

TRIANGLE TALENT

A Regional Skills Analysis



WAKE COUNTY
ECONOMIC DEVELOPMENT



Raleigh

RALEIGH
CHAMBER | R




NO. 1
Best City for Jobs
in 2020 in the U.S.
(Raleigh, NC)
Glassdoor

INTRODUCTION

Regional Skills Analysis

The regional skills analysis was launched in March 2020 to provide a follow-up to the 2017 Triangle Talent report, which highlighted critical skills needs in growing industries including IT, life science, and construction and skilled trades. With the onset of the pandemic and economic crisis in 2020, the team quickly pivoted to re-frame the survey as a tool to inform economic recovery. Giving businesses more time to respond in light of unprecedented economic changes, the survey revealed data not only on workforce and hiring, but on sentiment related to growth amid the economic crisis. In partnership with Wake County Economic Development, Raleigh Chamber, City of Raleigh, Capital Area Workforce Development Board, and RTI International, the survey deployed to businesses across the Research Triangle region and a parallel effort was launched by the Cape Fear Collective and the Wilmington Chamber in the Cape Fear region.

From March to July, the team worked with hundreds of regional partners to promote the survey to a wide range of businesses to gather data to inform future skill needs in the region. As a result, the survey reached thousands of businesses across 15 counties and received over 700 responses, giving a glimpse into what our economic future could look like.

57% of businesses surveyed expect to grow in the next three years

Survey Objectives

- ✓ Understand short & long-term hiring needs
- ✓ Inform training & education providers of the current workforce needs
- ✓ Provide current workforce information for policy makers in workforce, education, & economic development
- ✓ Develop an effective cradle-to-career talent pipeline strategy
- ✓ Create an efficient structure for ongoing industry feedback

Since the first iteration of the Regional Skills Analysis in 2017, workforce development has evolved. Global pandemic or not, the economy continues to change, industry is shifting, technology is at the forefront of business operations, the education system has been disrupted, and diversifying the workforce is top of mind. For regions experiencing rapid growth like the Research Triangle (growing by 109 people per day), there is a need to understand emerging trends and challenges in talent and workforce development.



SURVEY KEY THEMES

Despite challenges related to the pandemic, the survey revealed that a high percentage of businesses plan to continue to grow and many expect to hire for new jobs. The high percentage is a reflection of the strong local economy and suggests that while economic growth will remain slow, a recovery will occur in the Research Triangle region.

Businesses are looking to expand:

57 percent of businesses surveyed expect to grow in the next three years. This is a positive indicator of an economic recovery post-pandemic.

In the next three years, businesses surveyed expect to hire between 17,000 and 32,000 people for new jobs.

High growth industries:

IT, Software & Analytics (83%), Life Sciences & Bioscience (87%), and Manufacturing (74%) are among the most likely to grow.

Demand for technical education credentials:

Businesses cited credentials, training certificates, and associates degrees as the necessary credentials for their future workforce. Survey results from 2017 showed companies cited the need for a four-year degree at 49 percent whereas the 2020 survey revealed only 39 percent of companies prioritized a four-year degree over other credentials. This indicates a strong variation in education expectations across industry.

Respondents have a positive opinion of talent pipeline:

The majority of industry sectors indicate satisfaction with the quality of the local pipeline for well-trained workers.

Missing qualities and soft skills:

Similarly, to the survey results from 2017, businesses across all industries still struggle to find employees that have responsibility/self-discipline, the ability to think critically and to take initiative.

Emerging non-traditional soft skills:

Survey respondents noted other soft skills such as empathy and acceptance of diversity are prioritized at the same level as other soft or technical skills.

Sourcing talent from networks:

Businesses reported frequent use of networks for sourcing talent. However, respondents expressed concern for lack of diversity within their networks and are looking for new virtual tools to help diversify their workforce.

