IWDC | LAUNCH Workforce Survey Insights

Industries, Workforce, Skills Demand & Insights

September 2nd, 2020

Executive Summary

Skill Provider Alignment Methodology & Research Background

Research Dates
This study was fielded from August 6th – August 24th, 2020

Research Format
Data was gathered via an online survey and included 30 questions and a MaxDiff exercise.

Research Audience
Data was gathered from those that influence or make hiring decisions within the state of Idaho. **91%** of respondents were either **manager or executive** level employees, and **96%** stated they are **at least moderately influential in the hiring process**. The sample audience spanned **well over twenty-two discrete industries** and **all six regions** of Idaho.

In-Depth Interviews
To supplement survey findings, qualitative interviews were conducted with **nine public institutions**. These IDIs will also influence the future pairing of upskilling providers with the prominent skills prioritized from the survey.

Critical Objectives

1 **Survey** employers to determine the most relevant short-term skill development opportunities that will set applicants apart in the coming months as employers begin to hire again

2 **Interview** higher ed and other training/certification providers in the state to match their course and program offerings to the skills employers most demand

3 **Connect** relevant skill matrices with education providers by region, by industry, by business size, and by function

Job Posting Analytics
Cicero Group partnered with Emsi to aggregate Idaho's entire job postings data from **April 1st – July 27th, 2020**. These data tailored the survey to Idaho primarily by industry, specialty areas, and skill selection.

Statewide Workforce Survey Results

Skill Provider Alignment: Working Sample

Illustrative Example
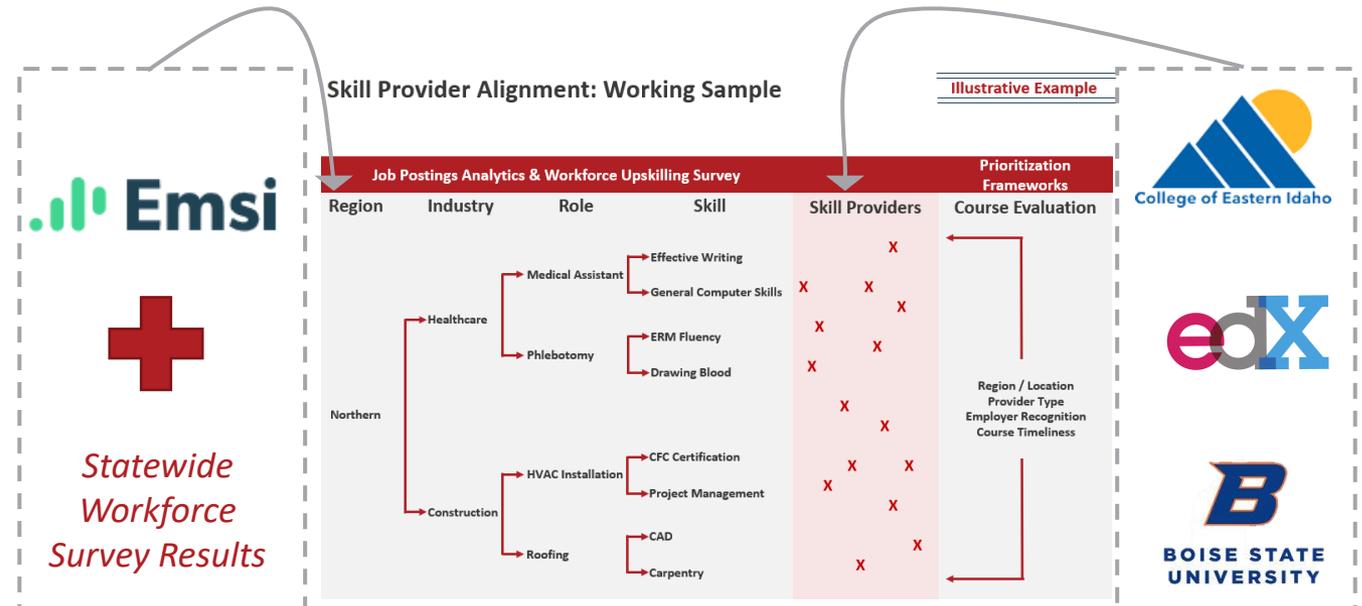
Survey respondents were spread across many of Idaho's top industries and were about proportionally in-line with the population in each of the state's six regions

