as marinas and boat dealers.)
- The data can be broken down by occupation.
- Forecasts are based on employers' estimations, rather than historical trends.

The downside to collecting information from employers is that the results represent only the respondents who elect to participate.

The CoE decided to solicit information directly from the marine employers in the region. In June of 2006, the CoE, in collaboration with the state department of Community, Trade and Economic Development (CTED) and the Northwest Marine Trade Association (NMTA), contracted with Washington State University's Social and Economic Sciences Research Center to conduct a web-based survey of boat manufacturers and repairers in Washington State.

The goal of the Marine Industry Employment and Compensation Survey was to create a rich database of information for the marine industry in Washington State. Employers, colleges, economic and workforce development organizations, and other service providers can use this information to effectively plan and design new programs and services and to secure funds for program startups and enhancements.

The survey covered the following topics:

- Current and projected employment, including current vacancies and forecasted retirements
- Wages and employment benefits
- Safety

Within these topics, the survey focused on 10 key hourly occupations. Survey results were explored by the following factors: the key occupations, primary company focus

(manufacturing/repair), company size (number of employees), and location (selected Workforce Development Areas).

This survey is intended to provide baseline economic and employment data, and future iterations of the survey will allow the CoE to track trends within the marine industry in Washington State. Additionally, future research may explore the industry with more breadth (i.e. soliciting information about a wider range of occupations) and more depth (i.e. examining specific skill levels within an occupation). Other areas of interest for future study include exploring subcontracting trends, vertical integration within the industry, how the regional industry fits into the global economy, training, education and skill sets.

METHODOLOGY

Survey Protocol Development

Data was gathered through an on-line survey. The survey protocol was developed through collaboration with the CoE and extensive review by an advisory committee, consisting of representatives from NMTA, Nordic Tug, Cap Sante Marine, U.S. Marine, CTED and the Northwest Workforce Development Council. The advisory committee represented marine manufacturers and repairers of all sizes.

The survey development included selecting the 10 key hourly occupations:

1. Marine Carpenters
2. Marine Electricians
3. Marine Mechanics
4. Welders
5. Fiberglass Laminators
6. Composite Laminators
7. Riggers (electrical/mechanical/sailboat)
8. Assemblers
9. Patch and Repair (i.e. patch and detail)
10. Painters

Respondents were requested to classify each employee in one primary occupation only, despite the fact that a single employee may perform duties in multiple categories. The survey also directed respondents to include all employees who work in that category, regardless of skill level. For wage questions, this would mean averaging the wages across all skill levels. Finally, the survey acknowledged that this list of occupations is not comprehensive and requested that respondents exclude information about employees outside of these categories.

Eight employers beta tested the survey in early January 2007. The beta testers represented manufacturers as well as repairers and both large and small companies. Feedback was solicited about the ease of completing the survey and navigating the website, the length of time necessary to complete the survey, and if any survey questions were unclear. The feedback was incorporated into the survey protocol.

Survey Sample Selection

The survey attempted to contact all marine manufacturers and repairers with employees in the 10 key occupations in Washington State. The list of potential respondents was compiled by the CoE and NMTA and contained 372 companies, 358 of which had email addresses. A single recipient was designated at each company, most often the company owner, manager, or human resources representative.

Survey Administration

In order to maximize employer participation in the survey, the CoE and NMTA mailed informational letters to all selected companies in January. An announcement about the survey was provided during the statewide Marine Advisory Committee meeting in December 2006. A press release issued by the CoE and an article in the NMTA newsletter published in January also helped raise employers' awareness about the survey.

The survey was launched on January 16th, 2007, and remained open through February 23rd, 2007. Respondents received an email invitation to participate that included their username and password, as well as a link to access the survey website. They were able to save their work on the survey and complete it in multiple sessions. However, after the final "submit" button was selected, they were locked out of the survey. The invitation emails were successfully emailed to 321 companies.

Reminder emails were sent on January 29th and February 7th, 2007 to all respondents who had not pressed the final "submit" button as of those dates.

The survey offered the option for respondents to provide their contact information if they were willing to be contacted with follow-up questions. Forty of the respondents provided contact information, and three were contacted with clarifying questions.

Response Rate

Of the 358 companies with email addresses, invitation emails were successfully delivered to 321. After the survey launch, five companies contacted the researchers and requested to be removed from the list of potential respondents, leaving a pool of 316 potential respondents.

Ninety-one respondents clicked the link to access the survey, and 70 respondents either partially or fully completed the web survey, for a response rate of 22 percent (70/316).⁴

Seven respondents did not report any employees in the 10 key occupations so they were removed from the analysis.

⁴ Survey respondents appear to accurately represent the marine manufacturers and repairers according to geographic distribution, though they may over-represent the large employers. See the Industry Background and Employer Characteristics section for further details.

RESULTS

The survey results are presented in the following chapters:

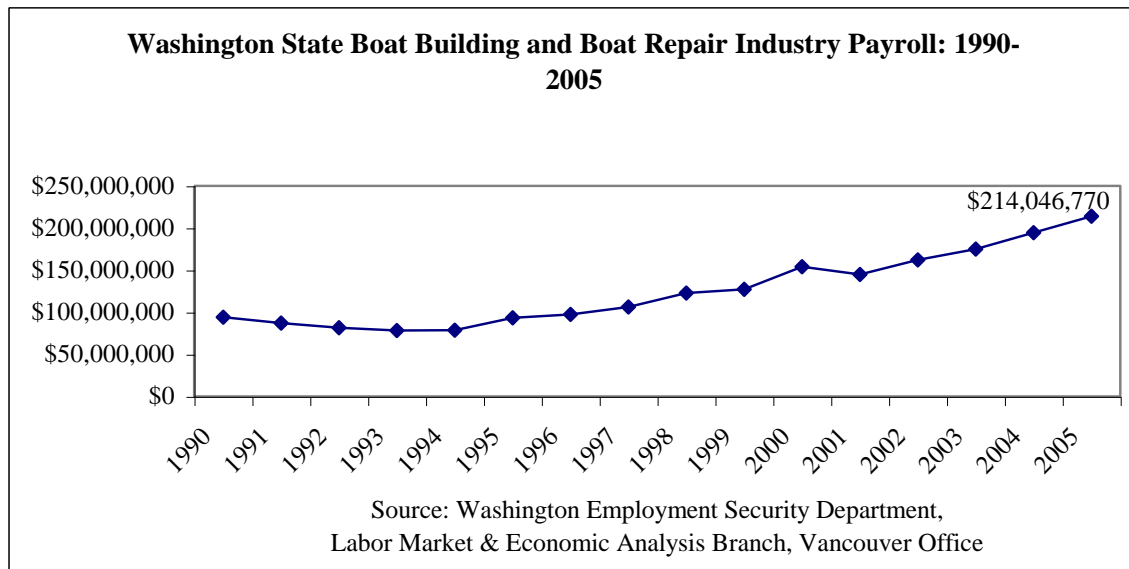
- **Industry Background & Employer Characteristics:** Industry information on payroll and employment. Company-level information on company location, company size, primary company focus and maximum vessel size.
- **Employment:** Current employment, projected employment, vacancy rates, difficulty of filling vacancies, anticipated retirements, unionization.
- **Benefits and Wages:** Average hourly wage, percentage that employment benefits add to the cost of each employee, bonus/profit sharing, employee stock option programs, 401k programs, health insurance, paid vacation time, sick leave, personal time off.
- **Safety:** Number of lost days and number of light-duty days.

Breakdowns are provided by occupation, primary company focus, company size, and selected regions of the state.

INDUSTRY BACKGROUND & EMPLOYER CHARACTERISTICS

Boat manufacturers and repair companies in Washington State represent an important and growing segment of the marine industry and of the state economy. For 2005, the Washington Employment Security Department (ESD) reported that the boat building and boat repair industry⁵ accounted for over \$214 million in annual payroll and 5,571 employees.^{6,7} (See Figures 1 and 2)

Figure 1

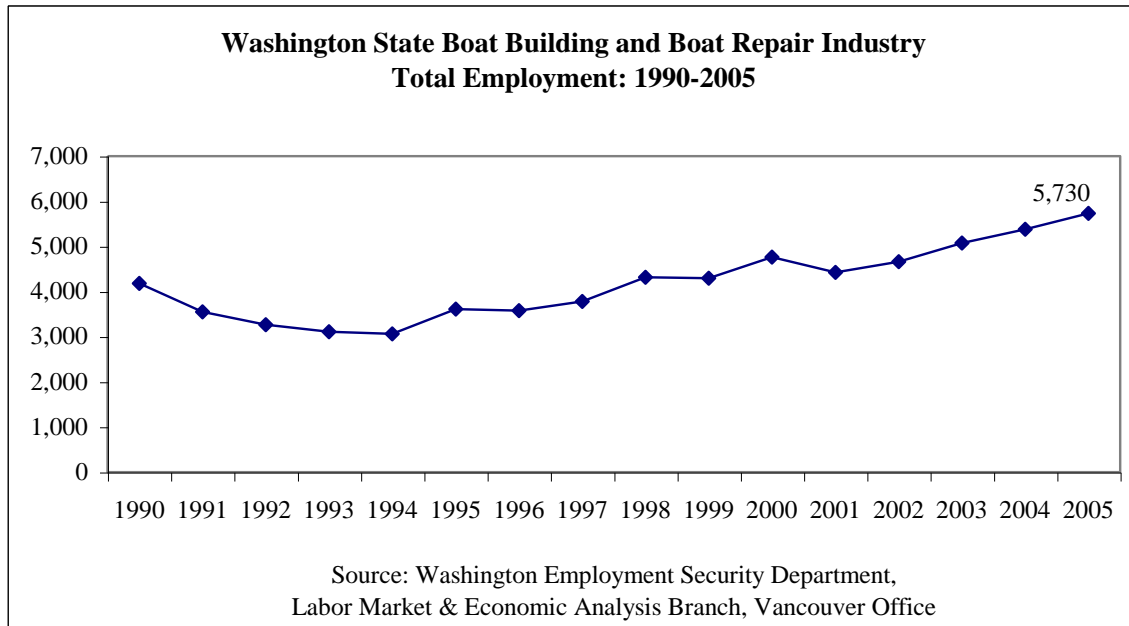


⁵ Based on NAICS 336612 and part of NAICS 811490

⁶ Washington Employment Security Department, Labor Market & Economic Analysis Branch, Vancouver Office, 17 April 2007.

