



Delaware Workforce Assessment: A Survey of Business Decision-Makers



Submitted to:
Delaware Workforce Development Board
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I. Methodology and Sample Characteristics

Zogby Analytics was commissioned by the Delaware Workforce Development Board to conduct a hybrid (online and live operator telephone) survey of 251 business decision-makers in Delaware.

Telephone samples were randomly drawn from known business lists. Up to four calls were made to reach a sampled phone number. Respondents that were not available but qualified to respond were allowed to set appointments to be recalled within the time frame of the field work.

Additionally, using internal and trusted interactive partner resources, thousands of adults were randomly invited to participate in this interactive survey. Each invitation was password coded and secure so that one respondent can only access the survey one time. Also, Delaware Workforce sent out links to their contact lists.

The final sample consisted of owners or partners (26%), directors (14%), HR (10%), CXOs (8%), presidents (8%) and other company officers with decision-making responsibilities (31%), working for organizations with over \$1 million in revenue in a 59% of the cases and more than 50 employees in 43% of the cases. The respondents most commonly worked in health care and social assistance (28), professional, scientific and technical services (27), retail trade (23), construction (20), educational services (20) and manufacturing (19). Sixty-four percent of surveyed businesses had a single Delaware location.

Based on a confidence interval of 95%, the margin of error for 251 is ± 6.1 percentage points. This means that all other things being equal, if the identical survey were repeated, its confidence intervals would contain the true value of parameters 95 times out of 100.

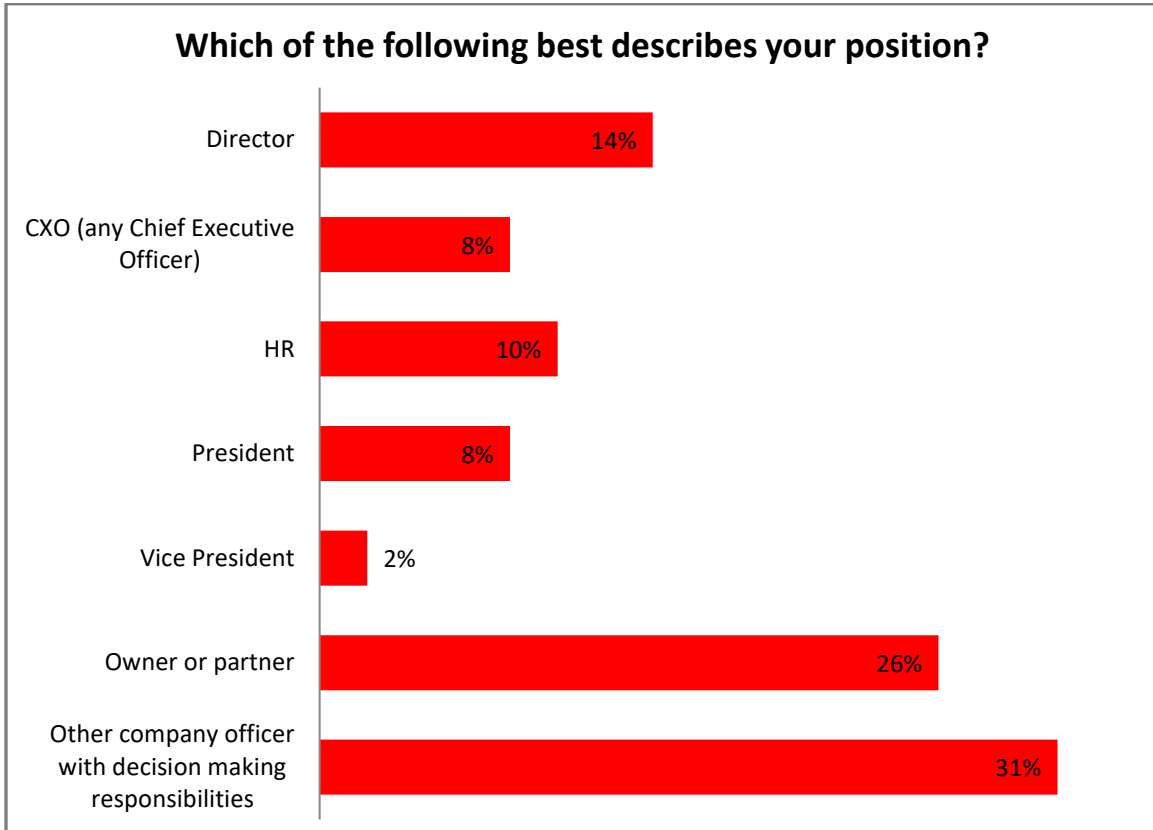
Subsets of the data have a larger margin of error than the whole data set. As a rule we do not rely on the validity of very small subsets of the data especially sets smaller than 50-75 respondents. At that subset we can make estimations based on the data, but in these cases the data is more qualitative than quantitative.

Additional factors can create error, such as question wording and question order.

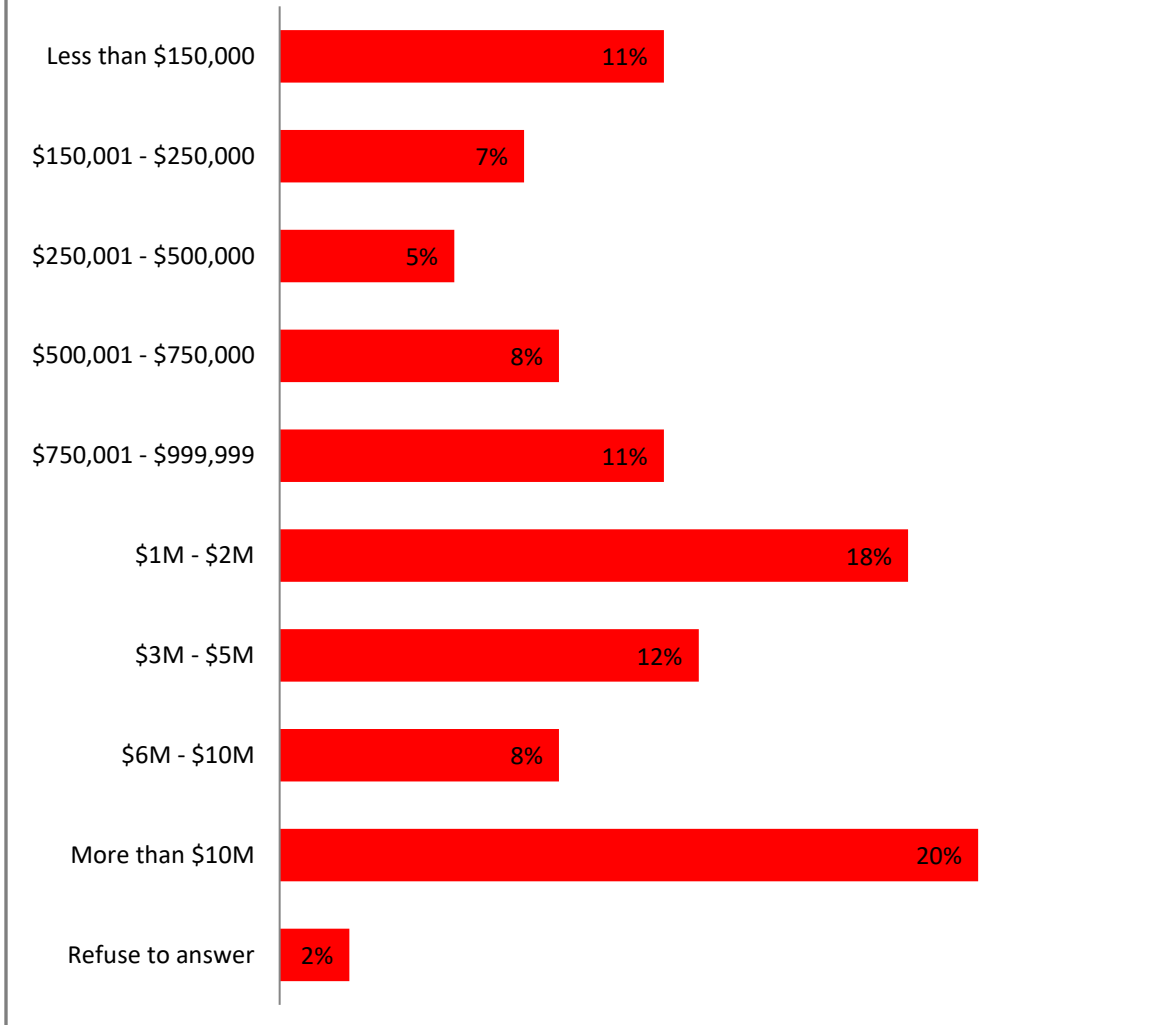
About Zogby Analytics:

Zogby Analytics is respected nationally and internationally for its opinion research capabilities. Since 1984, Zogby has empowered clients with powerful information and knowledge critical for making informed strategic decisions.

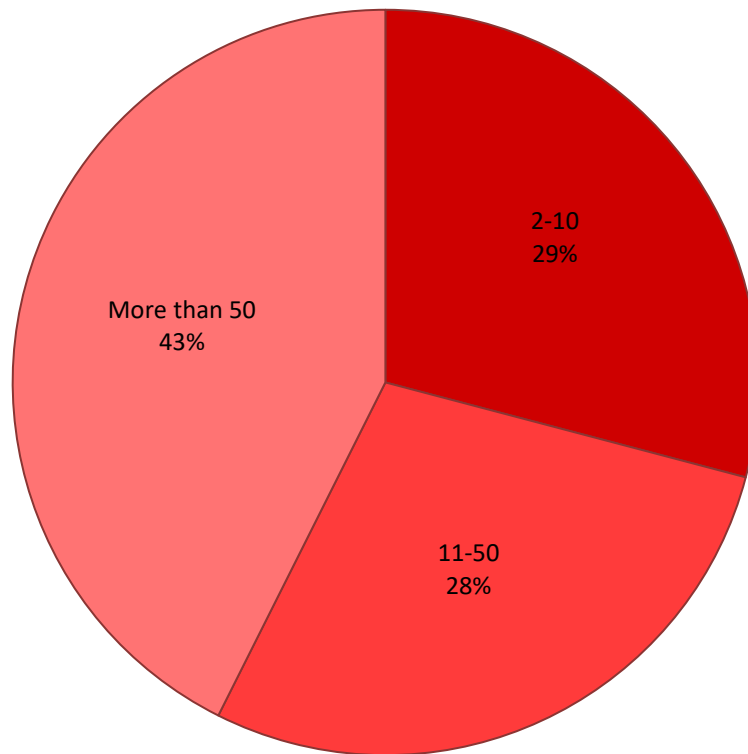
The firm conducts multi-phased opinion research engagements for banking and financial services institutions, insurance companies, hospitals and medical centers, retailers and developers, religious institutions, cultural organizations, colleges and universities, IT companies and Federal agencies. Zogby's dedication and commitment to excellence and accuracy are reflected in its state-of-the-art opinion research capabilities and objective analysis and consultation.



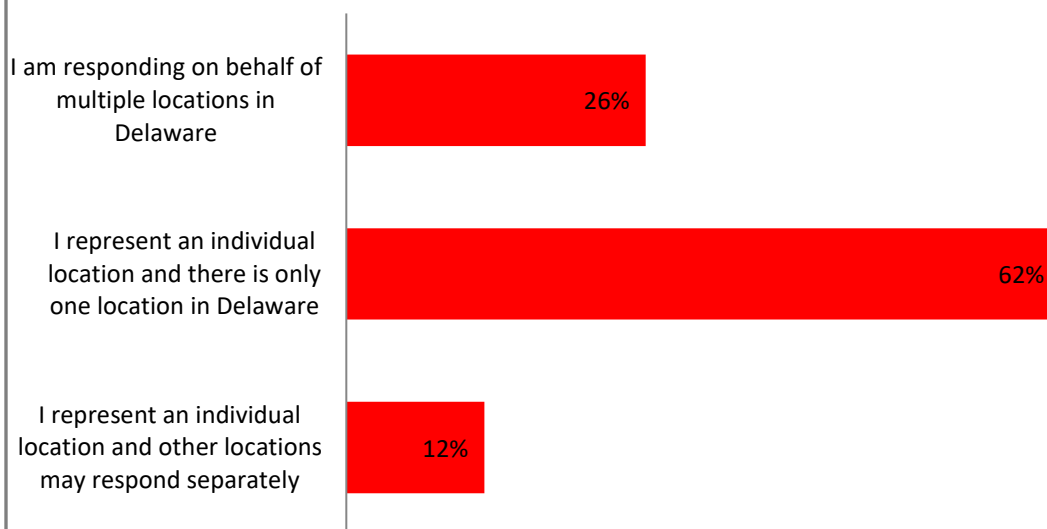
What is your company's annual revenue?



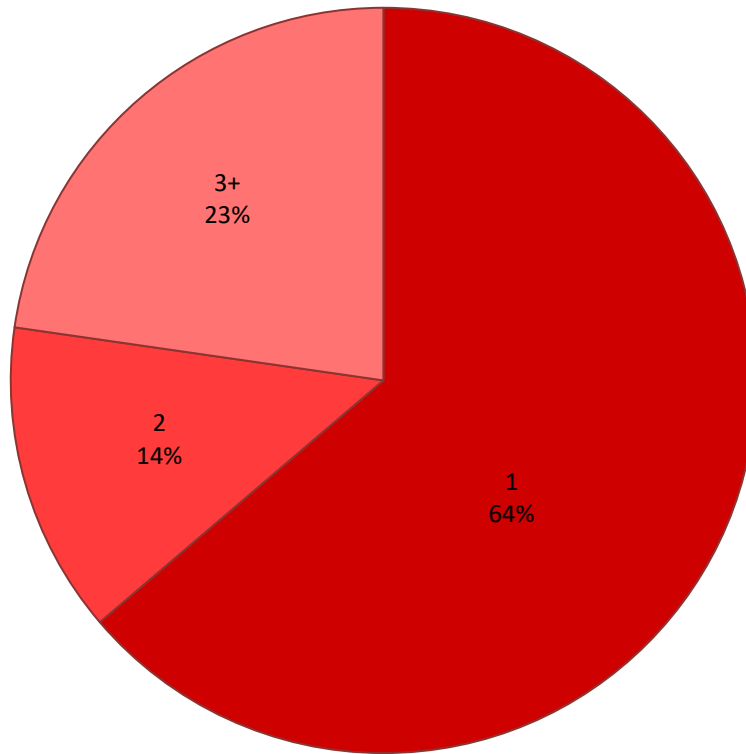
Which of the following best describes the number of employees in your company?



Do you represent a single location or multiple locations?



How many locations does your business have in Delaware?



Which of the following best describes your primary industry?

Industry	Frequency
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	3
Construction (NAICS 23)	20
Manufacturing (NAICS 31-33)	19
Wholesale Trade (NAICS 42)	7
Retail Trade (NAICS 44-45)	23
Transportation and Warehousing (NAICS 48-49)	8
Utilities (NAICS 22)	3
Information (NAICS 51)	11
Finance and Insurance (NAICS 52)	12
Real Estate and Rental and Leasing (NAICS 53)	6
Professional, Scientific and Technical Services (NAICS 54)	27
Management of Companies and Enterprises (NAICS 55)	5
Administrative and Waste Services (NAICS 56)	3
Educational Services (NAICS 61)	20
Health Care and Social Assistance (NAICS 62)	28
Arts, Entertainment, and Recreation (NAICS 71)	12
Accommodation and Food Services (NAICS 72)	15
Other Services (except Public Administration) (NAICS 81)	26
Unsure	3

Which of the following best describes your secondary industry (if applicable)?

Industry	Frequency
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	1
Construction (NAICS 23)	5
Manufacturing (NAICS 31-33)	11
Wholesale Trade (NAICS 42)	5
Retail Trade (NAICS 44-45)	12
Transportation and Warehousing (NAICS 48-49)	2
Utilities (NAICS 22)	4
Information (NAICS 51)	6
Finance and Insurance (NAICS 52)	8
Real Estate and Rental and Leasing (NAICS 53)	3
Professional, Scientific and Technical Services (NAICS 54)	18
Management of Companies and Enterprises (NAICS 55)	5
Administrative and Waste Services (NAICS 56)	1
Educational Services (NAICS 61)	5
Health Care and Social Assistance (NAICS 62)	10
Arts, Entertainment, and Recreation (NAICS 71)	5
Accommodation and Food Services (NAICS 72)	6
Other Services (except Public Administration) (NAICS 81)	15
Unsure / Not applicable	129

II. Executive Summary

In order to cope with the impact of the Covid-19 pandemic, surveyed decision-makers most often employed teleworking/telecommuting, shifting employees within the business, purchasing laptops and other equipment for staff, federal loans, temporarily reducing employment and employee hours, and by increasing marketing efforts. Companies with a single Delaware location and those that employ 11-50 employees are most likely to rely on federal loans to cope with the impact of Covid-19 pandemic.

Three out of four respondents have increased flexibility overall to help their employees cope with the pandemic crisis, while large numbers also supported effective communication in a virtual world, wellness days or workshops, fostered positive coping strategies in and outside of work and provided training on virtual tools. Larger companies, both in terms of number of employees and annual revenue, are more likely to employ a variety of strategies.

Approximately half of surveyed decision-makers doesn't have any staff working remotely at least two times a week, while approximately a quarter each has between 1% and 25% or more than 25% such staff. Respondents don't expect these numbers to change in the near future. An overwhelming majority of respondents maintains effective communication with remote employees through video conferencing, but majorities also use conference calls, periodic staff emails and in-person meetings.

A majority of respondents expect that, in the next 12-24 months, they will keep their physical footprint as is, or are undecided about it. About a third expects to increase it, while only 10% expects to reduce it.

