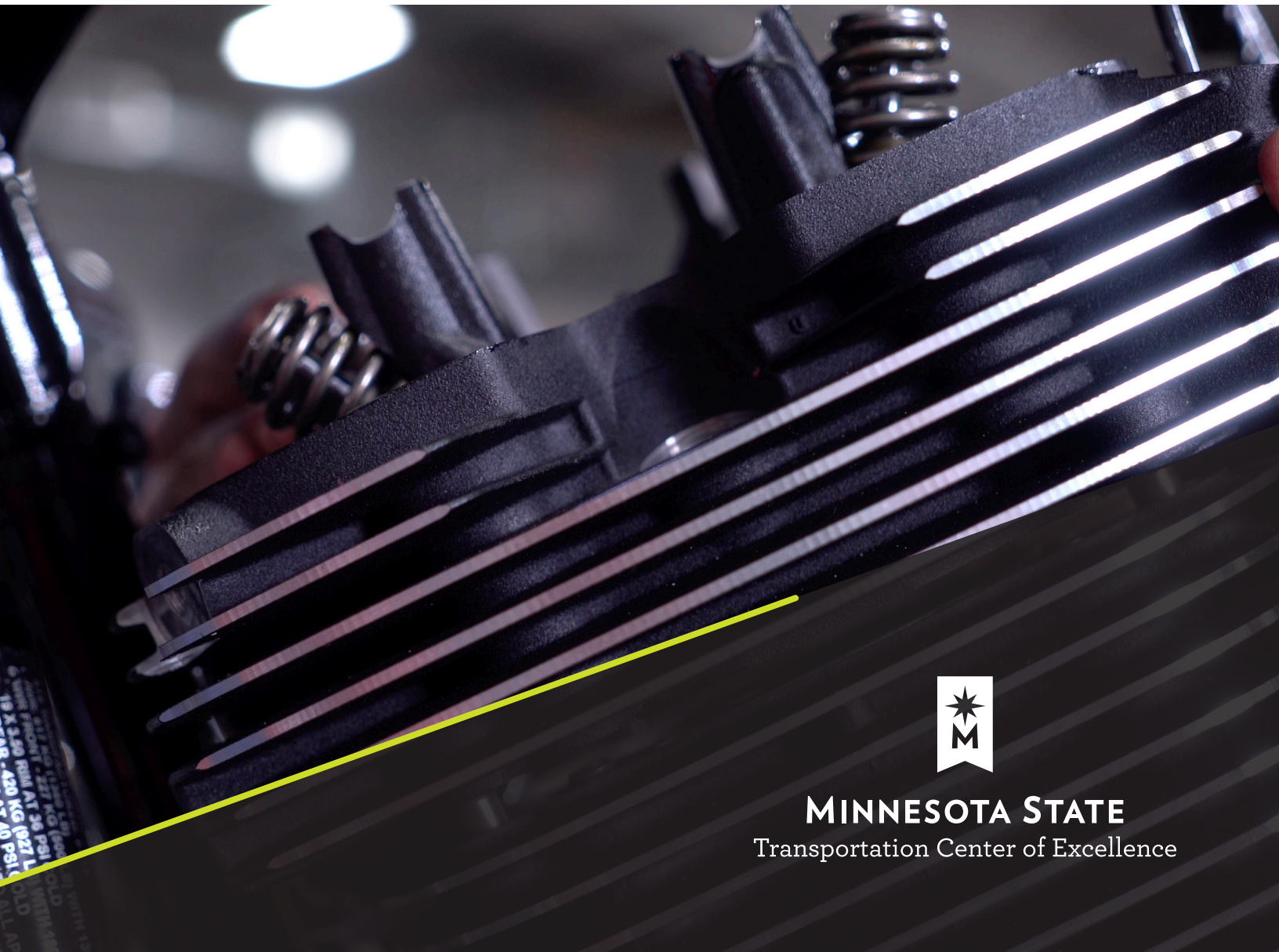


MARINE & POWERSPORTS

Demand Analysis

2021



MINNESOTA STATE
Transportation Center of Excellence



**Developed for the Minnesota State
Transportation Center of Excellence
by RealTime Talent**

January 2022

Introduction and Sector Overview.....2

Industry/Occupation Mix4

Pathway Detail4

Employment Types7

Job Posting Trends7

 Top Employers by Volume of New Job Postings in 2021, With Change from Prior Year 8