⁷ The survey respondents account for 4,134 employees, or 72 percent of the 2005 employment.

Figure 2



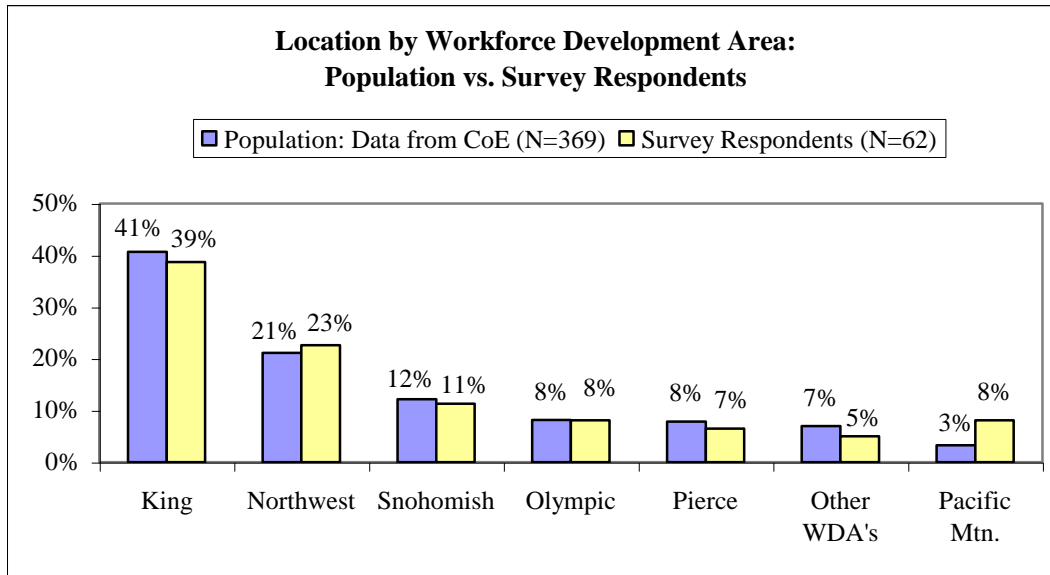
This report relies on two sources of data to describe the overall population of marine manufacturers and repairers in Washington State: 2005 data from ESD and 2007 data from the CoE/NMTA. The ESD data is based in a total of 270 companies that reported a NAICS code of 336612 or 811490. This is a narrower slice of the boat building and repair industry than the CoE and NMTA identified as the survey population, which started with a total of 372 companies.⁸

Company Location

The majority of the population of boat builders and repairers identified by the CoE and NMTA were located in King, Northwest, Snohomish and Olympic Workforce Development Areas (WDA's). The distribution of company location among the survey respondents was very similar to the distribution of the overall population. (See Figure 3) This suggests that the survey responses were geographically representative of the overall population. (see Figure 3)

⁸ There are likely two main factors leading to the discrepancy in the number of companies included in each data source: 1) the CoE included companies that have opened since 2005, and 2) the CoE included sectors of the industry outside of the two NAICS codes that were the focus of the ESD data.

Figure 3



Breakdowns of the survey results are provided in the remainder of the report for the WDA's with at least 10 respondents: King (24 employers), Northwest (14), and combined WDA's of Olympic/Pacific Mountain (10). These selected WDA's can be described as follows (See Figures 4 and 5):

- The King WDA primarily consisted of smaller companies that focused mainly on repair.
- The Northwest WDA was more heavily weighted towards larger companies that focused on manufacturing.
- The combined WDA's of Olympic/Pacific Mountain were more mixed, containing a large proportion of small companies but a fairly even mixture of manufacturing and repair.

Figure 4

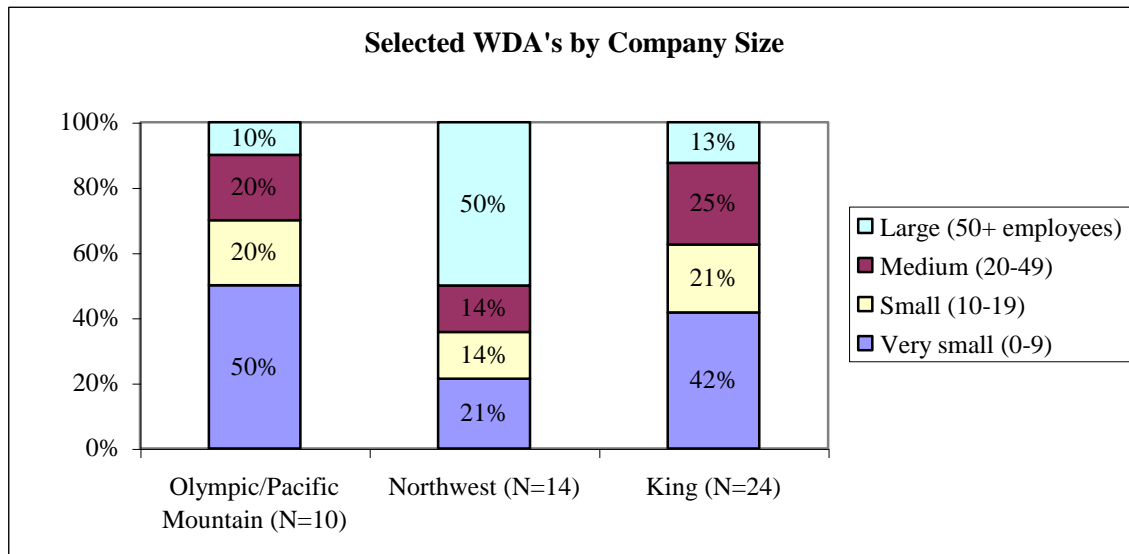
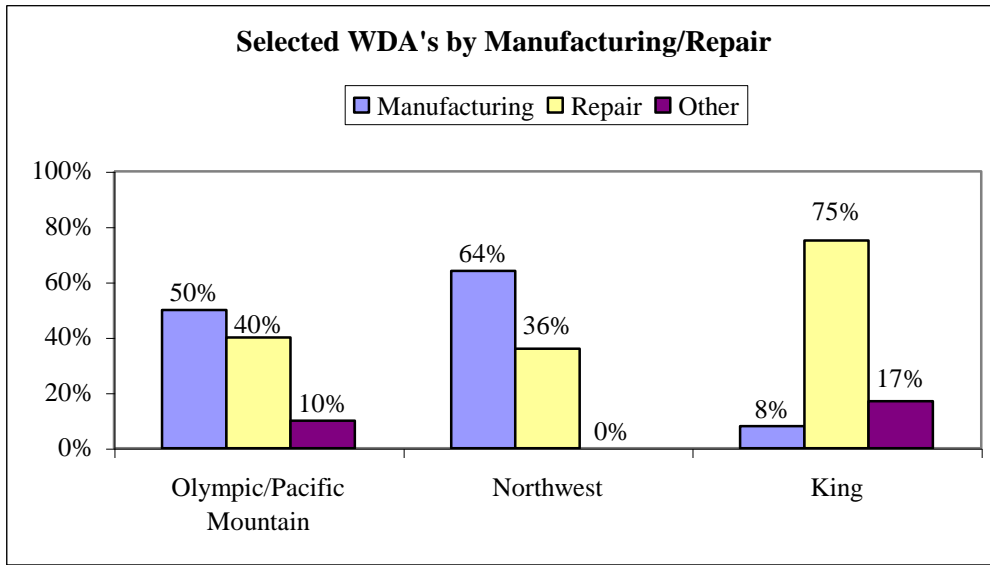


Figure 5

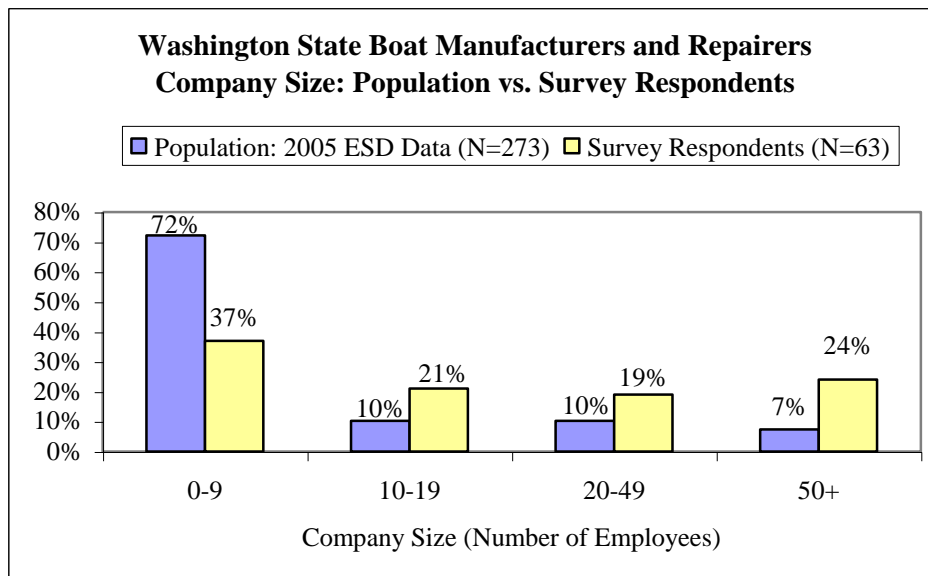


Company Size

It appears that a greater percentage of the large employers responded to the survey than the small employers.⁹ For instance, large companies (with over 50 employees) comprised 7 percent of the overall population but 24 percent of the survey respondents. (See Figure 6)

This result is not surprising since small companies may have less time to spend responding to surveys. While reviewing the summary-level findings below, please keep in mind that the viewpoints of the larger employers may be over-represented.