When fully staffed, majorities of surveyed businesses employ more than ten full-time employees and less than six part time-employees. About a third employs at least some third-party or contract workers working at least 30 hours a week and a similar number employs at least some third-party or contract workers working fewer than 30 hours a week. "Warehouse associates," "store managers," "housekeeping and maintenance," "carpenters," "product sales and marketing," crew managers," "servers and cooks," "lifeguards, fitness instructors, childcare workers", "staff and senior accountants" are some of the positions where respondents expect an increase in headcount or hours over the next 12 months. In addition, "loan officers and tellers", "massage therapists", "scientists", "room attendants", "morgue assistants", "maintenance", "customer service", "childcare workers", "carpenters", "machine operators", "mechanics", "development engineers", "service tech", "drivers", "CPAs", "sales" are some of the positions that respondents find particularly difficult to fill and retain typically because of the competition from other employers, low wages, job demands, limited pool or lack of skilled candidates.

A majority of surveyed decision-makers assess job descriptions and minimum hiring requirements as the need arises, while approximately a quarter combined does it every 3-6 months or annually.

Word of mouth/networking/referrals, Indeed and company website are the most commonly used recruitment tools, while word of mouth/networking/referrals and Indeed are seen as most successful in recruiting new employees. Word of mouth/referrals and Indeed are seen as the most successful recruiting tools, while company websites, Indeed, Facebook and Delaware JobLink are seen as the least successful. The most successful recruiting tools typically provide the large number of qualified and diverse candidates, while the least successful tools provide the smallest number of qualified candidates, and don't return the best talent.

Delaware JobLink is used by 36% of surveyed businesses with more than 50 employees, compared to 18% and 16% of companies with 2-10 and 11-50 employees, respectively.

Approximately half of respondents believe that Delaware JobLink could help their business through job postings, helping recruit new workers, and talent matching, while significant numbers also believe it could help by providing hiring incentives, training assistance to re-skill or up-skill existing employees, career fairs and tax credits. Respondents perceive high-schools, career and technical education programs, Delaware 4-year public colleges, out of state 4-year public colleges, Delaware private colleges, out of state private colleges and Delaware 2-year public colleges as most important in providing qualified applicants for their businesses. As a rule, businesses with multiple locations in Delaware perceive various education and training providers as more important than their single location peers, often by large margins.

Four out five survey respondents offer new or existing employees on-the-job training while a half also offers on-board training, job shadowing, and mentoring/coaching. Respondents who already do not do so would most often like to offer in-house online learning/professional development, management/leadership development or training, third-party online learning or professional development, lunch-and-learn or similar programs, registered apprenticeship programs and mentoring/coaching. Lack of time among staff members and management, lack of funding and high cost are the biggest barriers to additional training. Businesses with annual revenues that are greater than \$1M offer all forms of training more often than companies with annual revenues that are less than \$1M. This is especially true for on-board training, mentoring/coaching and management/leadership development or training.

Self-motivation, communication skills, problem-solving and critical thinking, attention to detail, time management and timeliness/attendance are the non-technical, while software proficiency in Excel and basic computer use/computer literacy and data analysis are technical skills most commonly lacking among job applicants and new employees, with some also mentioning "professional licensure or certification", "ability to read shop drawings blueprint", and "architectural modeling and rendering". Similar non-technical

and technical skills are also the ones most difficult to recruit for. Only 13% of respondents report having job candidates complete a digital assessment to test their computer capabilities.

Lack of experience, self-motivation and initiative, gap in salary and wage expectations, scheduling, and transportation are most common barriers preventing decision-makers from hiring job candidates or them taking the jobs. Self-motivation and initiative is the top barrier at companies with 2-10 employees. On the other hand, gaps in salary and wage expectations are more common barrier at businesses with more than \$1M than at companies with less than \$1M in annual revenue.

More than half of surveyed decision-makers average over \$5,000 in recruitment costs per year and close to half take more than a month, on average, to fill their current vacancies.

Most surveyed decision-makers believe their wages are the same or higher than those of the nearby similar businesses.

Respondents expect the number of their open positions in Delaware to grow over the next three years. Thus, while half have 0-2 positions currently open in Delaware, only 29% expect to have so few a year from now, and only 21% expect to have as many three years from now.

More than a quarter of surveyed decision-makers currently use Delaware JobLink and nearly a third use staffing agencies to fill vacancies. Approximately one in three have an intern program and a similar number have an in-house leadership training program for long-term replacement of senior positions. Both internship and leadership programs are much more common at larger companies.

Four out of five respondents report having positions that do not require a college degree, and nearly half say that they accept individuals coming out of the criminal justice system. A majority of survey respondents believe that new applicants are ready for the jobs they are applying for.

Nearly a third of surveyed decision-makers expect to lose two or more mission critical positions to retirement in the next year, and half expect to lose two or more such positions over the next five years.

III. Covid-19 Aftermath

In order to cope with the impact of the Covid-19 pandemic, surveyed decision-makers most often employed teleworking/telecommuting (39%), shifting employees within the business (30%), purchasing laptops and other equipment for staff (29%), federal loans (29%), temporarily reducing employment (27%) and employee hours (26%), and increasing marketing efforts (26%). Companies with a single Delaware location (34%; 20% among businesses with multiple locations) and those that employ 11-50 employees (51%; 30% and 14% among businesses with 2-10 and more than 50 employees, respectively) are most likely to rely on federal loans to cope with the impact of Covid-19 pandemic.

Three out of four (75%) respondents have increased flexibility overall to help their employees cope with the pandemic crisis, while large numbers also supported effective communication in a virtual world (43%), wellness days or workshops (34%), fostered positive coping strategies in and outside of work (32%) and provided training on virtual tools (31%). Larger companies, both in terms of number of employees and annual revenue, are more likely to employ a variety of strategies. For example, 51% of surveyed businesses with more than \$1M in annual revenue have supported effective communication in a virtual world, compared to 30% of companies with less than \$1M in annual revenue. Similarly, 47% of businesses with more than 50 employees have employed wellness days or workshops but only 16% of companies with 2-10 employees have done the same.

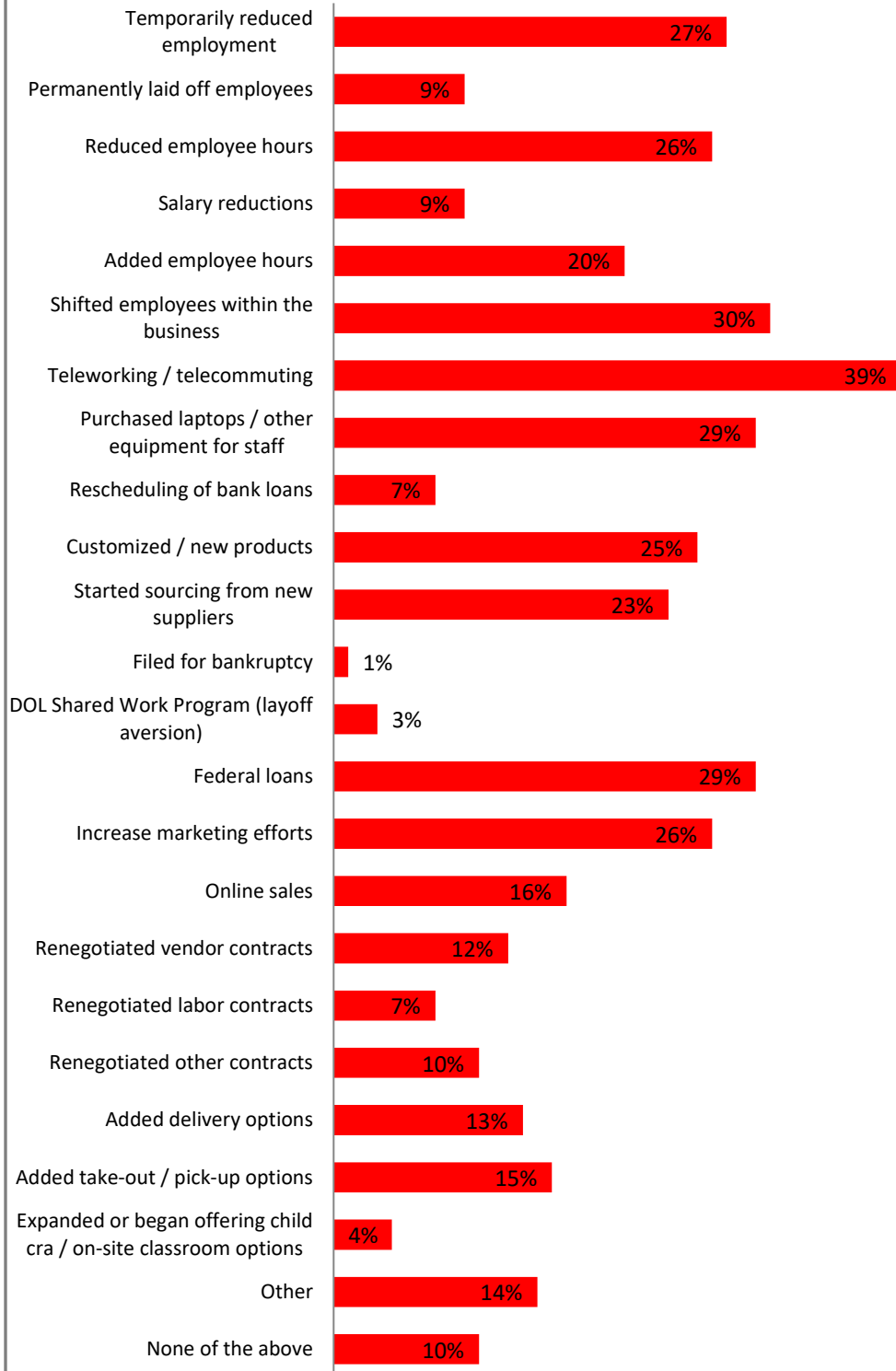
Approximately half (47%) of surveyed decision-makers doesn't have any staff working remotely at least two times a week, while approximately a quarter each has between 1% and 25% (26%) or more than 25% (27%) such staff. Respondents don't expect these numbers to change in the near future as the numbers of remote workers they anticipate having in 6 months (46%;27%;27%) and 12 months (48%;27%;26%) are almost identical to the current distribution. An overwhelming majority of respondents maintains effective communication with remote employees through video conferencing (92%), but majorities also use conference calls (60%), periodic staff emails (57%) and in-person meetings (54%).

A majority (59%) of respondents expect that, in the next 12-24 months, they will keep their physical footprint as is, or are undecided about it. About a third (32%) expects to increase it, while only 10% expects to reduce it.

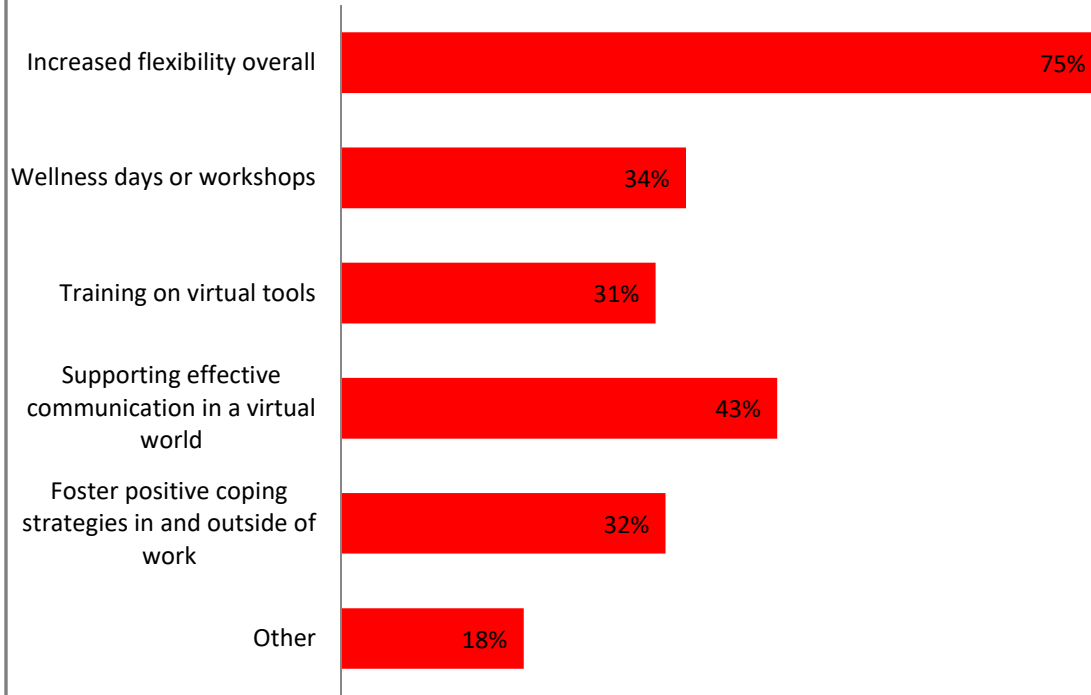
When fully staffed, majorities of surveyed businesses employ more than ten full-time employees (60%) and less than six part time-employees (56%). About a third employ at least some third-party or contract workers working at least 30 hours a week (36%) and a similar number (30%) employs at least some third-party or contract workers working fewer than 30 hours a week. "Warehouse associates," "store managers," "housekeeping and maintenance," "carpenters," "product sales and marketing," crew managers," "servers and cooks", "lifeguards, fitness instructors, childcare workers", "staff and senior accountants" are some of the positions where respondents expect increase in headcount or hours over the next 12 months. In addition, "loan officers and tellers", "massage therapists", "scientists", "room attendants", "morgue assistants", "maintenance",

“customer service”, “childcare workers”, “carpenters”, “machine operators”, “mechanics”, “development engineers”, “service tech”, “drivers”, “CPAs”, “sales” are some of the positions that respondents find particularly difficult to fill and retain typically because of the competition from other employers, low wages, job demands, limited pool or lack of skilled candidates.

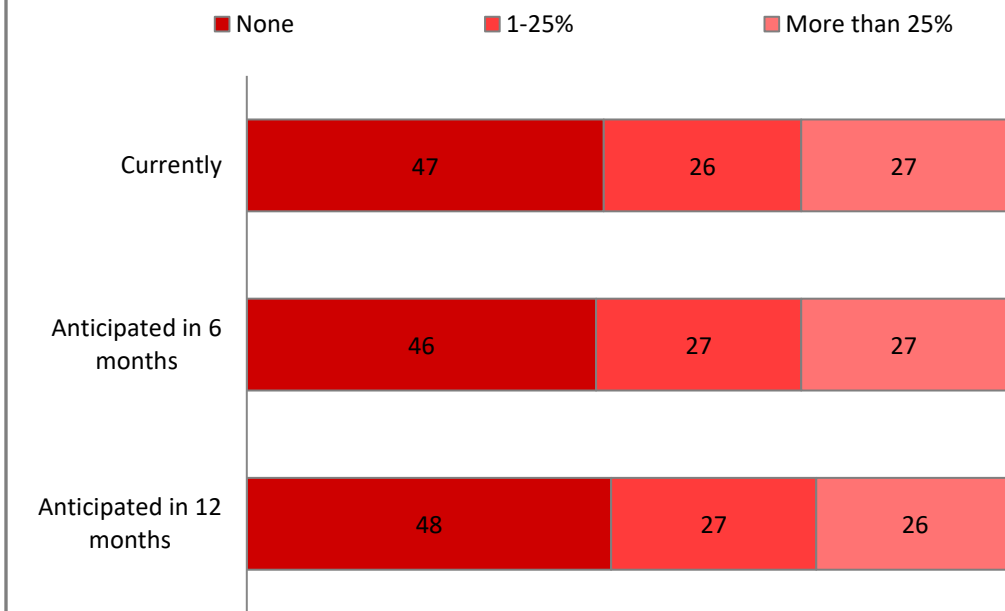
Q1. What, if any, of the following strategies have you employed to cope with the impact of the Covid-19 pandemic? (Select all that apply)



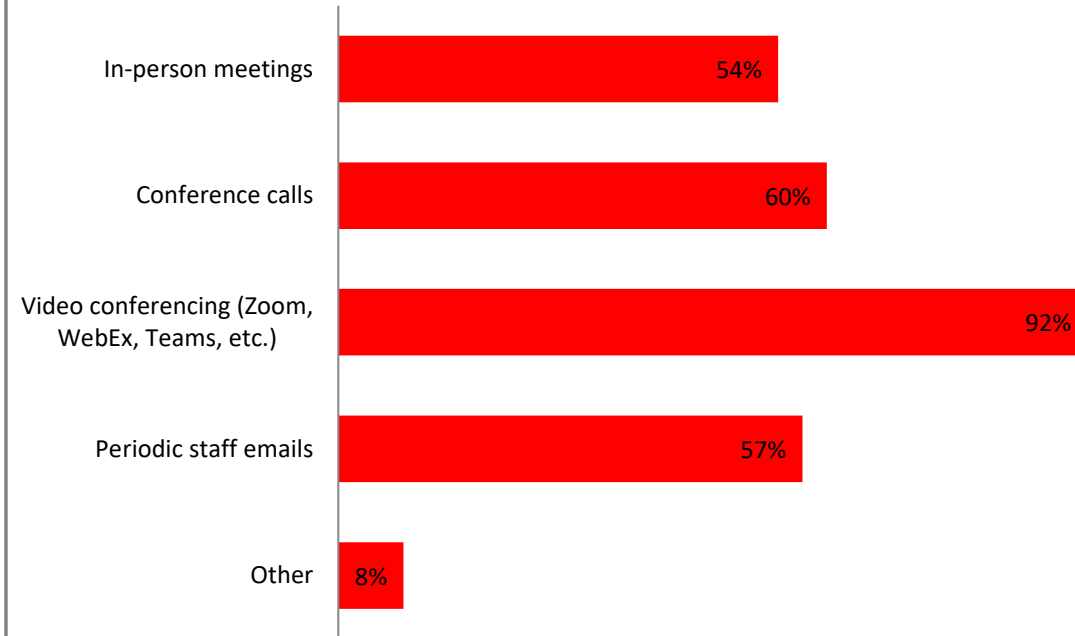
**Q2. What strategies have you employed to help your employees cope with the pandemic crisis?
(Select all that apply)**



Q3. What percentage of your staff are / may be working remotely at least two days per week:

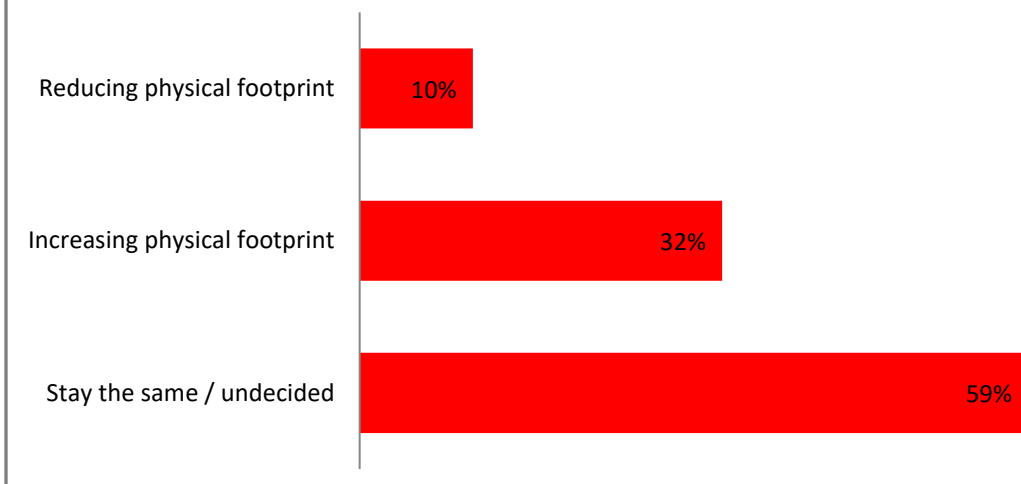


**Q4. How are you maintaining a team effort / collaboration / effective communication with remote employees?
(Select all that apply)**

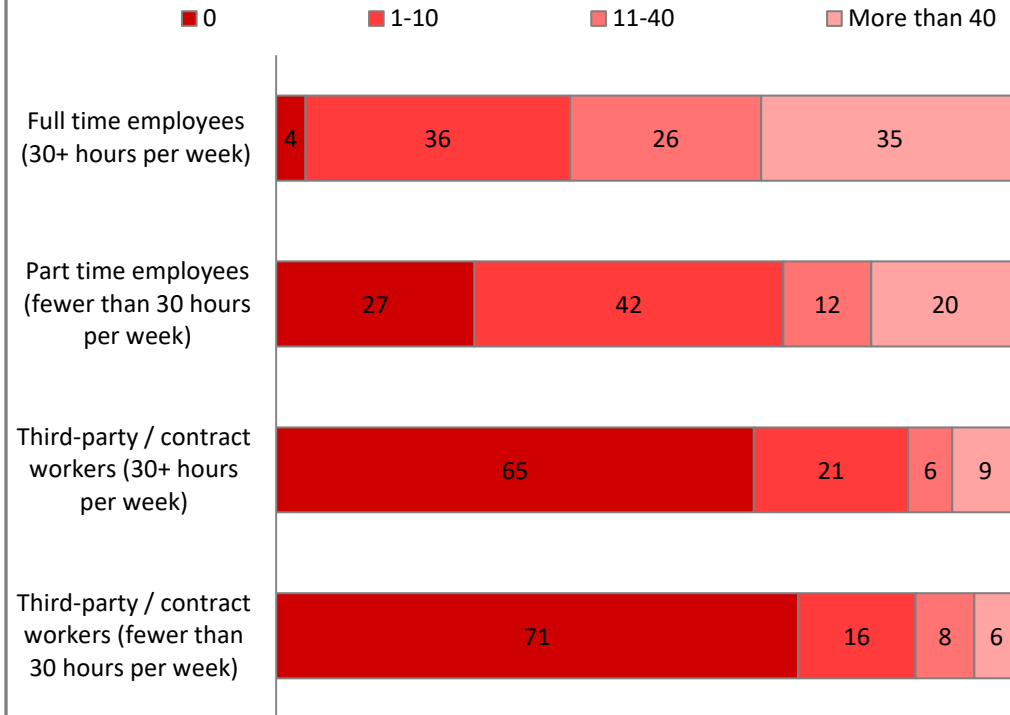


Note: sample size = 89

Q5. In the next 12-24 months, are you considering reducing or expanding your physical footprint (e.g. office space, facility space)?



Q6. When fully staffed (i.e., not when operating under restrictions) how many employees does your company employ in Delaware:



IV. Recruitment and Training

A majority (56%) of surveyed decision-makers assess job descriptions and minimum hiring requirements as the need arises, while approximately a quarter combined does it every 3-6 months (12%) or annually (16%).

Word of mouth/networking/referrals (72% actively use this tool), Indeed (62%) and company website (55%) are most commonly used recruitment tools, while word of mouth/networking/referrals (38% perceive it as 'very successful' in recruiting new employees) and Indeed (26%) are seen as most successful in recruiting new employees. Word of mouth/referrals (38%) and Indeed (22%) are seen as the most successful recruiting tools, while company websites (23%), Indeed (16%), Facebook (15%) and Delaware JobLink (11%) are seen as the least successful. The most successful recruiting tools typically provide the large number of qualified (50%) and diverse (40%) candidates, while the least successful tools provide the smallest number of qualified candidates (44%), and don't return the best talent (32%).

Delaware JobLink is used by 36% of surveyed businesses with more than 50 employees, compared to 18% and 16% of companies with 2-10 and 11-50 employees, respectively.

Approximately half of respondents believe that Delaware JobLink could help their business through job postings (53%), helping recruit new workers (49%), and talent matching (45%), while significant numbers also believe it could help by providing hiring incentives (32%), training assistance to re-skill or up-skill existing employees (31%), career fairs (27%) and tax credits (27%). Respondents perceive high-schools (34% perceive them as very important in providing qualified applicants), career and technical education programs (33%), Delaware 4-year public colleges (29%), out of state 4-year public colleges (25%), Delaware private colleges (24%), out of state private colleges (22%) and Delaware 2-year public colleges (22%) as most important in providing qualified applicants for their businesses. As a rule, businesses with multiple locations in Delaware perceive various education and training providers as more important than their single location peers, often by large margins. For example, 77% of surveyed companies with multiple locations consider career and technical education programs at least somewhat important in providing qualified applicants, compared to 56% of businesses with one location in Delaware who feel the same. This significant 77%/56% gap also exists when survey respondents are asked to evaluate the importance of other providers such as out-of-state private colleges (63%/43%), non-profit/private training programs (55%/29%), labor unions (39%/14%), Delaware 2-year programs (68%/47%), etc.

Four out five survey respondents offer new or existing employees on-the-job training (83%) while half also offers on-board training (52%), job shadowing (49%), and mentoring/coaching (49%). Respondents who already do not do so would most often like to offer in-house online learning/professional development (17% would like to offer this to their new/existing employees), management/leadership development or training (15%), third-party online learning or professional development (14%), lunch-and-learn or similar

programs (13%), registered apprenticeship programs (12%) and mentoring/coaching (12%). Lack of time among staff members (44%) and management (33%), lack of funding (31%) and high cost (24%) are the biggest barriers to additional training. Businesses with annual revenues that are greater than \$1M offer all forms of training more often than companies with annual revenues that are less than \$1M. This is especially true for on-board training (65% vs. 34%), mentoring/coaching (56% vs. 39%) and management/leadership development or training (39% vs. 20%).

Self-motivation (53%), communication skills (51%), problem-solving and critical thinking (45%), attention to detail (43%), time management (39%) and timeliness/attendance (38%) are the non-technical, while software proficiency in Excel (27%) and basic computer use/computer literacy (20%) and data analysis (20%) are technical skills most commonly lacking among job applicants and new employees, with some also mentioning “professional licensure or certification”, “ability to read shop drawings blueprint”, and “architectural modeling and rendering”. Similar non-technical (self-motivation –36%, problem-solving – 32%, communication skills – 30%, attention to detail – 29%) and technical (software proficiency in Excel – 17%, data analysis – 14%, software proficiency in Word – 13%) skills are also the ones most difficult to recruit for. Only 13% of respondents report having job candidates complete a digital assessment to test their computer capabilities.

Lack of experience (40%), self-motivation and initiative (32%), gap in salary and wage expectations (30%), scheduling (26%), and transportation (26%) are most common barriers preventing decision-makers from hiring job candidates or them taking the jobs. Self-motivation and initiative is the top barrier at companies with 2-10 employees (47%; 32% and 21% at businesses with 11-50 and more than 50 employees, respectively). On the other hand, gaps in salary and wage expectations are more common barrier at businesses with more than \$1M than at companies with less than \$1M in annual revenue (22%).

More than half (54%) of surveyed decision-makers average over \$5,000 in recruitment costs per year and close to half (45%) take more than a month, on average, to fill their current vacancies.

Most surveyed decision-makers believe their wages are the same (42%) or higher (32%) than those of the nearby similar businesses.

Respondents expect the number of their open positions in Delaware to grow over the next three years. Thus, while half (49%) have 0-2 positions currently open in Delaware, only 29% expect to have so few a year from now, and only 21% expect to have as many three years from now.

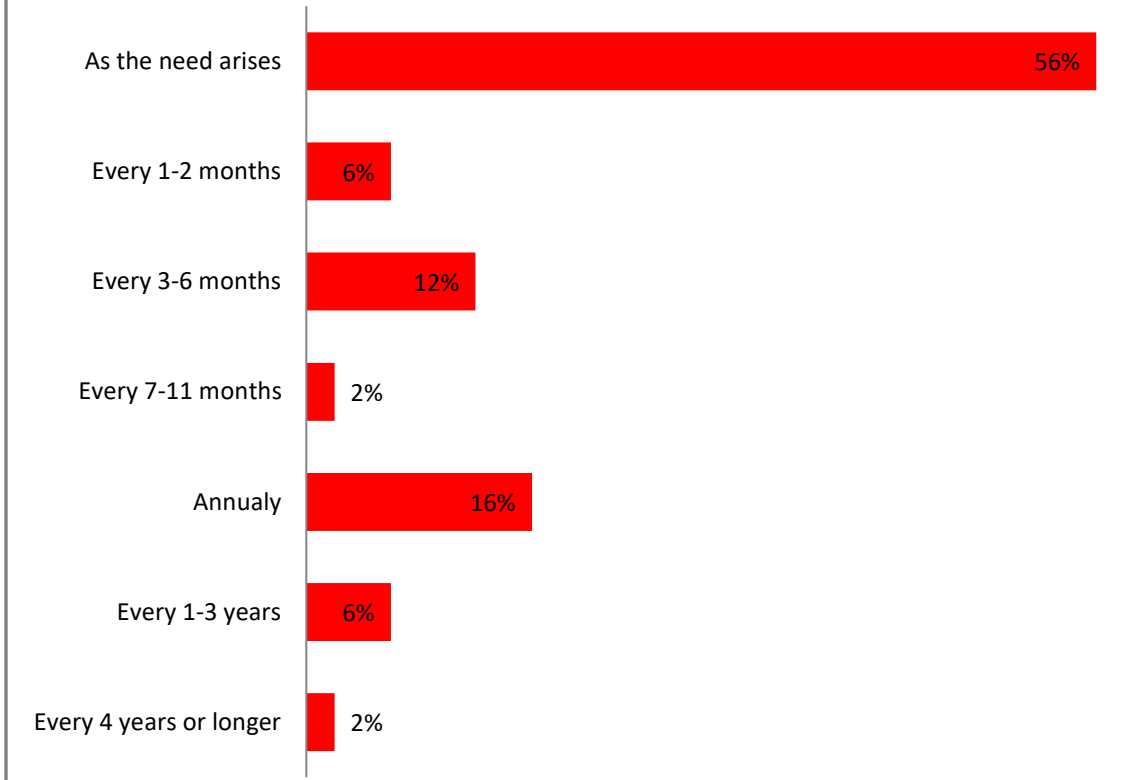
More than a quarter (28%) of surveyed decision-makers currently use Delaware JobLink (41% among businesses with more than 50 employees, compared to 14% among companies with 2-10 employees) and nearly a third (31%) use staffing agencies to fill vacancies (45% among businesses with more than 50 employees, compared to 10% among companies with 2-10 employees). Approximately one in three have an intern program

(34%) and a similar number (35%) have an in-house leadership training program for long-term replacement of senior positions. Both internship and leadership programs are much more common at larger companies – for example 57% of surveyed businesses with more than 50 employees have an in-house leadership training program for long-term replacement of senior positions, compared to 16% and 21% of companies with 2-10 employees and 11-50 employees, respectively.

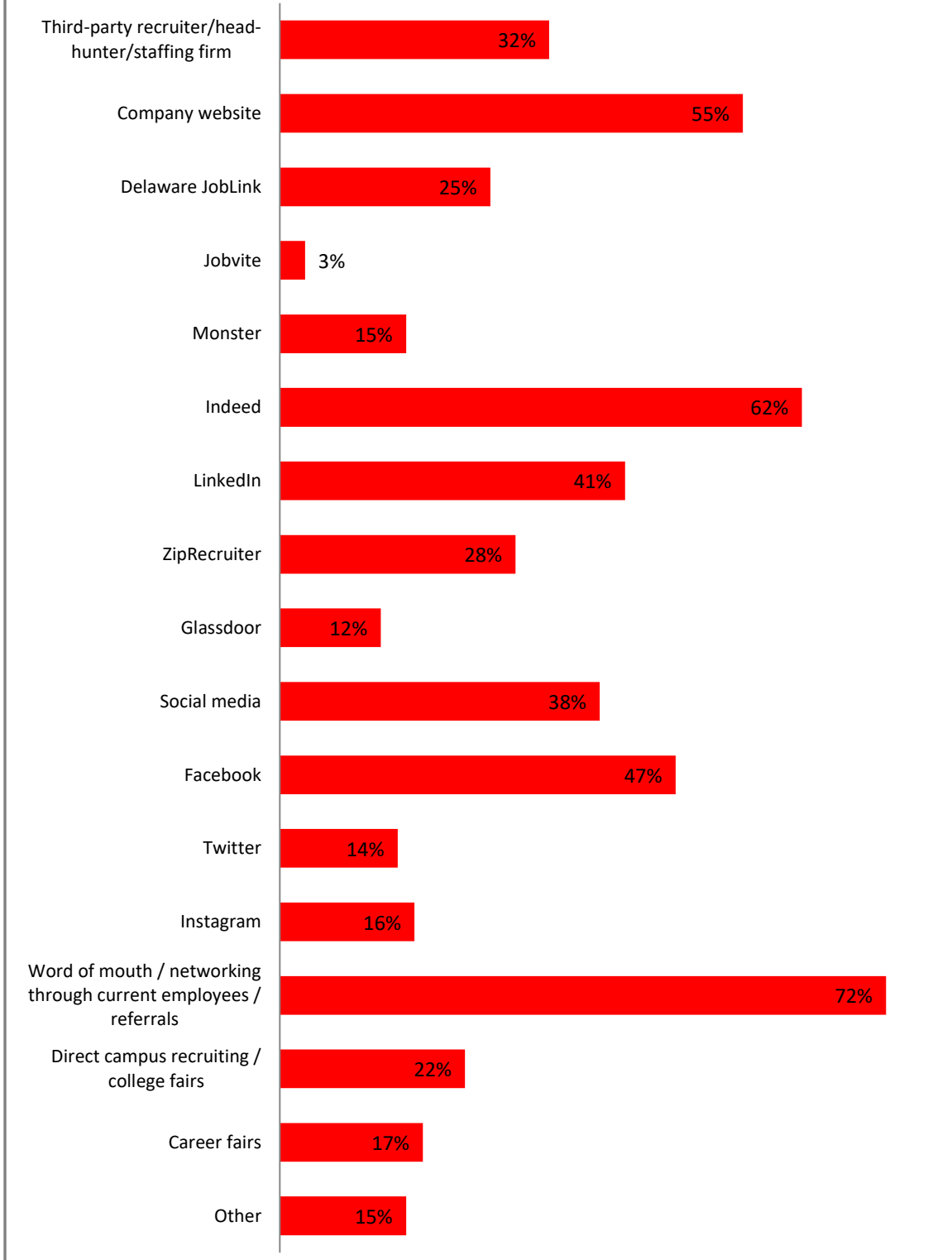
Four out of five (80%) respondents report having positions that do not require a college degree, and nearly half (45%; and even higher at businesses with 2-10 employees, at 55%) say that they accept individuals coming out of the criminal justice system. A majority (75% ‘very ready’ and ‘somewhat ready’ combined) of survey respondents believe that new applicants are ready for the jobs they are applying for.

Nearly a third (31%) of surveyed decision-makers expect to lose two or more mission critical positions to retirement in the next year, and 48% expect to lose two or more such positions over the next five years.

Q12. How often do you assess your job descriptions and minimum hiring requirements (i.e. requiring a high school diploma or a college degree?)

