

# EMPLOYER NEEDS SURVEY

2020



**NC DEPARTMENT**  
**of COMMERCE**  
LABOR & ECONOMIC  
ANALYSIS

*NCWorks*  
COMMISSION

## **INTRODUCTION**

The 2020 Employer Needs Survey, carried out by the Labor and Economic Analysis Division (LEAD) of the North Carolina Department of Commerce on behalf of the NCWorks Commission, asked over 2,000 business establishments during the Fall of 2019 about their hiring practices, with emphasis on hiring difficulties and workforce needs. Respondents came from all 100 of the state's counties, and the industry mix and firm size of the Overall sample is reflective of the state. Although labor market conditions have changed dramatically since the reference period due to the coronavirus pandemic, the survey results offer a snapshot of the tight labor market conditions faced by employers just a few months before the pandemic as well as other more long-term challenges for the workforce development system.

The first survey instrument contained six samples. Five samples included employers with 10 or more employees--an Overall sample representing employers from all industries in the state, Manufacturing, STEM, Construction, Health Care and Social Assistance. A sixth sample focused on Small Firms of all industries but with fewer than 10 employees. Each sample received enough responses for the findings to be representative of similar employers across North Carolina. The Center for Urban Affairs and Community Services (CUACS) at NC State University conducted telephone interviews between October and December 2019. In total, the interviewers collected 2,308 surveys which included responses from all 100 counties. In addition, a second survey with additional questions collected another 786 responses and will be described in a later section of this report.

## **FINDINGS FROM THE 1<sup>ST</sup> SURVEY**

### **Most companies tried to hire over the previous year**

Respondents were first asked if their establishment tried to fill any positions in the past 12 months, and 84 percent of employers in the Overall sample said they did. The other samples reported similar percentages of attempted hiring, with the exception of the Small Firms, where about one-third tried to hire (34%).

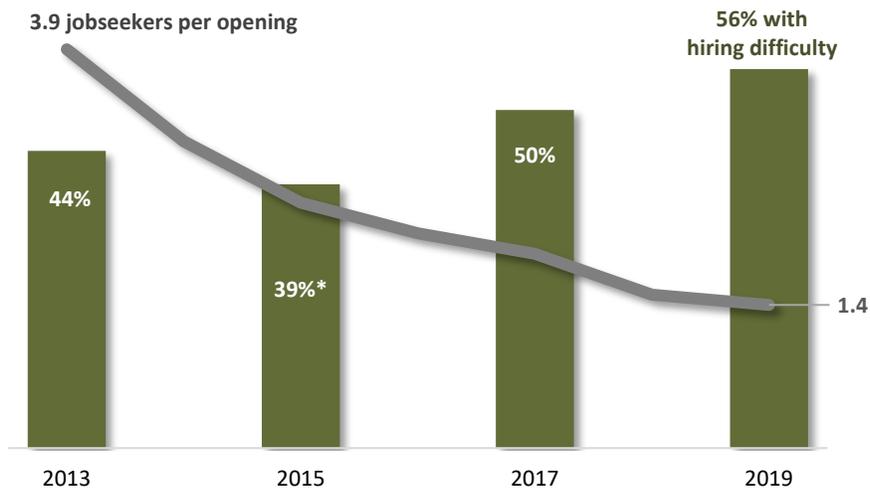
Those respondents who did attempt to hire were then asked to quantify how many positions were entry-level, defined as those requiring one year or less of experience. Seventy-eight percent of Overall employers tried to hire for entry-level positions, with similar percentages for Health Care, Construction, and Small Firms. More Manufacturers (85%) reported hiring for entry-level positions, while fewer STEM employers (67%) said they did so. When those who had tried to hire were asked about hiring for experienced positions, those requiring two or more years, 65 percent of Overall employers reported trying to hire these types of positions, with STEM employers (81%) and Construction (80%) reporting higher percentages and Small Firms (52%) reporting lower percentages.

When looking at the proportion of entry to experienced level positions employers were seeking, the average Overall firm tried to hire about 60 percent entry-level and 40 percent experienced workers. Manufacturing, Health Care, and Small Firms had about the same mix, while the average STEM employer was seeking 44 percent entry and 56 percent experienced workers, and the average Construction employer was seeking about equal number of entry and experienced workers.

## Over half of employers trying to hire had difficulty filling positions

Employers who had reported attempting to hire in the past 12 months were asked whether they had difficulty filling any position, and 56 percent of Overall employers reported affirmatively. Other employers reported similar levels of difficulty, although more Construction employers (65%) reported difficulty. The Overall rate of 56 percent was higher than reported in the 2018 (50%) and 2016 (39%) surveys, reflecting a tighter labor market overall with fewer jobseekers per open position.