 Top Skills by Volume of New Job Postings, With Change from Prior Year 8

 Top Knowledge Areas, Tools, and Tech by Volume of New Job Postings, With Change from Prior Year..... 8

 Top Certifications by Volume of New Job Postings, With Change from Prior Year 9

FAQ 10

Introduction and Sector Overview

This report highlights key opportunities in the Marine and Power Sports career pathway for Minnesota's Transportation Industry. Professionals in Marine and Power Sports work in diverse roles from industrial equipment maintenance, outdoor power equipment maintenance, and small engine, motorboat, and motorcycle mechanics, serving a variety of industries. In all, about 5,181 people work in Marine and Power Sports roles in Minnesota as of the second quarter of 2021—a -3.2% decrease (173 workers) from a year prior.

Overall employment in Minnesota has declined by nearly -92,000 workers (-3.1%) between the second quarter of 2020 and 2021, and the five-year forecast dropped from 49,053 expansion of employment over five years to just 31,051 from 2021 through 2026 as of the most current baseline forecasts, or about 0.2% average annual growth. An optimistic forecast assuming reduction in labor force exits, economic conditions improving, and lessening impacts of COVID-19 on key industries forecasts up to 1.2% average annual growth over the next five years, or a total of 172,340 people newly employed by 2026. During this time frame, Marine and Power Sports employment is anticipated to remain relatively stable in Minnesota, rising by about 15 total jobs (0.1% annually) due to a tight talent pool, but could grow by about 211 (0.48% annually) in an optimistic forecast model. Total baseline demand for Marine and Power Sports talent is anticipated to be around 3,109 professionals needed to fill positions due to job exits and transfers, such as retirements and job changes.

Transportation Pathways in Minnesota – Baseline Forecast, 2021Q2¹

Occupation	Current						5-Year History		5-Year Baseline Forecast				
	Empl	Avg Ann Wages ²	LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
Automotive Technology Pathway	21,614	\$61,300	1.03	753	3.4%	1,263	163	0.2%	8,991	2,619	6,697	-324	-0.3%
Aviation Pathway*	8,773	\$122,300	0.88	346	3.9%	210	-674	-1.5%	3,844	1,121	2,688	35	0.1%
Collision Repair Pathway	6,864	\$46,900	1.14	324	4.6%	376	-307	-0.9%	3,524	1,042	2,480	2	0.0%
Diesel Equipment and Truck Pathway	12,889	\$56,000	1.20	344	2.7%	487	-451	-0.7%	6,292	1,919	4,383	-10	0.0%
Marine and Power Sports Pathway	5,181	\$41,900	1.07	373	6.8%	58	80	0.3%	3,109	963	2,131	15	0.1%
Truck Driving Pathway	95,261	\$44,600	0.96	6,493	6.60%	8,796	-843	-0.2%	57,082	22,543	33,247	1,293	0.3%
Transportation Occupations	147,533	\$51,600	0.99	8,573	5.6%	11,284	-1,891	-0.3%	81,732	29,859	50,858	1,015	0.1%
Total - All Occupations	2,920,850	\$58,900	1.00	145,886	4.9%	181,745	-83,089	-0.6%	1,672,986	625,772	1,016,164	31,051	0.2%

*This pathway includes Drone Technology careers as of 2021, which were not included in the 2020 estimates of career pathway employment or demand.

Source: [JobsEQ®](#)

Data as of 2021Q2 unless noted otherwise

Note: Figures may not sum due to rounding.