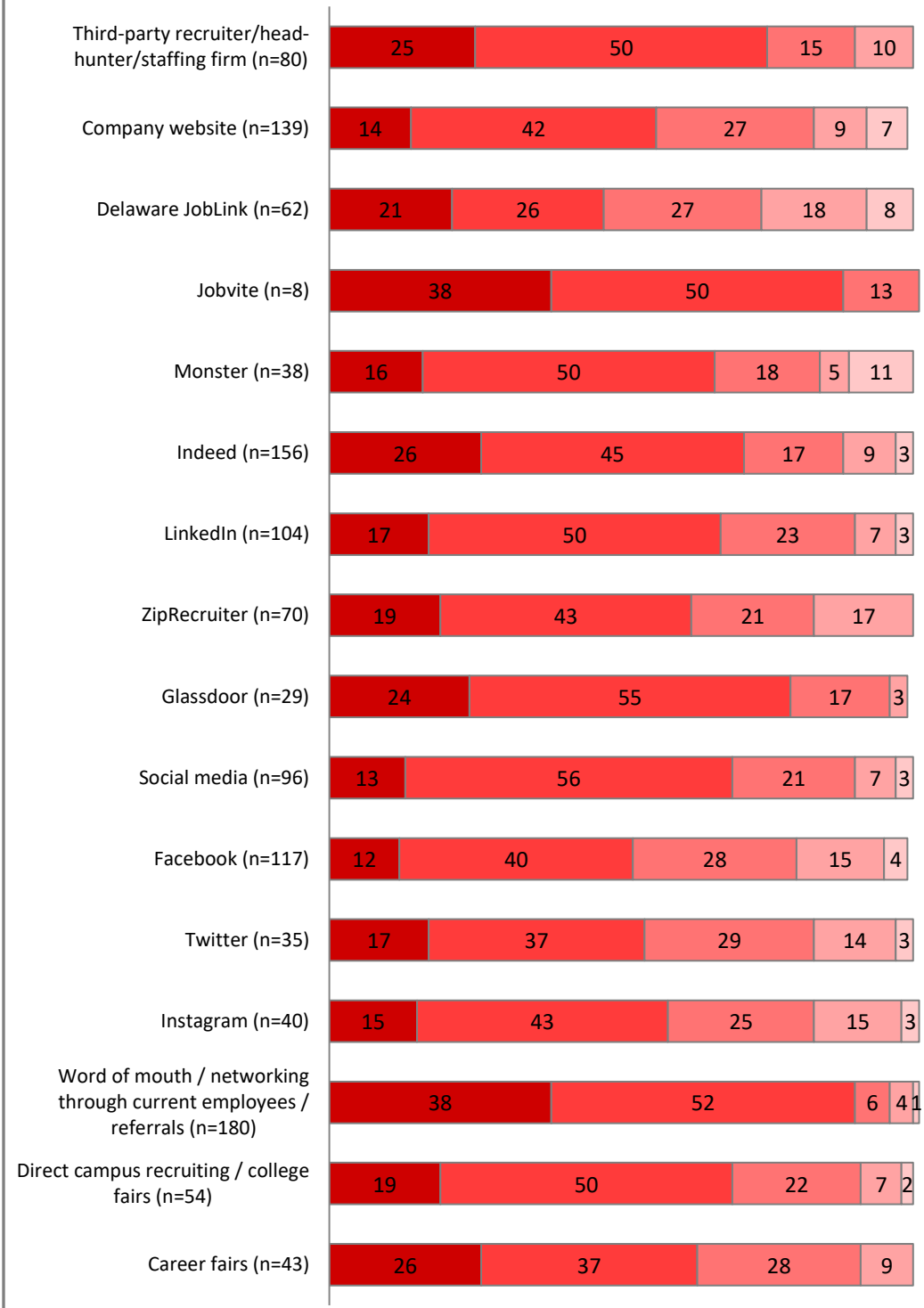


**Q13. What recruitment tools do you actively use?
 (Select all that apply)**

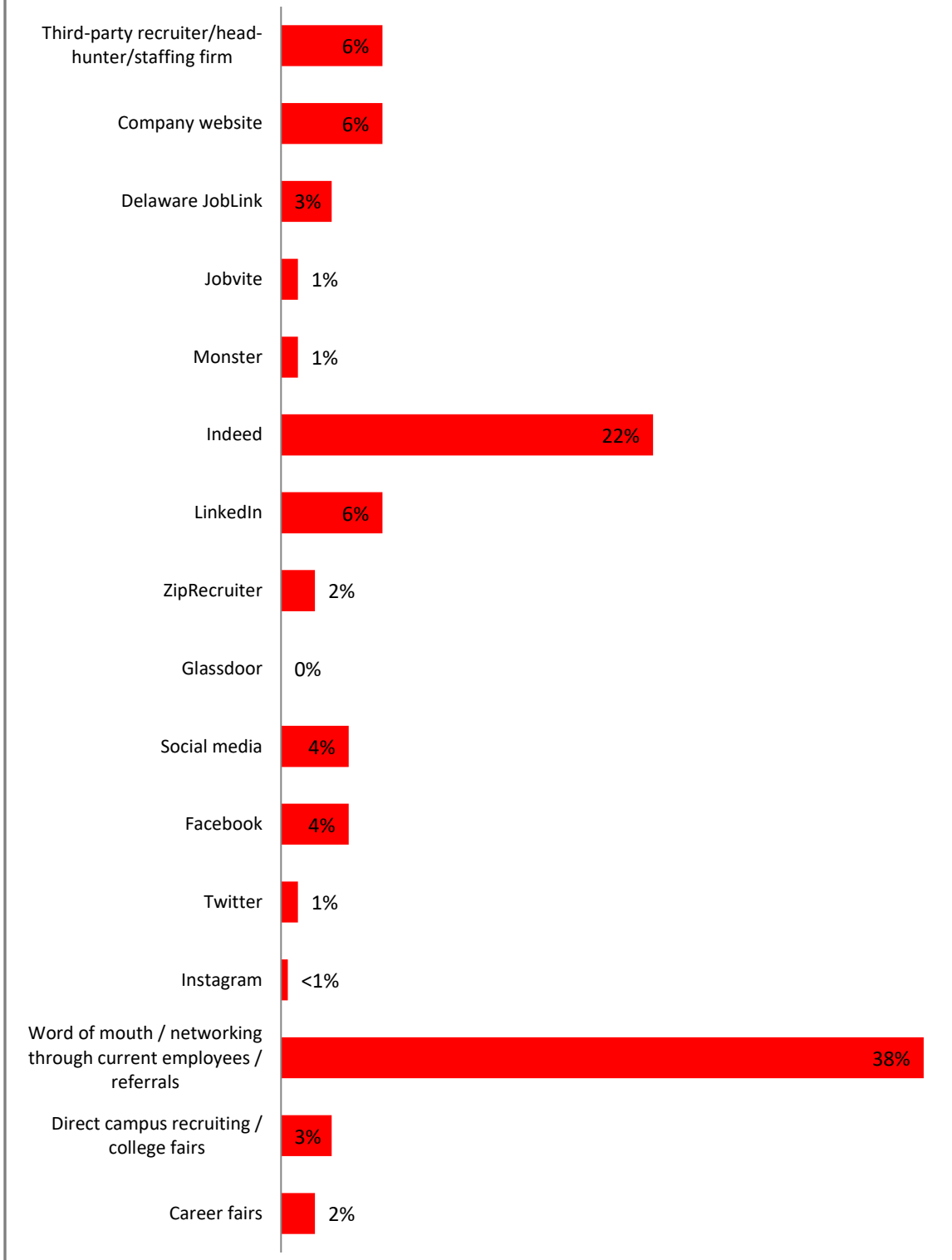


Q14. Of the following recruitment tools that you actively use, how successful are each at recruiting new employees:

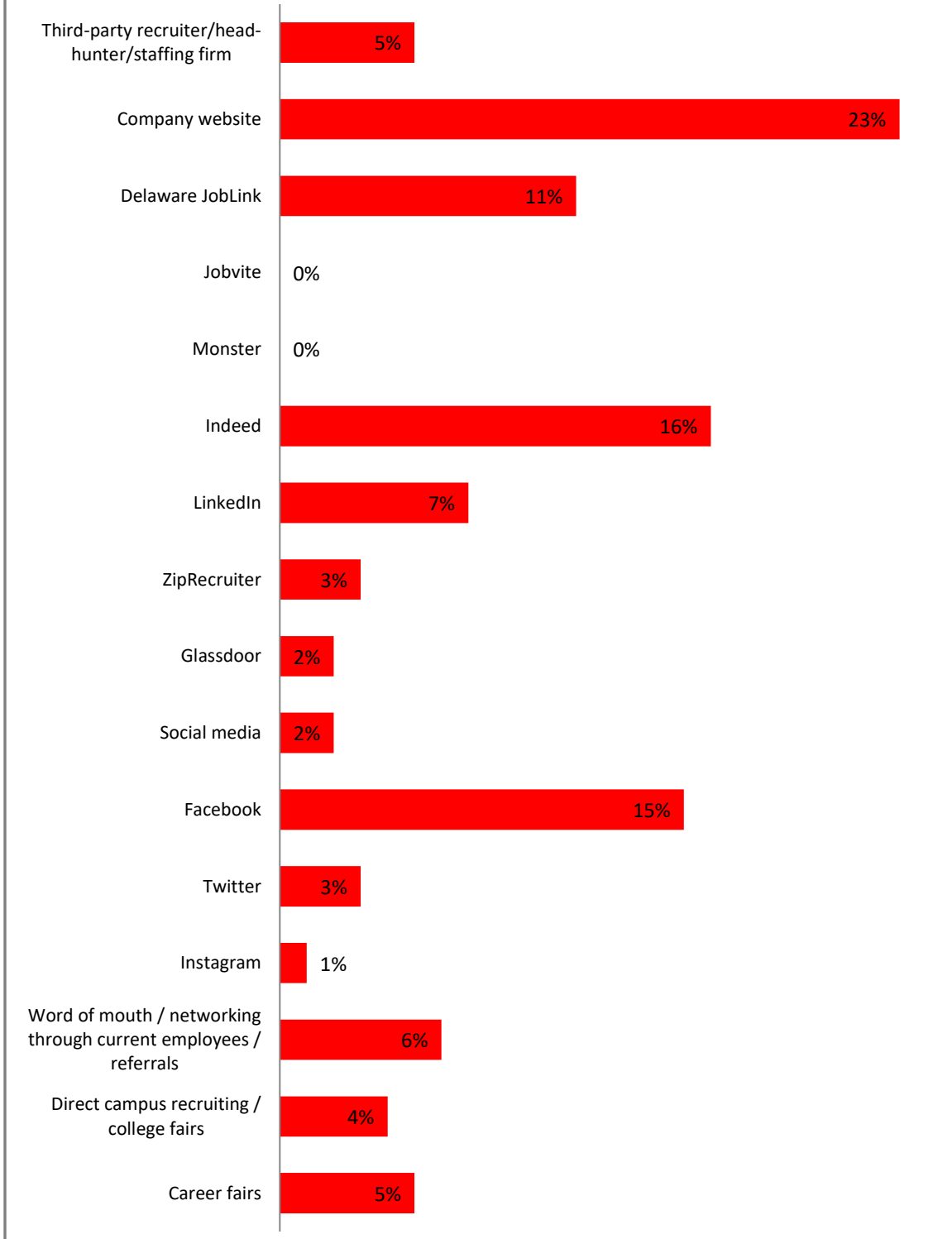
■ Very successful
 ■ Somewhat successful
 ■ Not very successful
■ Not at all successful
 ■ Not sure



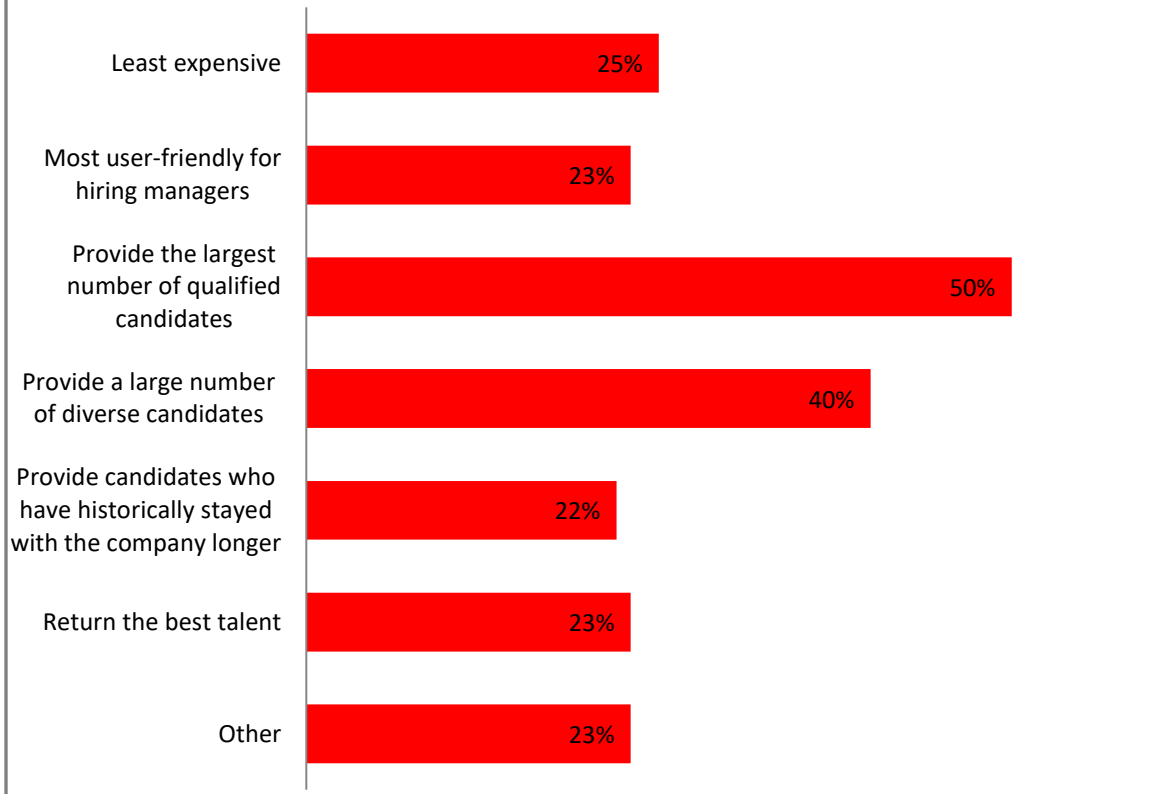
Q14B. Of the following recruitment tools that you actively use, which is the most successful?



Q14C. Of the following recruitment tools that you actively use, which is the least successful?