**NC Decline in Jobseekers per Opening,  
Increase in Hiring Difficulty**



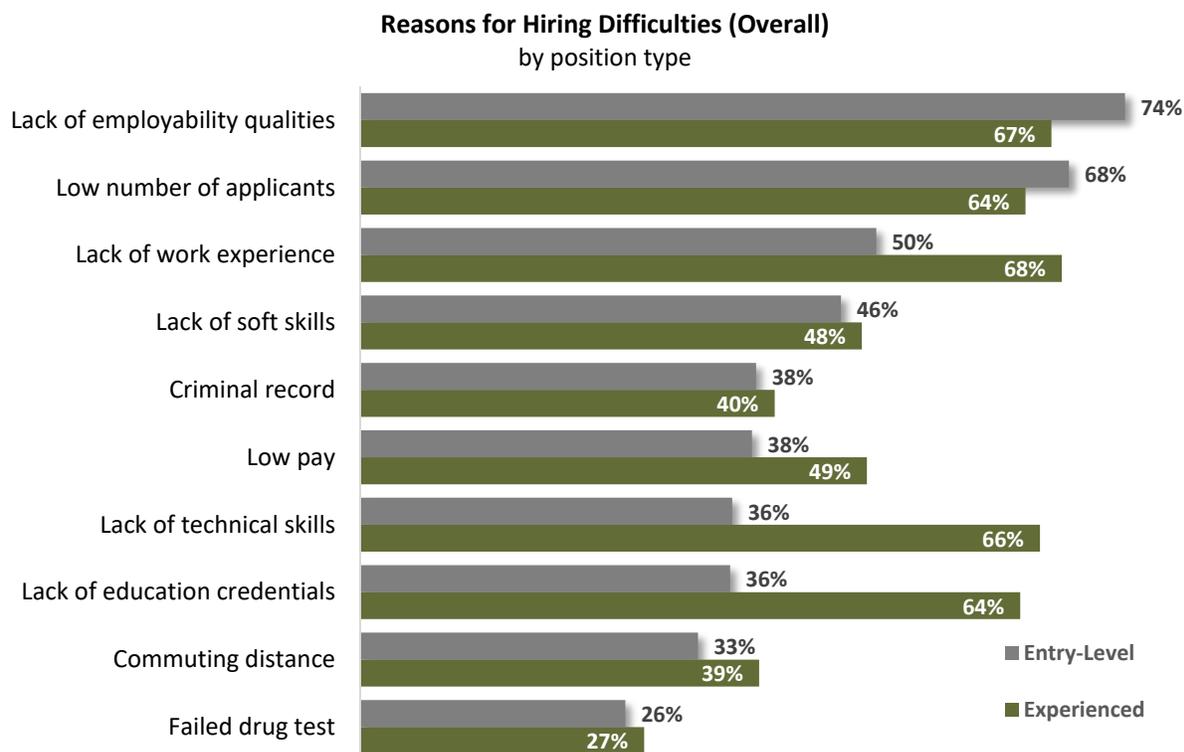
*\*No statistical significance in hiring difficulty from 2013  
Bars represent reference period asked in Employer Needs Surveys  
NC Department of Commerce, Labor & Economic Analysis Division, August 2020*

Employers were then asked more specifically about difficulty with entry-level vs. more experienced positions, with half (50%) of Overall employers reporting difficulty with entry-level positions. Other employers had similar percentages reporting difficulty with entry-level positions, with the exception of STEM employers, who had significantly less difficulty (28%).

When asked about experienced positions, about 46 percent of Overall employers reported hiring difficulty, with significantly more Manufacturers (58%) and Construction (64%) employers reporting difficulty.

## Many reasons were given for hiring difficulties

Employers with hiring difficulties were then asked to select reasons for difficulty from a list of potential explanations (with the ability to choose multiple reasons). The following chart shows the responses from the Overall sample for both entry and experienced positions:



*NC Department of Commerce, Labor & Economic Analysis Division, August 2020*

As can be seen in the chart above, a lack of basic employability qualities (dependability, work ethic, etc.), a low number of applicants, and a lack of work experience on the part of applicants were top reasons for entry-level difficulties, as in previous years. Experienced positions included these top reasons as well as a perceived lack of technical skills and education credentials.

There were a few differences from the Overall sample in explaining hiring difficulties. When it came to entry-level positions, Manufacturers were more likely to cite lack of technical skills, employability qualities, and failed drug testing. Construction employers were more likely to cite a lack of technical skills and failed drug testing as reasons for difficulty. Health Care employers were more likely to cite a lack of soft skills and a lack of education/certifications. A greater percentage of Small Firms reported a lack of technical skills and employability issues as reasons for difficulty.

When considering experienced positions, Manufacturers were similar to the Overall sample, while Construction employers were more likely to report applicants failed drug screening. Health Care employers had higher percentages reporting a lack of education/certifications and lower percentages reporting technical skills or criminal records. STEM employers reported lower percentages of issues with employability, criminal records, and drug screening. Small Firms were similar to the Overall sample, although they had lower percentages for soft skills as a reason for difficulty.

Employers reporting difficulty were also asked whether they felt that a lack of local, affordable childcare options contributed to hiring difficulties, and 24 percent of Overall employers agreed. The other samples reported similar percentages, with the exceptions of Health Care (34%) and Construction (15%). It is

important to recognize that childcare may be an issue of greater importance to jobseekers rather than employers.

