

EXECUTIVE SUMMARY

FutureMakers Coalition conducts the Workforce Employer Survey annually and uses the data to inform its Southwest Florida (SWFL) network, specifically our education partners, about employer needs and opportunities to better work together to ensure the desired qualified workforce is available to the region's employers. The Survey was broadly distributed to a variety of SWFL businesses and organizations via direct email and social media, as well as via a link on the FutureMakers Coalition homepage, between mid-April and the end of June 2022. FutureMakers Coalition had two important goals for the 2022 Workforce Employer Survey: 1.) to continue to expand its reach to include as many SWFL organizations and businesses as possible; and 2.) to improve the representation of important industry segments so the results more accurately reflect the diverse SWFL workforce/employer environment. We are pleased that both of those goals were achieved.

One hundred ten organizations responded to the 2022 Workforce Employer Survey, which is a 10% increase over the 2021 Survey. Among the 110 organizations that responded to the 2022 Workforce Employer Survey, approximately 57% were small employers (100 employees or less) and 42% were large employers (more than 100 employees). The SWFL organizations that responded to the 2022 Survey represent a broader mix of industry segments compared to the 2021 Survey, including increased representation from the Healthcare or Social Services/Assistance (23%), Manufacturing (combined Research + Other, 9%), Government (8%), and Construction/the Trades (7%) segments. Organizations in the Retail Trade (2%) and Accommodation/Hospitality/Food Services (4%) segments, which are among the largest employers in SWFL, may still be underrepresented in the 2022 Survey.

A combined 90% of the surveyed organizations (up from 79% in 2021) reported that it is "very likely" or "likely" that recruiting and hiring new, qualified employees will be a priority in 2022. This priority was shared almost equally between small and large organizations. Similarly, as organizations grow their staffs, a combined 89% of all responding SWFL employers replied that it is "very likely" or "likely" that improving the training of new or existing employees will be a priority in the next six months. More importantly and speaking to FutureMakers Coalition's mission, 48% of the organizations indicated that "yes" they would pay a **higher** starting salary to potential employees who have a post-high school credential (degree), certificate, or industry-recognized certification. Thirty-seven percent stated that the starting salary would depend on the specific job requirements and candidate, while only 15% of the organizations stated that "no", they would not pay a higher starting salary to potential employees who have a post-high school credential (degree), certificate, or industry-recognized certification. The observations about starting salaries were similar among small and large organizations.

Ninety-three percent of the organizations reported that, in addition to an employee's salary, the organization offers additional employee benefits. Among all organizations that offer employee benefits in addition to a salary, the most offered benefits included health benefits (97%), paid vacation (86%),

and personal time off (81%). The proportions of large and small organizations reporting that they offer benefits were similar, with small organizations with less than five employees being the least likely to offer additional employee benefits. It is interesting to note that compared to last year's Survey results, the proportion of organizations offering housing cost assistance increased from 3% in 2021 to 22% in 2022 and remote working options increased from 27% in 2021 to 42% in 2022. These findings perhaps reflect the evolving needs of the SWFL workforce and the challenges businesses are having in recruiting qualified employees to the region. In fact, over half of the organizations (51%) indicated that financial assistance for housing would be "very helpful" toward assisting their organizations in recruiting, hiring, or retaining qualified employees. Childcare services, both from the public sector (34%) and the private sector (30%), were also ranked "very helpful" by about one-third of the organizations.

Sixty-five percent of the organizations reported "yes" that they partner or collaborate with one or more of SWFL's educational institutions to assist in finding, recruiting, and/or training qualified employees. Of those responding "yes", a greater proportion of large organizations, 56%, reported partnerships or collaborations compared to 42% of small organizations. Among both large and small organizations, offering student internships/preceptorships/co-ops (95%) and participating in recruiting activities (84%) were the most often reported partnerships or collaborations.

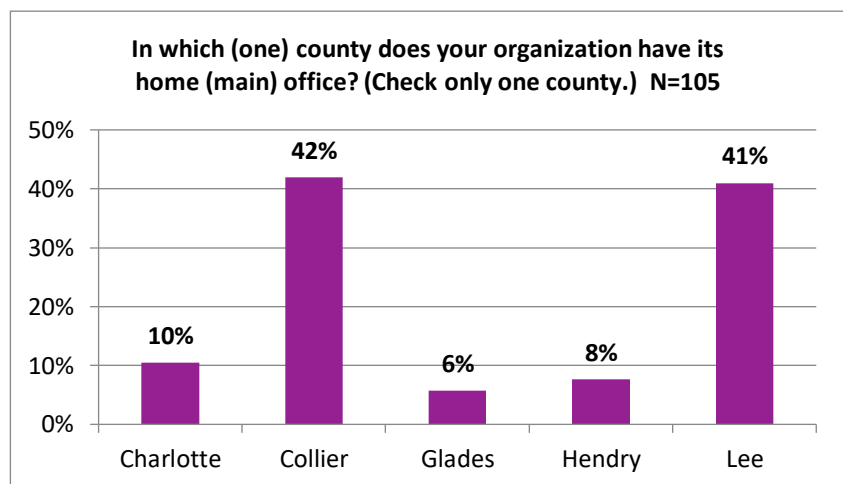
FutureMakers Coalition will continue to analyze the Survey data and publish new results in the FutureMakers Coalition [newsletter](#) to hopefully provide new insights into the needs of the region's employers and how to gain better access to a qualified workforce.

INTRODUCTION

FutureMakers Coalition conducts the Workforce Employer Survey annually and uses the data to inform its Southwest Florida (SWFL) network, specifically our education partners, about employer needs and opportunities to better work together to ensure the desired qualified workforce is available to the region’s employers. The 2022 Survey is particularly important as it provides an early snapshot of the employment climate in a “post-COVID world”. Several new questions were added to this year’s Survey that help to better understand the unique economic challenges that are still producing headwinds against a full “return to normal” after COVID. The Survey was broadly distributed to a variety of SWFL businesses and organizations via direct email and social media, as well as via a link on the FutureMakers Coalition homepage, between mid-April and the end of June 2022.

