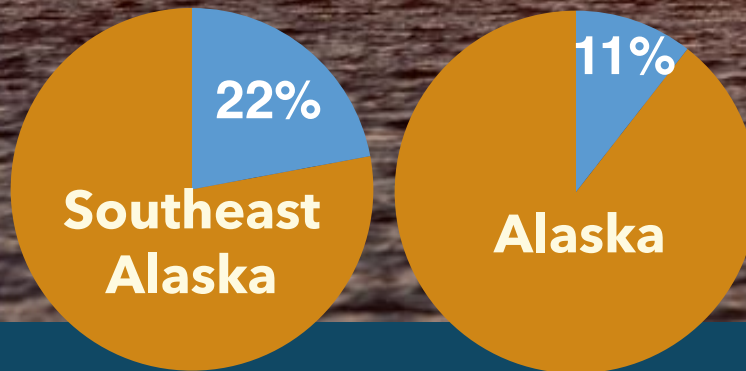


# THE MARITIME ECONOMY OF SOUTHEAST ALASKA:

## By the Numbers

### Maritime as a % of all private sector earnings



## A PUBLICATION OF SOUTHEAST CONFERENCE by Rain Coast Data

Southeast Alaska is a maritime region. Nearly every element of our economy is intermingled with the maritime economy. It is the region's largest sector outside of government; and it draws from nearly every element of the workforce.

Just over one-quarter of all Southeast Alaska wages are directly earned through ocean related employment. In Southeast Alaska there are 8,200 "blue jobs" as maritime jobs are called, with \$475 million in associated wages. However, when tracking the change of the maritime sector over time and comparing across geographies, it is simpler to focus only on the private sector (along with Coast Guard jobs). This subset includes 6,700 blue jobs, and accounts for 22% of the region's **private** sector economy.

Between 2010 and 2013, employment in the Southeast Alaska maritime industry grew by 13% (800 jobs). This includes a 49% increase in US Coast Guard jobs, a 24% increase in marine tourism jobs, a 12% increase in marine transportation jobs, and a 7% increase in seafood sector jobs.

Jobs in the ship building and repair component of this sector actually fell by two percent. During the same period, total employment earnings in this sector increased by 24% across all components of maritime in the region, an increase of \$74 million in **direct** regional wages.

Statewide this sector has also been growing, albeit a bit more slowly. Between 2010 and 2013, the private/military maritime economy of the state grew 5%—by nearly 1,300 jobs, while wages grew by \$139 million (10%). In 2013, Alaska's private and US Coast Guard maritime sector employed more than 29,000 people, and was responsible for \$1.59 billion in direct employment earnings. The largest component of the maritime sector is the seafood industry, responsible for 58% of all Alaska maritime workforce earnings.

With Alaska State ferries under construction in the state for the first time, a rebounding tourism sector, and expected increases in 2015 seafood harvests, the outlook for the maritime economy is for continued growth.