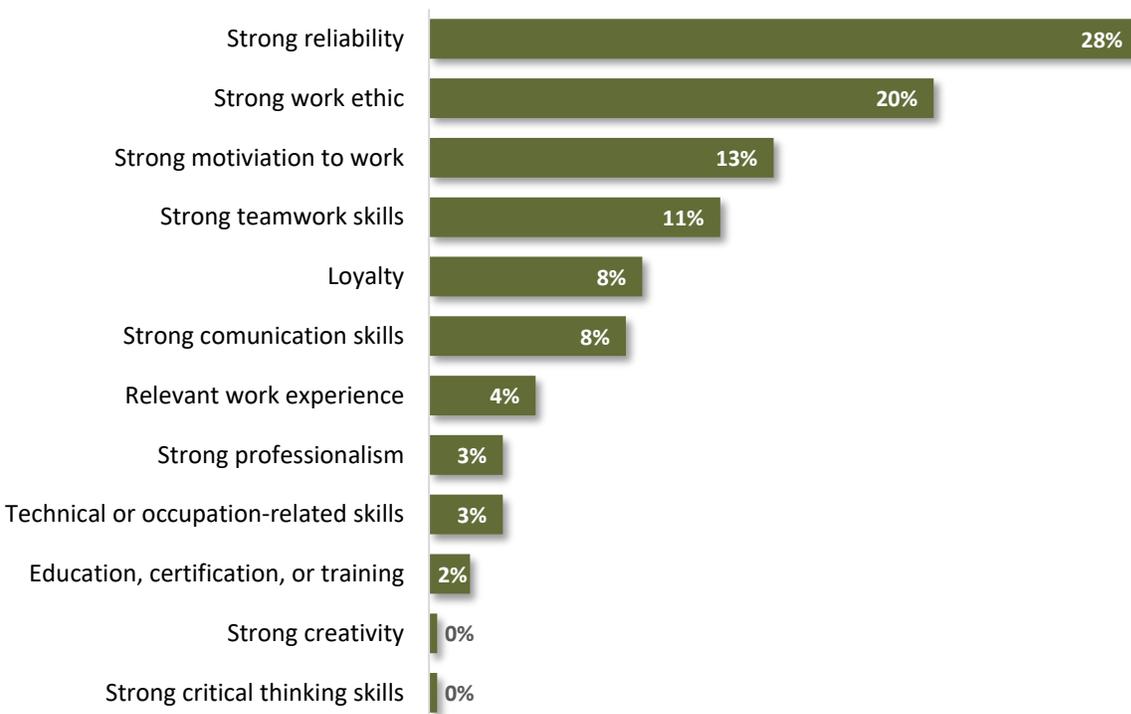
When asked how likely employers would be to hire a qualified individual with a criminal record, 25 percent of Overall employers said they would be “not at all likely” to hire such a candidate. Smaller percentages of Manufacturers (12%) and Construction (15%) employers said they were not at all likely to hire those with criminal records, while STEM (36%), Health Care (52%), and Small Firms (39%) reported larger percentages of those unlikely to hire such candidates.

Employers were then asked if they have had a difficult time accessing capital to maintain or grow their business, and 92 percent of Overall employers said they did not have difficulty accessing capital. The other samples’ responses were similar, indicating that this issue is not a significant one for most businesses.

## Employers value reliability and a strong work ethic above all else

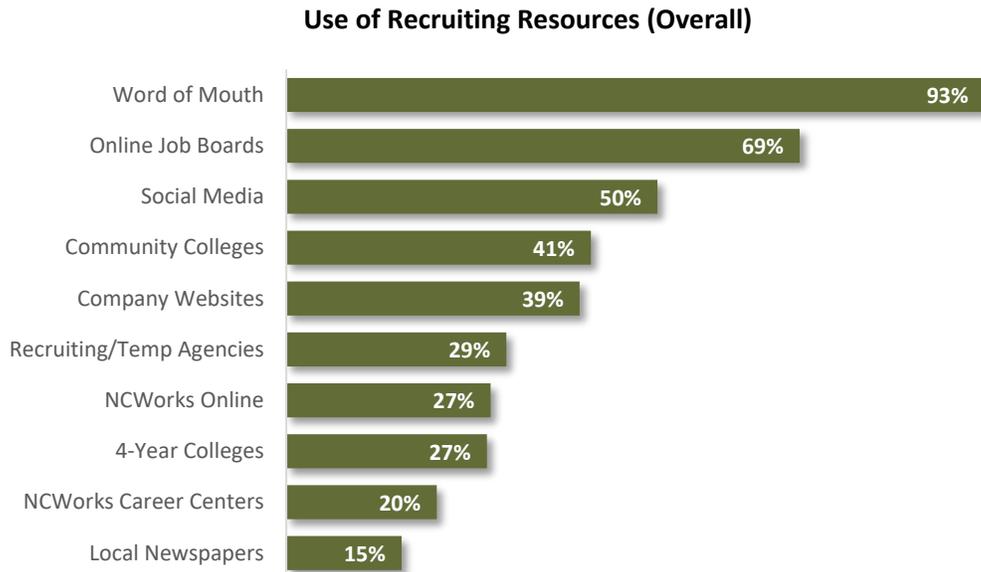
Employers were asked to think about their ideal employee and select one characteristic which immediately comes to mind. Reliability and a strong work ethic were the most frequently chosen characteristics across all samples. Other top characteristics included a strong motivation to work and strong teamwork skills. Technical skills, education, creativity, and critical thinking skills were chosen by the fewest employers.