RESULTS

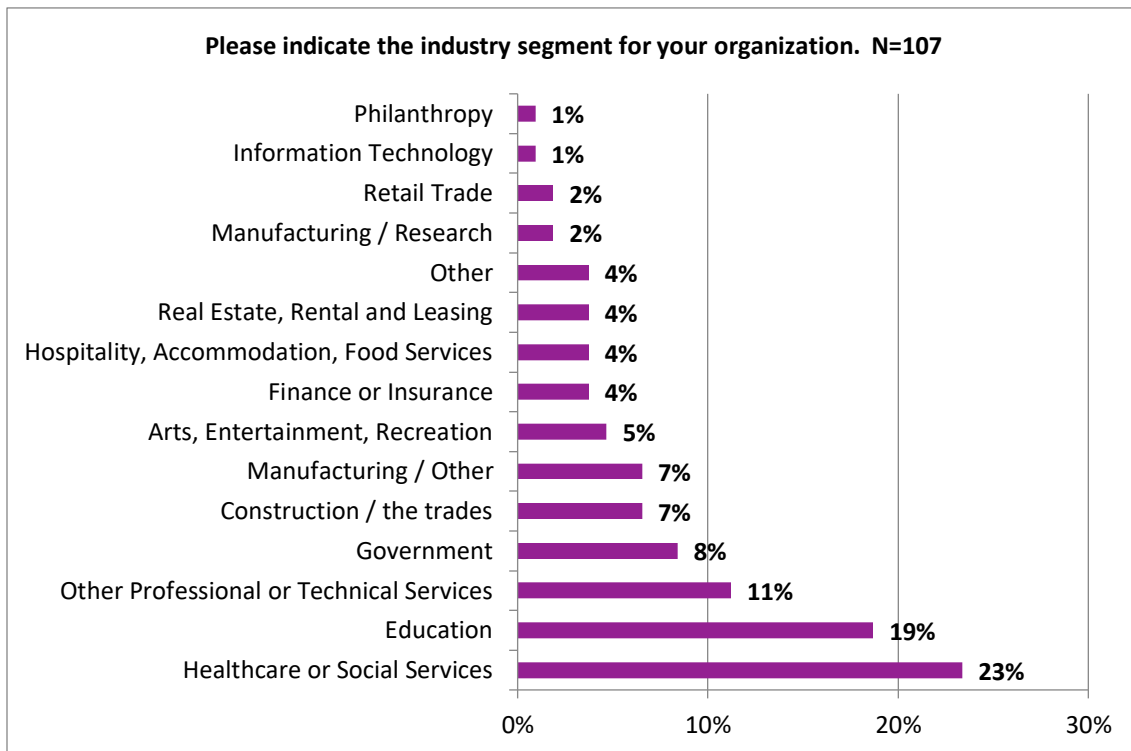
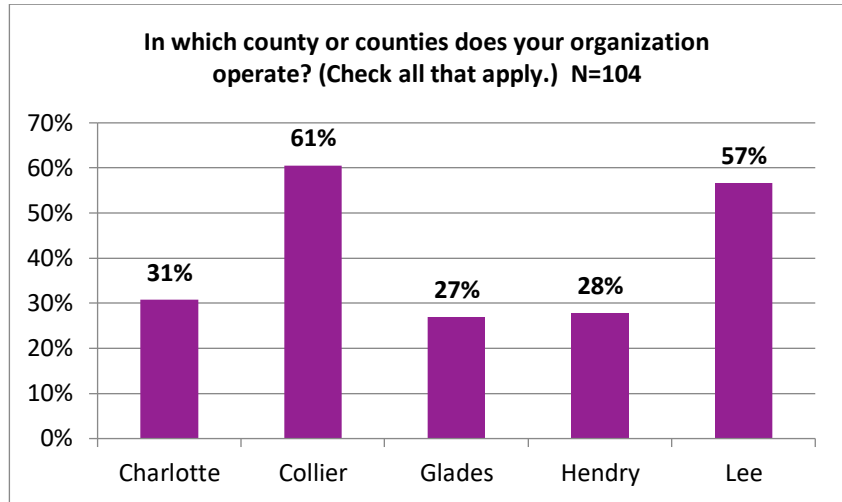
One hundred ten organizations and businesses responded to the 2022 Workforce Employer Survey. Not every organization answered every question, therefore the charts provide the “N” = the number of organizations that responded to the specific question.



NOTE: Four organizations reported having main offices in more than one SWFL county.

The participating organizations reported that Collier and Lee Counties had the highest concentrations of home (main) offices (42% and 41%, respectively) while Hendry and Glades Counties had the lowest concentrations of home offices (8% and 6% respectively).

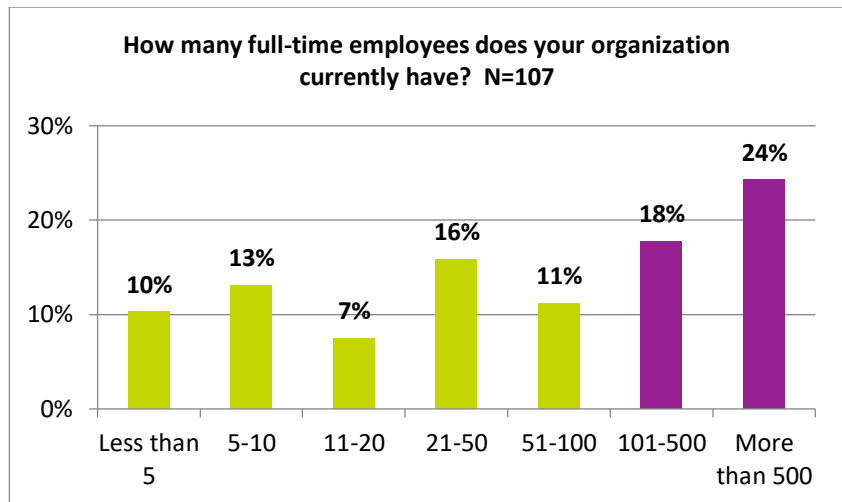
Almost all of the organizations reported having operations in or serving more than one SWFL county.



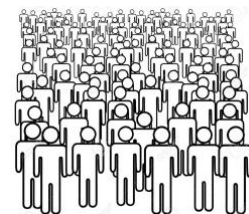
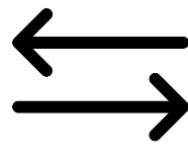
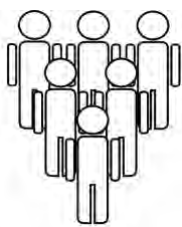
The SWFL organizations that responded to the 2022 Survey represent a broader mix of industry segments compared to the 2021 Survey. Of note, increased representation was seen from the Healthcare or Social Services/Assistance (23%), Manufacturing (combined Research + Other, 9%), Government (8%), and Construction/the Trades (7%) segments. Nineteen percent of the responding organizations replied that they are in education, which includes the regional universities and colleges,

specialized academies, and childcare/early learning organizations. The “Other” segment (4%) represent utility, well drilling and water systems, and fiber optics organizations. Organizations in the Retail Trade (2%) and Accommodation/Hospitality/Food Services (4%) segments, which are among the largest employers in SWFL¹, may still be underrepresented in the 2022 Survey since distributing surveys to the many individual businesses in these segments is challenging.

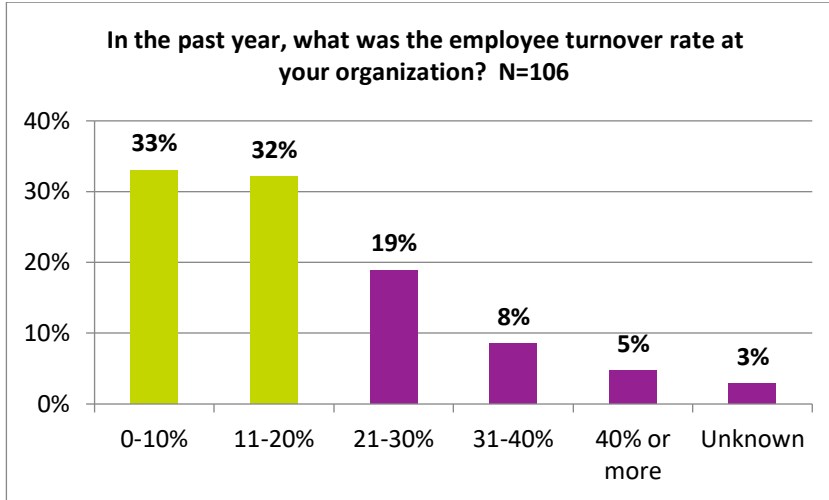
The largest proportion of the responding organizations (24%) reported having more than 500 employees, which represents a significant shift from the 2021 Survey results. (Last year, organizations with fewer than five employees had the highest representation.) For the purposes of this report, we will examine some of the results by organization size.