Industry & Region

Survey Response Breakdown

*Single Select, n=833 & Free-Fill (Zip Code), n=845*

Region	Respondent Count
Region One	169
Region Two	84
Region Three	351
Region Four	88
Region Five	48
Region Six	105

Bar chart:
- Construction: 15%
- General Business: 15%
- Healthcare: 14%
- Transportations & Manufacturing: 12%
- Hospitality/Tourism: 10%
- Education: 8%
- Retail: 8%
- Government: 7%
- Agriculture: 5%
- Technology: 2%
- Natural Resources: 2%
- Aerospace: 1%

Q1: Which one of the following best describes your industry?
Q7: What is the zip code of the office in which you currently work?

Cicero **S360**

Over 90% of respondents were at the manager level or above and ranked themselves as influential in the hiring process.

Statewide
Respondent Roles
Single Select & Likert Scale, n=845

Executive: 50%
Manager: 41%
Employee: 9%
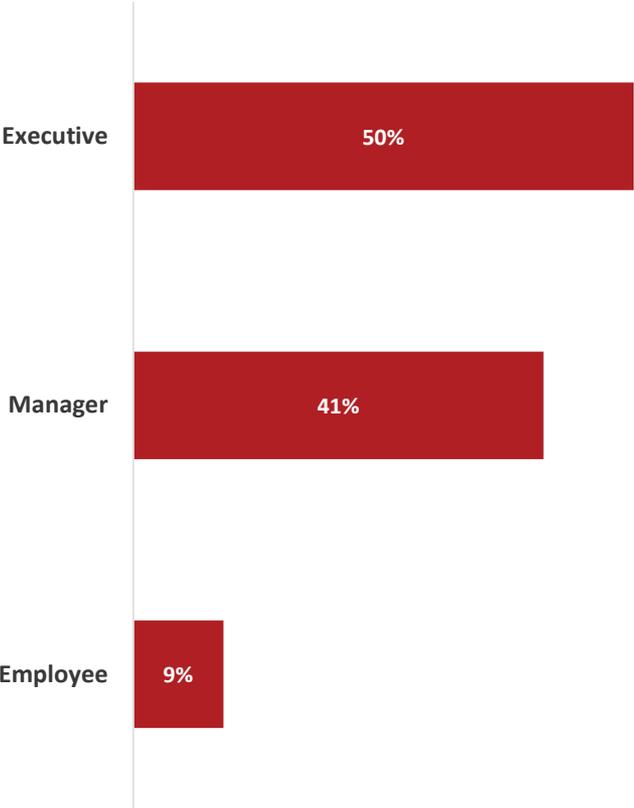
Statewide
Respondent Influence
Likert Scale, n=845

4% | 22% | 74%

■ No Influence ■ Some Influence ■ Highly Influential

Q8: What is your role within your company?
Q10: How much influence do you have on the hiring process?