**Single Ideal Characteristic of Employee (Overall)**



## Employers use a wide range of resources to recruit and are increasingly using online resources

Employers were asked about which resources they had used to recruit and the Overall firms gave the following responses:



*NC Department of Commerce, Labor & Economic Analysis Division, August 2020*

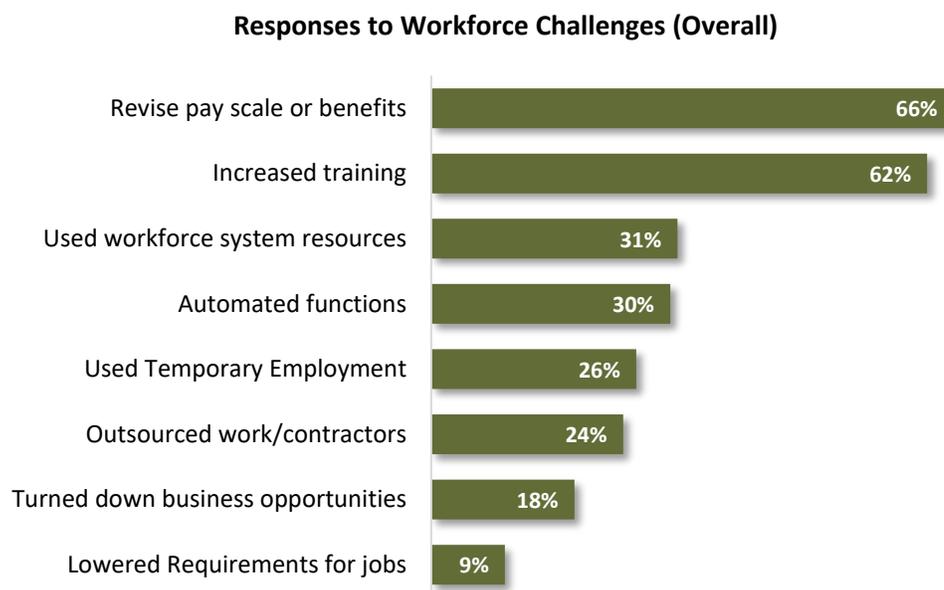
When compared to the 2018 survey, the use of word of mouth, online job boards and social media has increased. The use of recruiting and temp agencies has also increased, as has the use of NCWorks Career Centers. The use of company websites and local newspapers has decreased since 2018. While almost all employers use word of mouth in conjunction with other resources, the percentage of firms using only word of mouth (8%) was the same as in 2018.

Several significant differences were found across samples. Manufacturers were much more likely to use recruiting/temp agencies (56% vs. 29%) and NCWorks Online (35% vs. 27%) and less likely to use social media sites (36% vs. 50%) than the Overall firms. Construction firms were also more likely to use recruiting/temp agencies (42% vs. 29%) than the Overall sample. STEM and Health Care employers also had significant differences in recruiting resources, with greater uses of online job postings and the use of the community colleges to recruit. Small Firms differed from Overall employers by using less of every type of resource except word of mouth.

## Employers responded to workforce challenges by revising pay and increasing training

Employers were asked to choose their single biggest workforce challenge and 45 percent of Overall employers selected “finding job candidates”, followed by 31 percent choosing “turnover”. The other samples also chose these two challenges as the most important.

Employers were then asked which actions they had taken to respond to any workforce challenges.



*NC Department of Commerce, Labor & Economic Analysis Division, August 2020*

As can be seen in the chart above, the most common response was to revise pay scale or benefits (66%), an increase from the 2018 survey (51%), perhaps reflecting the upward pressure on wages in a tighter labor market. Sixty-two percent of employers said they increased training in response to challenges. Slightly less than a third said they used workforce system resources, and a similar percentage used automation to meet their challenges. Temporary employment and outsourcing were used by about a quarter of employers. About one in five said they turned down business opportunities as a result of their workforce challenges. Less than 10 percent lowered the requirements for the job postings.

Manufacturers were more likely than the Overall sample to use temporary employment (52%), outsource (33%), automate functions (42%), and lower job requirements (15%). They were also more likely to use the workforce development system (41%). Construction employers were more likely to use temporary employment (41%) and outsourcing (42%) and were much more likely to report turning down business opportunities as a result of workforce challenges (37%). Health Care employers were less likely to use temps (18%) or outsourcing (11%) but were more likely to use the workforce development system (43%). Small Firms were less likely to revise pay or benefits (52%), use temps (17%), or use the workforce development system (11%). STEM employers were similar in their responses to the Overall sample.

## **Community Colleges were the most commonly used part of the workforce development system**

If employers reported using the workforce development system to respond to challenges, they were then asked about which specific resources they had used. Seventy-four percent of respondents said they used the Community Colleges and 57 percent said they used NCWorks Career Centers, followed by 54 percent who used NCWorks Online and 23 percent who used the Workforce Development Boards.

Health Care (92%), Manufacturers (86%), and STEM (86%) employers were even more likely to use the Community Colleges, while Small Firms (50%) were less likely. Manufacturers were more likely to use NCWorks Online (69%), while Health Care (39%) and Small Firms (24%) were less likely to use NCWorks Career Centers. Construction employers were similar in their responses to the Overall sample.