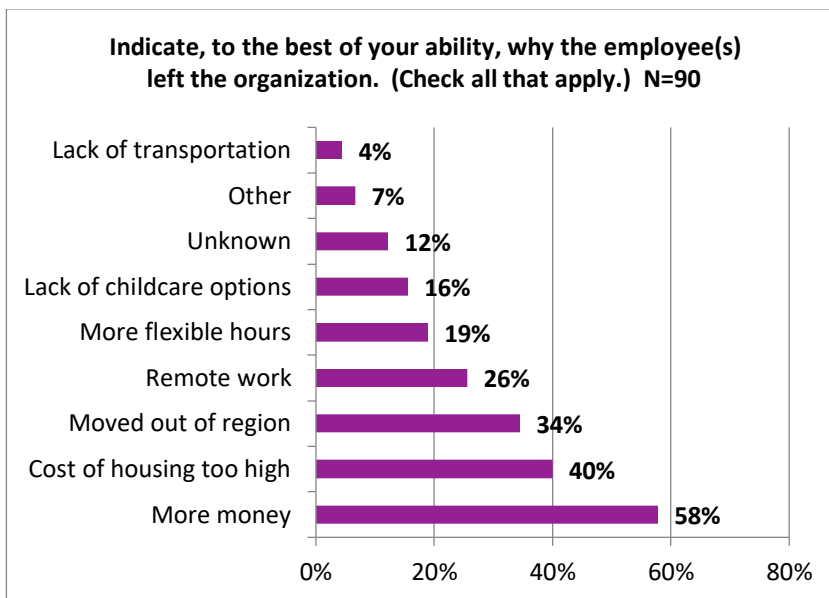
- **Small** = 100 employees or less (57% of the responding organizations)
- **Large** = more than 100 employees (42% of the responding organizations).



¹ U.S. Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*



A combined 65% of responding SWFL organizations reported turnover rates between 0% and 20%. For comparison, the annual average employee turnover rate in the U.S. in 2022 is 47%, according to the Bureau of Labor Statistics. In the U.S., the food service industry has one of the highest employee turnover rates (86.3%) with the education industry segment having one of the lowest (16%). A turnover rate of 10% or less is considered ideal.² Interestingly, among the organizations reporting an employee turnover rate of 0-10% (ideal), 74% (26/35) were small organizations and 26% (9/35) were large organizations.



When the SWFL organizations could suggest the reasons why employees left their organizations, the highest reported reasons for leaving were the new position offered more money (58%) and the cost of housing too high (40%).



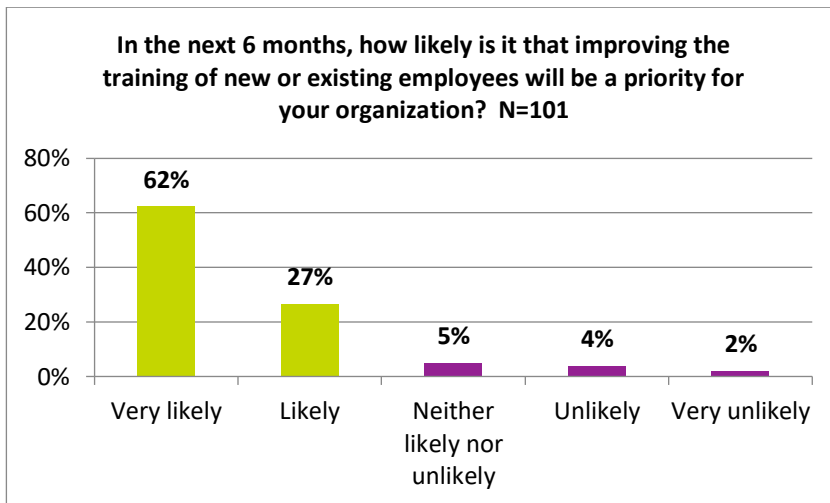
There were noteworthy differences in these two reported reasons between small and large organizations. Among organizations that reported “more money” as the reason for an employee leaving, 40% (21/52) were small organizations while 60% (31/52) were large organizations. A similar trend was seen among employers that reported “high cost of housing”; 31% (11/36) were small organizations while 69% (25/36) were large organizations. These findings may correlate with the observation above that large organizations in SWFL have worse turnover rates compared to small organizations in the region.

²<https://www.creditdonkey.com/average-turnover-rate.html#turnover-rate>



In the next 6 months, as SWFL continues to recover from the COVID-19 pandemic era, a combined 90% of the surveyed organizations (up from 79% in 2021) reported that it is “very likely” or “likely” that recruiting and hiring new, qualified employees will be a priority in 2022. Only 7% of organizations reported that it is “unlikely” or “very unlikely” that recruiting and hiring new, qualified employees

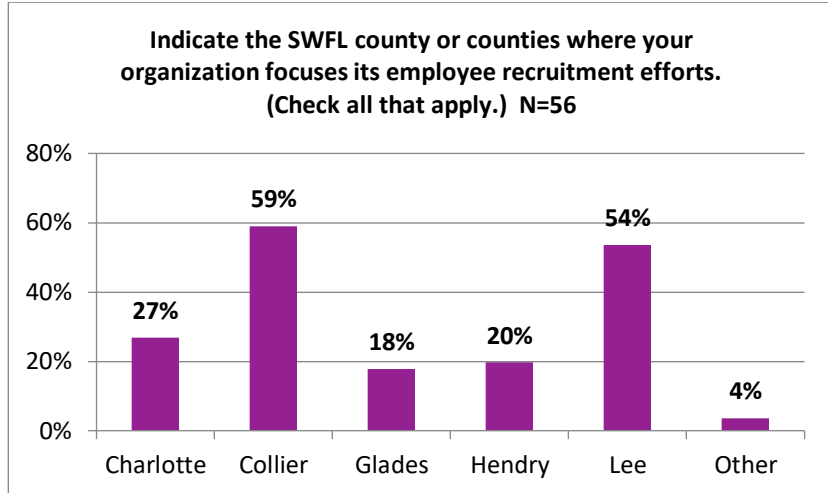
will be a priority in the next six months of 2022. Among the organizations responding that it is “very likely” or “likely” that recruiting and hiring new, qualified employees will be a priority, 54% (49/91) were small organizations and 45% (41/91) were large organizations. (One organization did not provide their number of employees.)



Similarly, as organizations grow their staffs, a combined 89% of the SWFL employers replied that it is “very likely” or “likely” that improving the training of new or existing employees will be a priority in the next six months.

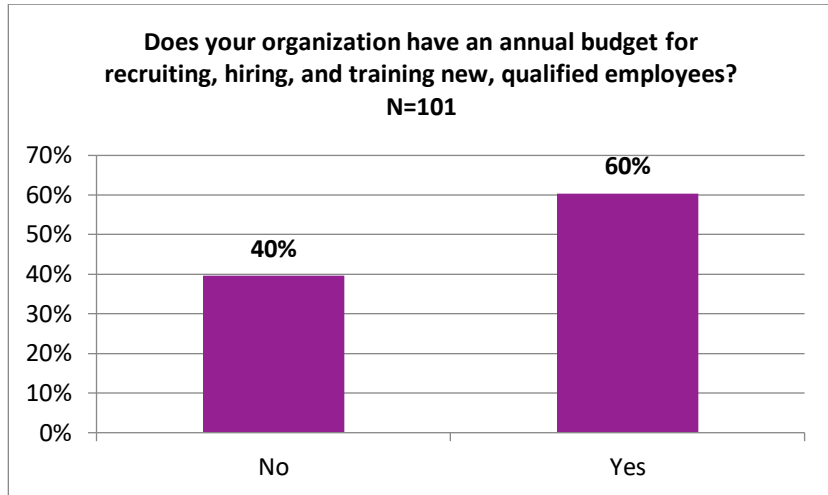


Just under half (46%) of the SWFL organizations reported that they focus their employee recruitment efforts across the 5-county region. Recruitment efforts, however, tend to be focused most in Collier County (59%) with the lowest recruitment focus in Glades County (18%). The “Other” category includes Manatee and Sarasota Counties.