Confidential / 5
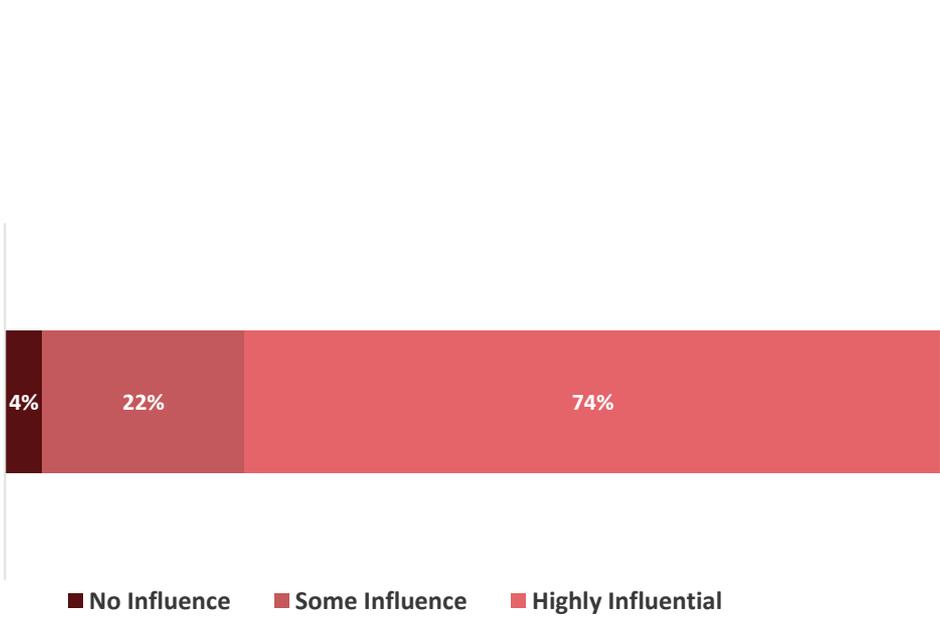
Executive Summary

Idaho Hiring Environment

Optimism for Future Hiring: Approximately, **4 out of 5 employers have tried to hire** someone since March, and **over half of Idaho's employers** think it is likely they will keep hiring in the next year

Negative Effects of COVID-19: Still**, 3 out 4 employers say that this pandemic has had a negative impact** on their business operations, and **40%** say that it has made it very difficult to maintain current operations

Over 250,000 Job Postings: Since April, there have been approximately **250,000 job postings** across Idaho, with the vast majority originating in Region 3, in which Boise is located

Skill Development & Prioritization

Healthcare, Tech, and Transportation: These industries are leading the way, with employers continuing to post jobs for **truck drivers, certified nurse assistants, software developers** (to a lesser extent), registered nurses, and many other positions

Getting an Interview vs. Getting a Job: Employers clearly **desire more general skills** such as trustworthiness and effective communication, but a potential employee needs to signal key specialty skills prior to even being able to demonstrate those skills

Skill Credentialing

Employers Prefer University and College Credentials: While industry preference varies widely, **employers generally see universities/colleges and industry orgs. as the most preferred credential providers**; online platforms are viewed as less credible by more traditional industries with the tech industry being the exception

Aligning Prioritized Skills with Skill Training: For each of the prioritized industries within each region, there are **multiple institutions and organizations from which courses are being sourced**. In total, there will be training opportunities identified for over 30 skills

Idaho Hiring Environment

Cicero

COVID-19 has not prevented most employers from attempting to hire, as 3 out of 4 employers in Idaho have either hired or attempted to hire someone since March.

Statewide Hiring Efforts
### March 2020 & Beyond
Single Select , n=816
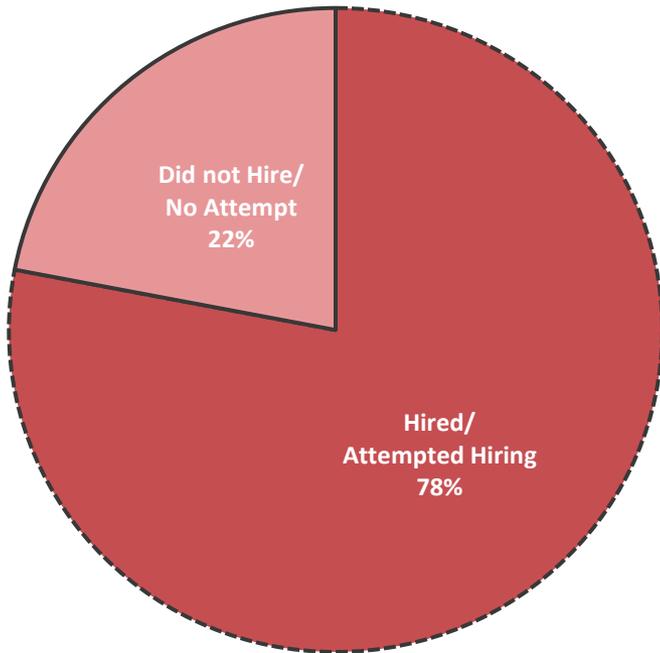
Statewide Hiring
Probability & Expected Quantities
Likert Scales (Five Options), n=845

Pie chart: Did not Hire/ No Attempt 22%; Hired/ Attempted Hiring 78%

Hiring Probability

Months	Unlikely	Neutral	Likely
0-6	33%	11%	56%
6-12	22%	22%	56%
12-18	20%	24%	56%