Figure 6

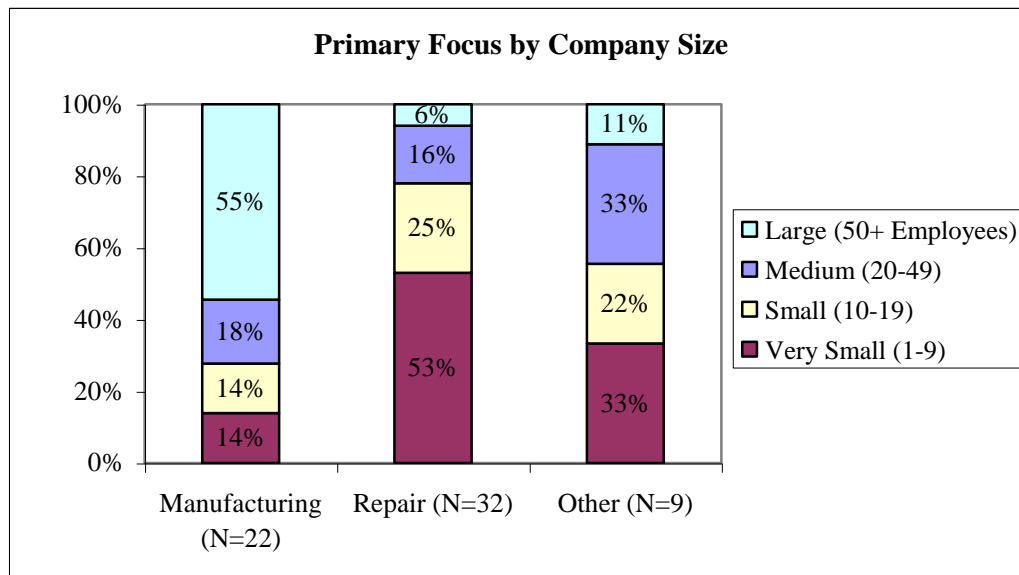


⁹ The 2005 ESD data was used to represent the population in the company size comparisons. Company size was not available for the CoE/NMTA population.

In general, the companies responding to the survey ranged in size from one to 1,050 employees, with a median of 15.¹⁰ Thirty-seven percent of the respondents had fewer than 10 employees. Twenty-one percent had 10 to 19 employees. Nineteen percent reported 20-49 employees, and 24 percent had at least 50 employees.

Companies that primarily focused on manufacturing tended to be larger companies. Over half of the manufacturers (55%) had 50 employees or more, compared to only 6 percent of the companies focused on repair. In contrast, companies with a primary focus on repair appeared to be mainly smaller companies. Over three-quarters of the repairers (78%) had fewer than 20 employees, compared to about one-quarter of the manufacturers (28%). (See Figure 7)

Figure 7



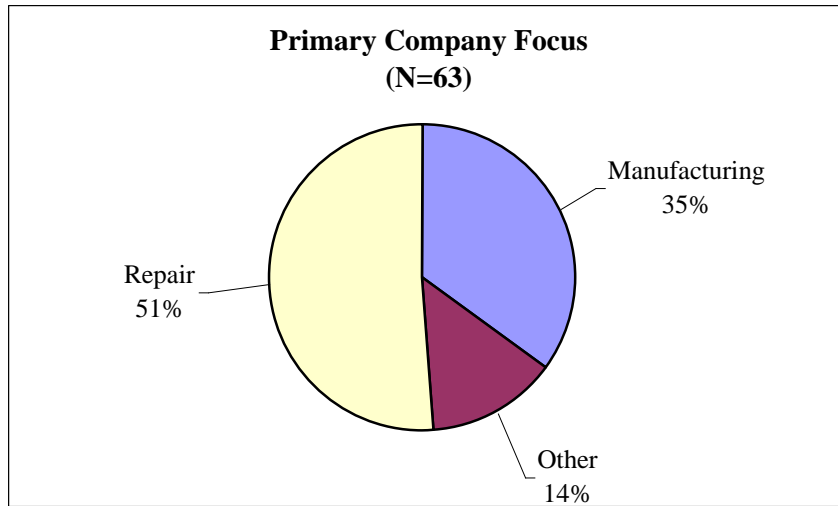
Primary Company Focus: Repair vs. Manufacturing

Respondents were asked whether their primary focus was marine repair, manufacturing, or something else. (See Figure 8)

- About half of the respondents primarily focused on repair (51%).
 - Of the repairers, 13 percent also did manufacturing work.
- Roughly one-third of the respondents primarily focused on manufacturing (35%).
 - Over half of the manufacturers (55%) also did repair work.
- Fourteen percent had a different primary focus, including the following:
 - Marine construction
 - Sales: marine engines, marine accessories, sails
 - Moorage and fuel
 - Boat dealership

¹⁰ The median is one way to report the “average” of a set of numbers; specifically, it is the value where half the cases fall below it, and half are above.

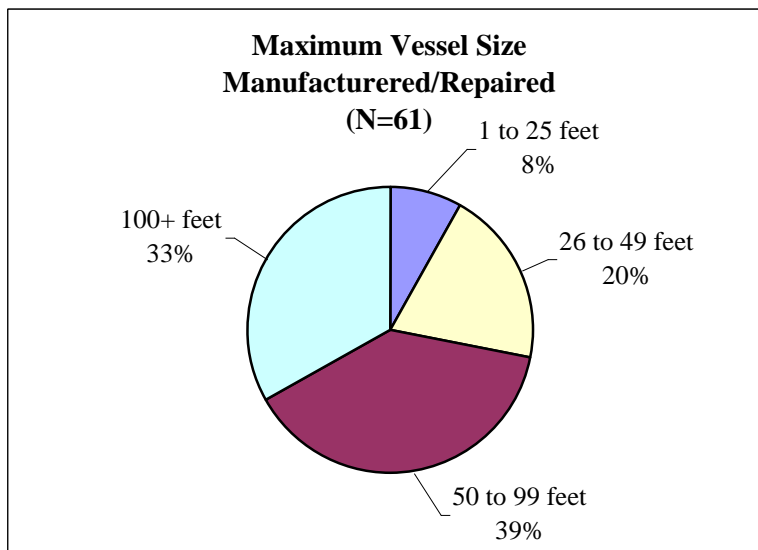
Figure 8



Maximum Vessel Size

Eight percent of the respondents manufactured or repaired vessels with a maximum size of up to 25 feet. Twenty percent worked on vessels with a maximum length of 26 to 49 feet. Thirty-nine percent worked on vessels with a maximum size of 50 to 99 feet. One-third (33%) worked with vessels with a maximum size of 100 feet or more.

Figure 9



EMPLOYMENT

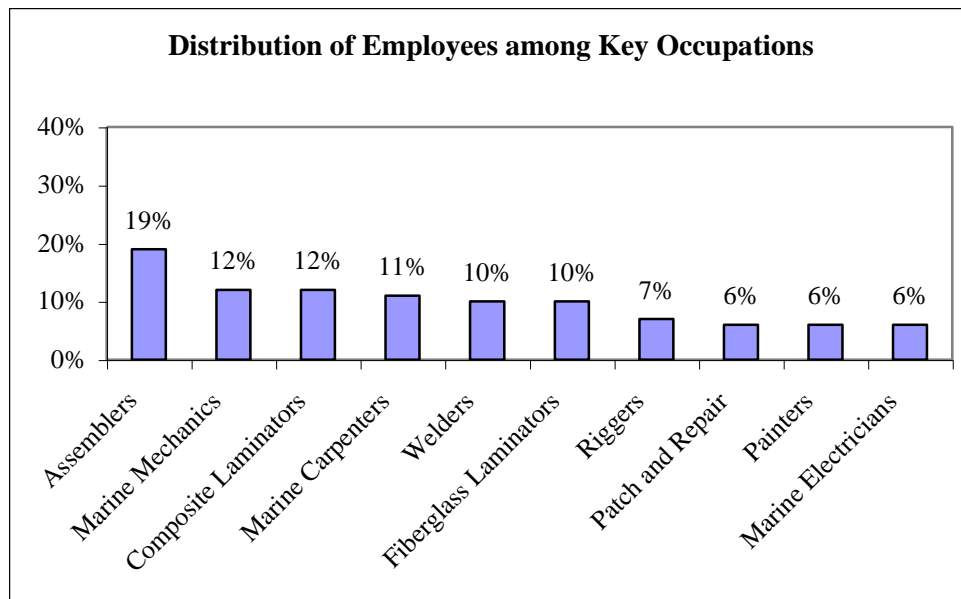
This survey asked questions about the current number of employees, the predicted change in employment by occupation over the next 2 years, current vacancies, anticipated retirements, and unionization. Each of these topics is addressed below.

Number of Employees in Key Occupations

This survey question asked respondents to report how many full-time and part-time employees they had in each of the key occupations. The numbers below provide a “snapshot” of employment at the time of the survey. (See Figures 10 and 11)

- The 63 responding companies reported a total of 2,277 employees in the 10 key occupations at the time of the survey.
- The employees were fairly evenly distributed among the occupations, with each occupation accounting for between 6 and 19 percent of the reported employment. Assemblers were the most common type of employee among survey respondents (434). The occupations with the fewest employees were marine electricians (129), painters (145), and patch and repair (147).
- One-third (33%) of the employees worked for an organization focusing on repair, 62 percent worked for a manufacturer, and 5 percent worked for an organization with another primary focus.
- The most common occupations among manufacturers were assemblers (21%), laminators (composite, 18%; fiberglass, 15%), and marine carpenters (13%).
- Among repair organizations, the most common occupations were marine mechanics (22%), assemblers (17%), welders (13%), marine electricians (12%) and riggers (12%).

Figure 10



Number of Employees in Key Occupations: Full-Time and Part-Time
Figure 11

	Full-time Employees		Part-time Employees		Total Employees		
	Number Companies	Number Employees	Number Companies	Number Employees	Number Companies	Number Employees	Column %
Marine Carpenters	30	251	5	6	32	257	11%
Marine Electricians	25	127	1	2	25	129	6%
Marine Mechanics	39	262	7	12	41	274	12%
Welders	23	235	2	2	24	237	10%
Fiberglass Laminators	13	227	3	3	15	230	10%
Composite Laminators	11	267	0	0	11	267	12%
Riggers	24	149	5	8	27	157	7%
Assemblers	22	426	3	8	23	434	19%
Patch and Repair	15	143	3	4	16	147	6%
Painters	27	141	3	4	27	145	6%
Total	60	2228	21	49	63	2,277	100%

Forecast Growth/Decline in Employment

Respondents were asked to estimate the number of employees they expect to have in each occupation in 2009. Please note that this is a “snapshot” of expectations and does not show the large fluctuations that may occur due to changing market conditions or other economic factors.