- Friends and networks
- Online job portals
- Internal employee references
- Social media

Industry Findings



Professional & Technical Services 4



IT, Software, & Analytics 5



Restaurants, Lodging, & Hospitality Services 6



Life Sciences & Biosciences 7



Public Sector & Education 8



Construction & Skilled Trades 9



Healthcare & Social Assistance 10



Manufacturing 11



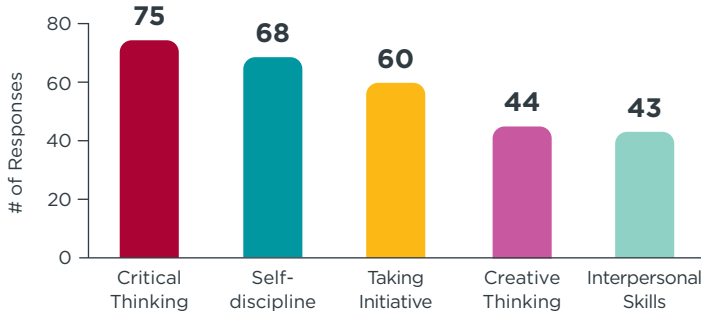
Energy, Utilities, & Cleantech 12



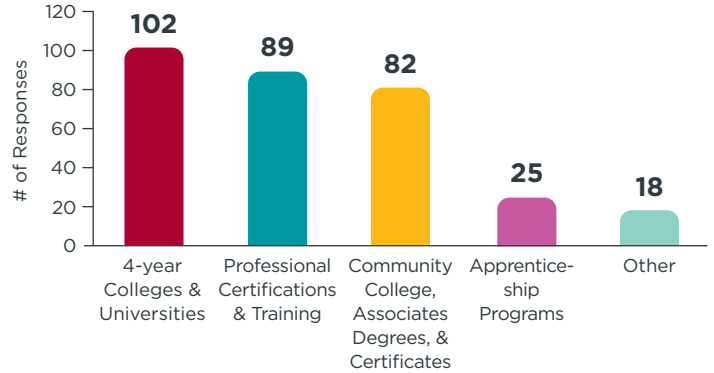
Logistics, Transportation, & Warehousing 13

PROFESSIONAL & TECHNICAL SERVICES

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



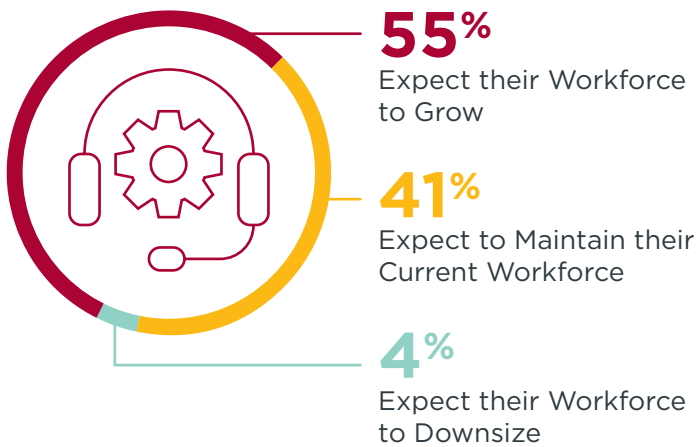
Which positions do you expect to have the most openings in the next 3 years?

- 124** Administrative Assistants
- 106** Marketing Professionals
- 99** Other
- 83** Accountants & Book Keepers
- 78** Supervisors & Managers

What skills are the most important for hiring?

- 238** Ability to Work Efficiently
- 214** Effective Communication Appropriate to Intended Audience
- 208** Information Gathering & Analysis
- 180** Creation & Maintenance of Positive Client Relations
- 166** Knowledge of Relevant Computer Software

Do you expect your workforce to grow in the next 3 years?