■ Unlikely   ■ Neutral   ■ Likely

Expected Hiring Quantities

	0-6 Months	6-12 Months	12-18 Months
I Plan to Hire 50+ Employees	2%	3%	4%
I Plan to Hire 1-50 Employees	61%	63%	64%
I Don't Plan to Hire	37%	34%	32%
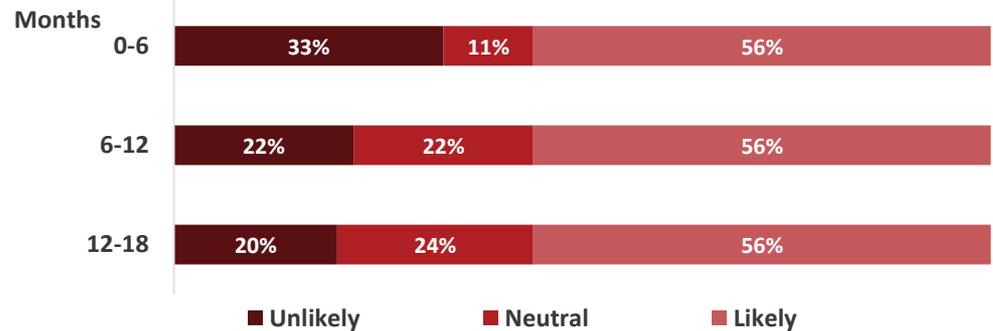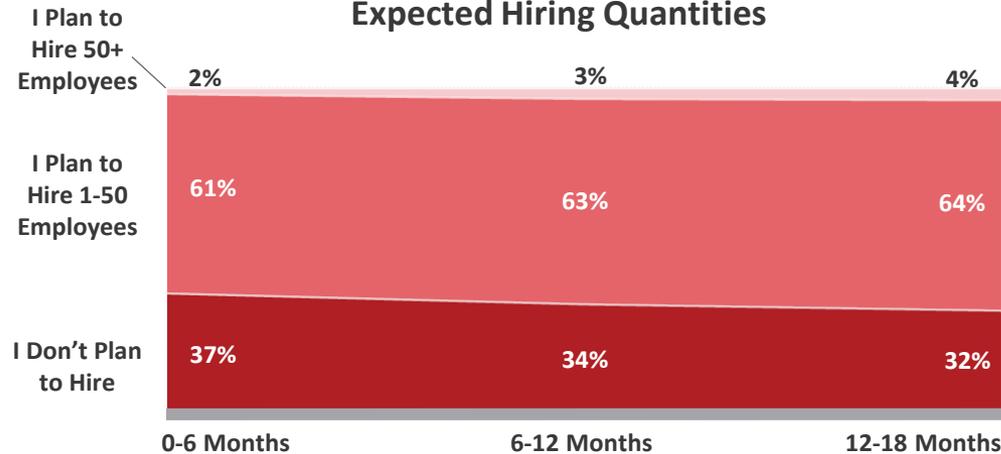
Survey Results
Expected Hiring Quantities

Question 3: How many employees do you expect to hire within the following time frames?
Single Select, n=845

	None	1-10	11-50	50-200	200+
0-3	298	491	41	11	4
3-6	334	454	42	13	2
6-12	288	469	61	20	7
12-18	272	482	61	23	7

0-3 Months: None 35.3%, 1-10 58.1%, 11-50 4.9%, 51-200 1.3%, 200+ 0.5%
3-6 Months: None 39.5%, 1-10 53.7%, 11-50 5.0%, 51-200 1.5%, 200+ 0.2%
6-12 Months: None 34.1%, 1-10 55.5%, 11-50 7.2%, 51-200 2.4%, 200+ 0.8%
12-18 Months: None 32.2%, 1-10 57.0%, 11-50 7.2%, 51-200 2.7%, 200+ 0.8%