## **Half of employers who didn't use the workforce development system weren't aware of it**

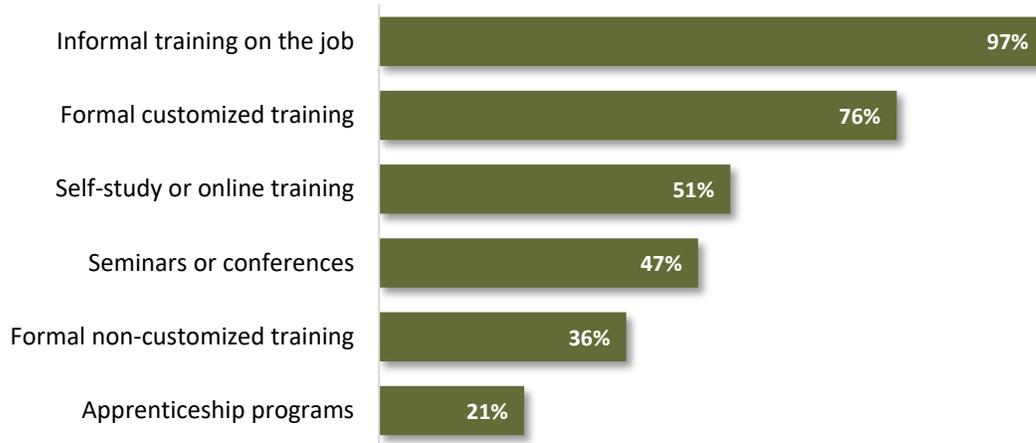
Employers who said they did not use the workforce development system were asked about reasons why they did not. Just over half (51%) said they were not aware of these resources, followed by 40 percent who said the services offered were not a good fit for their business or industry and 32 percent who felt the job candidates available are not the right fit for their business. Smaller percentages felt it wasn't worth the time and effort (18%) or that the quality of these services was not sufficient (12%).

STEM employers had the largest differences from the Overall sample, with 76 percent saying they were not aware of these resources. Sixty-five percent of Construction employers also said they were not aware of the workforce system resources. These industries may therefore be good targets for future outreach efforts by workforce development practitioners.

## **Most employers met the skill needs of their workforce through a mix of informal and formal training**

Employers were asked which of the following activities they used to meet the skill needs of their workforce:

### Meeting Skill Needs of Workforce (Overall)



NC Department of Commerce, Labor & Economic Analysis Division, August 2020

As previous surveys found, nearly all employers use informal on-the-job training, but more than three-quarters (76%) said they used formal customized training. About half of employers (51%) use self-study or online trainings and seminars and conferences (47%) and smaller percentages used non-customized training and apprenticeship programs.

STEM employers were more likely to use seminars or conferences (77%), self-study or online training (69%), formal non-customized training provided by a vendor or college (46%), and apprenticeship programs (38%). Health Care employers were more likely to use formal customized (88%) and non-customized (59%) training, seminars or conferences (66%), and self-study or online training (72%). Construction employers were more likely to use apprenticeship programs (28%), and Small Firms were less likely to use formal customized training (61%) or apprenticeship programs (13%). Manufacturers were less likely to use seminars or conferences (36%) and self-study or online training (34%).

### Most Professional Development and Training is done by in-house or corporate staff

Employers were asked to estimate the number of hours of professional development or training the average employee receives in a year. The median response for the Overall sample was 24 hours and the mean was 45 hours, with no significant differences among the other samples. Employers were then asked *who conducts* the professional development or training:

- In-house or corporate staff 97%
- Private-sector vendors 42%
- Community College programs 17%
- Apprenticeship programs 12%
- 4-Year Universities/Colleges 8%
- NCWorks Career Centers 7%

STEM (66%) and Health Care (67%) employers were more likely to use private-sector vendors and 4-year Universities and Colleges (STEM 15%, Health Care 16%). Health Care was also much more likely to use the Community Colleges (43%) to provide training. Construction (63%) employers also used more private-sector vendors as well as Apprenticeships (18%) to train. STEM (3%), Construction (3%), and Small Firms (2%) were less likely to use NCWorks Career Centers. Small Firms (5%) were also less likely to use Apprenticeship programs. Manufacturers were similar to the Overall sample in their use of training providers.

## **Employer-provided benefits vary by industry**

Employers were asked about benefits offered to their employees. Seventy-five percent reported offering paid leave, 64 percent offered health insurance, 54 percent contributed to a pension or retirement savings plan, and 9 percent offered childcare.

Manufacturers reported higher offerings of paid leave (83%) and health insurance (75%) and lower levels of childcare (5%). STEM employers had higher levels of paid leave (93%), health insurance (83%), and contributions to pensions/retirement savings accounts (80%). Health Care (84%) and Construction (83%) reported higher percentages offering paid leave, and Health Care had much higher percentages offering childcare (20%). Small Firms had lower percentages of each benefit, including paid leave (56%), health insurance (38%), contributions to retirement (31%) and childcare (4%).

## **Looking backwards and forward**

Employers were asked whether their experience filling positions was more difficult, less difficult, or about the same as the previous year. Most felt it was about the same (67%), with about a quarter (24%) saying it was more difficult than the previous year and only 9 percent reporting less difficulty. There were not significant differences among the samples with respect to those reporting more difficulty.

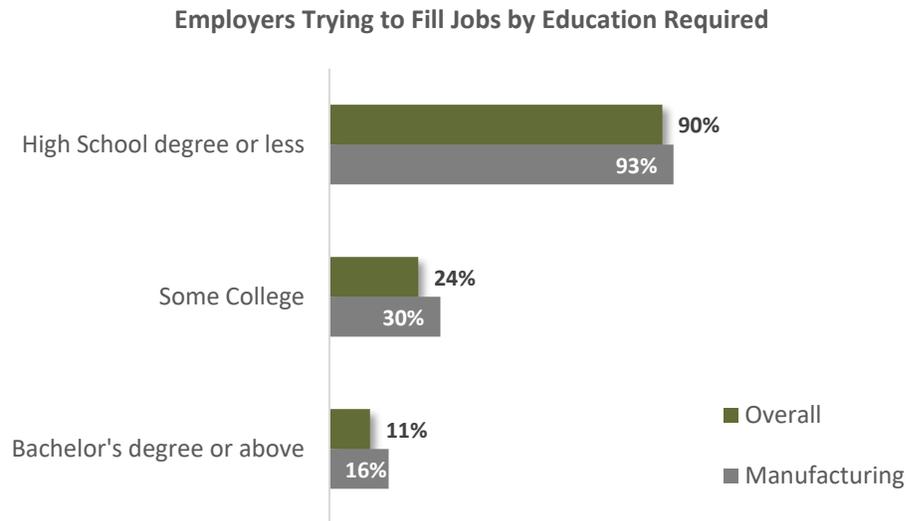
Employers were also asked about their hiring expectations for the coming year. Most (62%) expected their total employment to remain the same, while 36 percent expected to increase employment and only 2 percent expected to decrease. Higher percentages of STEM (48%) and Construction (49%) employers expected employment to increase, while fewer Small Firms (27%) expected employment to increase. Manufacturing and Health Care employers were similar to the Overall sample.