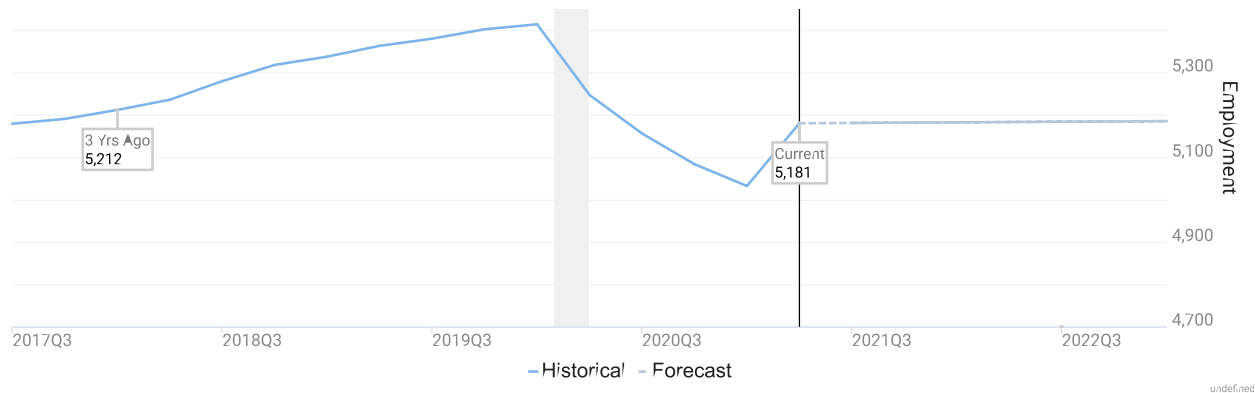
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As Minnesota’s economy continues to sustain loss of workers due to the pandemic and overall talent shortage, and with unknown ongoing impacts of the COVID-19 pandemic on our economy and public health, employment forecasts are changing rapidly. Supply chain impacts, the drive to automation and technological innovation mean that the transportation industry, in particular, may look very different in five years from what it looks like today. The compounding impacts of a tight labor market prior to the start of the pandemic and significant, rapid layoffs of non-essential workers across service industry positions creates a complex landscape of employer demand and an available workforce. Forecasting future needs under current conditions with an eye to anticipated talent pipelines into Marine and Power Sports suggest that there may be shortages of talent across several specific occupations in this career pathway unless more talent decides to enter the field. Employment counts rebounded in the first two quarters of 2021, but are forecast to flatten in the years ahead. One year ago, employment had been forecast to rebound by the close of 2021 with an overall five-year forecast of 0.2% average annual employment growth; however this forecast estimate has soured, now with a baseline forecast of just 0.1% annual average growth in overall employment through the second quarter of 2026.

Marine and Power Sport Employment Forecast Under Baseline Scenario, Minnesota



Industry/Occupation Mix

The industry mix of pathway employment has shifted from 2020 to 2021, with Other Motor Vehicle Dealers rising in prominence from employing 12.2% of talent in this pathway in 2020 to being the number one employer of Marine and Power Sports talent in 2021 (13.4%). Gasoline Stations (12.2%), Automotive Repair and Maintenance (11.2%), and Automobile Dealers (8.2%) are the next-highest employers of talent in this pathway, also forecasting the highest total demand for talent over the next five years.

Top Industry Distribution for Automotive Technology Pathway Occupations in Minnesota

NAICS Code	Industry Title	CURRENT			5-YEAR DEMAND			
		% of Occ Empl	Empl	Avg Ann Wages	Exits	Transfers	Empl Growth	Total Demand
4412	Other Motor Vehicle Dealers	13.4%	693	\$44,100	141	215	16	373
4471	Gasoline Stations	12.2%	632	\$28,200	134	313	-24	423
8111	Automotive Repair and Maintenance	11.2%	580	\$29,400	131	305	15	451
4411	Automobile Dealers	8.2%	426	\$32,300	94	220	2	316
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	5.4%	279	\$30,100	60	141	-4	197
4442	Lawn and Garden Equipment and Supplies Stores	4.6%	240	\$43,500	49	75	7	132
7139	Other Amusement and Recreation Industries	4.3%	221	\$38,200	47	83	12	143
8114	Personal and Household Goods Repair and Maintenance	4.1%	215	\$43,500	41	62	-10	93
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	3.3%	172	\$67,900	15	60	1	76
4522	Department Stores	2.5%	129	\$30,100	28	65	-2	91
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	2.2%	113	\$47,700	20	34	-3	51
4451	Grocery Stores	2.1%	107	\$30,000	23	55	0	78
5617	Services to Buildings and Dwellings	1.6%	81	\$42,000	17	25	3	44
3344	Semiconductor and Other Electronic Component Manufacturing	1.5%	78	\$68,400	7	28	1	36
9211	Executive, Legislative, and Other General Government Support	1.2%	60	\$52,900	9	23	1	32
4413	Automotive Parts, Accessories, and Tire Stores	1.2%	60	\$31,800	13	29	0	43
2382	Building Equipment Contractors	1.1%	59	\$63,400	5	21	0	26
4441	Building Material and Supplies Dealers	1.1%	57	\$39,700	11	17	0	28
8112	Electronic and Precision Equipment Repair and Maintenance	0.8%	40	\$59,400	4	15	3	22
3221	Pulp, Paper, and Paperboard Mills	0.8%	39	\$70,600	3	13	-3	13
n/a	All Others	17.4%	899	n/a	111	331	-6	437