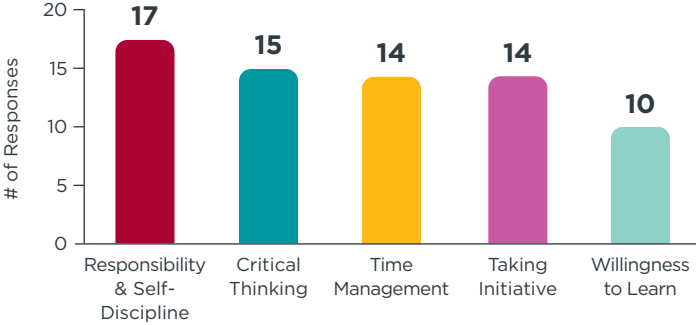


Key Takeaway

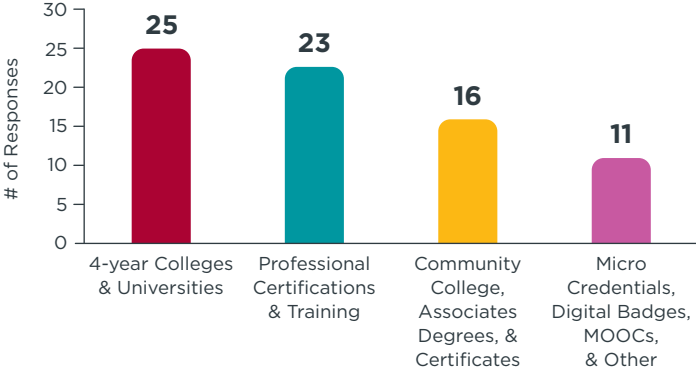
Of the respondents in this category, **69 percent are small businesses who plan to double their footprint** in the next three years.

IT, SOFTWARE, & ANALYTICS

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



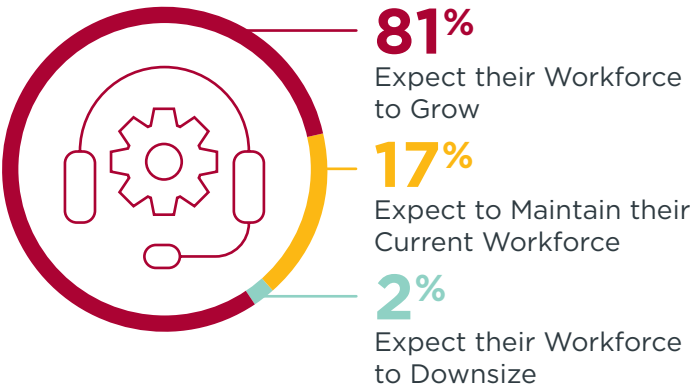
Which positions do you expect to have the most openings in the next 3 years?

- 65** Software Developers, Programmers & Engineers
- 57** Computer, Networking & IT Support Professionals
- 32** Technical Sales Representatives
- 32** Database Administrators & System Architects
- 32** Cyber Security Analysts

What skills are the most important for hiring?

- 53** Remaining Current on Advancements in Technology
- 52** Analysis & Recognition of Potential Security Threats
- 47** Creating & Maintaining Positive Client Relations
- 43** Effective Communication Appropriate to Intended Audience
- 39** Organization & Management of Data

Do you expect your workforce to grow in the next 3 years?

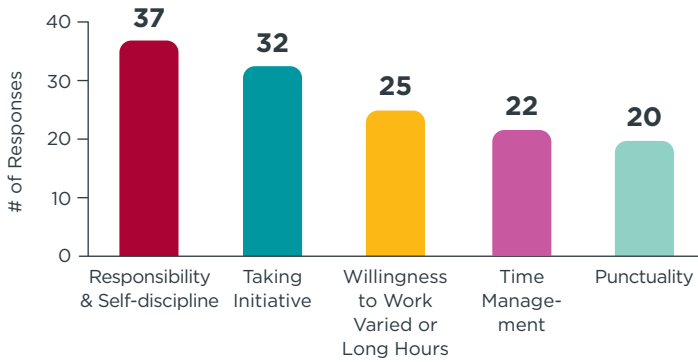


Key Takeaway

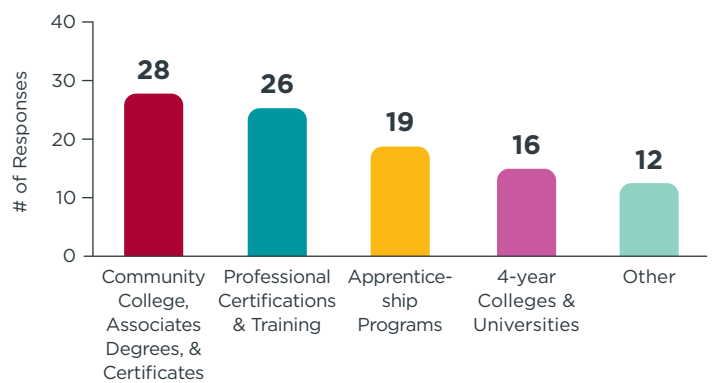
Of all 10 industry sectors, **IT, software and analytics is expected to grow the most in the next three years**, with a number of respondents having 1,000 or more employees. **Not only is this industry growing quickly, but it's also scaling rapidly.**