- Overall, employers anticipated 24 percent growth in employment within the 10 key occupations by 2009. (See Figures 12 and 13)
- Anticipated growth for most of the key occupations was 10 to 20 percent.
 - The most dramatic growth was expected among composite laminators, an increase of 75 percent (199 additional employees among surveyed employers). Forecast growth of employment in fiberglass lamination was the lowest, at 13 percent (29 additional employees). These results support anecdotal reports that many companies are transitioning from fiberglass to composite lamination. (See Figures 12 and 13)
 - The high rate of growth among composite laminators was anticipated across manufacturers and repairers and companies of all sizes.

Employment Forecasts by Manufacturing/Repair

- The occupation with the largest anticipated growth among manufacturers was composite laminators (75% increase, 193 additional employees).
- The occupation with the largest anticipated percentage growth among repairers was composite laminators (67% increase, 6 additional employees). The occupation with the largest growth in the count of employees among repairers was marine mechanics (16% growth, 26 additional employees).

Employment Forecasts by WDA

Examined by location, the Northwest WDA anticipated the highest rate of growth (45%, 272 additional employees), followed by the combined Olympic/Pacific Mountain WDA (30%, 49 additional employees), and the King WDA (15%, 121 additional employees).

- In the Northwest WDA, most of the growth was expected in composite laminators (an additional 181).
- In the Olympic/Pacific Mountain WDA, the largest proportion of the growth was expected in marine carpenters (an additional 11). This finding may be indicative of the high percentage of wooden boat activity in this region.
- In the King WDA, most of the growth was anticipated in marine mechanics (an additional 39).

Figure 12

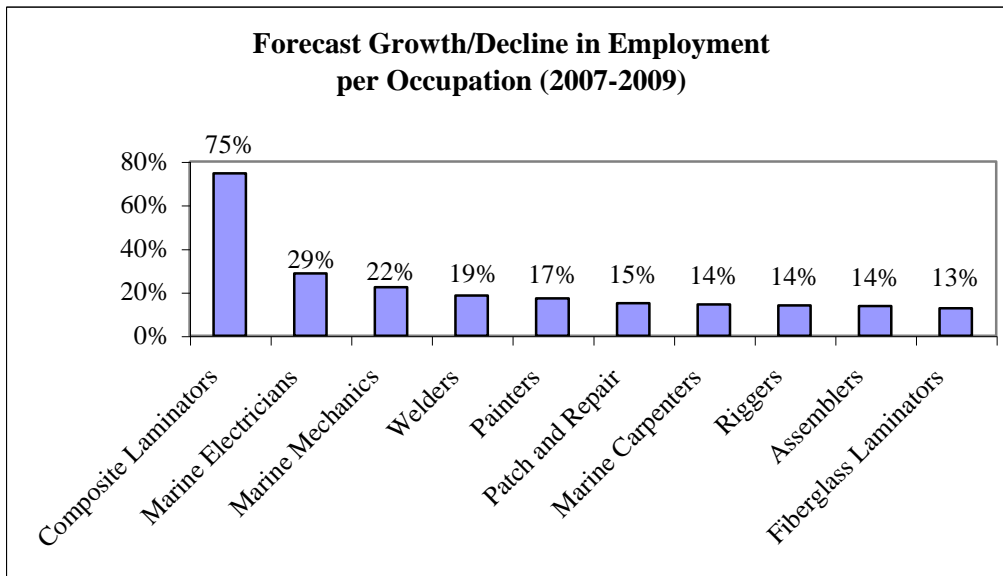


Figure 13
Forecast Growth/Decline in Employment per Occupation (2007-2009)

	Number of Companies	Total Forecast Employees	Change in Number of Employees	Percent Change
Marine Carpenters	31	294	+37	14%
Marine Electricians	29	166	+37	29%
Marine Mechanics	41	335	+61	22%
Welders	24	281	+44	19%
Fiberglass Laminators	16	259	+29	13%
Composite Laminators	12	466	+199	75%
Riggers	28	179	+22	14%
Assemblers	24	493	+59	14%
Patch and Repair	15	169	+22	15%
Painters	27	170	+26	17%
Total	63	2,813	+536	24%

Vacancies

Respondents reported the number of vacancies they were trying to fill at the time of the survey in each of the key occupations. These numbers provided the basis for calculating a snapshot of the vacancy rates at the time of the survey.

- The total number of vacancies reported by the respondents was 228, for an overall vacancy rate of 9 percent.¹¹ (See Figure 14)
- Overall, the greatest numbers of vacancies were among marine mechanics (42), welders (31), and composite laminators (31).

Vacancies by Manufacturing/Repair and Company Size¹²

- Among manufacturers, the occupations with the most vacancies were welding (29) and composite lamination (27).
- Within the repair organizations, the occupation with the most vacancies was marine mechanic (26).

Vacancies by WDA

- In the King WDA, the majority of the vacancies were in assemblers (28), welders (21), and marine mechanics (19).
- In the Northwest WDA, most of the vacancies were in assemblers (10) and marine mechanics (7).

¹¹ The vacancy rate was computed as the number of vacancies divided by the total desired employment (current employment plus vacancies).

¹² Since manufacturers tended to be large and repair-focused businesses were smaller, these results are combined.

- In the Olympic/Pacific Mountain combined WDA’s, the majority of the vacancies were in marine carpenters (8).

**Figure 14
Vacancies per Occupation**

	Number of Companies with Vacancies	Total Desired Employment (Current employment + vacancies)	Current Vacancies	Vacancy Rate
Marine Carpenters	12	269	22	8%
Marine Electricians	11	140	16	11%
Marine Mechanics	23	293	42	14%
Welders	9	245	31	13%
Fiberglass Laminators	7	247	24	10%
Composite Laminators	5	298	31	10%
Riggers	14	167	19	11%
Assemblers	7	442	14	3%
Patch and Repair	7	155	10	6%
Painters	10	164	19	12%
Total	45	2,420	228	9%

Difficulty of Filling Vacancies

The survey asked respondents to report how difficult it has been to fill vacancies in each position over the past year. This was a multiple choice question with response options of “not difficult”, “somewhat difficult”, and “very difficult”. Between 10 and 23 companies reported on each occupation. (See Figure 15)

- Within each occupation, the difficulty of filling vacancies varied quite a bit between the respondents. Some companies reported that recruiting had been very difficult and others reported that it was not difficult.
- Overall, positions for marine mechanics were reported as the most difficult to fill, which is supported by the fact that marine mechanic was the occupation with the most vacancies.
- The occupation that was reported as being the easiest to fill was assemblers.

Recruiting Difficulty by Manufacturing/Repair

Repairers were more likely than manufacturers to report that it was “very difficult” to fill vacancies for all occupations except welders, patch and repair, and painters.

Recruiting Difficulty by Company Size

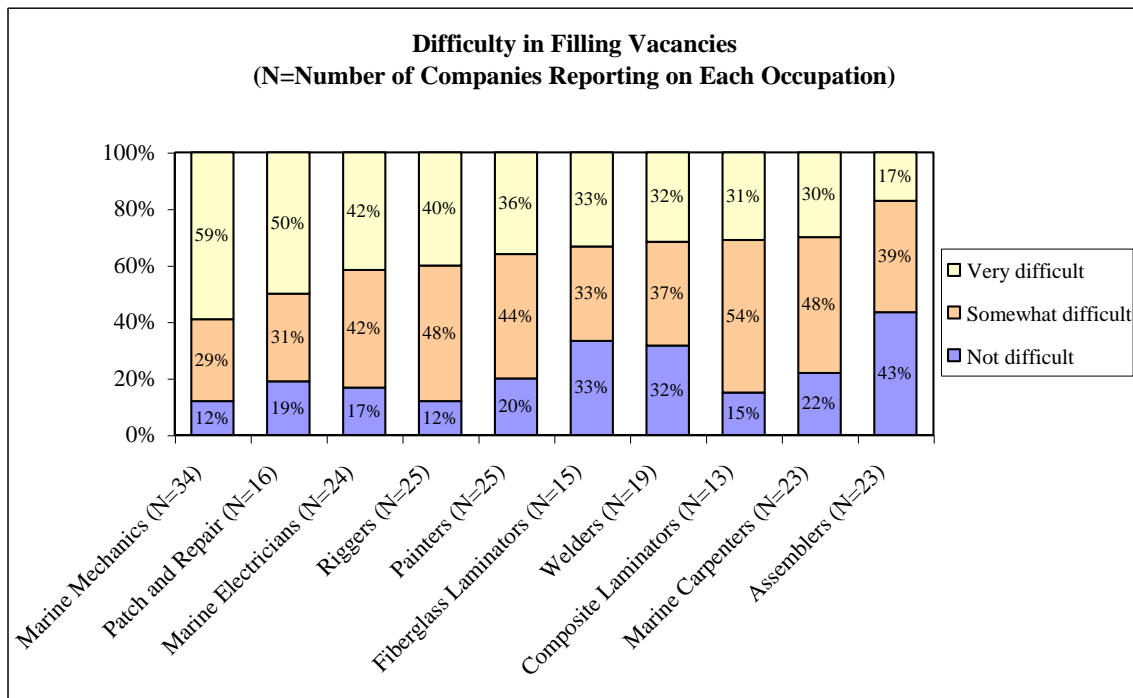
Very small (1-9 employees) and small companies (10-19 employees) were more likely than larger companies to report that it was “very difficult” to fill vacancies for marine electricians, marine mechanics, fiberglass and composite laminators, riggers, and assemblers.

Recruiting Difficulty by WDA

The difficulty of recruiting for the key occupations varied by WDA:

- In the King WDA, respondents reported the most difficulty filling vacancies in marine mechanics and marine electricians.
- In the Northwest WDA, respondents indicated that the most difficult openings to fill were in welding and patch and repair.
- In the Olympic/Pacific Mountain combined WDA’s, respondents reported that the most difficult vacancies to fill were marine electricians, fiberglass laminators, and patch and repair.

Figure 15



Anticipated Retirements

Respondents reported how many current employees they anticipate losing to retirements in the next five years (2007-2012).