Source: JobsEQ®
 Data as of 2021Q2 except wages which are as of 2020. Note that occupation-by-industry wages represent adjusted national data and may not be consistent with regional, all-industry occupation wages shown elsewhere in JobsEQ.
 Note: Figures may not sum due to rounding.

Pathway Detail

Of all occupations found in the Marine and Power Sports pathway, Motorcycle Mechanics are uniquely concentrated in Minnesota to a higher degree than seen in the nation overall (Outdoor Power Equipment and Small Engine

Mechanics to a lesser degree). On average, Marine and Power Sports careers pay about \$41,900 per year (up from \$40,900 last year)—well below the average wage statewide across all positions.

Marine and Power Sports Pathway in Minnesota – Baseline Forecast, 2021Q2¹

SOC	Occupation	Current						1-Year History		5-Year Baseline Forecast				
		Empl	Avg Ann Wages ²	LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
53-6031	Automotive and Watercraft Service Attendants	2,441	\$30,000	1.07	155	6.1%	2	7	0.3%	1,780	535	1,252	-6	-0.1%
49-2094	Electrical and Electronics Repairers, Commercial and Industrial Equipment	1,054	\$66,800	1.02	61	5.7%	40	-65	-5.8%	455	89	368	-2	0.0%
49-3053	Outdoor Power Equipment and Other Small Engine Mechanics	781	\$42,000	1.13	75	8.9%	11	-14	-1.8%	405	158	237	10	0.3%
49-3051	Motorboat Mechanics and Service Technicians	501	\$44,000	1.06	46	8.4%	5	-4	-0.9%	258	101	152	6	0.2%
49-3052	Motorcycle Mechanics	381	\$45,300	1.23	35	8.5%	n/a	13	3.7%	200	77	116	7	0.3%
53-5022	Motorboat Operators	23	\$57,100	0.47	2	7.2%	n/a	-3	-12.7%	11	3	8	0	0.0%
	Marine and Power Sports Pathway	5,181	\$41,900	1.07	373	6.8%	58	-67	-1.3%	3,109	963	2,131	15	0.1%
	Total - All Occupations	2,920,850	\$58,900	1.00	145,886	4.9%	181,745	-91,909	-3.1%	1,672,986	625,772	1,016,164	31,051	0.2%

Source: [JobsEQ®](#)