# MARITIME DATA: Southeast Alaska 2013

Private and US Coast Guard Maritime Employment & Workforce Earnings

Fishing & Seafood Processing



Jobs: **4,252**  
Wages: **\$244.5 M**  
Change in jobs  
2010-13: **+7%**



Jobs: **761**  
Wages: **\$61.1 M**  
Change in jobs  
2010-13: **+49%**

Marine Tourism



Jobs: **952**  
Wages: **\$27.9 M**  
Change in jobs  
2010-13: **+24%**

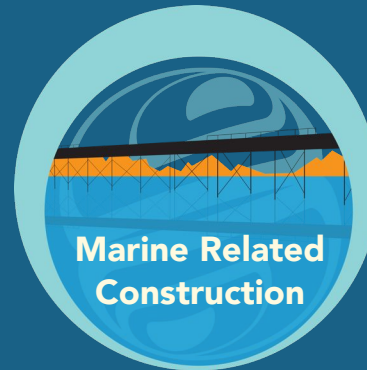


Jobs: **450**  
Wages: **\$29.6M**  
Change in jobs  
2010-13: **+12%**

Offshore Oil & Gas



Jobs: **0**  
Wages: **\$0**  
Change in jobs  
2010-13: **0%**

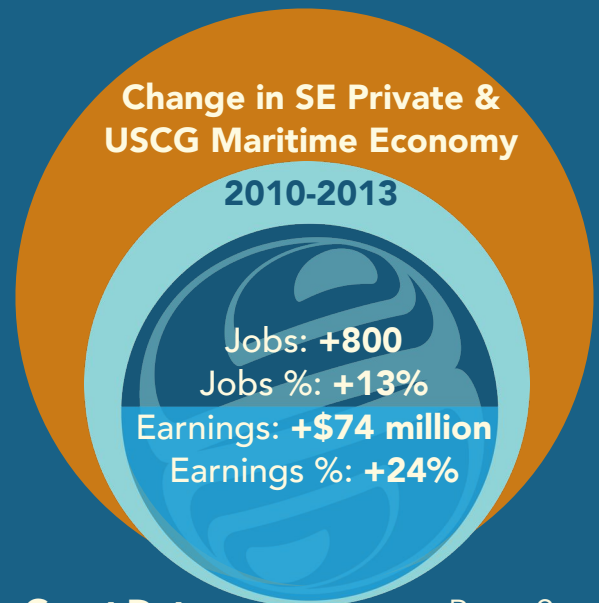


Jobs: **51**  
Wages: **\$4.3 M**  
Change in jobs  
2010-13: **+76%**

Ship Building, Repair, Marinas



Jobs: **231**  
Wages: **\$12.3 M**  
Change in jobs  
2010-13: **-2%**



Maritime icons were created by graphic illustrator Averyl Veliz. For methodology, notes and sources, see page 4.

# MARITIME DATA: Alaska 2013

Private and US Coast Guard Maritime Employment & Workforce Earnings

Fishing & Seafood Processing



Jobs: **19,562**  
Wages: **\$921.3 M**  
Change in jobs  
2010-13: **+6%**



Jobs: **2,333**  
Wages: **\$175.1 M**  
Change in jobs  
2010-13: **-15%**

Marine Tourism



Jobs: **2,495**  
Wages: **\$72.5 M**  
Change in jobs  
2010-13: **+22%**

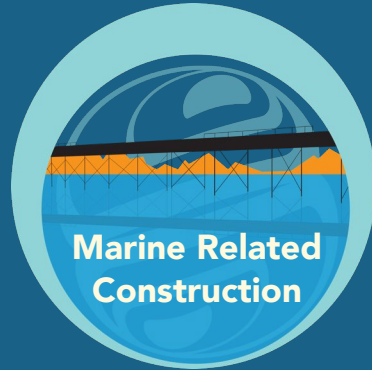


Jobs: **1,982**  
Wages: **\$136.5M**  
Change in jobs  
2010-13: **+11%**

Offshore Oil & Gas



Jobs: **1,676**  
Wages: **\$214.1 M**  
Change in jobs  
2010-13: **+4%**

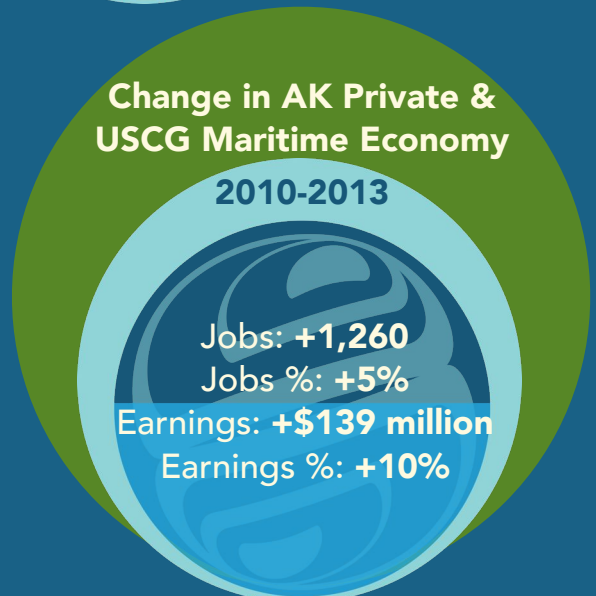


Jobs: **505**  
Wages: **\$48.4 M**  
Change in jobs  
2010-13: **-21%**

Ship Building, Repair, Marinas



Jobs: **538**  
Wages: **\$25.6 M**  
Change in jobs  
2010-13: **+4%**



Maritime icons were created by graphic illustrator Averyl Veliz. For methodology, notes and sources, see page 4.