- Overall, respondents indicated that they expect 10 percent of their employees in the key occupations to retire within five years. (See Figures 16 and 17)
- Anticipated retirements ranged from 1 to 16 percent among the different occupations, with most occupations falling between 9 and 16 percent.
- The largest percentage of retirements was anticipated to be within marine electricians (16%, 20 employees retiring among 10 companies).
- The lowest percentage of retirements was expected within composite laminators (1%, 4 employees retiring among 4 companies). This low retirement rate is not surprising since composite lamination is a technical field that has developed somewhat recently and has likely attracted a younger workforce.
- Repair organizations were expecting retirements at three times the rate of manufacturers (repair: 18% and 137 retirements, manufacturing: 6% and 79 retirements).

Figure 16

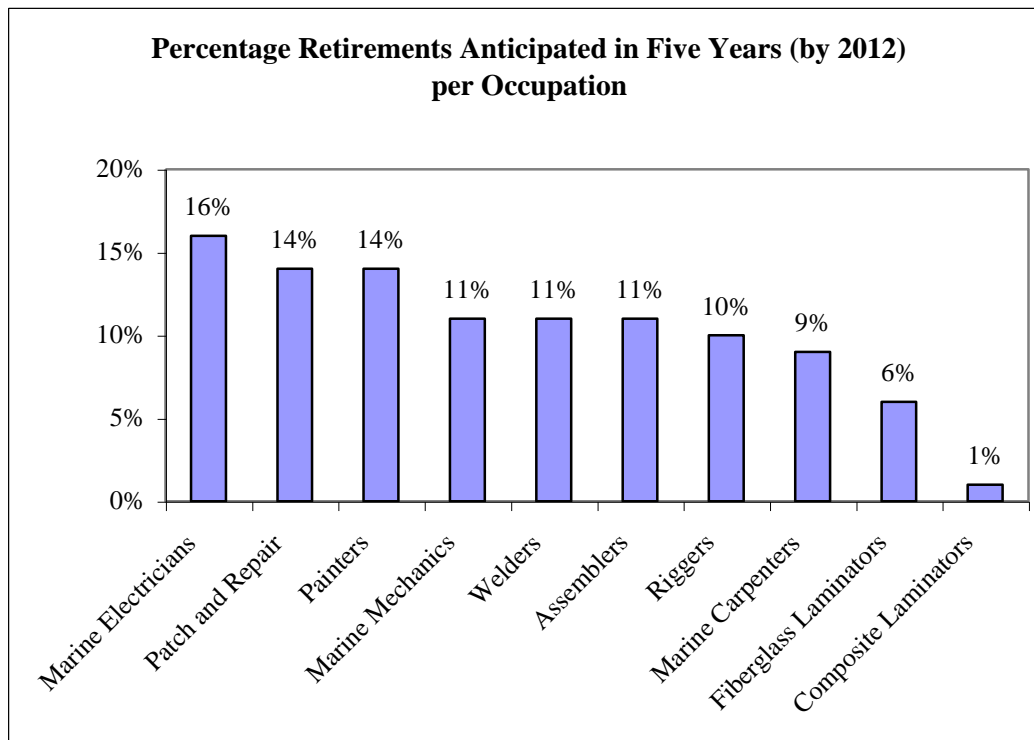


Figure 17
Anticipated Retirements in Five Years (2007-2009) per Occupation

	Number of Companies Reporting Retirements	Current Employees	Anticipated Retirements	Retirement Rate
Marine Carpenters	12	257	23	9%
Marine Electricians	10	129	20	16%
Marine Mechanics	16	274	30	11%
Welders	5	237	27	11%
Fiberglass Laminators	7	230	14	6%
Composite Laminators	4	267	4	1%
Riggers	8	157	16	10%
Assemblers	6	434	49	11%
Patch and Repair	8	147	20	14%
Painters	9	145	20	14%
Total	32	2277	223	10%

Unionization

For each occupation, respondents reported whether or not their employees were unionized.

- Overall, unionization was not common among the respondents. Only three companies reported having unionized employees. (See Figure 18)
- The occupations that were most likely to be unionized were marine carpenters, riggers, marine electricians, and marine mechanics.
- None of the companies responding to the survey reported any unionization among the composite laminators or patch and repair employees.
- While unionization was rare for both manufacturers and repairers, it covered more occupations among repairers. Only one manufacturer reported unionization, and the unionization only covered a single occupation (marine carpenters). In contrast, while only two repairers reported any unionization, it covered all of the occupations except for composite laminators and patch and repair.
- Company size did not appear to affect unionization. One very small employer (1-9 employees), one mid-sized employer (20-49 employees) and one large employer (50 or more employees) had unionized occupations. (See Figure 18)

Figure 18
Number of Companies with Unionized Employees in Key Occupations

	Number of Companies with Unionized Employees
Marine Carpenters	3
Marine Electricians	2
Marine Mechanics	2
Welders	1
Fiberglass Laminators	1
Composite Laminators	0
Riggers	2
Assemblers	1
Patch and repair	0
Painters	1
Total	3

WAGES AND BENEFITS

The survey covered a variety of topics regarding wages and benefits. Specific employee benefit topics included profit sharing, stock options, 401k programs, health insurance, and paid leave.

Overall, one of the strongest findings was that smaller companies were more likely to offer higher wages while large companies tended to have more comprehensive benefits. The same trends were present among manufacturing versus repair organizations since most repairers were small companies, and manufacturers tended to be large. Trends by WDA weren't quite as straightforward, although the King WDA tended to have the highest wages while companies in the Northwest WDA offered the most benefits.

Median Hourly Wage

Respondents provided the average hourly wage for each key occupation at the entry level, with five years of experience, and at the maximum potential wage. These wages are presented in Figure 19.

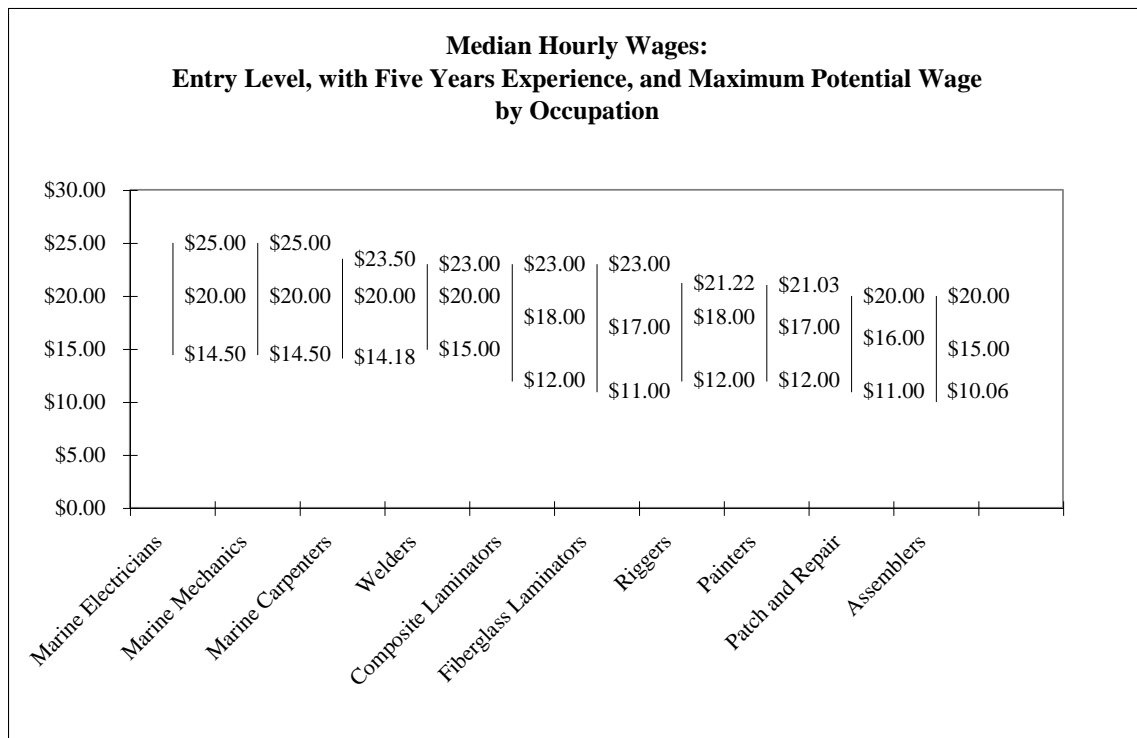
For each occupation, the figure provides three levels of wages. The bottom number is the median entry-level wage; the center number is the median wage with five years experience, and the top number is the median maximum potential wage¹³. The number of companies reporting wages ranged from 13 to 37, depending upon the occupation.¹⁴

¹³ The median is one way to report the “average” of a set of numbers; specifically, it is the value where half the cases fall below it, and half are above.

¹⁴ Please note: the survey question on unionization was intended to enable exploration of the hypothesis that unionized companies offer higher wages. However, since only three respondents had unionized employees, this analysis was not possible.

- The occupations with the highest maximum potential wages were marine electricians and marine mechanics (\$25.00/hr.).
- The occupations with the lowest maximum potential wages were patch and repair and assemblers (\$20.00/hr.).
- At the five-year experience level, marine electricians, marine mechanics, marine carpenters, and welders all averaged \$20.00 per hour (the highest of the five-year experience wages.)
- Welders had the highest entry-level wages (\$15.00/hr.).
- Assemblers started with the lowest entry-level wages (\$10.06/hr.).
- The laminators generally saw the most growth between their entry-level and maximum potential wages. Fiberglass laminators had the possibility to increase their wages by \$12.00 per hour between the entry level and maximum potential. Composite laminators could increase by \$11.00 per hour.

Figure 19



Wages by Manufacturing/Repair (See Figure 20)

Median wages were higher at companies focusing on repair than manufacturing, by an average of \$3.09 at the entry level, \$3.87 at the five-year level, and \$4.23 at the maximum potential wage. The higher wages among repair organizations held true for all occupations.

The wage disparity could be due to a couple of factors:

- 1) The majority of the repair organizations are small companies, which tended to have higher wages, and
- 2) Repair organizations' workforce tended to include higher proportions of the higher-paying occupations, such as marine mechanics.

Wages by Company Size (See Figure 21)

Wages were lowest at the large companies (50 or more employees). Compared to the very small companies, large companies paid an average of \$2.84 less at the entry level, \$3.17 less at the five-year level, and \$4.35 less at the maximum level.