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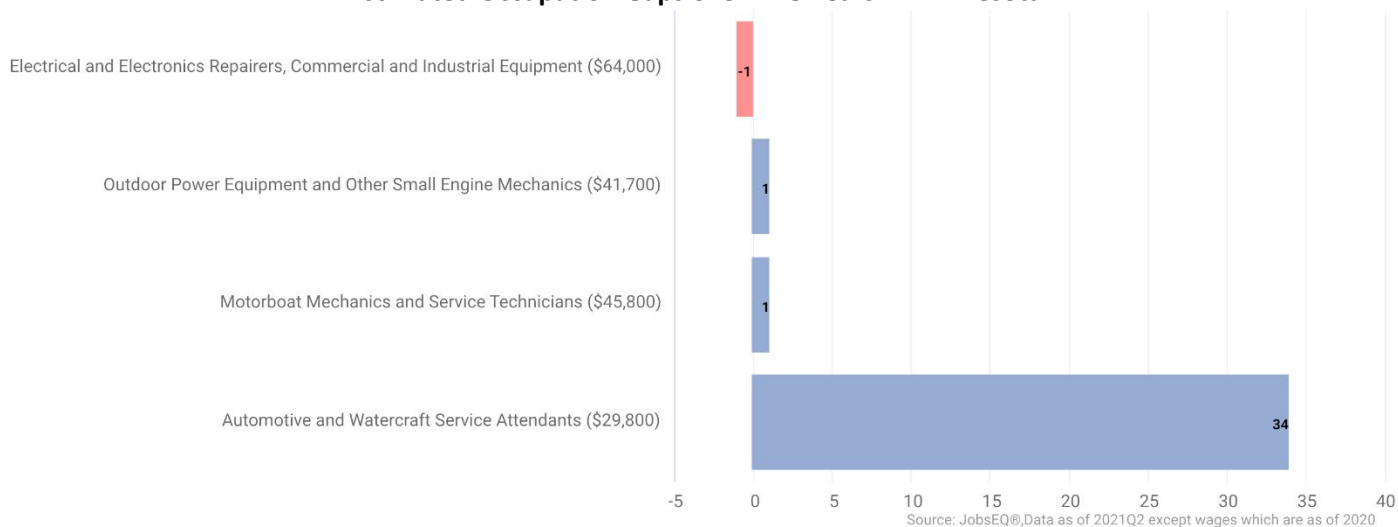
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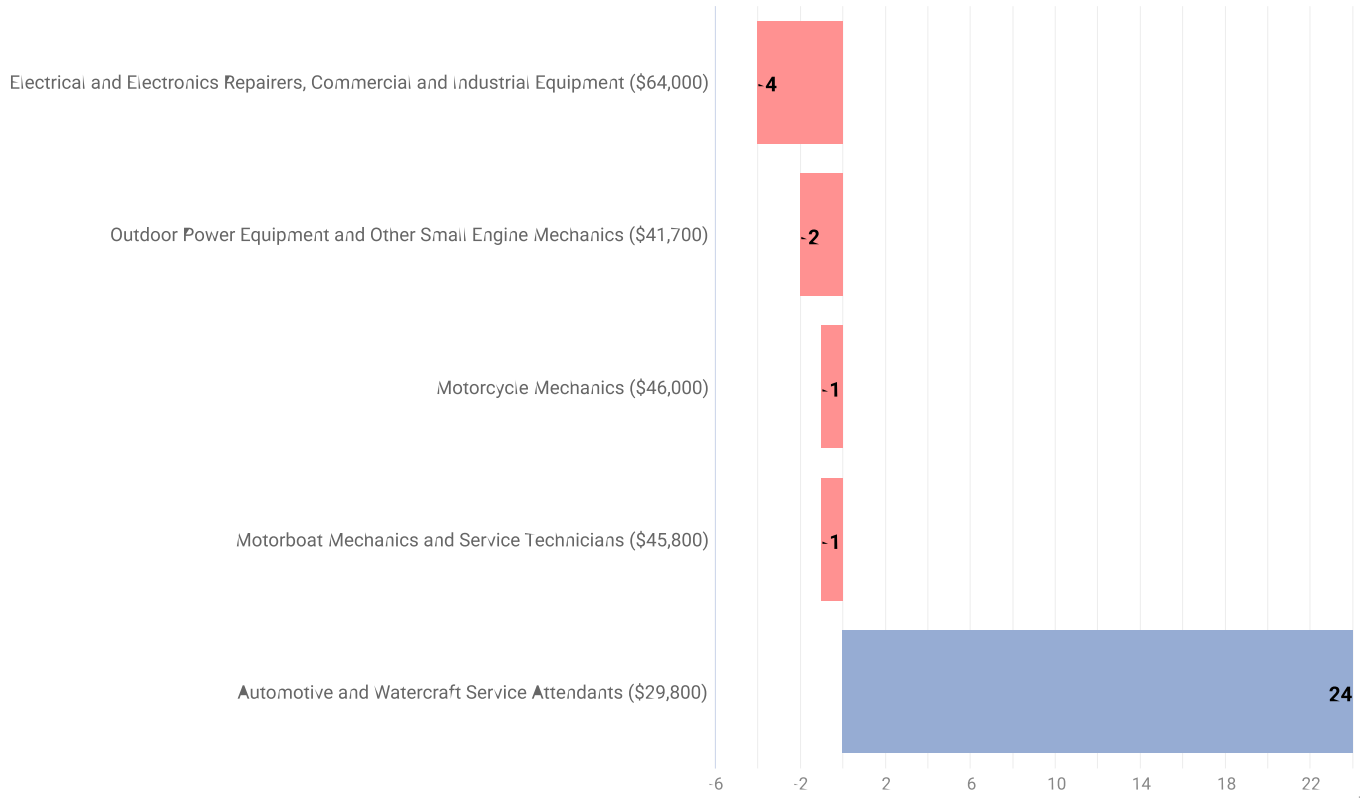
By 2026, Minnesota may see a growing shortage of Electrical and Electronics Repairers (shown in red below). The estimated annual shortage of Motorboat Mechanics and Service Technicians and Motorcycle Mechanics have improved slightly since 2020 estimates.