Legend: ■ None ■ 1-10 ■ 11-50 ■ 51-200 ■ 200+
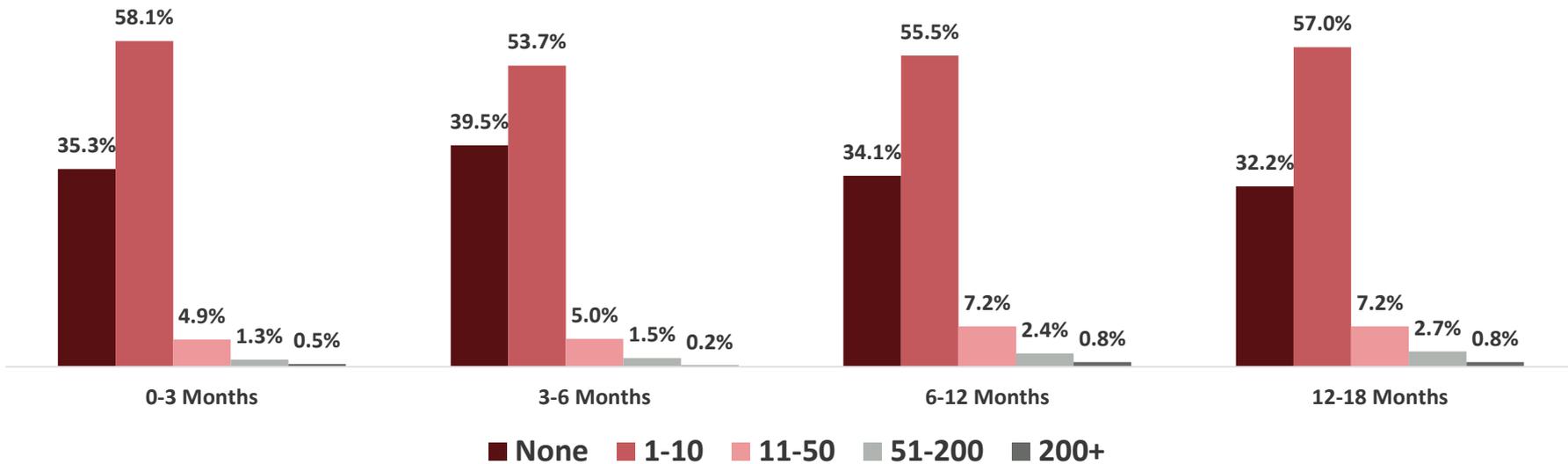
Across all industries, the impact of COVID-19 has been negative. However, ~60% of employers have been able to maintain or adapt their operations.

Statewide COVID-19 Impact
Industry v Company
Likert Scales (Five Options), n=816

	Negative Impact	No Impact	Positive Impact
Industry Overall	75%	12%	13%
Company Overall	74%	13%	13%

- ■ Negative Impact ■ No Impact ■ Positive Impact
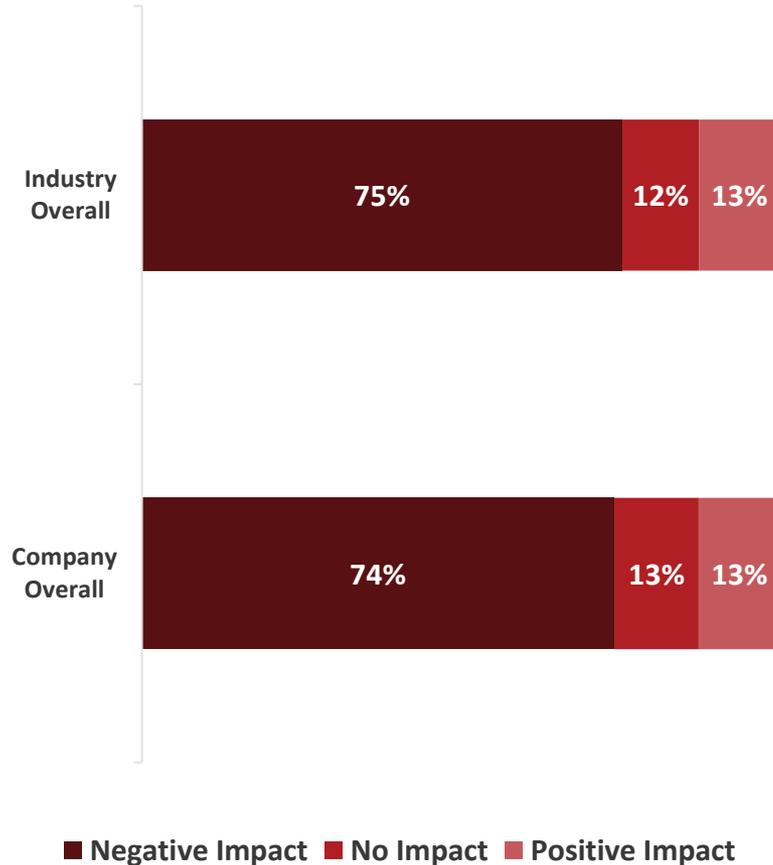
Statewide COVID-19 Impact
Ability to Maintain Operations
Likert Scale (Five Options), n=845