RESTAURANTS, LODGING, & HOSPITALITY SERVICES

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



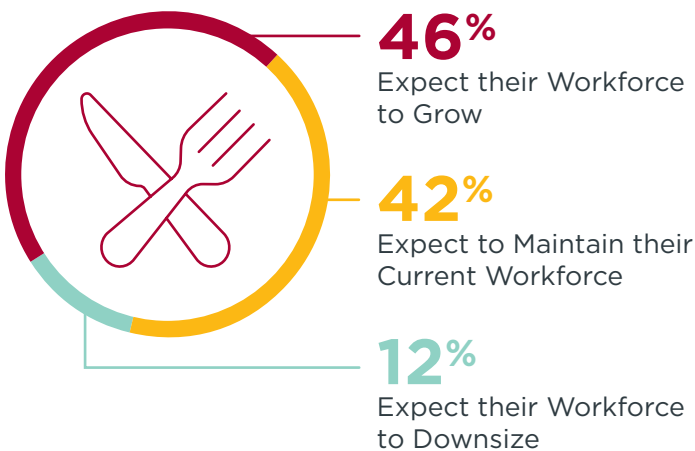
Which positions do you expect to have the most openings in the next 3 years?

- 85** Food Preparation Staff
- 76** Wait/Banquet Staff
- 63** Dishwasher/Bus Boy
- 54** Guest Services Staff
- 51** Supervisors & Managers

What skills are the most important for hiring?

- 83** Commitment to Customer Service
- 64** Effective Communication & Negotiation Techniques
- 62** Application of Appropriate Food, Health & Safety Practices
- 45** Knowledge of Relevant Computer Software
- 45** Effective Allocation of Resources

Do you expect your workforce to grow in the next 3 years?



Key Takeaway

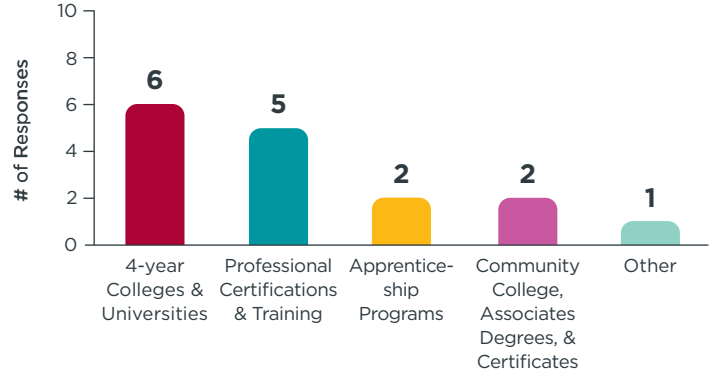
For the restaurant, lodging, and hospitality industry, the most in-demand positions are expected to be the most difficult to fill like, food preparation roles, wait staff, guest services, supervisors, managers, and housekeepers.

LIFE SCIENCES & BIOSCIENCES

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



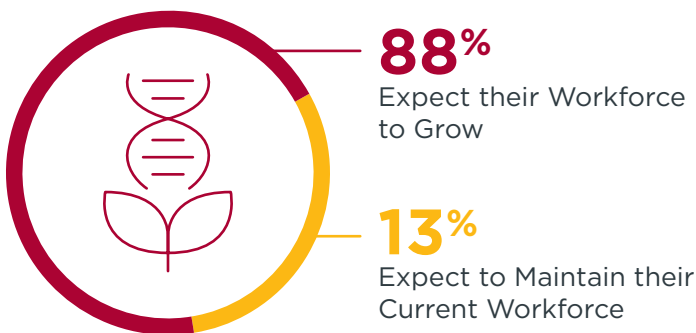
Which positions do you expect to have the most openings in the next 3 years?