Wages by Workforce Development Area (See Figure 22)

Generally, median hourly wages at the five-year level were highest in the King WDA, mid-range in the Northwest WDA, and lowest in Pacific Mountain/Olympic WDA's.

Figure 20

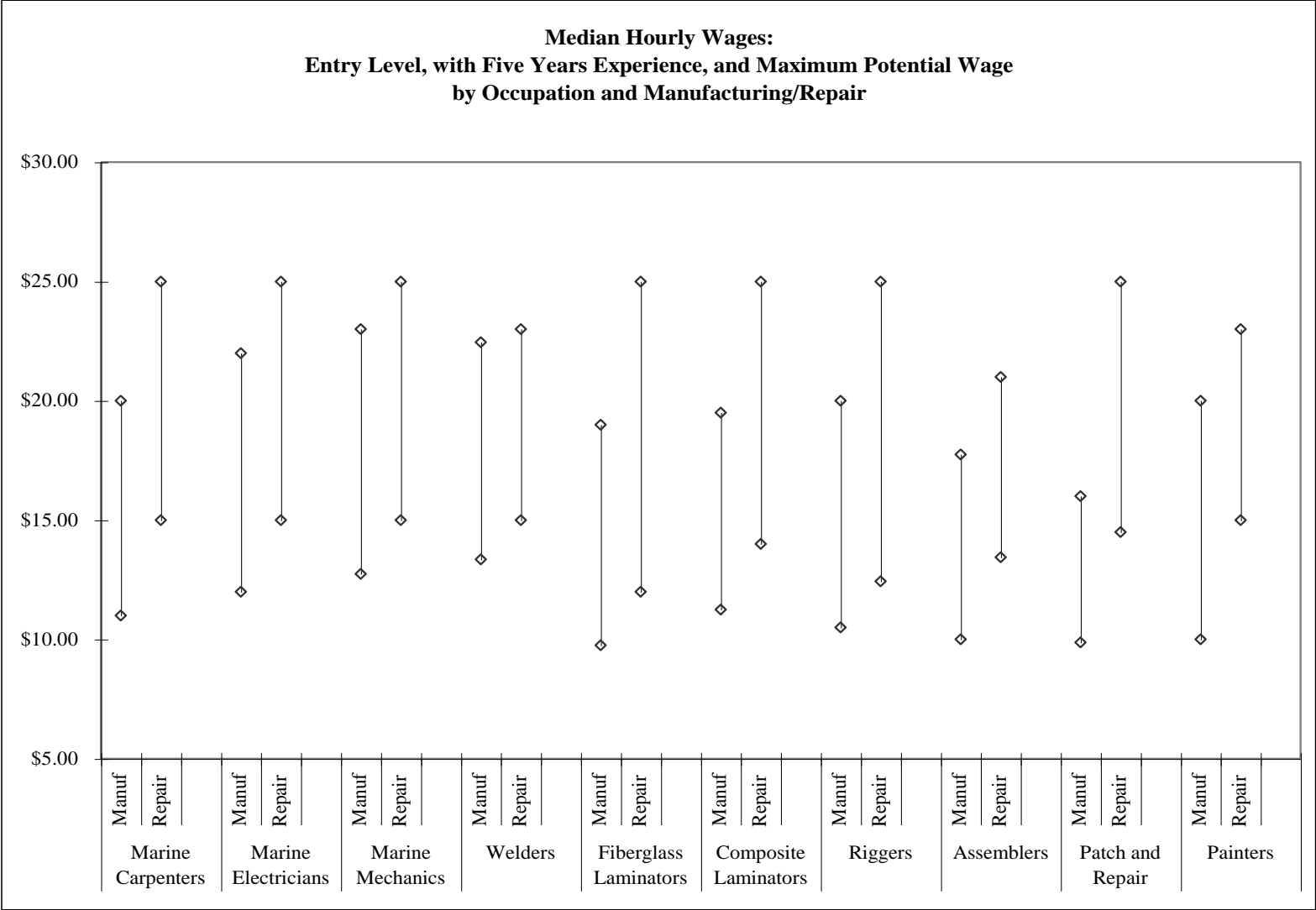


Figure 21

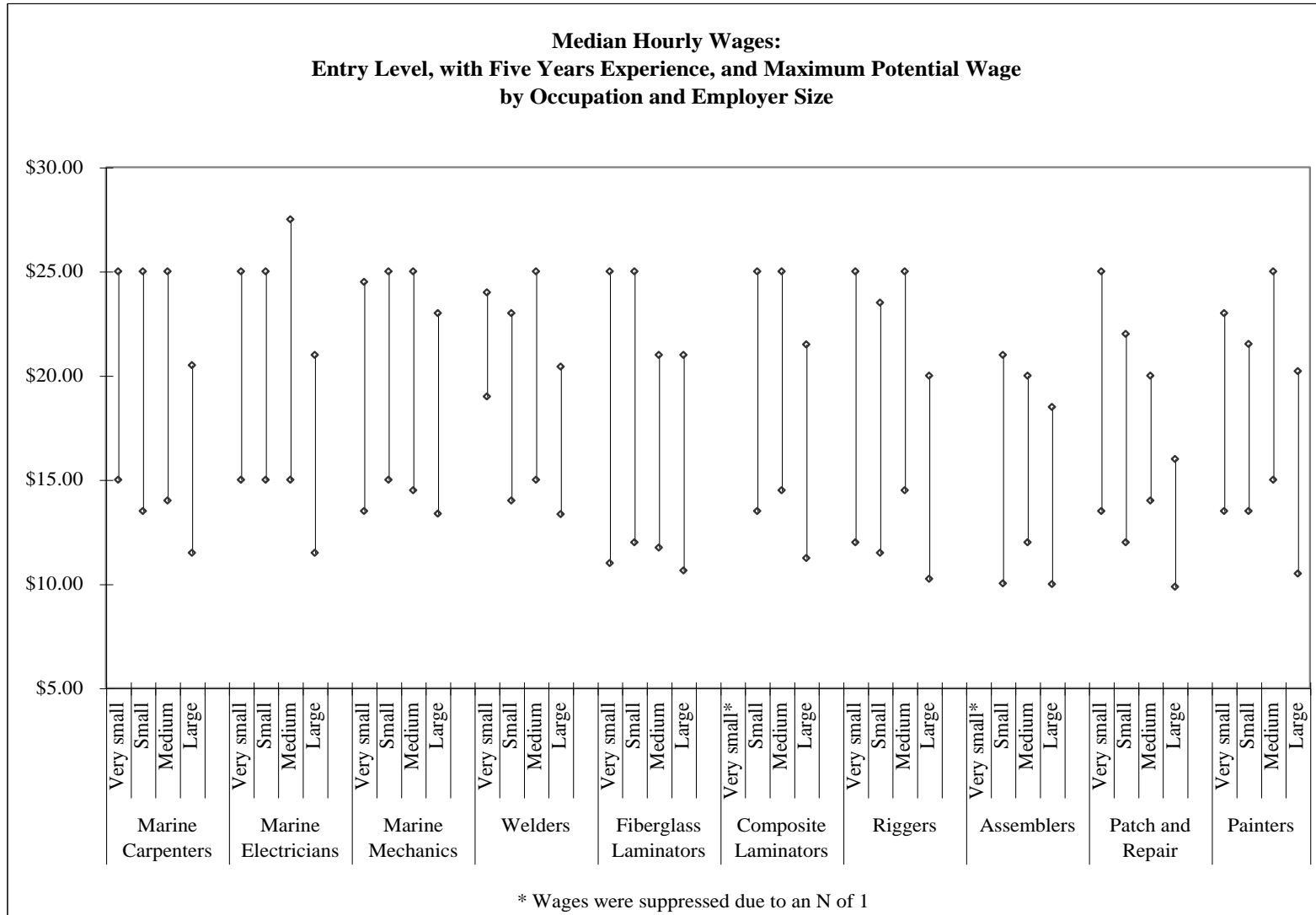
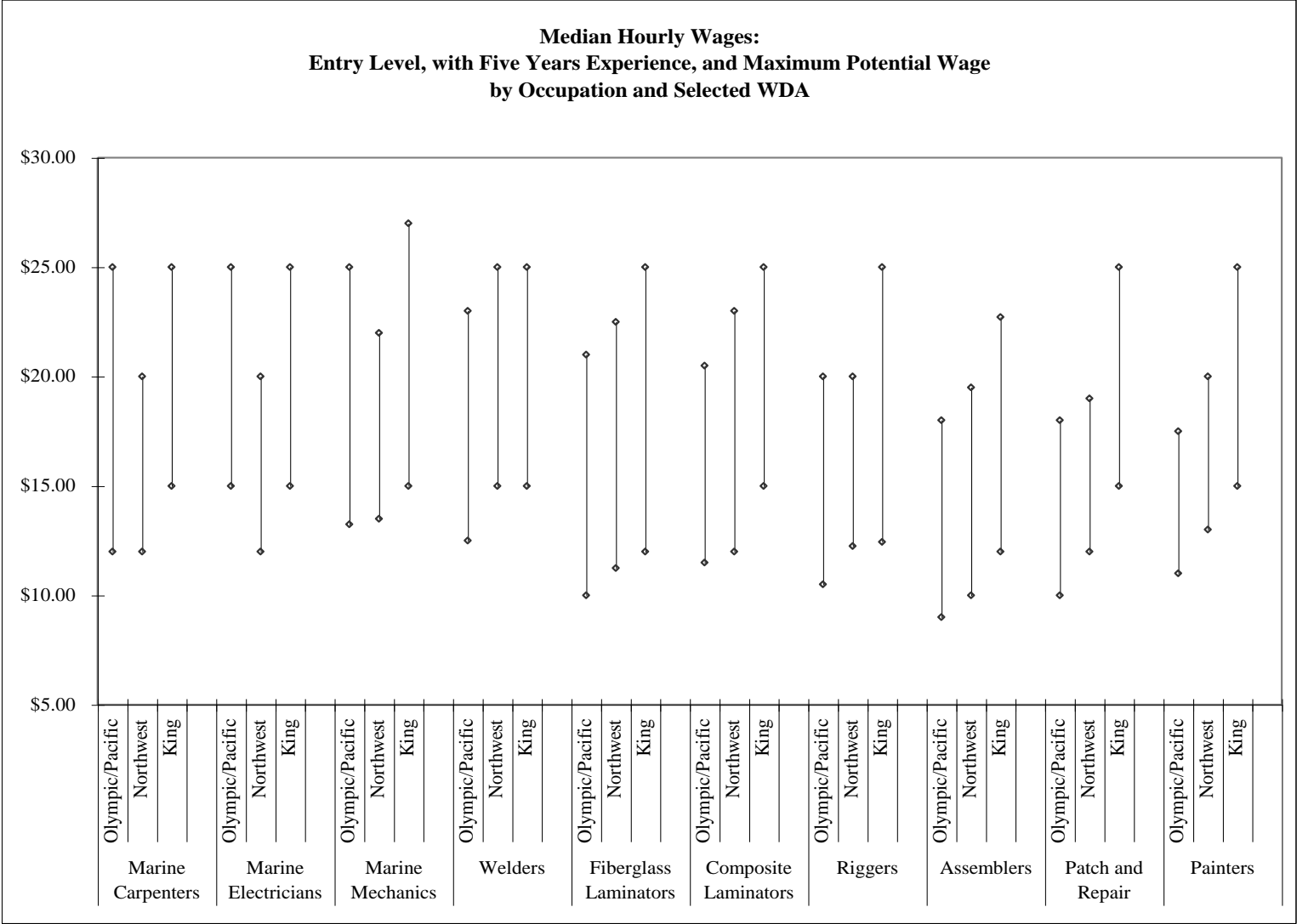