Estimated Occupation Gaps over Five Years in Minnesota



Looking out the next ten years, four occupations in the Marine and Power Sports pathway are anticipated to experience talent shortages. The long-term shortage of Electrical and Electronics Repairers has worsened from estimates in 2020.

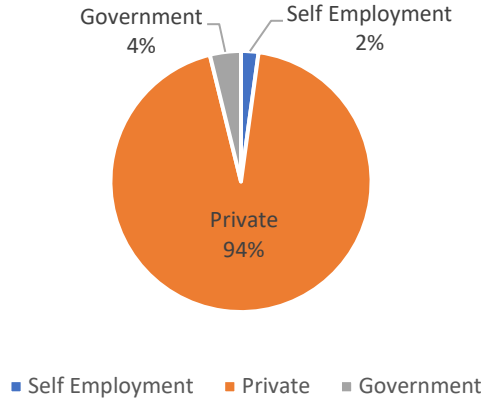
Estimated Occupation Gaps over Ten Years in Minnesota



Employment Types

About 94% of people employed in Marine and Power Sports careers in Minnesota work for private employers, while an estimated 2% are self-employed. The remaining 4% work for state, federal, or local government entities.

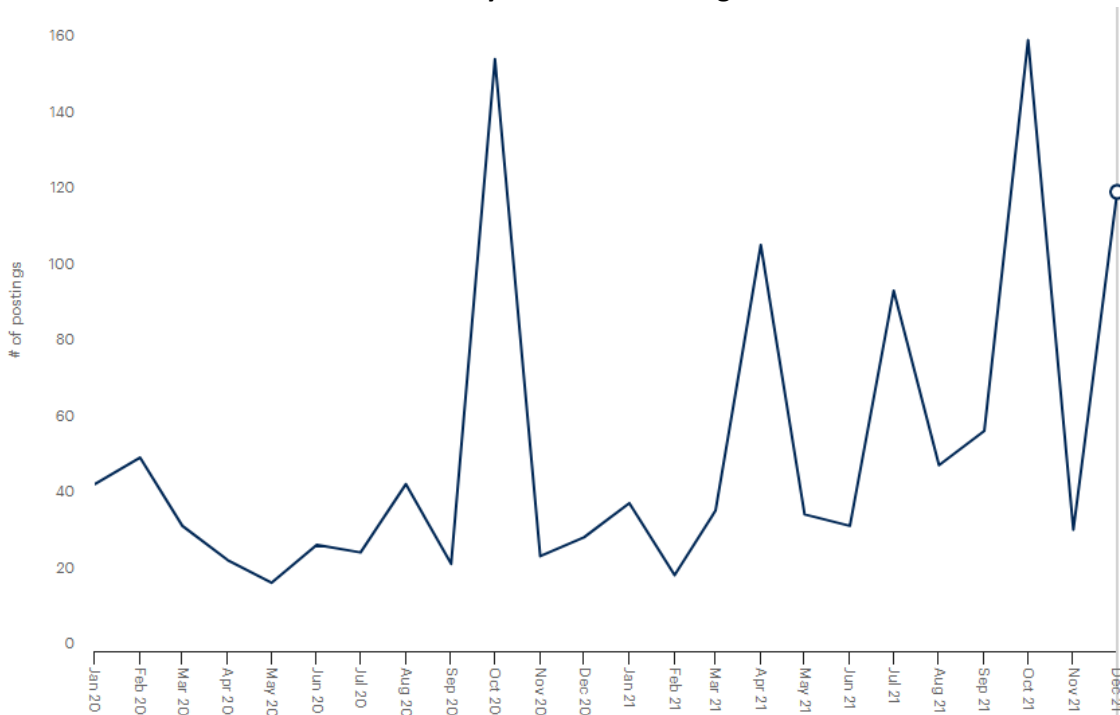
Employment Types, Minnesota 2021Q2



Job Posting Trends

Data in this section focuses on jobs newly advertised between January 1 and December 31, 2021 in Marine and Power Sports roles across Minnesota. All data in this section comes from Gartner TalentNeuron. Overall, there were 788 new jobs advertised in Marine and Power Sports during this time frame, an increase of 57% from the prior 12-month period (2020). The total share of posted positions advertised by staffing and temp agencies in the Marine and Power Sports pathway decreased to 5% in 2021 compared to 11% of postings in 2020.