- 14** Quality Assurance/Quality Control Professionals
- 14** Project Managers
- 11** Plant Operations & Manufacturing Support Workers
- 9** Regulatory Professionals
- 8** Research Associates/Scientists

What skills are the most important for hiring?

- 18** Effective Communication Appropriate to Intended Audience
- 12** Experimental Design
- 11** Current Good Manufacturing Practice
- 9** Project Management Skills
- 8** Experience with Specific Lab

Do you expect your workforce to grow in the next 3 years?

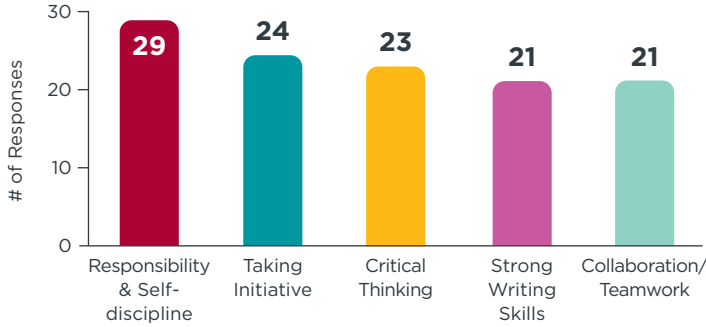


Key Takeaway

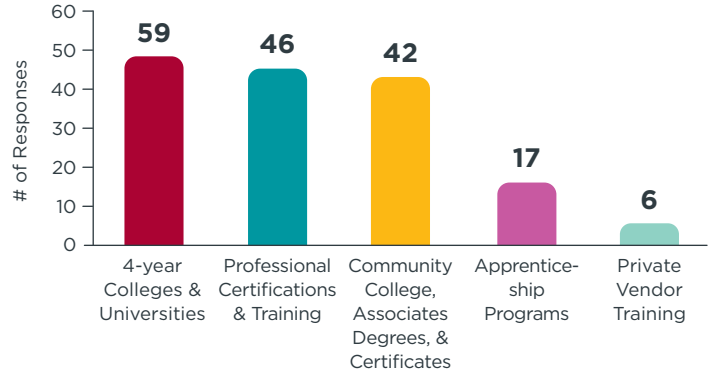
Respondents represented both small, early stage companies, and major employers. The **life sciences and bioscience industry is most satisfied** with the workforce overall.

PUBLIC SECTOR & EDUCATION

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



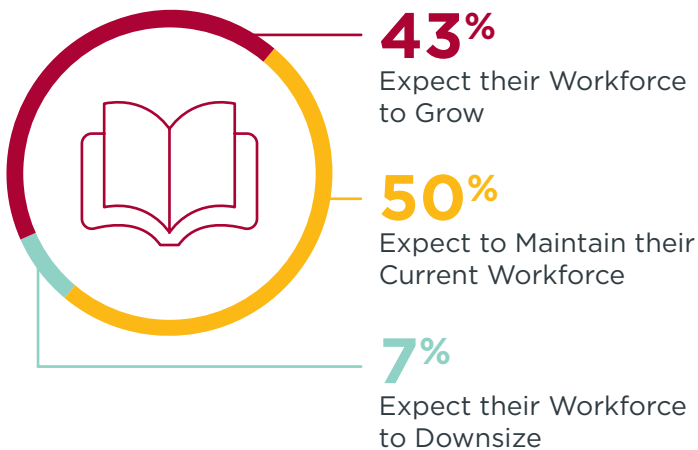
Which positions do you expect to have the most openings in the next 3 years?

- 124** Administrative, Technical & Support Staff
- 51** Teachers/Faculty
- 51** Counselors/Social Workers & Related
- 50** Marketing Professionals
- 47** Facilities/Maintenance

What skills are the most important for hiring?

- 103** Ability to Implement Plans & Policies
- 98** Ability to Organize, Plan & Set Goals
- 91** Information Gathering & Analysis
- 83** Effective Management & Leadership Skills
- 79** Strong Writing Skills

Do you expect your workforce to grow in the next 3 years?