## **FINDINGS FROM THE 2<sup>ND</sup> SURVEY**

The second survey included two samples: an Overall sample representative of all industries in the state and a Manufacturing sample. Both samples were made up of establishments with 10 or more employees. The second survey asked about hiring and hiring difficulties by level of education required for positions, as well as delved into topics such as use of temporary work and credentials of value. The achieved sample includes responses from 412 employers in the Overall sample and 374 Manufacturers. The survey data was collected from November through December of 2019.

## 90% of hiring employers tried filling low-education positions

Eighty-one percent of employers in both samples tried to fill at least one position in the previous year, a similar level of hiring to that found in the 1<sup>st</sup> survey. As opposed to the 1<sup>st</sup> survey, which asked about positions requiring a certain time period of work experience, the 2<sup>nd</sup> survey asked about the specific levels of education required for the positions. This allows us to see which levels of educational attainment were being sought by employers during the previous year.



*NC Department of Commerce, Labor & Economic Analysis Division, August 2020*

As seen above, most firms surveyed tried to fill jobs that required only a high school degree or less. Because firms often attempt to fill a mix of positions during a year, it is helpful to look at the proportion of positions the average firm tried to hire. Broken out this way, the average firm tried to fill:

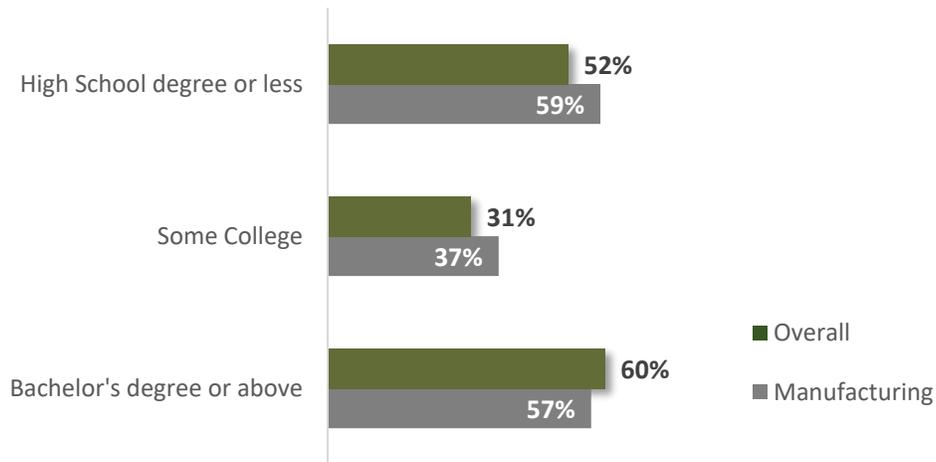
- 83% of positions requiring High School or less; (Manufacturing: 84%)
- 12% of positions requiring Some College; (Manufacturing: 12%)
- 5% of positions requiring a BA or above; (Manufacturing: 4%)

## Over half of employers had difficulty hiring, including for positions requiring a High School degree or less

The survey then asked those who had tried to hire about *difficulty filling at least one position* during the previous 12 months. Over half (56%) of the Overall firms and 63 percent of Manufacturers reported difficulty hiring (not a statistically significant difference from the Overall sample). This level of hiring difficulty was very similar to that reported in the 1<sup>st</sup> survey.

The second survey asked about hiring difficulties by education level required for the positions as well as the reasons for difficulty.

### Hiring Difficulty by Education Required



*NC Department of Commerce, Labor & Economic Analysis Division, August 2020*

Fifty-two percent of Overall firms reported difficulty with positions requiring High School or less, with Manufacturers (59%) reporting more difficulty at this level. Top reasons for difficulty in the Overall sample included applicants' lack of employability (76%), a low number of applicants (64%), a lack of work experience (60%), and a lack of soft skills (56%). Manufacturers reported similar reasons, however a lack of technical skills was cited much more often by Manufacturers (57% vs. 39%) as a reason for difficulty with this type of position.

Both samples had less difficulty with positions requiring Some College--31 percent of Overall employers and 37 percent of Manufacturers reported hiring difficulty. The top reasons for difficulty for Overall employers included applicants' lack of work experience (70%), a low number of applicants (67%), a lack of technical skills (58%), a lack of educational credential (58%), and applicants' unwilling to accept offered pay (50%). A lack of employability was less frequently chosen for this educational group, although it was still noted by 46 percent of Overall employers. There were no significant differences between Overall and Manufacturing employers on each of these reasons.