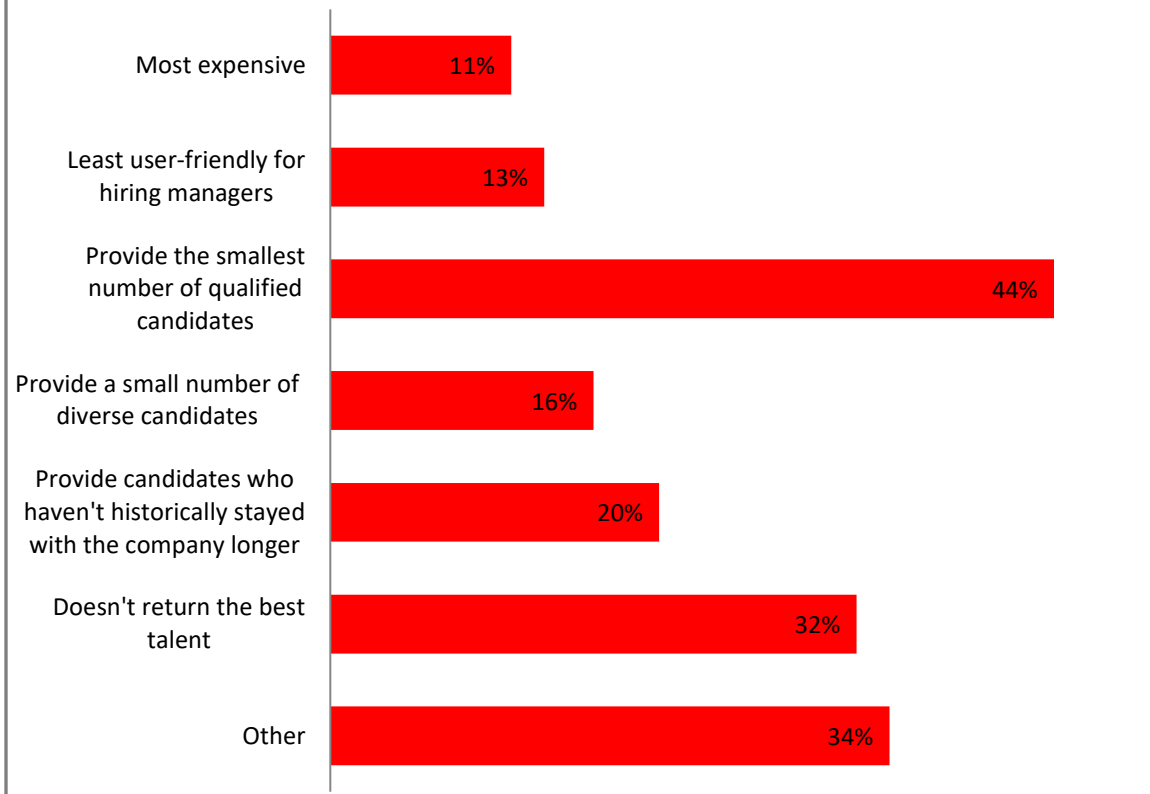


**Q15A. Generally, why is ... the most successful?
(Select all that apply)**



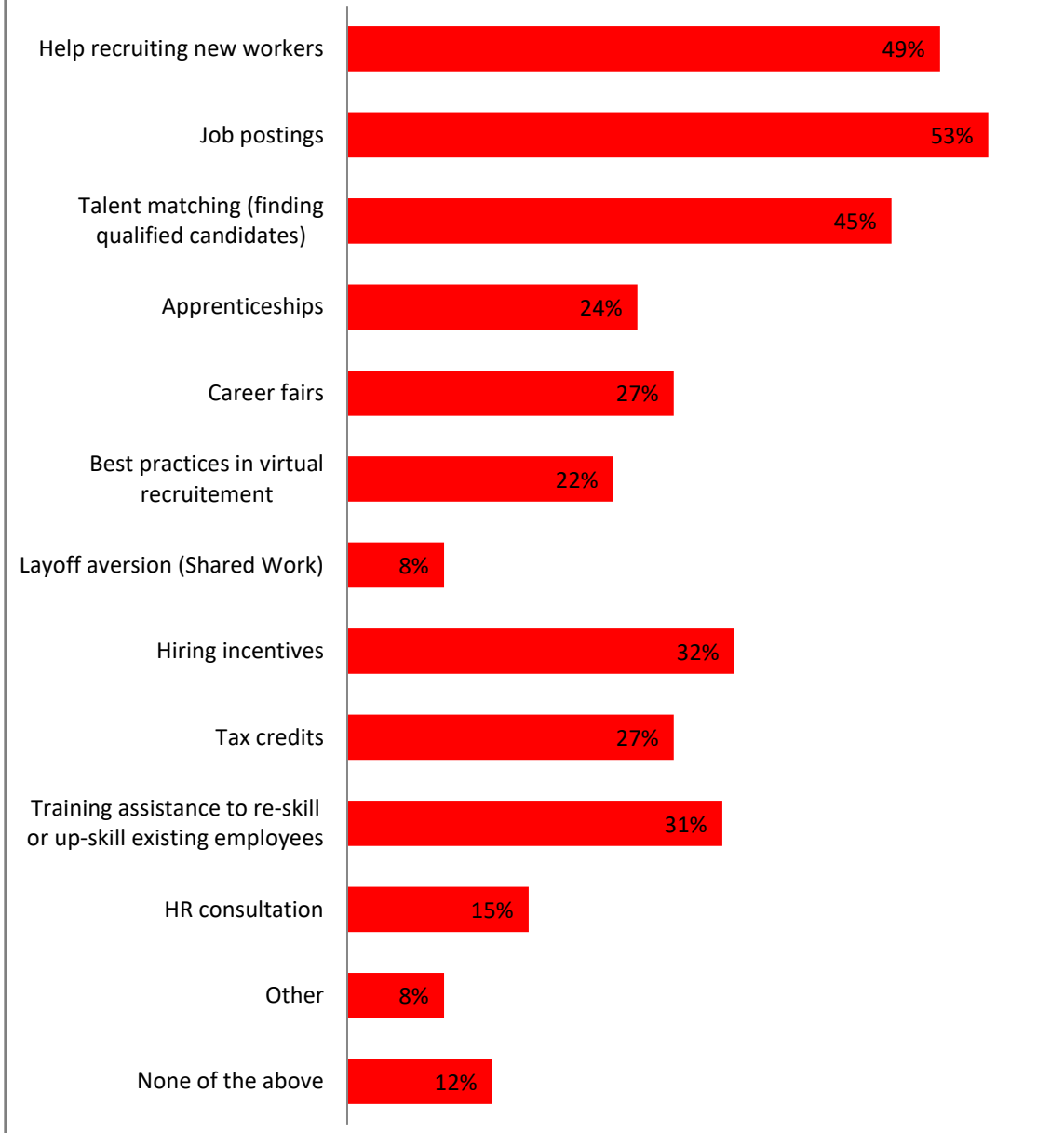
Note: sample size = 225

**Q15B. Generally, why is ... the least successful?
(Select all that apply)**



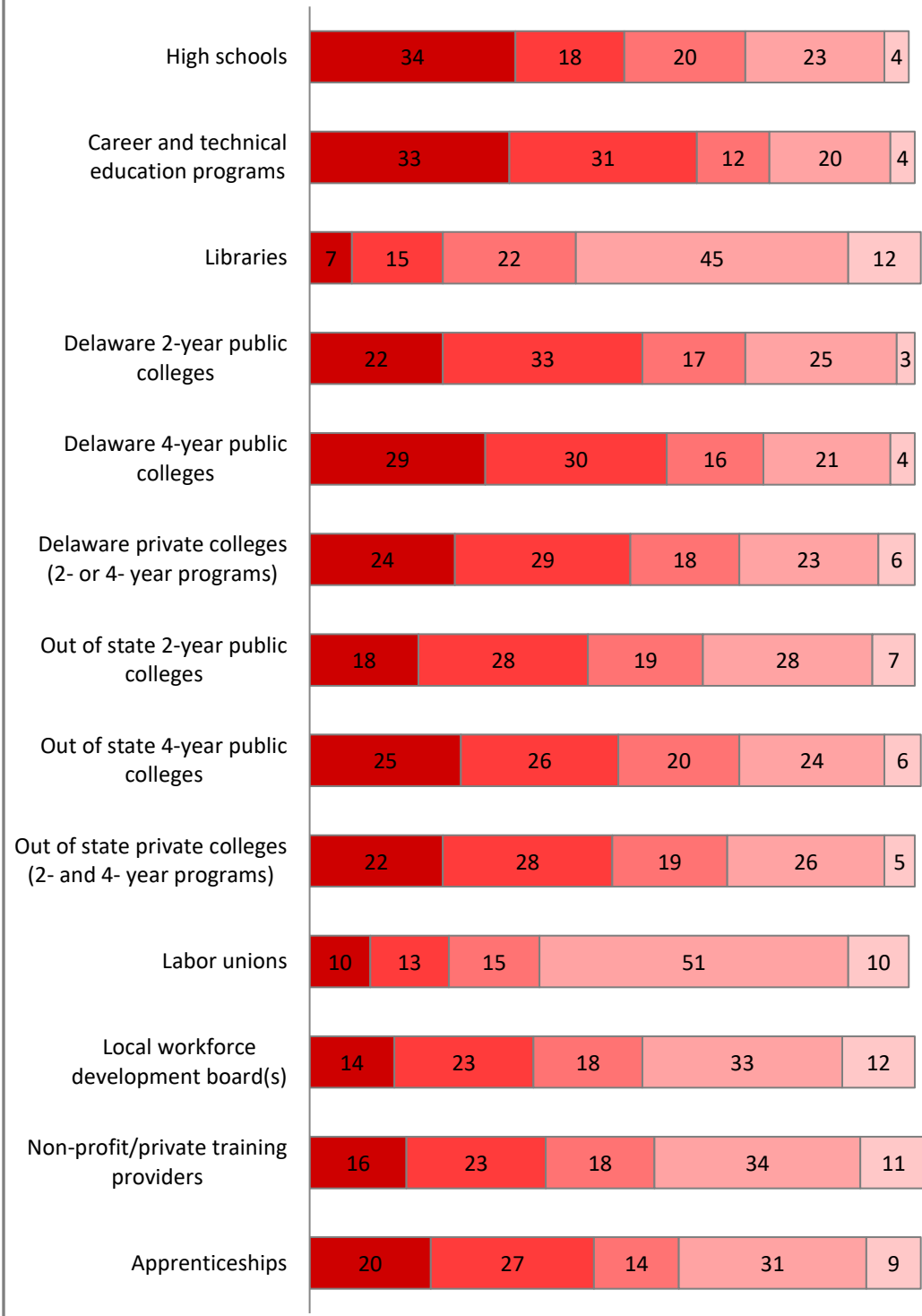
Note: sample size = 133

Q16. Which services could the Delaware JobLink provide that would help your business? (Select all that apply)

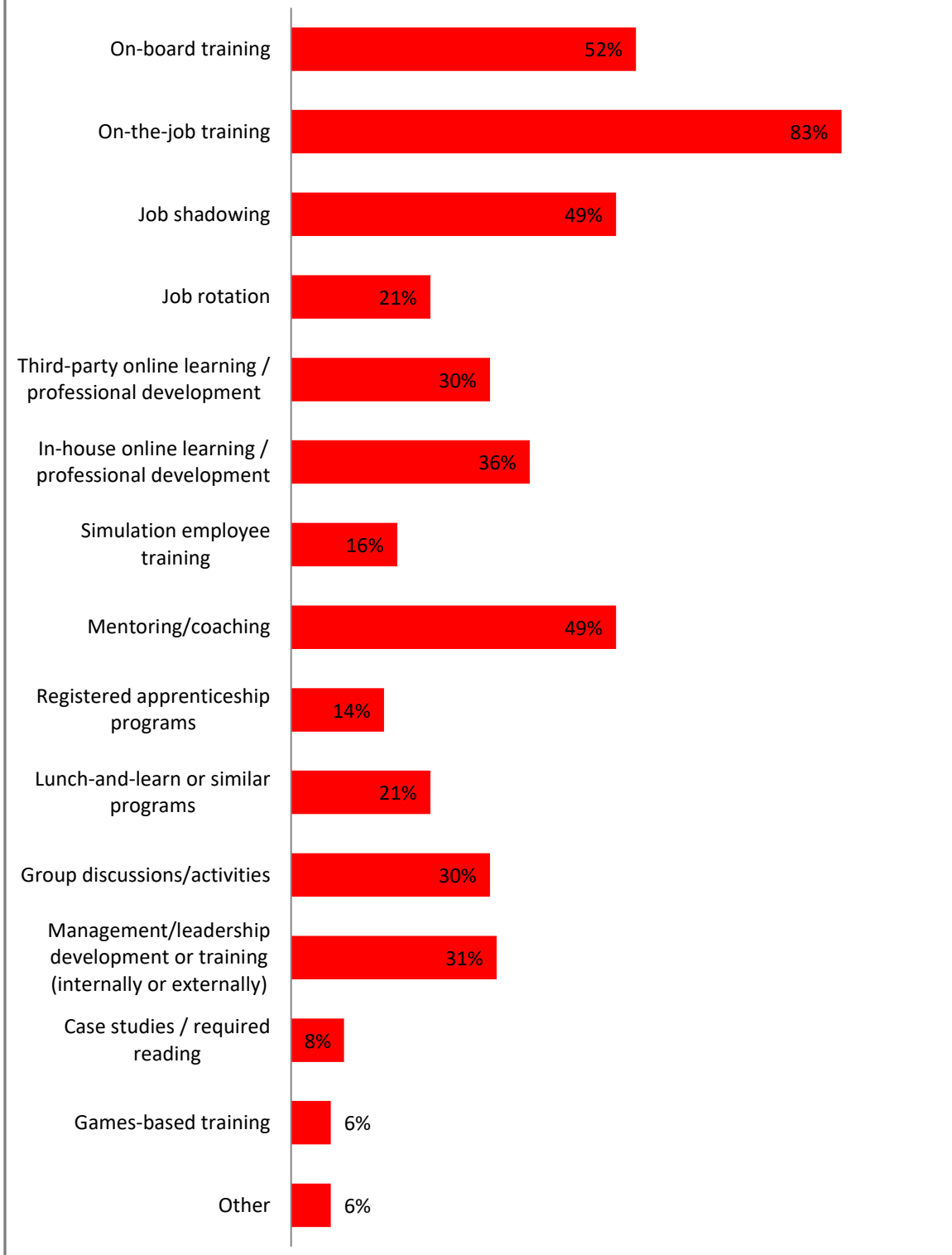


Q17. How important are each of the following in providing qualified applicants for your business:

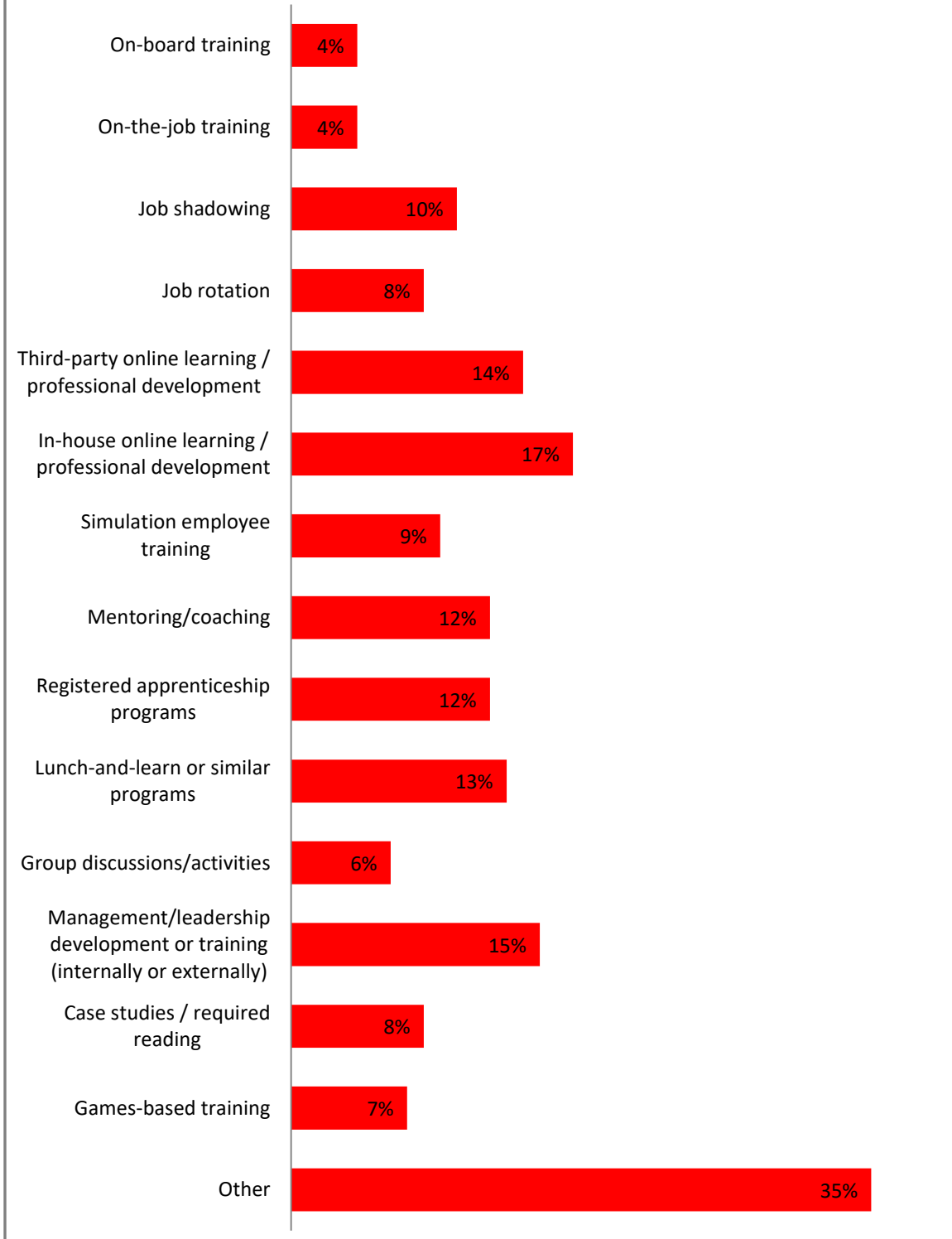
■ Very important
 ■ Somewhat important
 ■ Not too important
■ Not at all important
 ■ Not sure



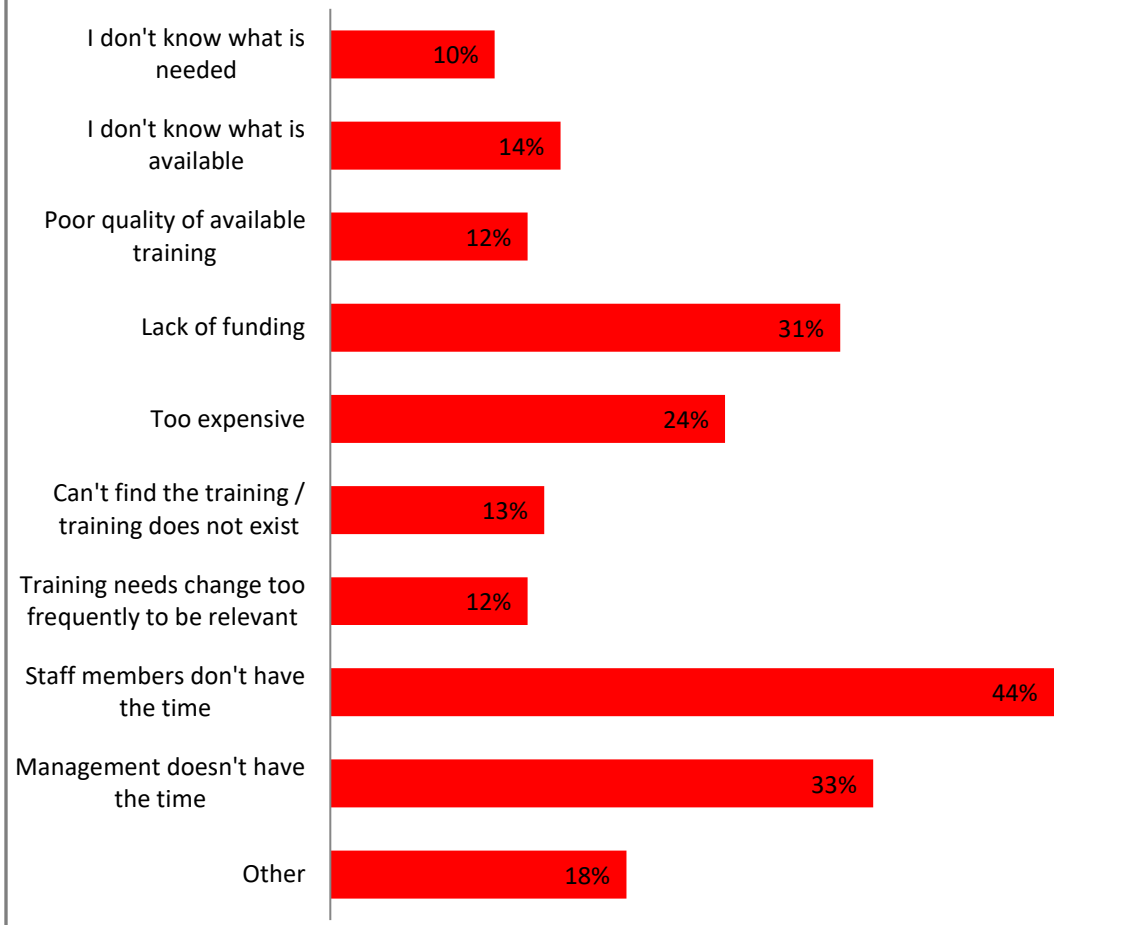
Q18. What training do you offer your new or existing employees? (Select all that apply)