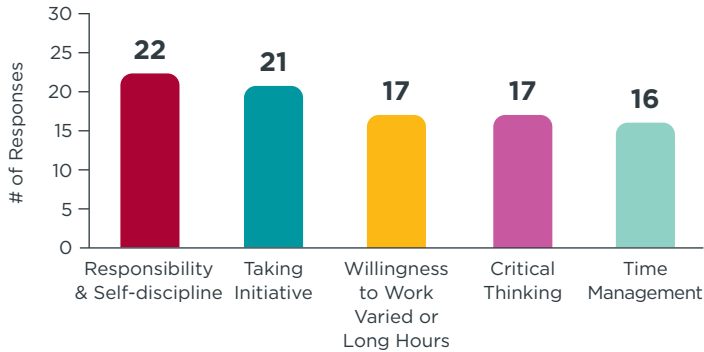


Key Takeaway

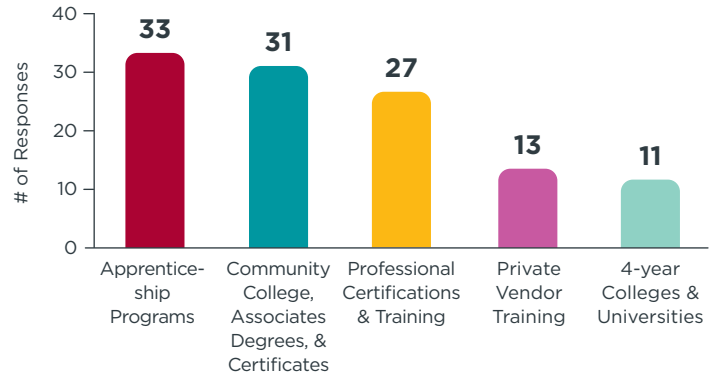
This industry requires a variety of credentials and/or education experience for positions like teachers, administrators, counselors, and leadership staff.

CONSTRUCTION & SKILLED TRADES

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



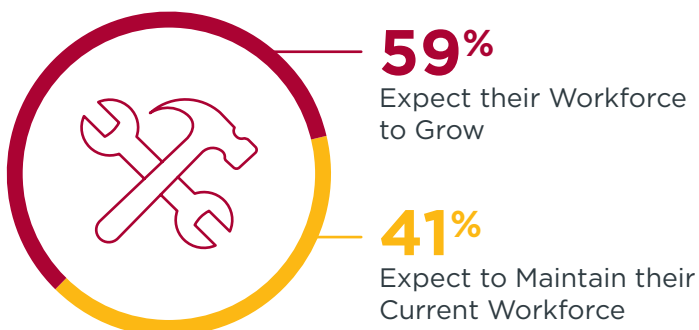
Which positions do you expect to have the most openings in the next 3 years?

- 34** Other
- 30** Plumbers
- 30** Commercial Construction Project Managers
- 28** HVAC Installers & Maintenance Workers
- 28** Commercial Construction Field Supervisors

What skills are the most important for hiring?

- 87** Communication & Visualization of Proposed Work
- 80** Selection & Effective Use of Appropriate Tools, Machinery, Equipment, etc.
- 66** Efficient Completion of Tasks
- 58** Participate & Contribute to a Safe Work Environment
- 52** Interpretation of Drawings Used in Project Planning

Do you expect your workforce to grow in the next 3 years?