Company Overall

Business as Usual	15%
Adaptable	46%
Difficult to Maintain Operations	39%

61% of employers have successfully maintained operations

- ■ Difficult to Maintain Operations ■ Adaptable ■ Business as Usual

Cicero S360

Q11: Overall, what level of impact has the COVID-19 pandemic had on your company's ability to maintain normal operations?
Q26: What type of impact is your industry currently experiencing as a direct result of the COVID-19 pandemic?
Q27: What type of impact is your company currently experiencing as a direct result of the COVID-19 pandemic?

Confidential / 10

Across Idaho, over 250,000 jobs have been posted in the past four months, with the most postings coming from Region 3.

Statewide Hiring
Total Job Postings
Job Posting Analytics April 2020 – July 2020

Total Unique Job Postings

257,000

(Note: This is an estimate of the total number of postings, not the number of jobs being hired for)

Region 1: **30,400**

Region 2: **19,400**

Region 6: **38,000**

Region 3: **127,300**

Region 4: **30,000**

Region 5: **20,700**

Cicero S360 *Emsi Data: Job Postings from April 2020 until July 2020*
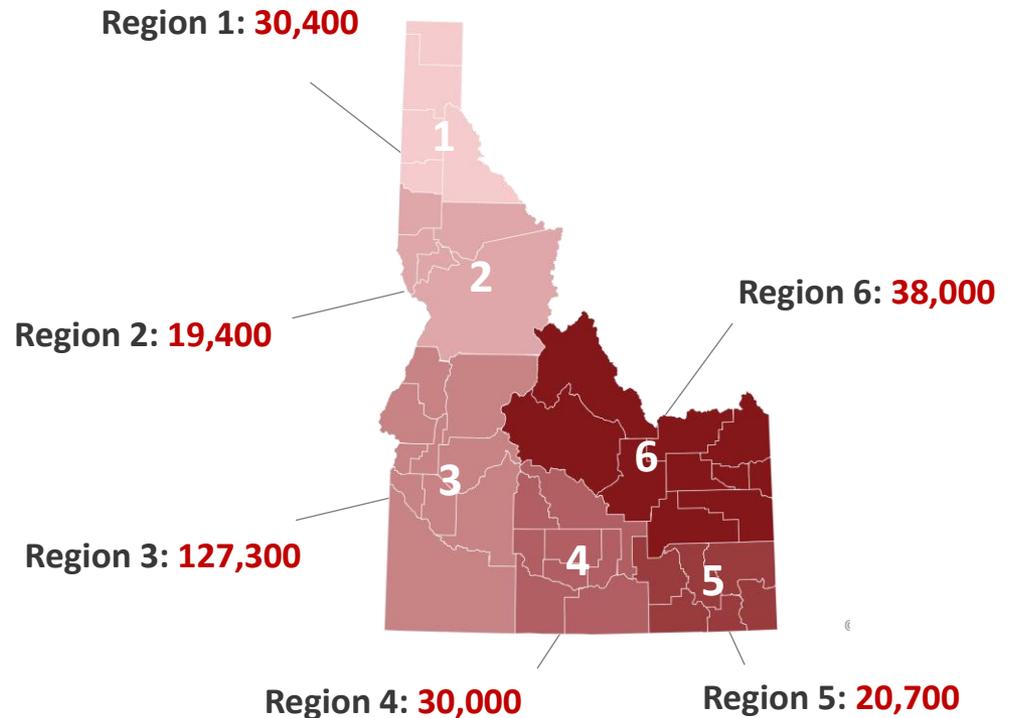
When looking at industries currently hiring, healthcare and transportation dominate the rural regions whereas general business and technology are strong in more urban regions.