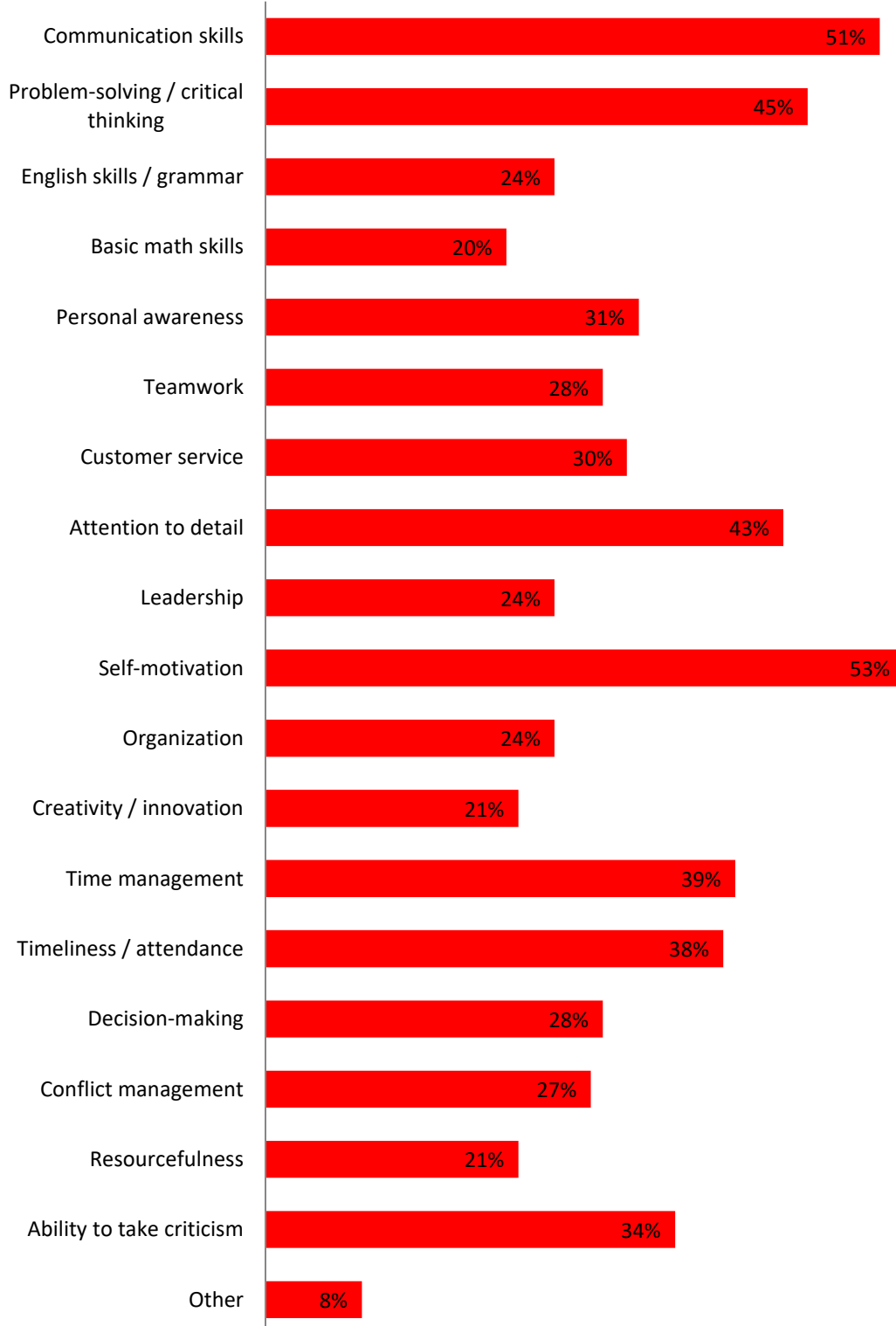
**Q19. Which of the following, if any, training would you like to offer your new or existing employees?
 (Select all that apply)**



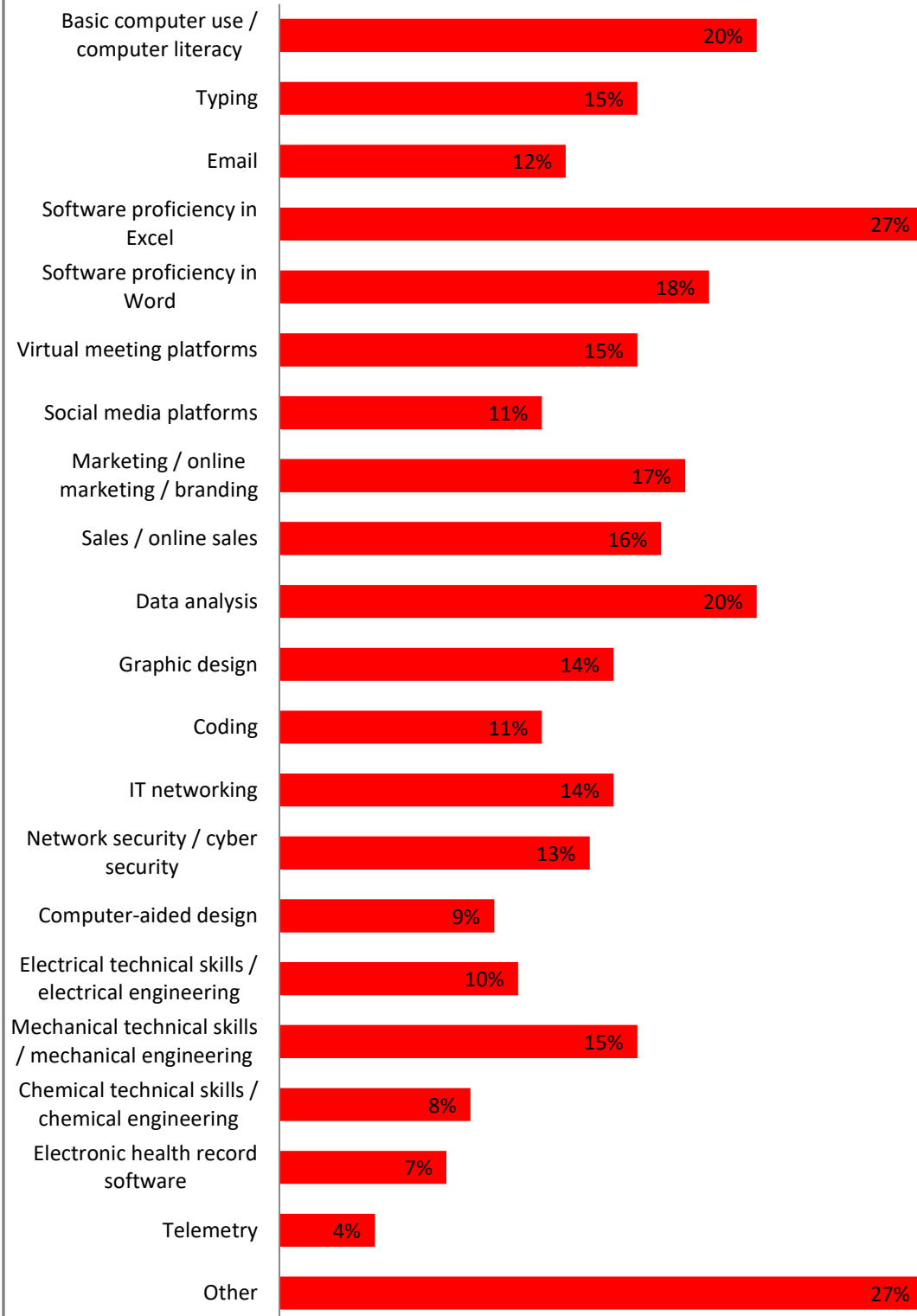
Q20. What are the biggest barriers to providing additional training to your employees? (Select all that apply)



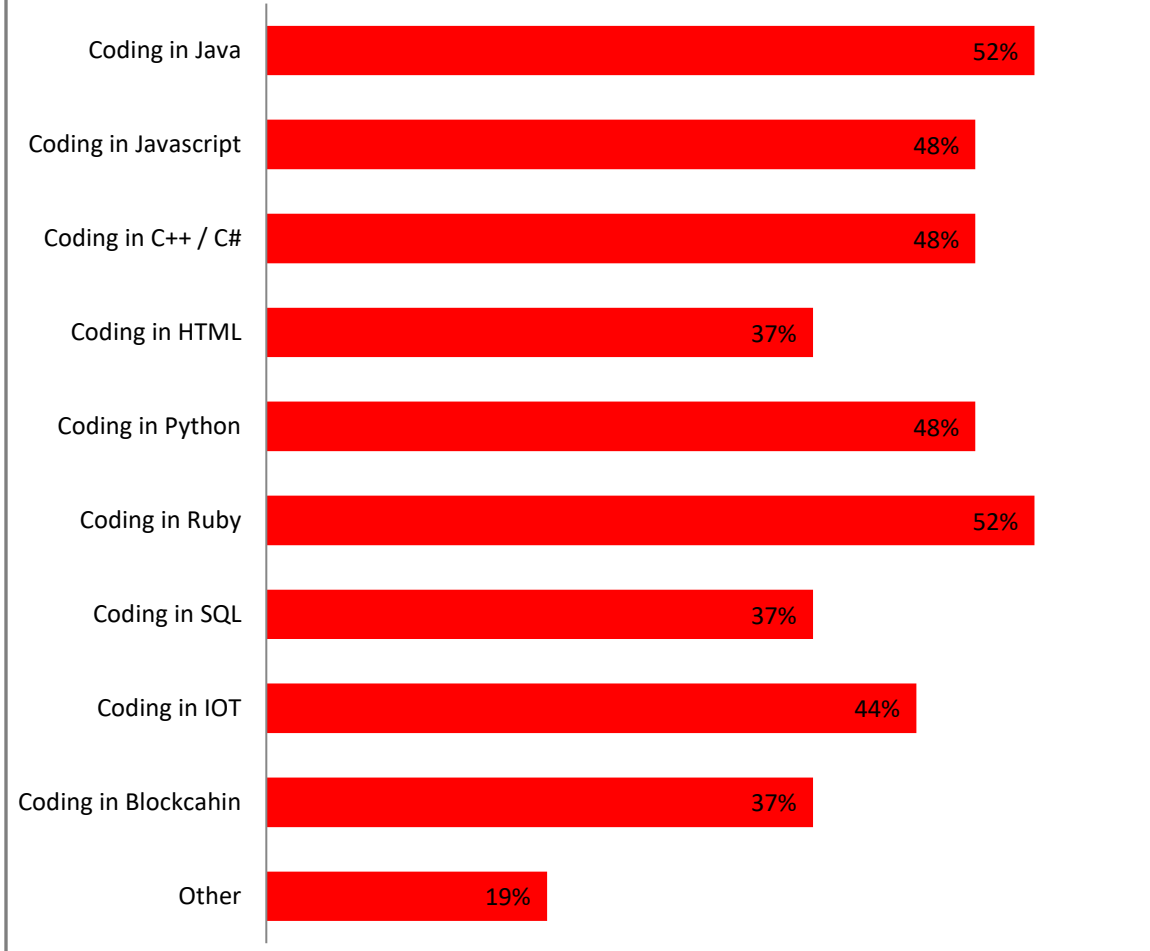
Q21. Which of the following non-technical skills do you find commonly lacking among job applicants or new employees? (Select all that apply)



Q22. Which of the following technical/digital skills do you find commonly lacking among job applicants or new employees? (Select all that apply)

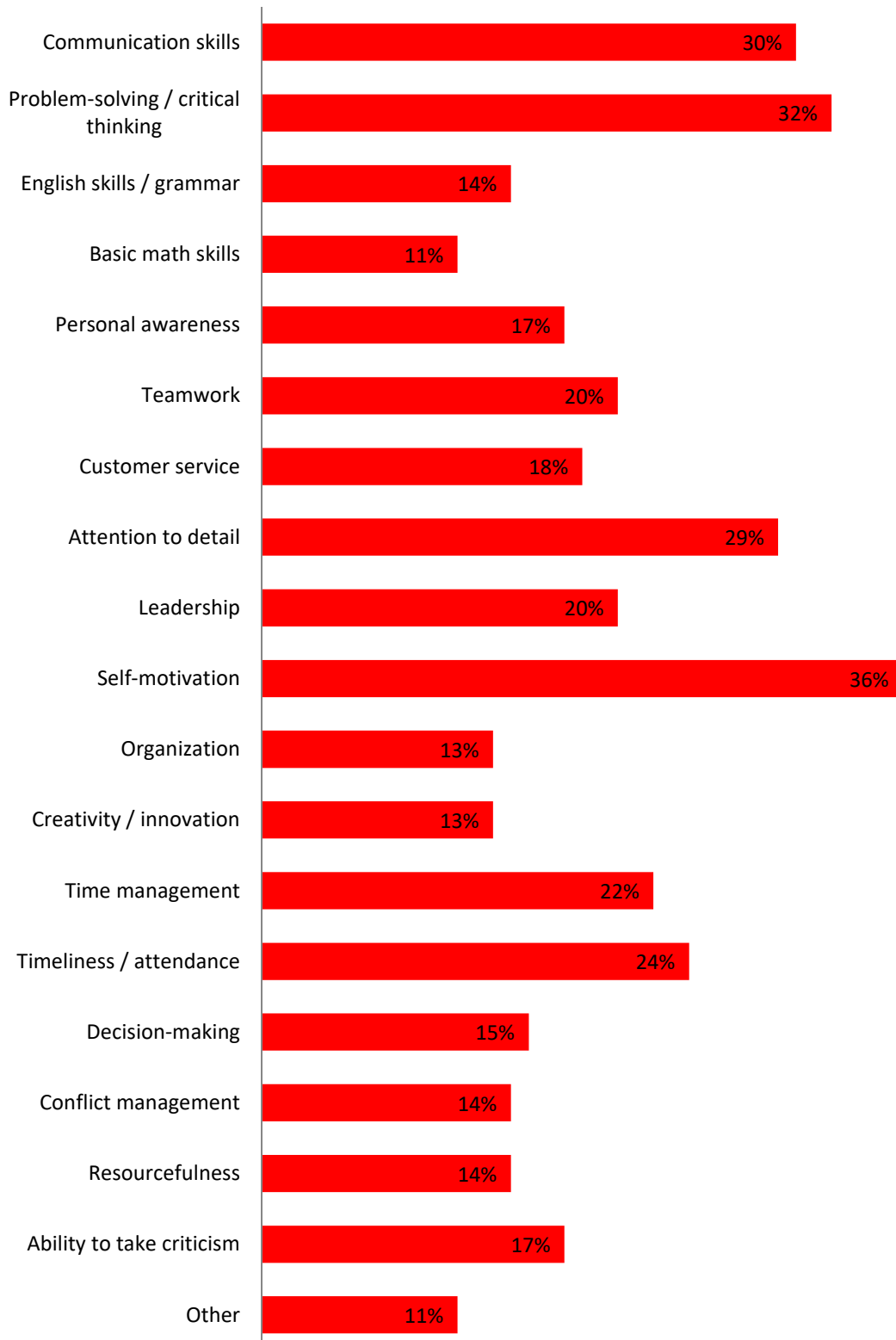


**Q22B. Which of the following computer coding languages do you find lacking among job applicants?
(Select all that apply)**

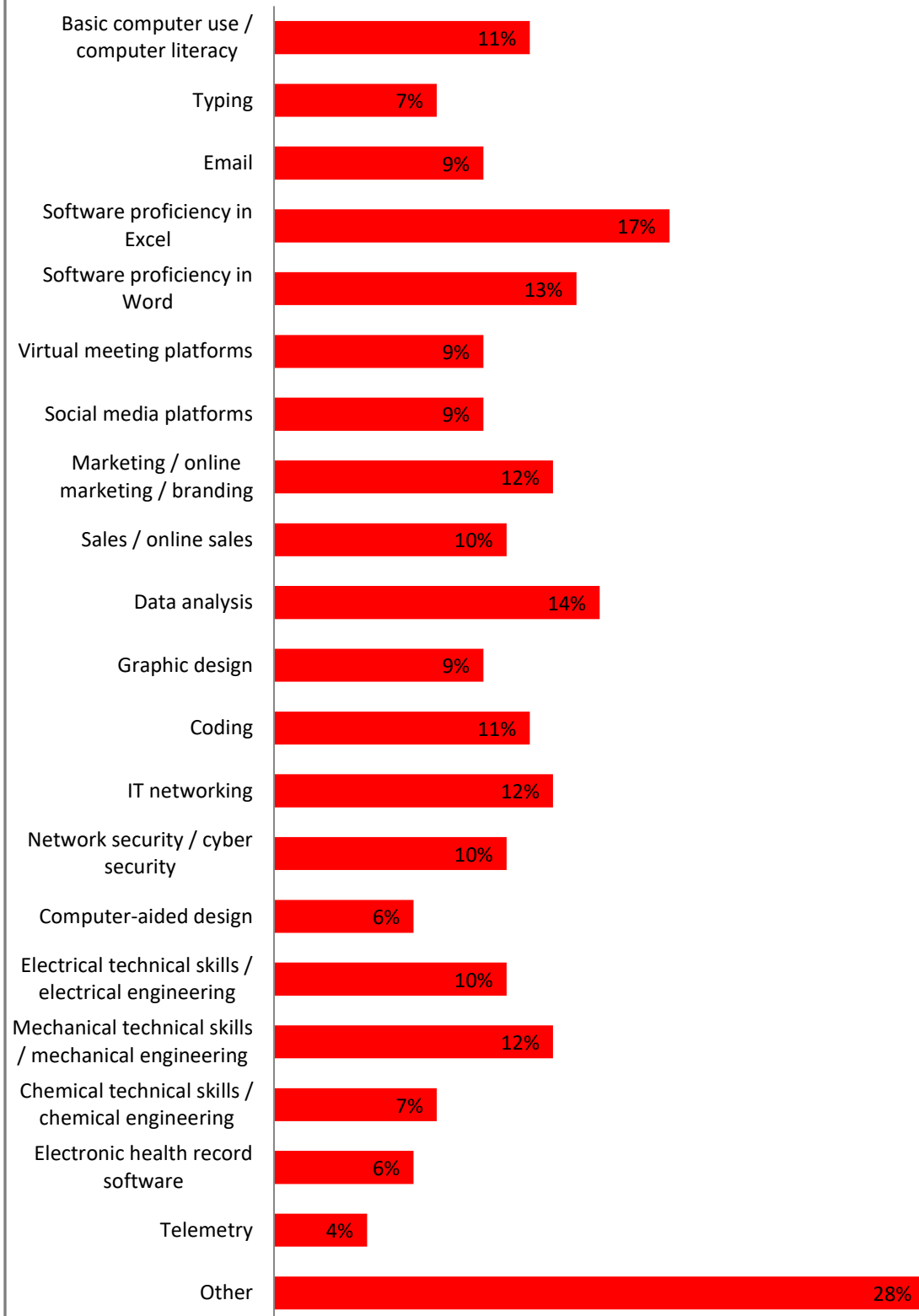


Note: sample size = 27

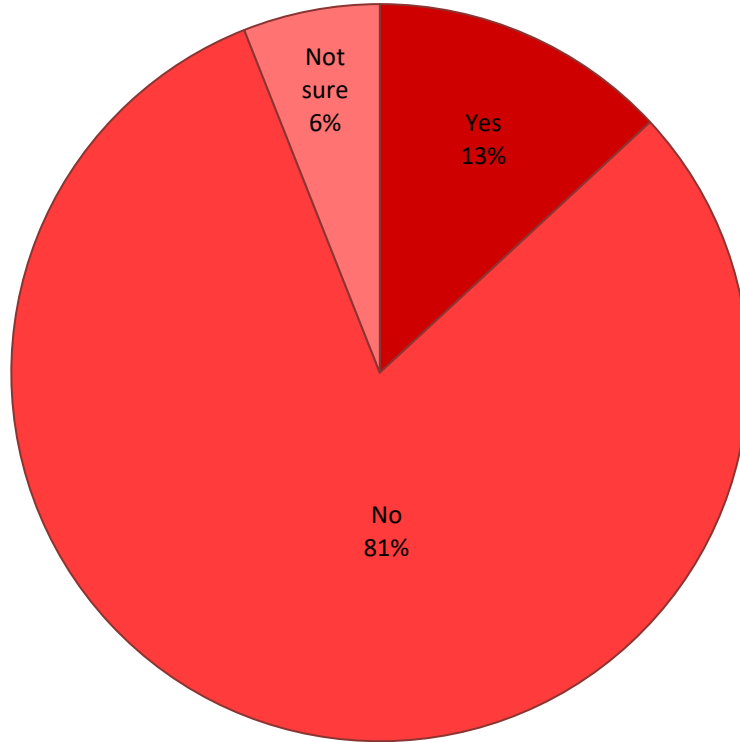
Q23A. Which of the following non-technical skills are most difficult to recruit for? (Select all that apply)