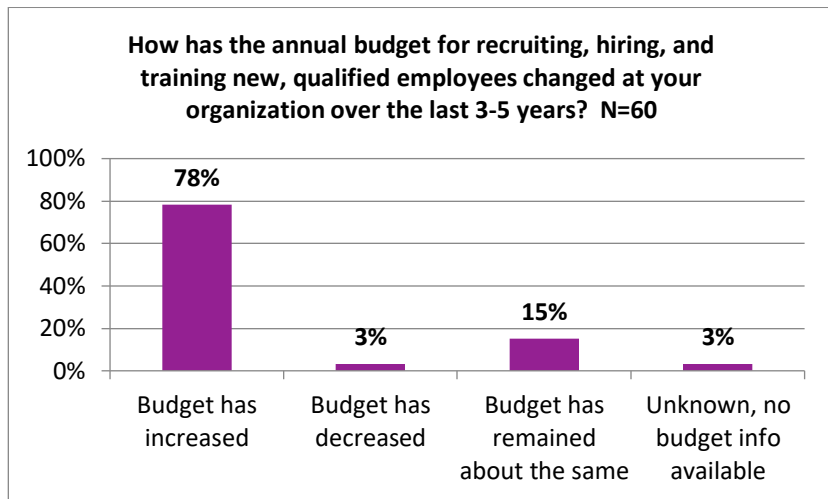


Seventy-four percent of the SWFL organizations reported using ads (print or on-line) to find new employees. Other methods included working with local colleges and universities, direct mail, in-store signage, electronic newsletters, social media. Most employers noted using more than one method – “anything that works!”

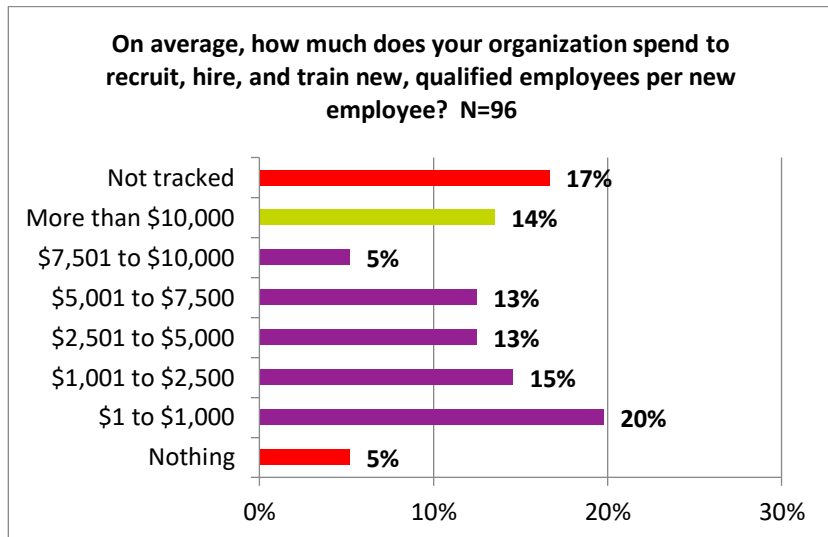
Among the SWFL organizations that responded to the question, 60% indicated that “yes” they have an annual budget for recruiting, hiring, and training new, qualified employees. Of those organizations that reported having an annual budget, 39% (24/61) were small organizations compared to 61% (37/61) of large organizations.

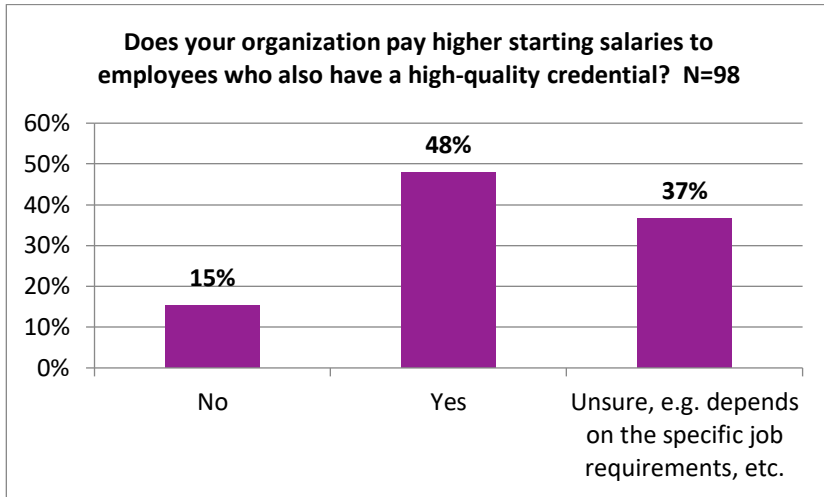


Furthermore, 78% of the organizations that provided information reported that their annual budgets for recruiting, hiring, and training new, qualified employees have increased over the last 3-5 years.



A combined 22% of the SWFL organizations reported spending “nothing” (5%) or “not tracking” annual budgets (17%) to recruit, hire, and train new qualified employees. Of those organizations that reported spending nothing or not tracking annual budgets, 67% (14/21) were small organizations and 29% (6/21) were large organizations. (One organization did not provide their number of employees.) Among the 14% of organizations that spend more than \$10,000 annually, 85% (11/13) were large employers.