Employers reported more difficulty with positions requiring a Bachelor's degree or higher, with 60 percent of employers in the Overall sample and 57% of Manufacturers reporting difficulty. Top reasons for difficulty among Overall employers included a low number of applicants (71%), Commuting distance (48%), applicants' lack of educational credential (43%) and work experience (43%). Employability concerns were less frequently chosen for this educational group, with 26 percent of Overall employers citing this reason. Manufacturers reported similar reasons for difficulty.

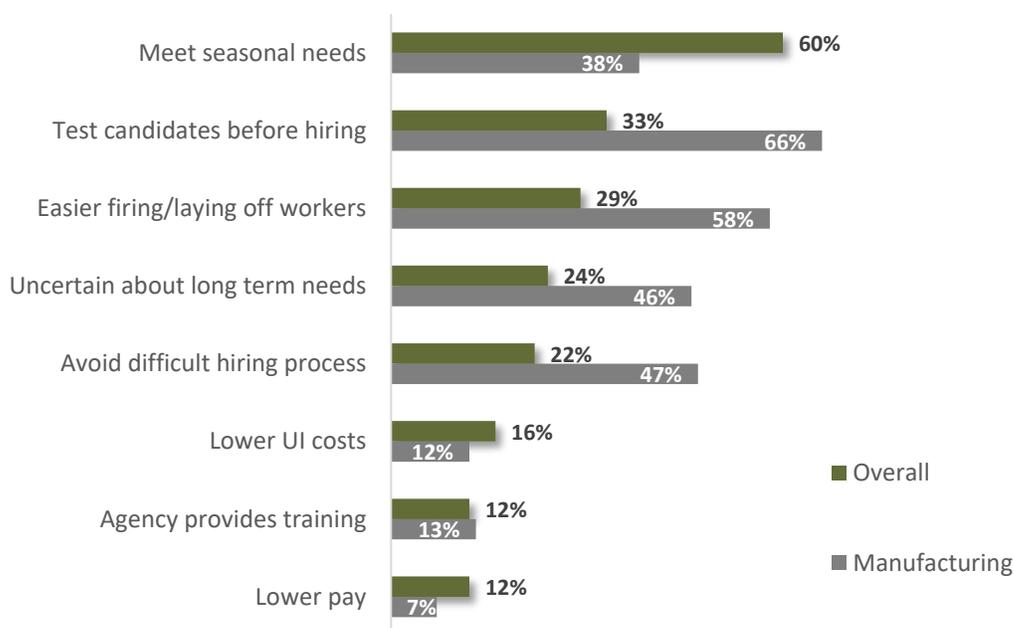
### **Temporary and contractor workers are used by many employers to fill needs**

Employers were then asked about their use of contracted or temporary workers. Twenty percent of Overall employers and 37 percent of Manufacturers reported using at least some contract or temporary workers. Of those that did, 81 percent of Overall employers and 86 percent of Manufacturers said they accounted for 1/3 or fewer of their positions.

Over half of employers said their use of temps was about the same over the past two years, with slightly more reporting increasing vs. decreasing use. Manufacturers (76%) were more likely to regularly use a temp agency than Overall employers (39%).

When asked about the reasons for using temp workers, significant differences emerged between the Overall sample and the Manufacturers. The top reason for Overall employers was to meet seasonal needs (60%), while Manufacturers were much more likely to report using temps to test candidates before hiring (66%). Manufacturers were also more likely to report using temps because of uncertainty about long-term needs (46%) and the fact that the use of temps made it easier to both hire (47%) and fire (58%) workers. Using temps for seasonal needs were much less common for Manufacturers (38%).

**Reasons for Using Contract or Temporary Workers**



*NC Department of Commerce, Labor & Economic Analysis Division, August 2020*

### **Employers are seeking a wide range of credentials as well as experience and character traits**

Employers were asked what industry or training credentials they seek when hiring new employees and whether these credentials were difficult to find. Employers listed about 40 unique credentials, ranging from the general (regular and Commercial Driving Licenses) to specialized credentials specific to certain industries (Automotive Service Excellence certification). Employers also desired experience in industry-specific work environments such as restaurants. Although not formally credentials, employers also mentioned character traits such as dependability and a strong work ethic.

Among the Overall sample, some of the most frequently mentioned difficult to find credentials included Commercial Driving Licenses, ServSafe certification, Automotive Service Excellence certification, and Early Childhood Education Certificates. Among Manufacturers, difficult to find certifications included

Commercial Driving Licenses, Welding certifications, Computer Numerical Control (CNC) certifications, Forklift certifications, and Machinist certifications.

### Employers see a growing need for General skills in the short-term

Employers were asked whether the following types of skills will be more important, less important, or about the same over the next two years: General skills (e.g. communication, critical thinking, and active learning), Technical skills (e.g. repairing, troubleshooting, quality control analysis, and operation and control), Management skills (e.g. personnel and financial management, negotiation, and judgement), and Science, Math, and Technology (STEM) skills (e.g. math & science, programming, systems analysis, and technology Design).

<b>Overall</b>	<b>General Skills</b>	<b>Technical Skills</b>	<b>Management Skills</b>	<b>STEM Skills</b>
Increase	71%	61%	50%	51%
Decrease	1%	7%	7%	9%
Remain Same	29%	33%	43%	40%

<b>Manufacturing</b>	<b>General Skills</b>	<b>Technical Skills</b>	<b>Management Skills</b>	<b>STEM Skills</b>
Increase	54%	62%	40%	49%
Decrease	1%	5%	9%	7%
Remain Same	44%	33%	51%	44%

More than half of Overall employers anticipated that all four types of skills would be more important over the next two years, particularly General skills and Technical skills. More than half of Manufacturers agreed that General and Technical skills would increase in importance, although they reported lower percentages for Management and STEM skills. In general, low percentages of employers thought these skills would be less important in the future.