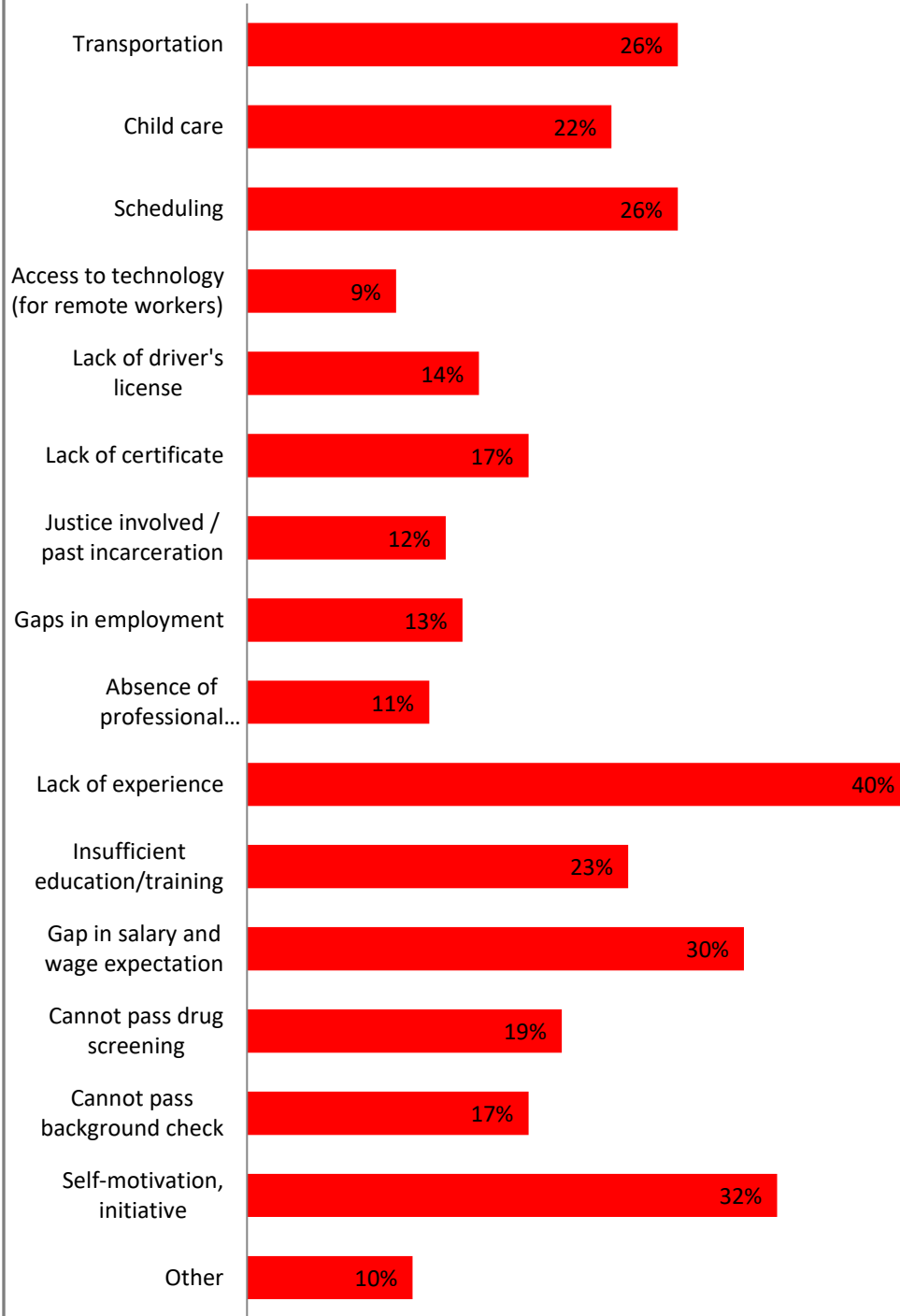
Q23B. Which of the following technical/digital skills are most difficult to recruit for? (Select all that apply)



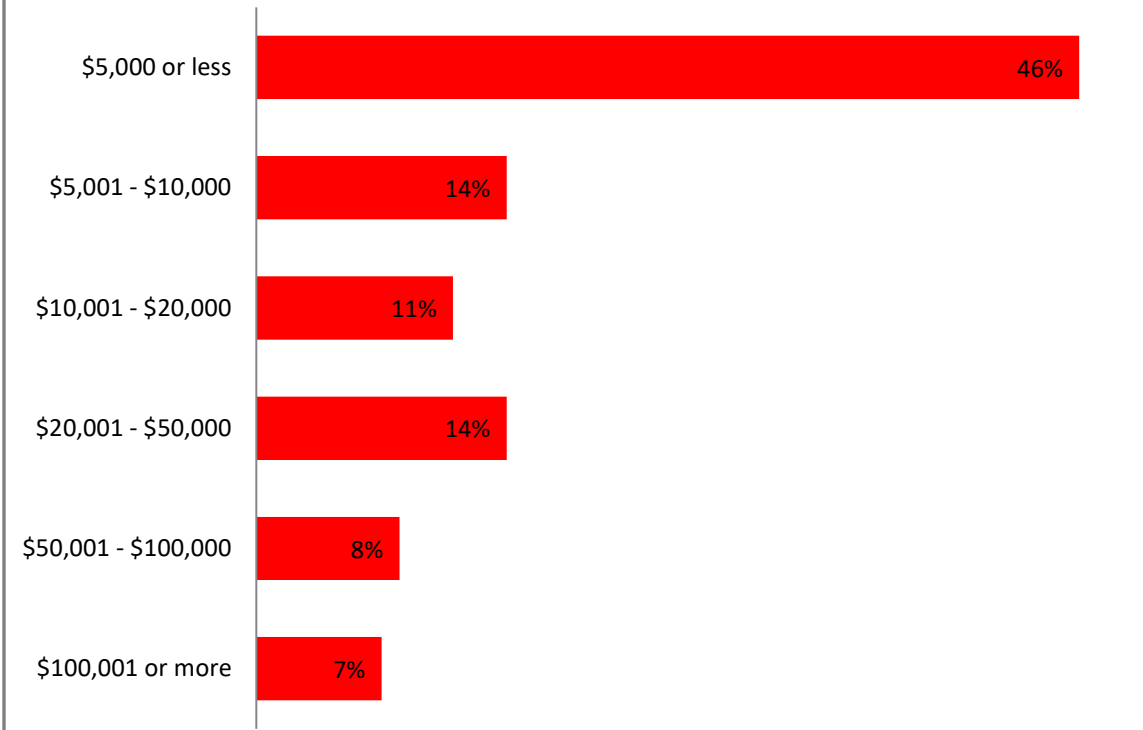
Q24. Do you have job candidates complete a digital assessment (i.e. a screening to test computer capabilities)?



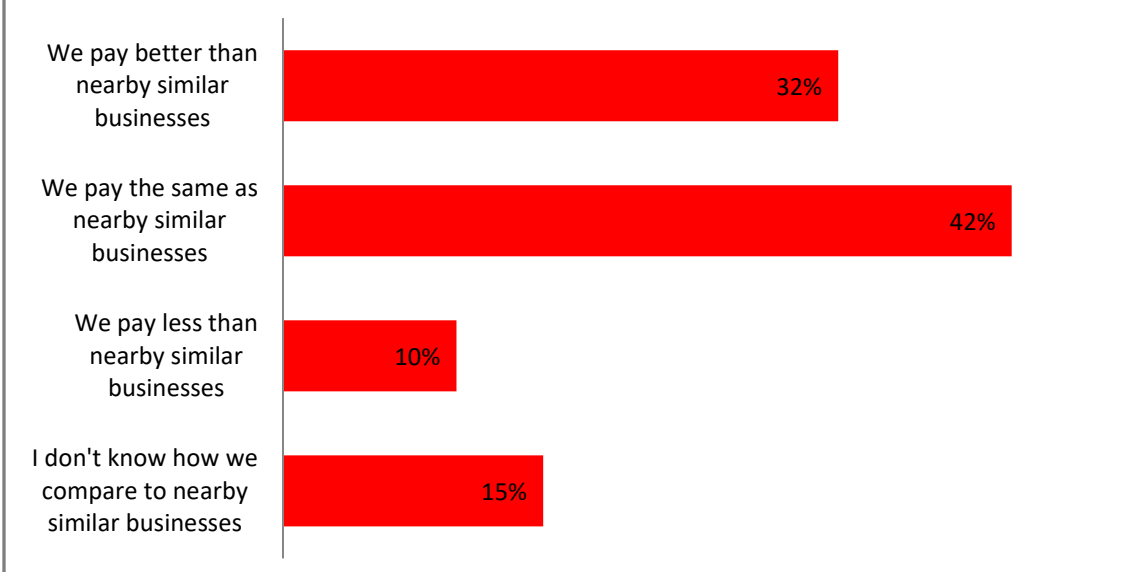
Q25. What are the most common barriers that prevent you from hiring a job candidate or prevent them taking a job? (Select all that apply)



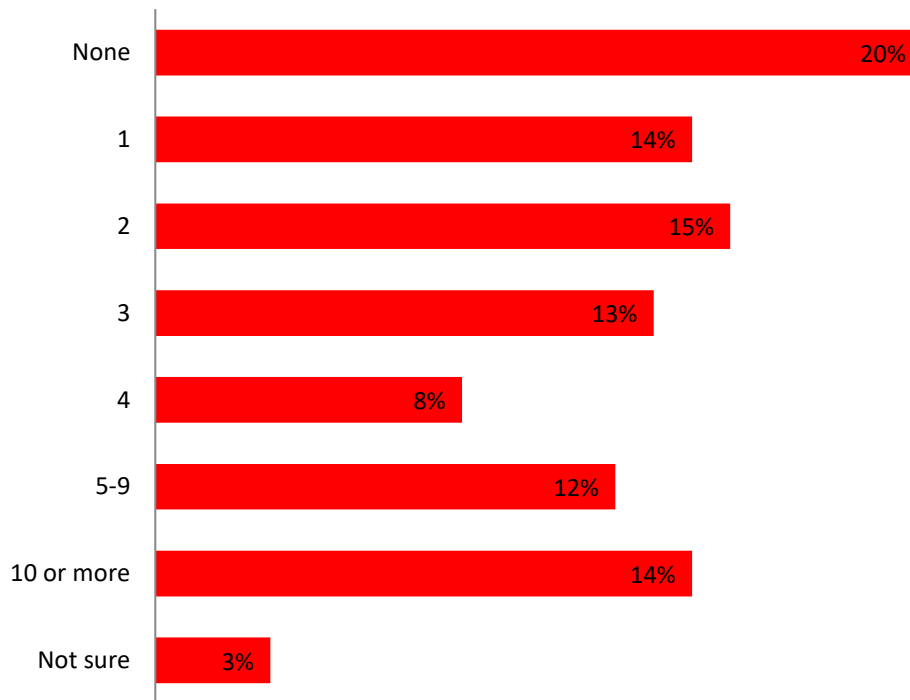
Q26. What is your average cost of recruitment per year?



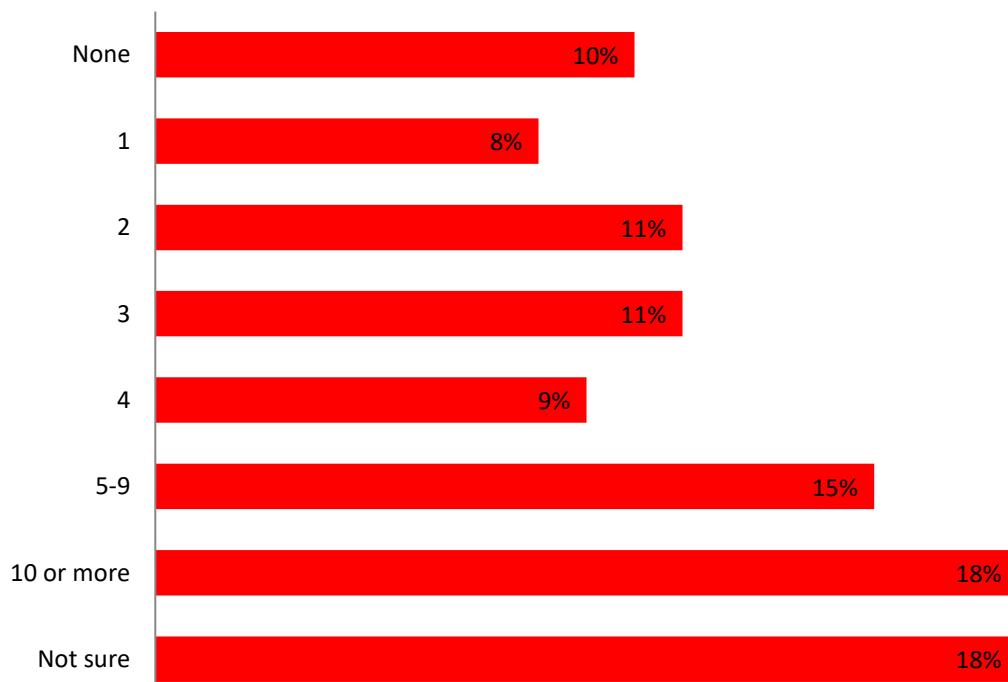
Q27. To the best of your knowledge, how would you rate your wages compared to regional market wages?



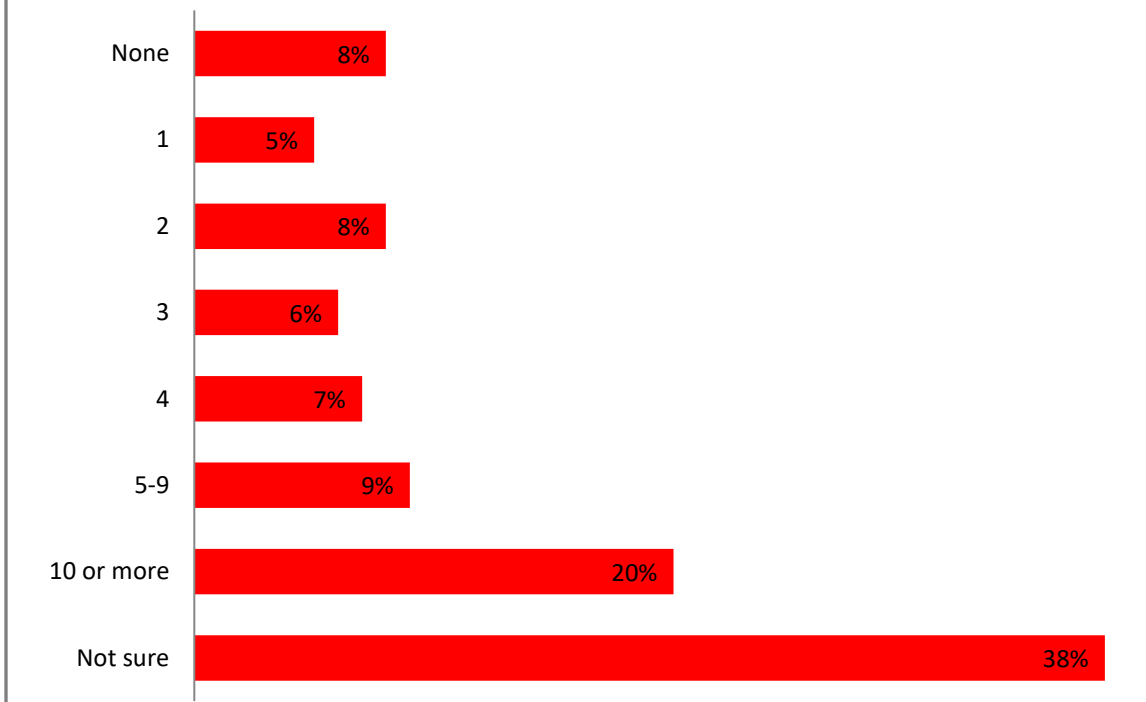
Q28A. How many positions do you currently have open in Delaware that you are actively trying to fill?