Figure 22



Percentage that Benefits Add to the Cost of Each Employee

Respondents reported the percentage their total benefits packaged added to the cost of each employee. In general, employment benefits added a median of 18 percent to the cost of each employee. (See Figure 23)

Benefits Costs by Manufacture/Repair

The median percentage that benefits added to the cost of each employee was similar between manufacturers (18%) and repairers (17%).

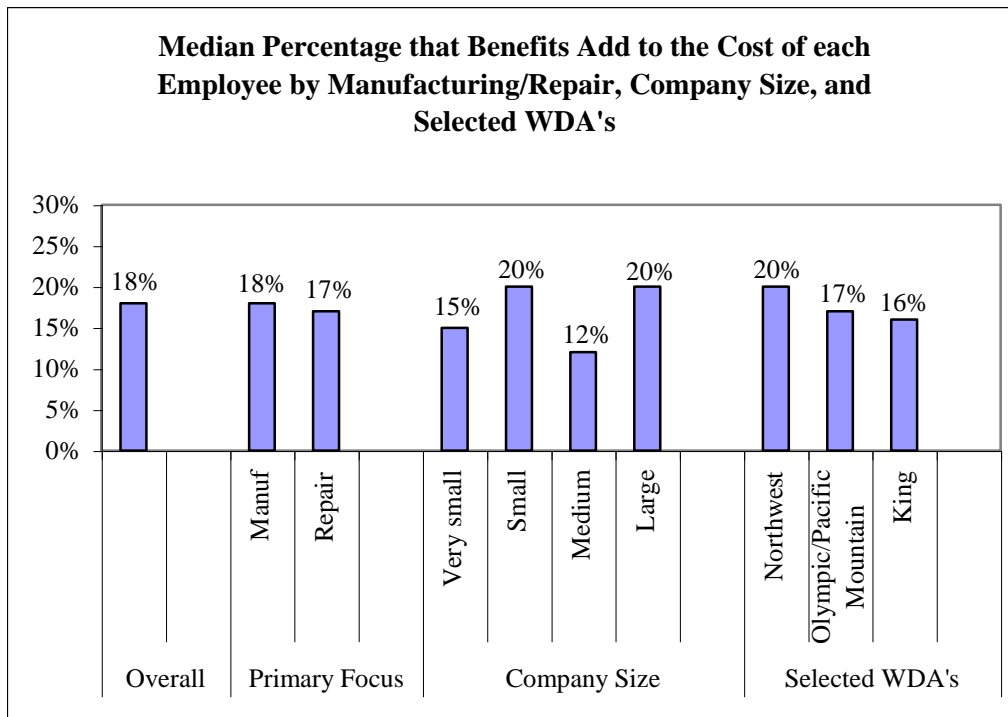
Benefits Costs by Company Size

The amount that benefits added to the cost of each employee varied from 12 to 20 percent, depending on the size of the company. Very small companies reported that benefits added 15 percent to the cost of each employee, compared to 20 percent for the small companies, 12 percent for the medium companies and 20 percent for the large companies.

Benefits Costs by WDA

The Northwest WDA had slightly higher benefit costs per employee (20%) than the King (16%) or Olympic/Pacific Mountain (17%) WDA's.

Figure 23



Bonus/Profit Sharing, Employee Stock Option Program, 401k

The survey asked if the respondents offered bonuses/profit sharing, an employee stock option program (ESOP), or a 401k program. If they had a 401k program, they were asked if they match employee contributions, and, if so, the maximum percentage of employee contributions that the company would match. (See Figure 24)

- Over two-thirds of the companies participating in the survey (68%) offered bonuses or profit sharing.
- More than half of the respondents offered a 401k retirement program (54%), and over three-quarters of those with a 401k program (76%) matched employees' contributions.
 - The maximum percentage of employees' contributions that the companies matched ranged from 2 to 50 percent, with a median of 4 percent.
- Only 5 percent of the respondents had Employee Stock Option Plans (ESOPs). These were mainly large manufacturers in the Northwest WDA.

Benefits by Manufacture/Repair

Manufacturers were more likely than repairers to offer bonuses/profit sharing, ESOP's, and 401k's.

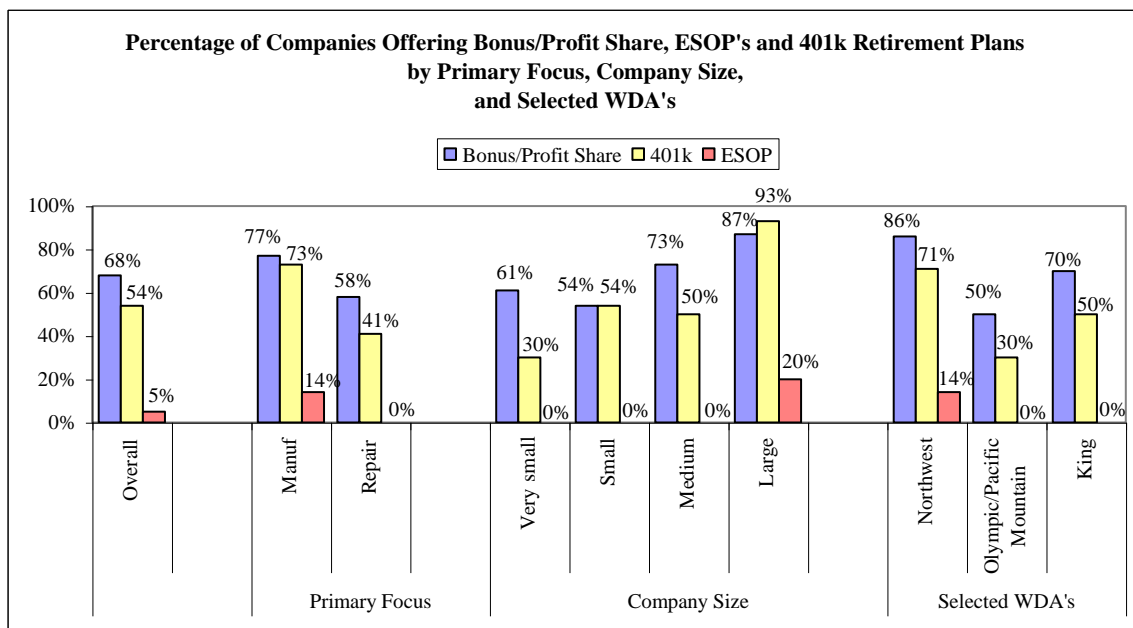
Benefits by Company Size

The likelihood that employers offered these benefits tended to increase with company size.

Benefits by WDA

In general, more companies in the Northwest WDA offered benefits than the other WDA's. This is consistent with the fact that the Northwest WDA had more manufacturers and large companies.

Figure 24

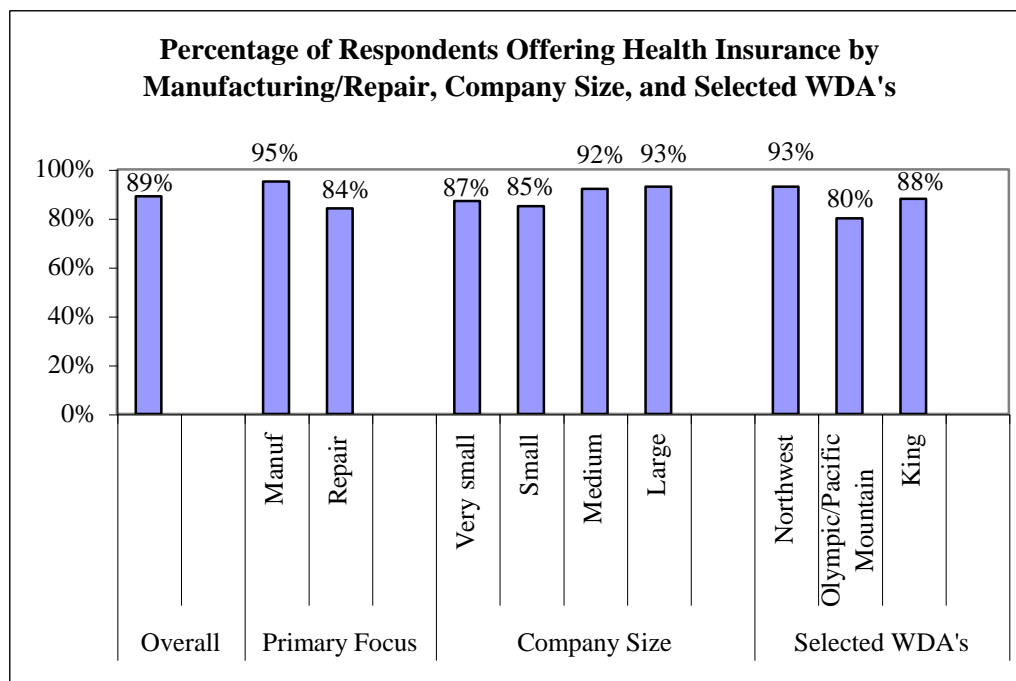


Health Insurance

Respondents reported whether or not they offered health insurance to their employees and, if so, the percentage of the cost of health insurance that employees paid for themselves (not including dependents). (See Figure 25)

The vast majority of companies offered health insurance to their employees (89%), regardless of primary company focus, size, or location. Like the other benefits, health insurance was found more frequently among larger companies, those with a primary focus on manufacturing, and those in the Northwest WDA. Employees with health insurance paid a median of 5.5 percent of the cost of their own health care, not including dependents.