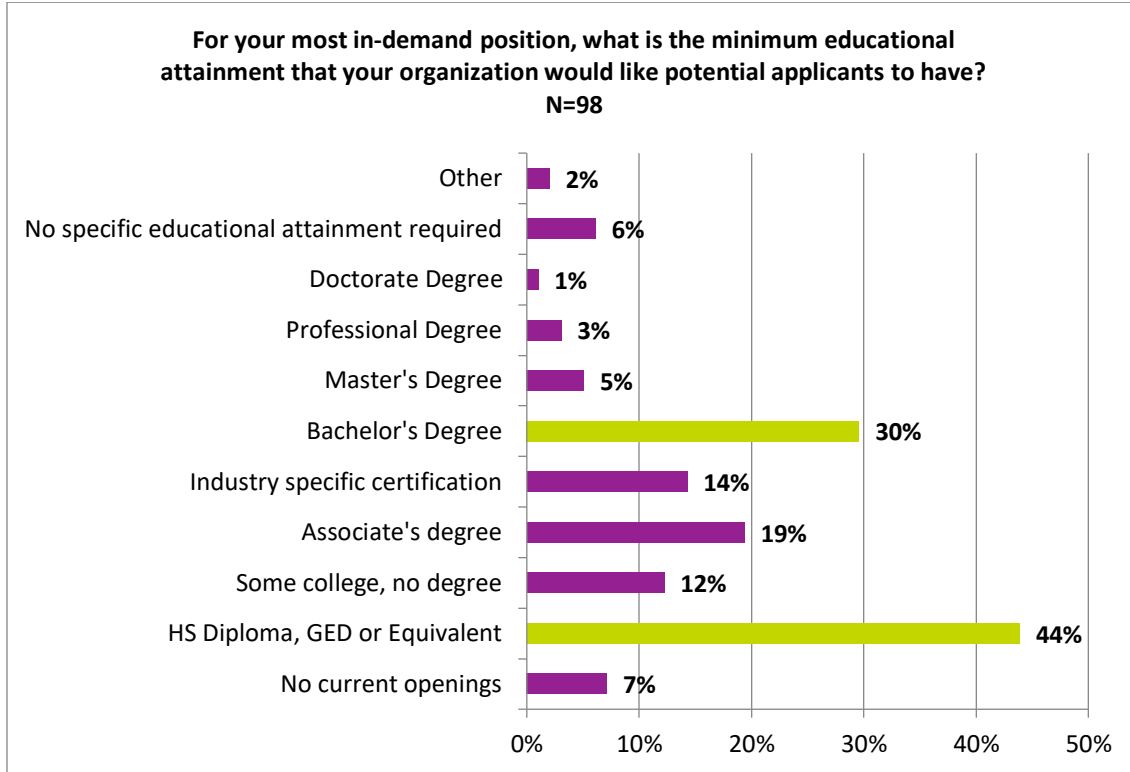




When asked about starting salaries, 48% of the organizations indicated that “yes” they would pay a higher starting salary to potential employees who have a credential (degree), certificate, or industry-recognized certification. Of the organizations that responded yes, 55% (26/47) were small organizations and 45% (21/47) were large organizations.

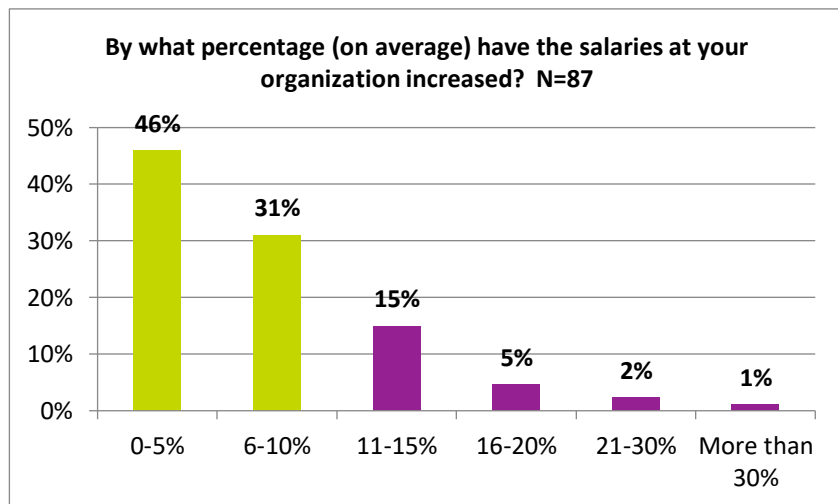


SWFL organizations are hiring for positions across the entire spectrum of levels. Only 12% (12/97) of the responding organizations indicated that they are not currently hiring and all 12 are small organizations.

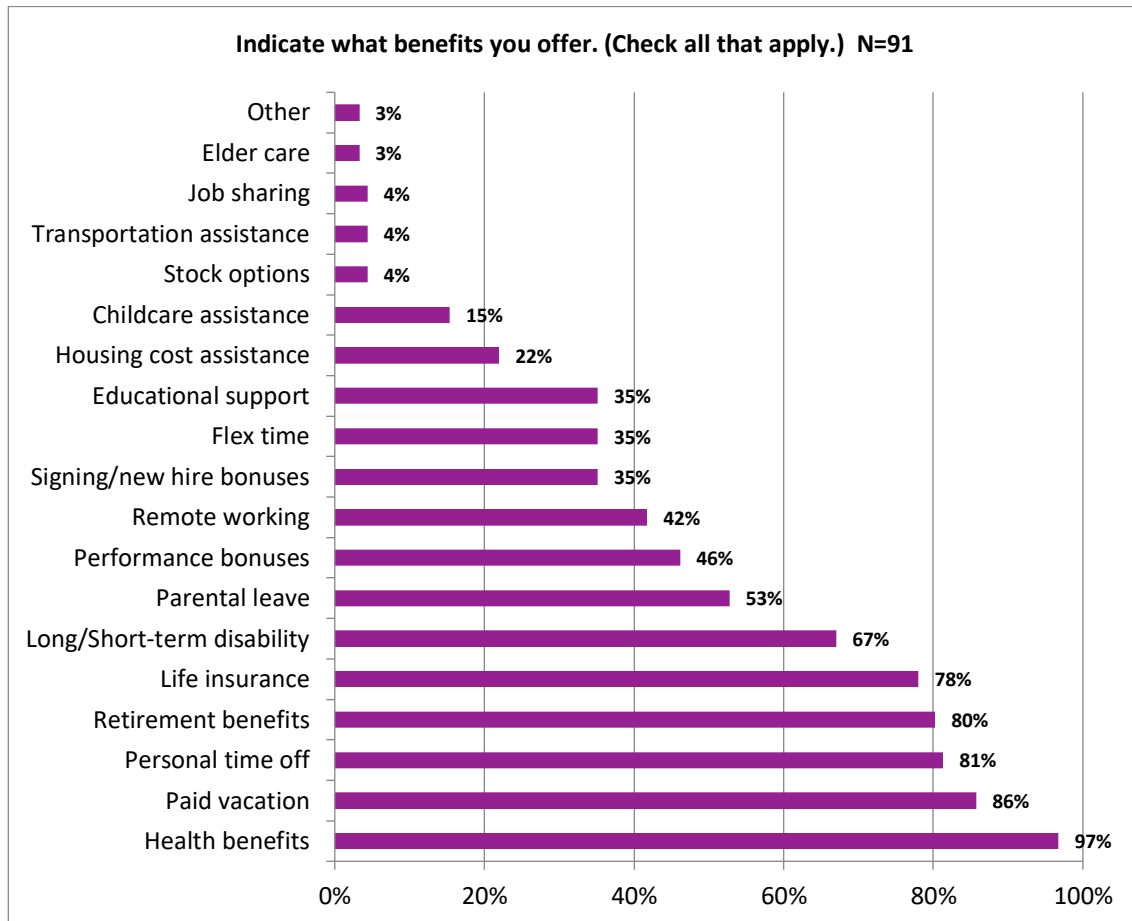


When the organizations considered their most in-demand position, almost half (44%) reported that a HS diploma, GED, or equivalent is the minimal educational attainment that is required. Among the organizations that reported a HS diploma, GED, or equivalent as the minimal required educational attainment, 47% (20/43) were small organizations and 53% (23/43) were large organizations. The proportions of organizations requiring a Bachelor's degree were the same between small organizations, 29% (14/29), and large organizations, 29% (14/29). (One organization did not provide their number of employees.)

Almost all organizations, 91% (88/97), reported increasing their employees' wages in the past year. A combined three-quarters of those organizations (77%) indicated that wages increased by 0-5% (46%) or 6%-10% (31%). Among organizations who increased employee wages between 0-10%, 54% (36/67) were small organizations and 45% (30/67) were large organizations.