Volume of Career Pathway Online Job Postings in 2020 and 2021



Top Employers by Volume of New Job Postings in 2021, With Change from Prior Year

	Employer	Percent Change between 2020 and 2021
1.	Walmart	49%
2.	Lube-Tech Services, LLC	0%
3.	Xcel Energy	583%
4.	Army	31%
5.	Signature Flight Support	0%
6.	PENSKE	-25%
7.	Neighbor Storage	0%
8.	Park Industries	0%
9.	Trudell Trailers	0%
10.	John Deere	0%

New Job Postings Advertised in Minnesota by Employer Type



Top Skills by Volume of New Job Postings, With Change from Prior Year

1. Troubleshooting (+50%)
2. Communication (+42%)
3. Relationships (+294%)
4. Programming (+230%)
5. Testing (+3%)

Top Knowledge Areas, Tools, and Tech by Volume of New Job Postings, With Change from Prior Year

1. Operations (-3%)
2. Instrumentation (+163%)
3. Microsoft Office Suite (+300%)
4. Scheduling (+927%)
5. Automation (+193%)

Top Certifications by Volume of New Job Postings, With Change from Prior Year

1. Class D Driver's License (+58%)
2. NICET Certification (+767%)
3. Class A Commercial Driver's License (-44%)
4. Army Training – Radar Repairer (+300%)
5. Security Clearance (-50%)

Supply

This supply section is a new addition to the 2021 Demand Analysis. This data provides insight on the number of graduates Minnesota is training to fill the workforce. The data below is from the Economic Development and Employer Planning System and has been put together by the Minnesota State Transportation Center of Excellence.

Marine and Powersports Program Completers by Degree Level in Minnesota 2019 - 2020					
CIP Code	Program Title	Cert2	Assc	Assc+	Total
47.0606	Small Engine Mechanics and Repair Technology/Technician	10	0	6	16
47.0616	Marine Maintenance/Fitter and Ship Repair Technology/Technician	0	11	9	20
47.0611	Motorcycle Maintenance and Repair Technology/Technician	0	0	0	0
Total		10	11	15	36

Cert1 = Postsecondary award, certificate, or diploma of (less than 1 academic year)

Cert2 = Postsecondary award, certificate, or diploma of (at least 1 but less than 2 academic years)

Assc = Associate's degree

Assc+ = Postsecondary award, certificate, or diploma of (at least 2 but less than 4 academic years)

Bach = Bachelor's degree or equivalent

FAQ

What is a location quotient?

A location quotient (LQ) is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is a cluster?

A cluster is a geographic concentration of interrelated industries or occupations. If a regional cluster has a location quotient of 1.25 or greater, the region is considered to possess a competitive advantage in that cluster.

What is separation demand?

Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. The total projected demand for an occupation is the sum of the separation demand and the growth demand (which is the increase or decrease of jobs in an occupation expected due to expansion or contraction of the overall number of jobs in that occupation).

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.

What is NAICS?

The North American Industry Classification System (NAICS) is used to classify business establishments according to the type of economic activity. The NAICS Code comprises six levels, from the “all industry” level to the 6-digit level. The first two digits define the top level category, known as the “sector,” which is the level examined in this report.

What is SOC?

The Standard Occupational Classification system (SOC) is used to classify workers into occupational categories. All workers are classified into one of over 804 occupations according to their occupational definition. To facilitate classification, occupations are combined to form 22 major groups, 95 minor groups, and 452 occupation groups. Each occupation group includes detailed occupations requiring similar job duties, skills, education, or experience.

Who created this report?

This report was developed by RealTime Talent for the Transportation Center of Excellence. If you have questions about the data found in this report, or are interested in learning more, please contact Director of Strategic Research Erin Olson at erin@realtimentalentmn.org or visit the RealTime Talent website at www.realtimentalent.org