Employers were also asked what qualities, talents, or skills were most valued in their existing employees. Some of the most common qualities included basic employability skills such as dependability, honesty, punctuality, and having a strong work ethic, as well as soft skills such as communication and good customer service.

### NC Manufacturers are more aware of NC’s Workforce System resources than businesses overall

Employers were asked about their awareness of services for finding, hiring, or training workers. The table below shows the percentage of employers “somewhat aware” or “very aware” of these services:

	<b>Overall</b>	<b>Manufacturing</b>
NCWorks Career Centers	49%	60%*
NCWorks Online	48%	57%*

Community Colleges	74%	79%
Workforce Development Boards	45%	49%

*\*indicates statistically significant difference*

As can be seen, the Community Colleges’ services are well known to both Overall employers and Manufacturers. Slightly less than half of the Overall employers were aware of the other resources. However, Manufacturers were significantly more aware of NCWorks Career Centers and NCWorks Online. This finding is in line with the results of the 1<sup>st</sup> survey, in which about half of Overall and Manufacturing employers who did not use the workforce system resources said they were not aware of them.

### **Half of NC businesses have a positive perception of most workforce resources**

Employers were then asked about their general perception of the following workforce resources for businesses. Among those who expressed any opinion, the following shows the percent of employers reporting a “good” or “very good” perception:

	<u>Overall</u>	<u>Manufacturing</u>
NCWorks Career Centers	51%	53%
NCWorks Online	49%	48%
Community Colleges	70%	69%
Workforce Development Boards	45%	53%

The perception of the quality of workforce resources seems to track with the awareness of the resources, with Community Colleges being viewed positively by 70 percent of employers and the other three resources viewed positively by about half of employers.

### **Future employee retirements are a significant concern for more than half of Manufacturers and over a third of businesses overall**

Employers were asked how concerned they were about adequately replacing key employees who may retire in the next five years. 38 percent of the Overall employers ranked their concern as a 4 or 5 on scale of 1 to 5, with 5 being “Most Concerned”. Over half of Manufacturers (54%) ranked their concern as a 4 or 5.

Employers were also asked to what degree turnover is a problem for their organization on a scale of 1 to 5, with 5 being “Most Important”. In both samples, 34 percent of employers ranked the importance of turnover as a 4 or 5.

## **CONCLUSIONS**

It is important to remember these levels of perceived difficulty and outlook on the future represented conditions during the Fall of 2019. In 2020, employers and workers are facing a highly uncertain labor market as a result of unprecedented job losses, economic recession, and an unknown path back to recovery.

Although conditions have changed, there are still several takeaways from the survey that may be useful to workforce development practitioners and policymakers going forward. Although needs vary by industry and type of position desired, employers consistently stress employability, reliability, and a strong work ethic as essential characteristics of workers. Other top reasons for difficulty, such as a lack of work experience, point to the need to develop opportunities for exposure to work and professional environments for young jobseekers. Employers struggling with a low number of applicants, another top reason for difficulty, may need to reexamine their offered wages, job conditions, and required qualifications in order to attract more and more qualified candidates.

Although skills and education are important, they occupied the middle tier of concerns for employers. While specific industries and positions may require particular skills, these needs can often be addressed through training and additional education. It is less clear whether issues of employability can also be addressed through formal training and education programs. Because employability is more frequently mentioned as an issue for jobs requiring only a high school degree, it could be addressed more formally through instruction at the high school level. Finally, although the inability to pass a drug test and having a criminal record may be a top issue for some employers, these reasons are not among the most frequently chosen reasons for difficulty by all employers. However, to the degree that these issues are frustrating employers and preventing workers from obtaining employment, these are challenges to address.

The survey results also suggest that more employers are using online resources to recruit. This helps employers expand the pool of candidates they are able to attract but also presents an opportunity to the workforce system to extend services – particularly to smaller businesses where electronic marketing may be technically more challenging or more expensive than for larger firms. In addition, emphasizing training and professional development for existing workforce is another strategy for retaining talent and promoting from within. Focus here may help grow awareness and utilization of the workforce development system among employers, particularly among industries which may not have traditionally engaged with the system such as STEM and Construction employers. Finally, offering more and better benefits may also be a way to attract and retain top talent.

Looking forward, there are many unknowns facing employers and workers. However, there are a few trends which may become more important in light of the pandemic. As physical workplaces transform and as remote working becomes more necessary, the specific labor needs of employers may shift. There is also the potential for increased automation in some industries, which would also change the mix of needed workers. Education and training providers such as universities and community colleges are also reexamining their models and may increasingly offer online forms of learning. Additionally, there is a new appreciation for the role of essential workers, including health care workers, but also grocery store workers, distribution workers and other retail and service positions which we rely upon.

Finally, the workforce development system as a whole faces the unprecedented task of assisting large numbers of unemployed individuals, many of whom have worked in industries which may not recover quickly. This may require workers changing industries and occupations, including retraining and obtaining additional skills and credentials. As employers and jobseekers adjust to these new conditions, it is our hope that this survey can help guide these efforts.