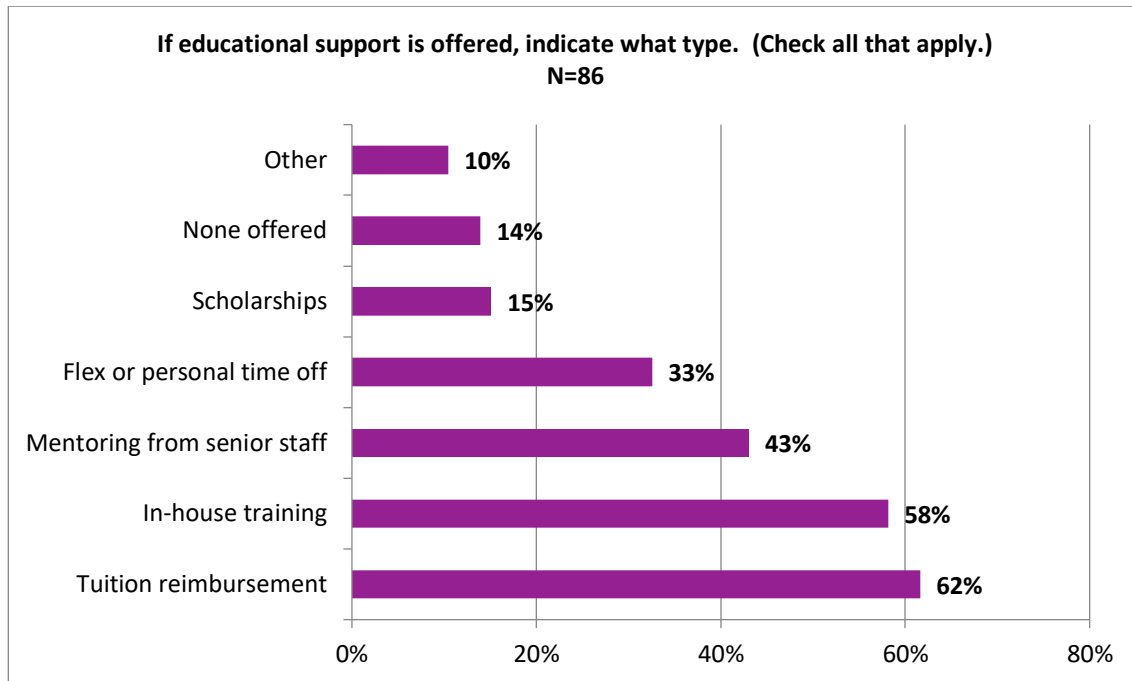


(One organization did not provide their number of employees.)



Ninety-three percent (91/98) of the organizations reported that, in addition to an employee’s salary, the organization offers additional employee benefits. The proportions of large and small organizations reporting that they offer benefits were similar, 46% (42/91) and 53% (48/91), respectively. (One organization did not provide their number of employees.) Small organizations with less than 5 employees are the least likely, 4% (4/91), to offer additional employee benefits. Among all organizations that offer employee benefits in addition to a salary, the most offered benefits included health benefits (97%), paid vacation (86%), and personal time off (81%). In the other category, employee benefits include profit sharing, mileage, cell phone reimbursement, gym membership, and professional organization memberships. It is interesting to note that compared to last year’s Survey results**, the proportion of organizations offering housing cost assistance increased from 3% in 2021 to 22% in 2022. Similarly, remote working options as part of employee benefit packages increased from 27% in 2021 to 42% in 2022. These findings perhaps reflect the evolving needs of the SWFL workforce and the challenges businesses are having in recruiting qualified employers to the region.

***Caution: The 2021 Survey results may not be completely comparable to the 2022 Survey results since a different mix of organizations responded to the Surveys between the two years.*



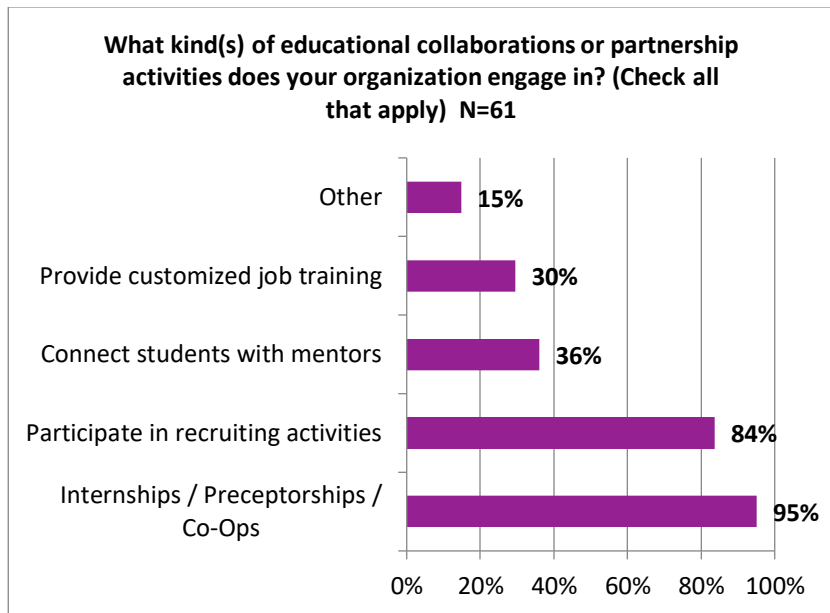
Among all organizations that offer educational support to their employees, the most offered support included tuition reimbursement (62%), in-house training (58%), and mentoring from more senior staff (43%).



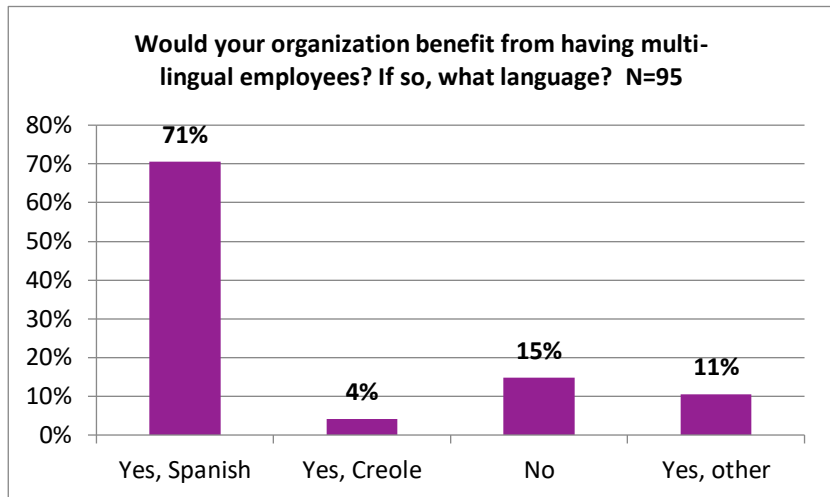
Sixty-five percent of the organizations reported “yes” that they partner or collaborate with one or more of SWFL’s educational institutions to assist in finding, recruiting, and/or training qualified employees. Of those responding yes, a greater proportion of large organizations, 56% (35/62), reported partnerships or collaborations compared to 42% (26/62) of small organizations. (One organization did not provide their number of employees.)



Among both large and small organizations, offering student internships / preceptorships / co-ops (95%) and participating in recruiting activities (84%) were the most often reported partnerships or collaborations.