Statewide Hiring
Top Job Industries
Job Posting Analytics April 2020 – July 2020

REGION	INDUSTRY 1	INDUSTRY 2	INDUSTRY 3	INDUSTRY 4	INDUSTRY 5
Idaho (Overall)	Healthcare	Retail	General Business	Transportation	Technology
Northern	Transportation	Healthcare	General Business	Retail	Hospitality
North Central	Healthcare	General Business	Technology	Retail	Hospitality
South Western	Healthcare	General Business	Technology	Retail	Hospitality
South Central	Transportation	Healthcare	General Business	Retail	Hospitality
South Eastern	Transportation	General Business	Healthcare	Retail	Hospitality
North Eastern*	Transportation	Healthcare	General Business	Retail	Hospitality

Skill Development & Prioritization

To ensure insights are representative of both employers who are currently hiring and skills that are desired, 250,000+ job postings were analyzed to determine the top industries and skills to be tested.

Statewide
Skills + Jobs Postings
Job Posting Analytics April 2020 – July 2020

Current Idaho Job Listings

- All job postings in Idaho were collected between April 1st and July 27th

- **250,000+ job postings were collated** to develop a database of industries hiring during COVID
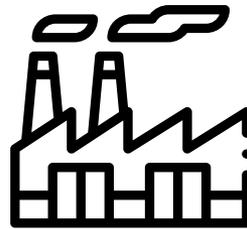
Top Hiring Industries

- Job positing were then segmented into **~750 unique industries**

- Upon further inspection, the ~750 unique industries were **synthesized into 22 industries**

- Industries currently hiring in each region were further prioritized to **ensure job seekers developed today's most relevant skills**

Critical Industry Skills

- Among all job postings, **a total of 4,381 unique skills** were listed as skills desired in an applicant

- Examining skills by each industry, the **average industry contained a unique list of ~1,800 skills**

- Based on frequency rates, **~150 top skills were identified** to inform our MaxDiff analysis

Prioritizing the industries currently hiring, several unique skills arose where applicants need to ensure they are listing and demonstrating credibility.

Top Industry Opportunities & Necessary Skills
Idaho Statewide
Job Posting Analytics Data & MaxDiff, n=845

Healthcare

Top Specialty Skills
1. Patient Care & Assistance
2. Caregiving & Homecare
3. Record-keeping & HC Calcs.
4. CPR
5. Acute Care

Top General Skills
1. Trustworthiness
2. Effective communication
3. Professionalism
4. Teamwork & Collaboration
5. Problem-solving

Retail

Top Specialty Skills
1. Customer experience training
2. Product knowledge
3. Deal closing
4. Point of Sales optimization
5. Lead generation

Top General Skills
1. Trustworthiness
2. Effective communication
3. Teamwork & Collaboration
4. Problem-solving
5. Customer service

General Business

Top Specialty Skills
1. Customer experience training
2. Product knowledge
3. Attention to quantitative detail
4. Deal closing
5. Spreadsheet & Financial literacy

Top General Skills
1. Trustworthiness
2. Effective communication
3. Problem-solving
4. Teamwork & Collaboration
5. Professionalism

Transportation

Top Specialty Skills
1. Physical strength & Endurance
2. Auto mechanic maintenance
3. CDL license & TWIC card
4. Specialized truck experience
5. Palletizing

Top General Skills
1. Trustworthiness
2. Problem-solving
3. Effective communication
4. Teamwork & Collaboration
5. Adaptability

Technology

Top Specialty Skills
1. Programming languages
2. Testing & Debugging
3. Customer experience training
4. Product knowledge
5. User Experience Design (UX)

Top General Skills
1. Trustworthiness
2. Effective communication
3. Problem-solving
4. Teamwork & Collaboration
5. Adaptability

Skill Credentialing

Cicero

Within regulated industries like healthcare and commercial driving, certifications are required, however, most industries do not require certifications but rather look at formal education or hands on training.