# 19,300 Boats and Vessels

There are 19,300 registered boats and documented vessels in Southeast Alaska. Our boat to person ratio of 1 to 4. Statewide there are 78,700 boats.



Boat and vessel count include boats registered by the Alaska DMV and Coast Guard documented vessels with a Southeast Alaska "hailing port". A quarter of Southeast Alaska vessels are documented. Documented vessels are commercially used or over 25 ft. According to the DMV, most boats in Southeast Alaska over 25' are documented vessels.

**Methodology:** There are multiple ways to define the maritime sector and the industries that comprise it. This study compiled the categories developed by NOAA in their "Crosswalk Table of Economics: National Ocean Watch Sectors and Industries and the North American Industry Classification System" and the Washington State Maritime Cluster Economic Impact Study by Community Attributes. While these studies used fewer NAICS categories than were included in the original Maritime Economy of Southeast Alaska 2013 (and excludes state, local, and federal wage and labor categories entirely), this private sector plus Coast Guard analysis enables analysts to readily make maritime comparisons across regions, states, and years. All employment is based on average annual employment. Special thanks to Conor Bell at the Alaska Department of Labor for data analysis.

**Maritime Analysis Sources:** ADOL 2013 Employment and Wage data; 2012 US Census Nonemployer (self-employment) Statistics; 2010 and 2013 US Coast Guard data; and US Office of Planning and Policy Analysis.

**Fishing and Processing includes** NAICS 1125 Fish Hatcheries and Aquaculture, 1141 Fishing, 3117 Seafood Product Preparation and Packaging, 42446 Fish and Seafood Merchant Wholesalers, 44522 Fish and Seafood Markets & self-employed Alaska resident commercial fishermen.

**US Coast Guard** figures come directly from the USCG and and US Office of Planning and Policy Analysis. Employment are actuals, Southeast wages are actuals. Alaska wages are estimated based on Southeast and US OPPPA data.

**Marine Tourism** includes NAICS 4872 Scenic and sightseeing water transportation, 487990 Other scenic and sightseeing transportation, 611620 Sports and recreation instruction, 713990 All other amusement and recreation industries, and 712190 Nature parks and other similar institutions.

**Marine Transportation** includes NAICS 483 Water Transportation, 483111 Deep sea freight transportation, 483113 Coastal freight transport, 483112 Deep sea passenger transportation, 4883 Support Activities for Water Transportation, 488320 Marine cargo handling, 488330 Navigational services to shipping, 488310 Port and harbor operations, 493120 Refrigerated Warehousing and Storage.

**Offshore Oil & Gas** includes NAICS 212321 Construction Sand and Gravel Mining, 211111 Crude Petroleum and Natural Gas Extraction, 211112 Natural Gas Liquid Extraction, 213111 Drilling Oil and Gas Wells, 213112 Support Activities for Oil and Gas Operations, 541360 Geophysical Exploration and Mapping Services. Offshore component determined by NOAA and Energy Information Administration of percent offshore oil and gas production analysis applied to ADOL figures. There is no offshore oil and gas included in the Southeast Alaska maritime component.

**Ship Building, Repair, Marinas and Boat Dealers** includes NAICS 441222 Boat Dealers, 713930 Marinas, 3366 Ship and Boat Building.

**Marine Construction** includes NAICS 237990 Marine Heavy and Civil Engineering Construction.

**Artwork:** The maritime icons were created by graphic illustrator Averyl Veliz.