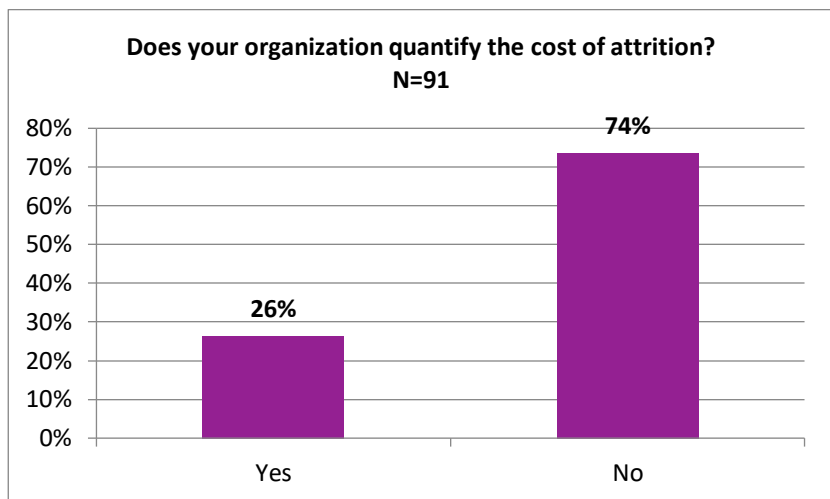


Seventy-one percent of the organizations indicated that they would benefit from having multi-lingual employees who spoke Spanish.

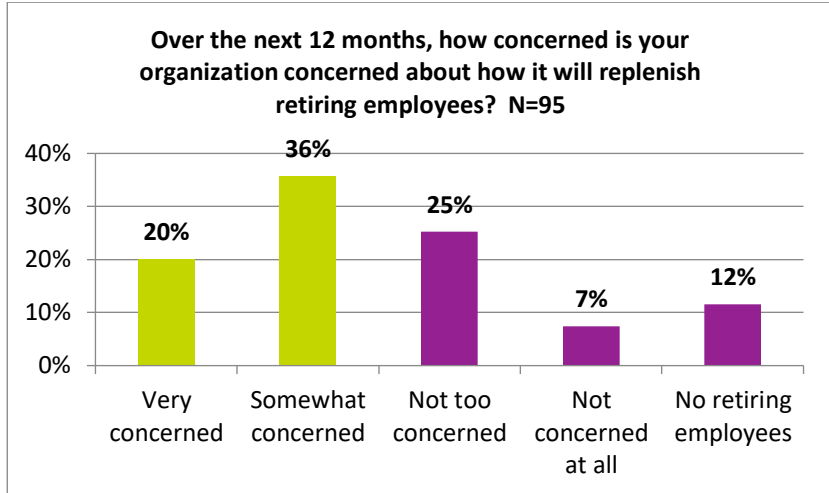


Nine percent reported both Spanish and Creole would be beneficial. Other mentioned languages included German, Russian, French, and Portuguese.

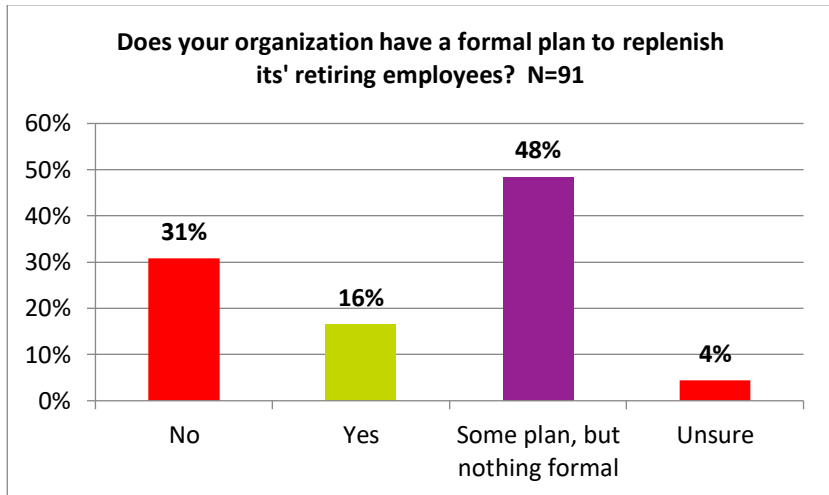
Only 26% of the SWFL organizations reported that they quantify the cost of attrition, although only one of the organizations provided any details on these costs (attrition costs increased 10% since 2021).

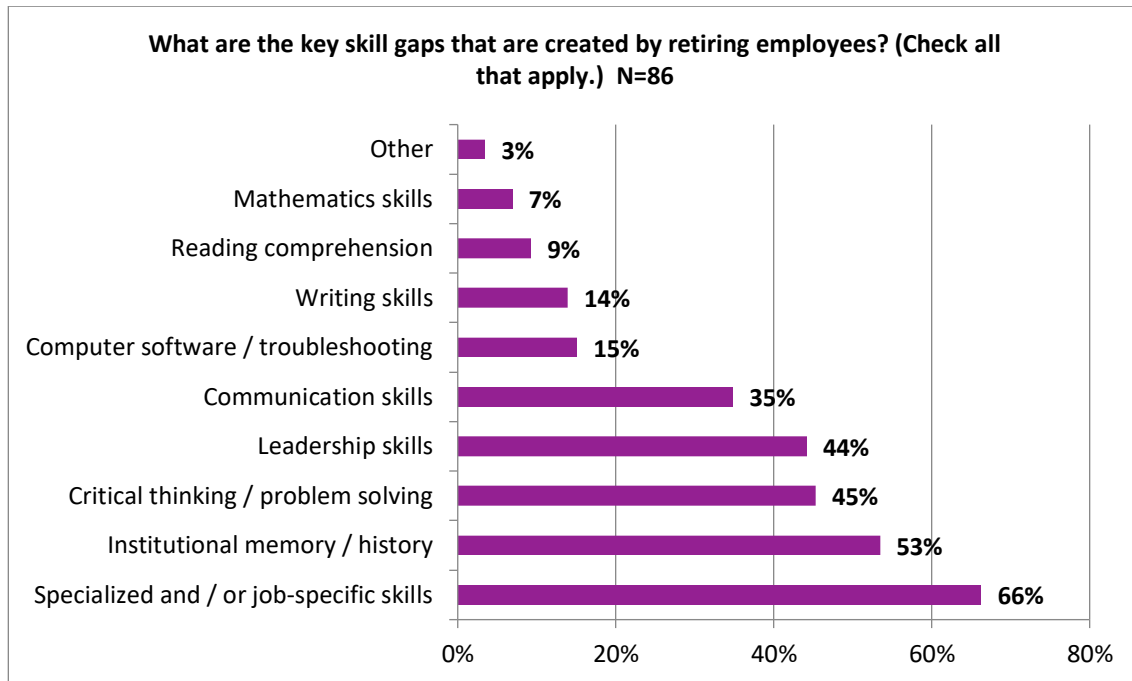


A combined 56% of organizations indicated that they are “very concerned” (20%) or “somewhat concerned” (36%) about replenishing their retiring employees.