Credentials & Certification Results
Statewide
Single Selects ("Yes", "No"), Multi Select, Free-Fill (Optional)

Company Requirement of Certifications, n=845

Yes
29%

No
71%

Upskilling Provider Perceived Reputation, n=824

Provider	%
College & Universities	62%
Industry Orgs.	57%
Training Orgs.	54%
Employer Provided	53%
Reputable Companies	37%
Online Course Platforms	23%
None	6%
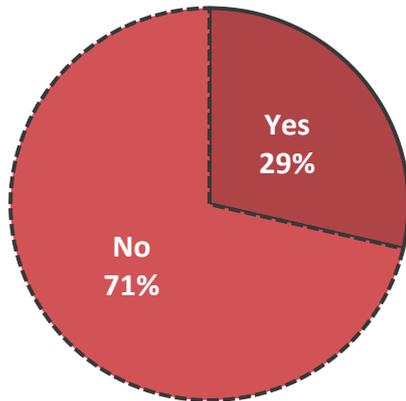
Commonplace Certifications, n= 593

1. Commercial Driver's License
2. Certified Nurse Assistant
3. Registered Nurse
4. Apprenticeship / Journeyman's License
5. Idaho Teaching Certification

Only 6% of employers find no value in credential providers

Q14: In general, does your company require applicants to possess any specific professional certifications
Q15: Please list all required professional certifications
Q24: What types of credential providers (those who award the credential) do you deem credible?

A variety of regional and supplementary courses exist to help individuals develop top skills—these have been aggregated into a Course Skills Catalog

Regional and Supplementary Skills Courses

Skills Course Catalog

The catalog connects top skills with courses to facilitate workforce re-entry within Idaho

	Course Count	Commentary		Course Count	Commentary
Acute Care	3 Courses	Online offerings from institutional partners	Palletizing	5 Courses	Primarily regional, in-person courses
Adaptability	4 Courses	Largely supplementary online offerings	Patient Care & Assist.	20 Courses	Variety of regional offerings
Attention to Quantitative Detail	13 Courses	Diversity of online & regional offerings	Plumbing	9 Courses	Variety of regional offerings
Auto Mechanic Maintenance	6 Courses	Online offerings from institutional partners	Power Tool Proficiency	5 Courses	Primarily mixed online offerings
Caregiving & Homecare	4 Courses	Mix of in-person and online regional courses	Problem-Solving	11 Courses	Largely supplementary online offerings
Carpentry	7 Courses	Mixed course offerings	Product Knowledge	5 Courses	Limited offerings due to the need for business specificity
CDL License & TWIC Card	5 Courses	Courses available through regional institutions & private organizations	Professionalism	5 Courses	Largely supplementary online offerings
CPR	8 Courses	Primarily regional, in-person courses	Programming Languages	40 Courses	Primarily mixed online offerings
Customer Experience Training	5 Courses	Largely supplementary online offerings	Record-Keeping & Healthcare Calc.	9 Courses	Online offerings from institutional partners
Customer Service	18 Courses	Diversity of online & regional offerings	Spreadsheet & Financial Literacy	34 Courses	Diversity of online & regional offerings
Deal Closing	11 Courses	Online offerings from institutional partners	Teamwork & Collaboration	14 Courses	Mix of regional and supplementary courses
Effective Communication	21 Courses	Diversity of online & regional offerings	Testing & Debugging	9 Courses	Largely supplementary online offerings
Electrical	17 Courses	Variety of regional offerings	Trustworthiness	4 Courses	Largely supplementary online offerings
HVAC	9 Courses	Variety of regional offerings	User Experience Design	11 Courses	Online offerings from institutional partners
Lead Generation	5 Courses	Largely supplementary online offerings	Welding	12 Courses	Primarily regional, in-person courses

Course Skills Catalog - Summary

327 courses

- **37 are from North Idaho College**

- **36 are from Lewis Clark State College**

- **49 are from Boise State**

- **25 are from College of Western Idaho**

- **43 are from College of Southern Idaho**

- **24 are from Idaho State University**

- **31 are from College of Eastern Idaho**

- **82 are from supplementary providers**

Cost ranges from free to $7,900

Course Skills Catalog - Considerations

CARES ACT Funding

- **Address all skills identified by employers as "immediate" needs in light of pandemic.**

- **Training needs to be accessible online in most cases (added benefit of connecting them to platforms where they can continue to learn).**

- **Can pay full cost of training for those who were laid-off.**

- **Connects them to other resources that workforce system partners can provide.**

Evolution to WDTF Short-Term Training Funded Program

- **Continues the connection to workforce system partners.**

- **Covers up to $2,000 or 70% of training cost (up to 90% if very low-income).**

- **Tie to longer term training needs and programs.**

- **Shift to in-person training where/when appropriate.**