Figure 25



Paid Vacation, Sick Leave, Personal Time Off (PTO)

The survey asked respondents how many hours of paid vacation, sick leave, or personal time off they offered annually to entry-level employees (after any probationary period) as well as the maximum potential number of hours. Breakdowns are presented below for paid vacation. (The number of companies reporting sick leave or PTO was too small to separate into manufacturing/repair, company size, or WDA.)

- Fifty-one of the 63 companies indicated that they offered at least one type of paid leave (paid vacation, sick leave, or PTO). Two companies indicated that they don't offer any of these benefits, and the other companies left the question blank. (See Figure 26)
 - Forty-nine offered paid vacation, 12 offered sick leave, and 13 offered PTO.

- Employees received a median of 40 hours of paid vacation annually at the entry level and 80 hours at the maximum level.
- Median annual sick leave was 22 hours at the entry level and 27 hours at the maximum level.
- Median entry-level PTO was 18 hours per year, and median PTO at the maximum level was 22.5 hours.
 - Two companies offered PTO in lieu of paid vacation and sick leave, while 11 offered it in addition to the other forms of leave.
 - Most of the companies offering PTO were manufacturers (7), compared to repairers (2) or companies with another focus (3).

Paid Vacation by Manufacturing/Repair

There were no differences in the median amount of paid vacation offered by manufacturers or repair organizations at the entry level (40 hours) or maximum level (80 hours).

Paid Vacation by Company Size

There were no differences in the median amount of paid vacation offered by companies of different sizes at the entry level (40 hours). Large companies offered a higher maximum potential number of hours of paid vacation (120 hours) than smaller companies (80 hours).

Paid Vacation by WDA

There were no differences in the median amount of paid vacation offered by companies in different WDA’s at the entry level (40 hours). The Northwest WDA offered the highest median number of maximum potential hours (100 hours), followed by King (90 hours) and Olympic/Pacific Mountain (80 hours). This is likely because the Northwest WDA has more large employers than the other WDA’s.

Figure 26
Annual Hours of Paid Vacation, Sick Leave, and Personal Time Off

	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

SAFETY

The survey explored the issue of safety by asking the number of lost and light duty days in 2005. In order to compare these numbers across companies of different sizes, they are often reported as the number of lost or light duty days per hours worked. Unfortunately, the number of hours worked was not available so this rate could not be calculated. Instead, the overall distributions are presented below.

- The median number of lost days and number of light-duty days was zero, though they ranged as high as 504 lost days and 2,583 light-duty days.
- Eighty-four percent of the respondents reported 10 or fewer lost days in 2005.
- Eighty-two percent of the companies reported 10 or fewer light-duty days in 2005.

Figure 27
Number of Lost Days and Number of Light-Duty Days in 2005

Number of Lost Days	Number of Companies	Percent
0	32	56%
1	3	5%
2	2	4%
3	2	4%
4	1	2%
4	1	2%
5	4	7%
6	3	5%
8	1	2%
11	2	4%
15	1	2%
20	1	2%
25	1	2%
30	1	2%
75	1	2%
504	1	2%
Total	57	100%

Number of Light Duty Days	Number of Companies	Percent
0	32	59%
1	1	2%
3	2	4%
5	5	9%
6	1	2%
6	2	4%
7	1	2%
10	1	2%
15	1	2%
20	2	4%
34	1	2%
85	1	2%
93	1	2%
100	1	2%
462	1	2%
2,583	1	2%
Total	54	100%

APPENDIX: SURVEY PROTOCOL

Washington State Marine Technology Industry Survey

Welcome to the Marine Industry Employment and Compensation Survey!

Here are a couple of tips for completing the survey:

- Please respond for all of your company sites located in the state. Do not include company sites located outside of Washington State.
- If you need to exit the survey and complete it at a later time, the survey will save your work. Simple press the “next page” button at the bottom of the questions that you have completed and then close the browser.
- Once you have pressed the "submit" button at the end of the survey, you will not be able to re-enter the survey.
- If you have any questions about the survey or the website, please contact Candiya Mann, WSU Research Associate, at 360-373-0468 or candiya@wsu.edu.

Survey Questions

Q1. Does your company's work primarily focus on...

- Manufacturing
- Repair
- Other
- Don't know

Q1a. [IF OTHER] What is your company's primary focus?

Q1b. [IF MANUFACTURING] Does your company also do repair work?

- Yes
- No
- Don't know

Q1c. [IF REPAIR] Does your company also do manufacturing?

- Yes
- No
- Don't know

Q2. How many employees does your company have at all of your sites in Washington State? (Please include **ALL employees**, not just hourly employees) _____

Q3. What is the zip code at your main site in Washington State? _____ zip code

Q4. What is the maximum vessel size your company produces and/or repairs (in feet)? _____ feet

We are especially interested in certain hourly jobs at your company. The following questions will focus on ten different categories of hourly occupations.

1. Marine Carpenters
2. Marine Electricians
3. Marine Mechanics
4. Welders
5. Fiberglass Laminators
6. Composite Laminators
7. Riggers (electrical/mechanical/sailboat)
8. Assemblers
9. Patch and Repair (i.e. patch and detail)
10. Painters

Please note:

- Please classify each employee in **ONE** primary occupation only. We recognize that some employees may perform work in more than one job category. For simplicity, please select the category that most closely represents each employee's primary job category.
- Please include all employees that fit in each job category, regardless of their skill level. For wage questions, please average the wage data across all skill levels, if necessary.
- This is not a comprehensive list of occupations. Employees who do not fit into any of these occupations should not be included.

Q5. How many employees do you currently have in each of these occupations?

	Number of Full-time Employees	Number of Part-time Employees
Marine Carpenters		
Marine Electricians		
Marine Mechanics		
Welders		
Fiberglas Laminators		
Composite Laminators		
Riggers		
Assemblers		
Patch and Repair		
Painters		

Q6. In the next two years (by 2009), how many employees do you expect have in each occupation? (Estimates are fine.)

	Number of Full-time Employees	Number of Part-time Employees
Marine Carpenters		
Marine Electricians		
Marine Mechanics		
Welders		
Fiberglas Laminators		
Composite Laminators		
Riggers		
Assemblers		
Patch and Repair		
Painters		

Q7. Are any of these occupations unionized at your company?

	Unionized	Not Unionized	Decline to Respond/Not Applicable
Marine Carpenters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marine Electricians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marine Mechanics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Welders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fiberglas Laminators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Composite Laminators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Riggers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assemblers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patch and Repair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Painters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q8. For each occupation, how many vacant positions are you currently trying to fill?

	Number of Current Vacancies
Marine Carpenters	
Marine Electricians	
Marine Mechanics	
Welders	
Fiberglas Laminators	
Composite Laminators	
Riggers	
Assemblers	
Patch and Repair	
Painters	

Q9. In the past year, how difficult has it been to fill vacancies in each occupation?

	Very difficult	Somewhat difficult	Not difficult	Does not apply
Marine Carpenters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marine Electricians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marine Mechanics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Welders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fiberglas Laminators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Composite Laminators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Riggers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assemblers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patch and Repair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Painters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q9. Over the next five years, how many of your current employees in these occupations do you anticipate losing to **employee retirements?**

	Retirements in the next 5 years (2007-2012)
Marine Carpenters	
Marine Electricians	
Marine Mechanics	
Welders	
Fiberglas Laminators	
Composite Laminators	
Riggers	
Assemblers	
Patch and Repair	
Painters	
Marine Carpenters	

Wages & Benefits:

Q11. What is the average hourly wage you currently offer for employees at the entry-level (after any probationary period), with five years experience, and at the maximum potential for each occupation?

	Entry-Level Hourly Wage	Hourly Wage with 5 Years Experience	Maximum Potential Hourly Wage
Marine Carpenters			
Marine Electricians			
Marine Mechanics			
Welders			
Fiberglas Laminators			
Composite Laminators			
Riggers			
Assemblers			
Patch and Repair			
Painters			

Q12. What percentage does the total benefits package add to the cost of each employee?
 _____%

Q13. Does your company offer any sort of bonus or profit sharing program?

- Yes
- No
- Don't know

Q14. Does your company offer an Employee Stock Ownership Plan?

- Yes
- No
- Don't know

Q15. Does your company offer a 401k for your employees?

- Yes
- No
- Don't know

Q15a. [IF YES] Does your company match employee 401k contributions?

- Yes
- No
- Don't know

Q15b. [IF YES] What is the maximum percentage of employee 401k contributions that your company will match through the 401k? _____%

Q16. Does your company offer health insurance coverage?

- Yes
- No
- Don't know

Q16a. [If YES] On average, what percentage of the cost of health insurance do employees pay for themselves, not including dependents? (An estimate is fine.) _____%

Q17. For each benefit that your company offers (paid vacation, sick leave and/or personal time), please provide the number of annual paid hours an entry-level employee receives (after any probationary period), and the maximum potential number of paid hours.

	Number of Annual Paid Hours: Entry-level	Maximum Potential Number of Annual Paid Hours
Paid vacation		
Sick leave		
Personal time off		

Q18. What is your company's annual downtime accident rate in 2005?

	Annual Downtime Accident Rate: Number of Days
Lost days	
Light duty days	

Q19. This is the end of the survey. Do you have any additional thoughts you would like to share or feedback about the survey?

Q20. If you are willing to be contacted by WSU researchers to answer possible follow-up questions about your responses to this survey, please enter your contact information below. This contact information will not be shared with any individual or organization outside of the WSU researchers.

a. Name: _____

b. Company Name: _____

c. Title: _____

d. Phone Number: _____

e. Email: _____

Thank you!