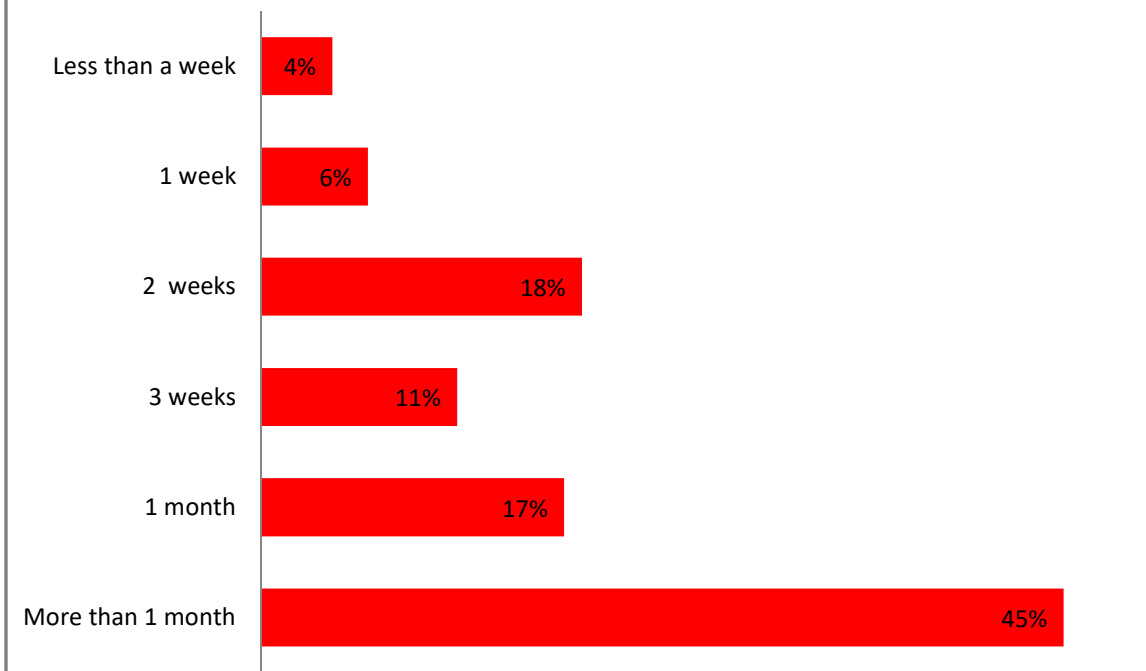
Q28B. How many positions do you currently have open in Delaware a year from now?



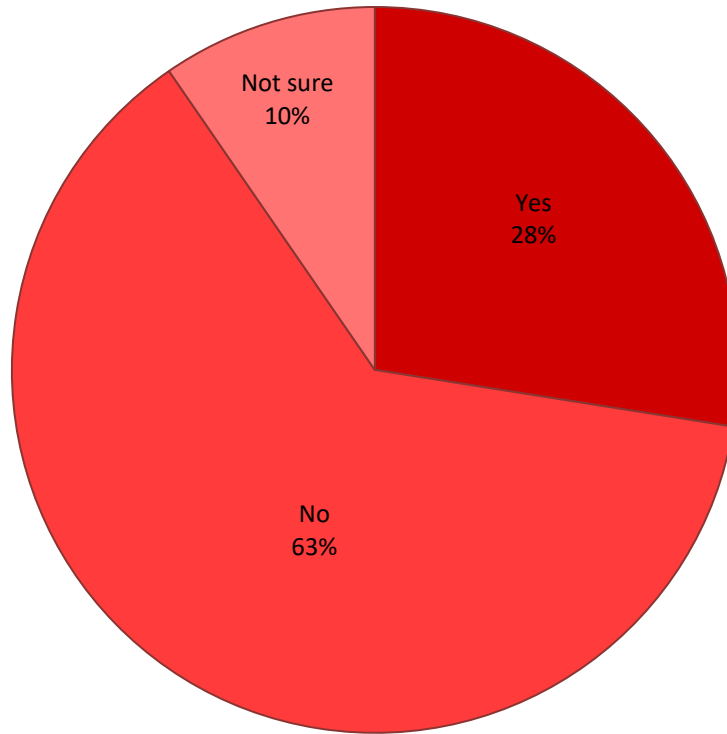
Q28C. How many positions do you currently have open in Delaware three years from now?



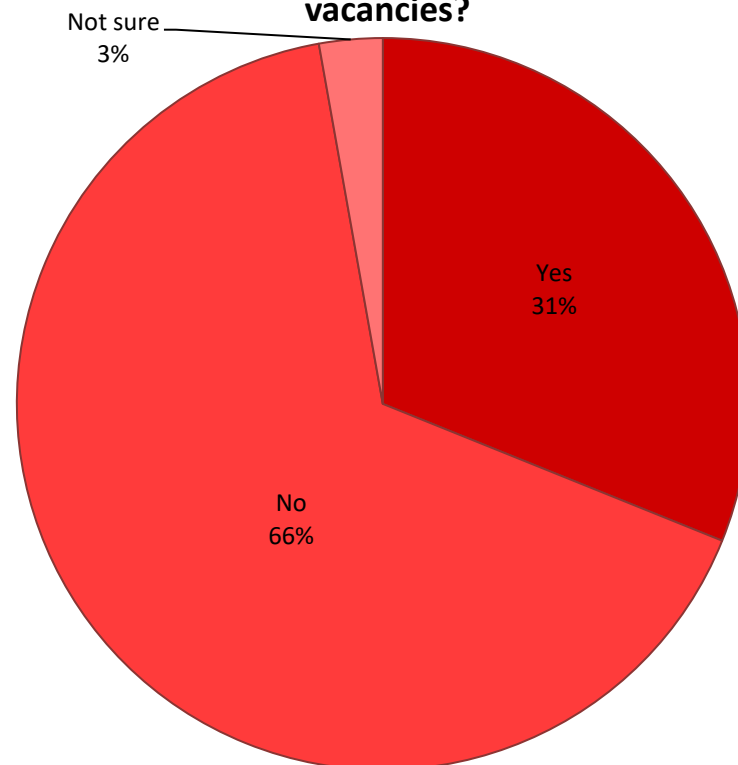
Q29. How long on average is it taking for you to fill current vacancies?



Q30. Do you use Delaware JobLink?

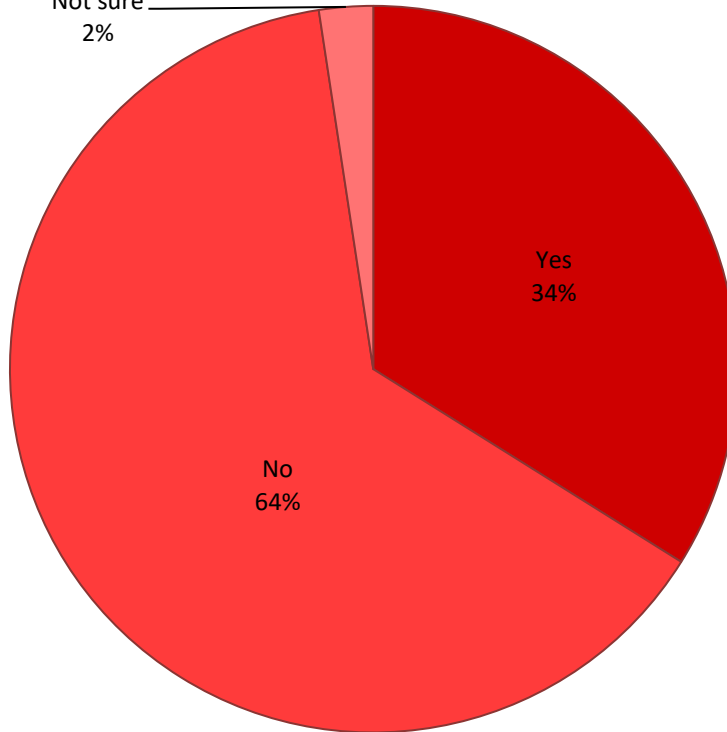


Q31. Are you currently using staffing agencies to fill vacancies?



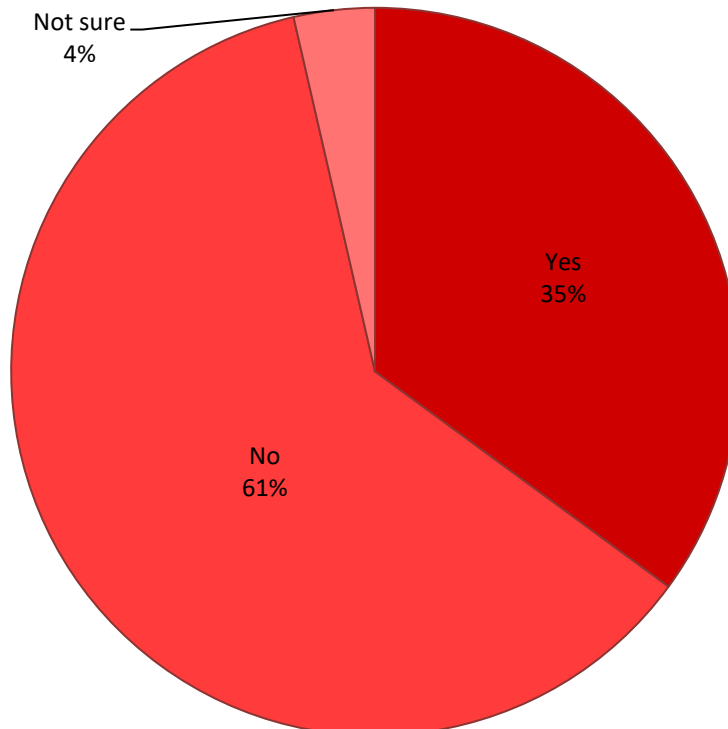
Q32. Do you have an intern program?

Not sure
2%

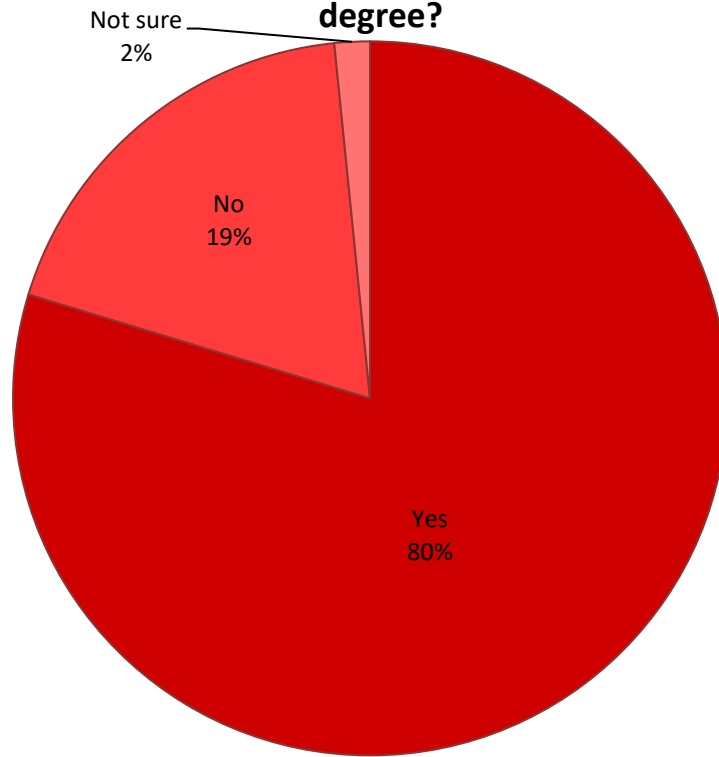


Q33. Do you have an in-house leadership training program for long-term replacement of senior positions?

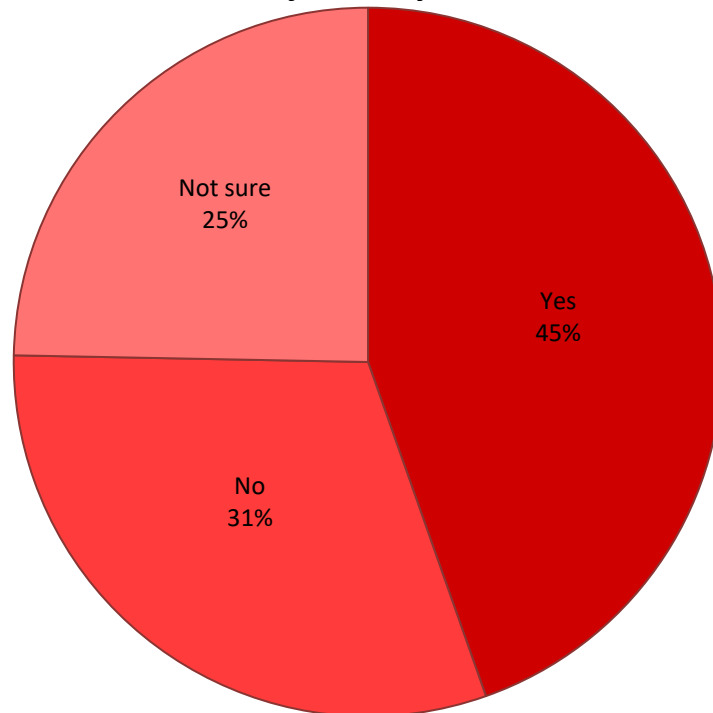
Not sure
4%



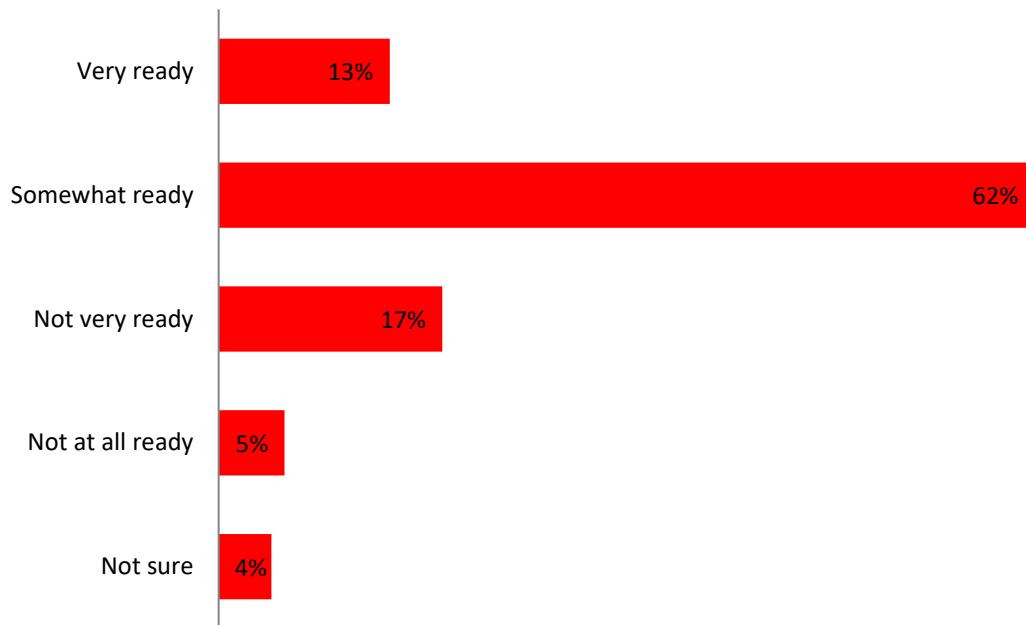
Q34. Do you have positions not requiring a college degree?



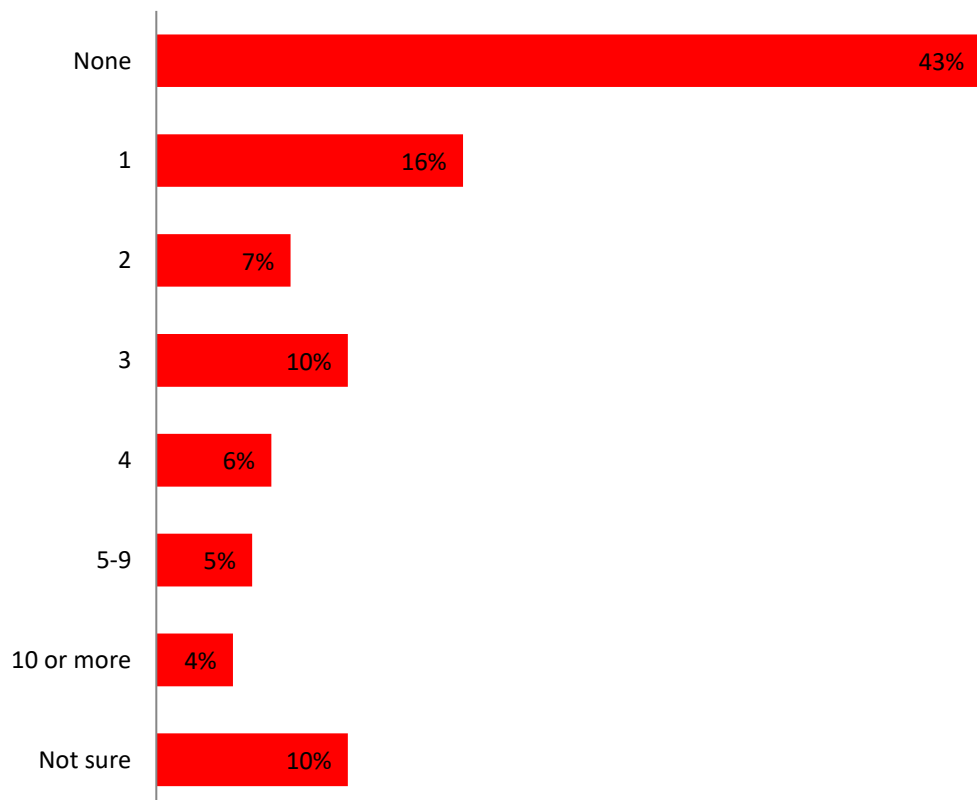
Q35. Do you accept individuals coming out of the criminal justice system?



Q36. How ready are new applicants in meeting the skills and qualifications for the job they are applying for?



Q37. How many mission critical positions will be lost due to retirement in the next year?



Q38. How many mission critical positions will be lost due to retirement in the next five years?