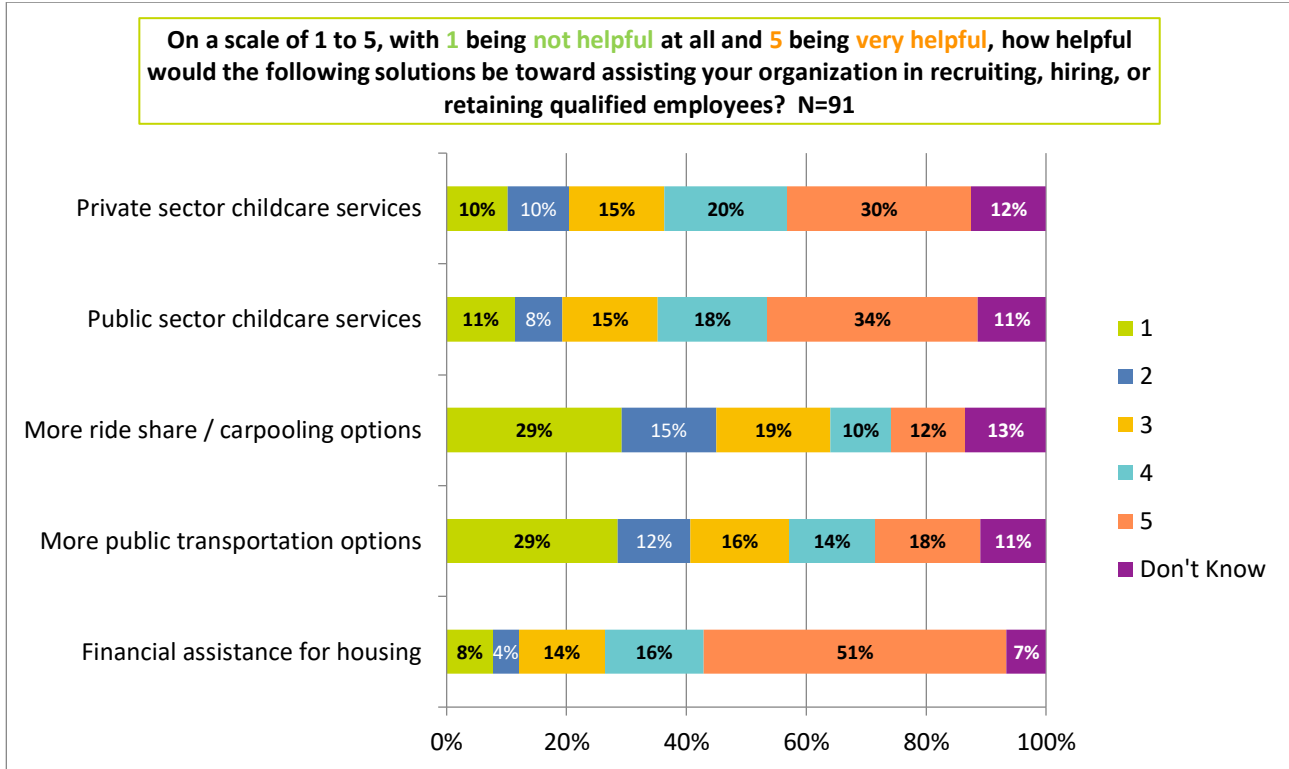
Only 16% of organizations stated that “yes” they have a formal plan to replenish their retiring employees. A combined 35% reported “no” (31%) or “unsure” (4%) as to whether they have a formal plan. Among those organizations that responded “yes” that they have a formal plan, 33% (5/15) were small organizations and 67% (10/15) were large organizations.





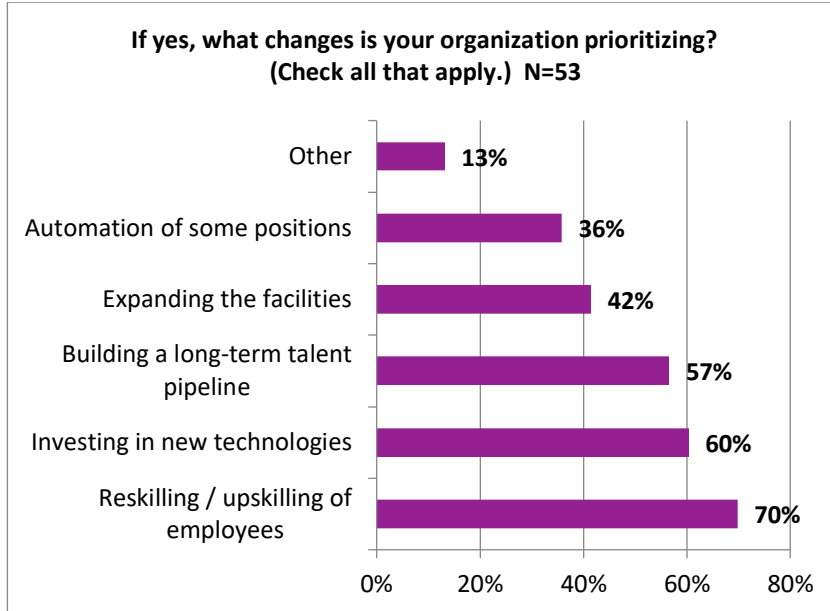
Across all organizations, highly specialized or job-specific skills (66%) and loss of institutional memory / history (53%) were identified most often by the organization as the skill gaps created by retiring employees. Critical thinking (45%), leadership skills (44%), and communication skills (35%) were also deemed important. Other skill gaps identified by the organizations included loyalty, responsibility, taking ownership of one’s mistakes, business administration/running a small business and teaching/mentoring.





Over half of the organizations (51%) indicated that financial assistance for housing would be “very helpful” toward assisting their organizations in recruiting, hiring, or retaining qualified employees. Childcare services, both from the public sector (34%) and the private sector (30%), were also ranked “very helpful” by about one-third of the organizations. Both more public transportation and ride share / car pooling options were viewed as “not helpful” among 29% of the organizations.





Just over half of the organizations, 56% (50/89), reported prioritizing changes to their structure or processes. There was little difference between small organizations (52%) and large organizations (48%) in their plans to prioritize changes to their structures or processes.

Reskilling/upskilling employees (70%), investing in new technologies (60%), and building a long-term talent pipeline (57%) were the most reported changes that organizations are prioritizing.

Finally, the 110 SWFL organizations were given the opportunity to provide their thoughts on any issues not covered in the Survey. The specific responses received from a handful of the organizations can be categorized in three main categories:

- Finding qualified (skilled) workers
 - ✓ Bring back shop class, so many young people lack knowledge and basic skills necessary for society to function and maintain infrastructure.
 - ✓ Among reasons for voluntary turnover reasons, culture and management remain very high on the list. Management training, specifically focusing on culture, communication, and delegation is essential.
 - ✓ Expand on the types of skills employers are looking for in new hires. Obviously, (the skills) will depend upon the specific employer, but we may see some commonalities that could be shared with educators.
- Cost of housing in the region
 - ✓ Cost of Housing/Access to affordable housing was mentioned in the questions, but it is KILLING us. The explosive growth of AirBnB/VRBO properties will be the death of the labor market in SWFL.
 - ✓ Not enough affordable housing for those under 30 working and attending college and starting new jobs out of college.

- Work options
 - ✓ While remote work was mentioned, it probably deserves additional information. Many workers have grown to like remote work, while many employers prefer having staff onsite. This would be interesting to delve into.

Perhaps one comment best summarizes the challenges most, if not all, SWFL employers are facing today:

- Our hiring challenges include lack of childcare options, overall cost of living (particularly housing), and the sheer lack of (qualified) candidates in the region. (We hire primarily for mid-level administration and program execution.)