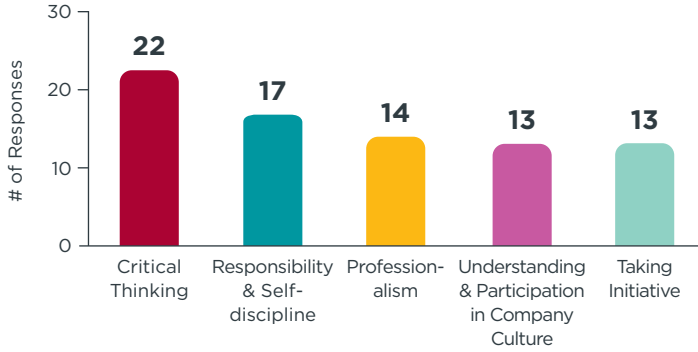


Key Takeaway

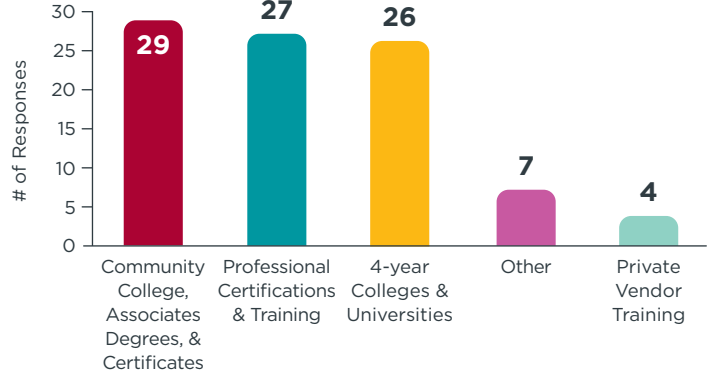
This industry ranks **two-year degrees and other certifications as the most desirable requirement** needed for future workforce.

HEALTHCARE & SOCIAL ASSISTANCE

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



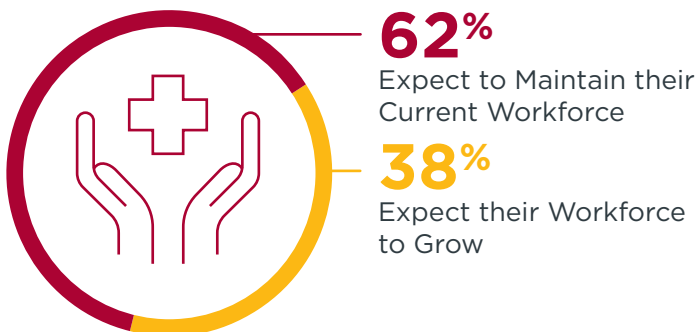
Which positions do you expect to have the most openings in the next 3 years?

- 40** Health Aides & Assistants, Including Home & Health Aides
- 39** Nurses (RN & LPN)
- 29** Case & Care Managers
- 27** Social Workers
- 23** Professional Managers, Administrators

What skills are the most important for hiring?

- 53** Effective Communication & Appropriate Documentation
- 51** Efficient Response to Patient/Client Health Changes
- 46** Implementation of Treatment Plans
- 31** Analysis of Information Gathered from Patient Evaluation
- 29** Treatment Plan Creation Using a Problem-Solving Model

Do you expect your workforce to grow in the next 3 years?

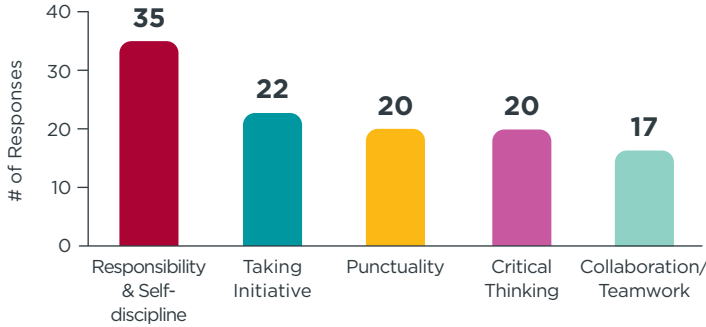


Key Takeaway

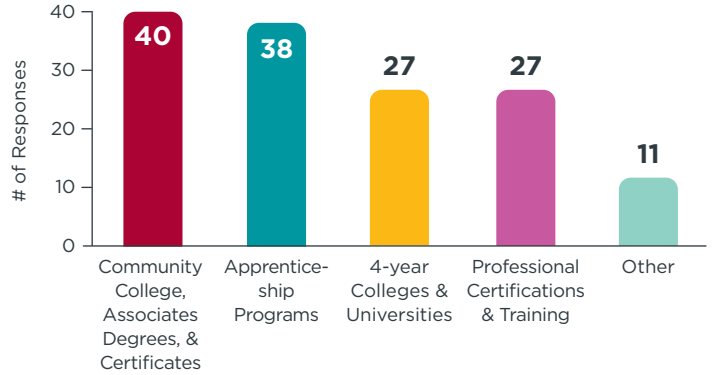
Healthcare and social assistance represent **larger companies who are projected to hire thousands of employees** over the next three years.

MANUFACTURING

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



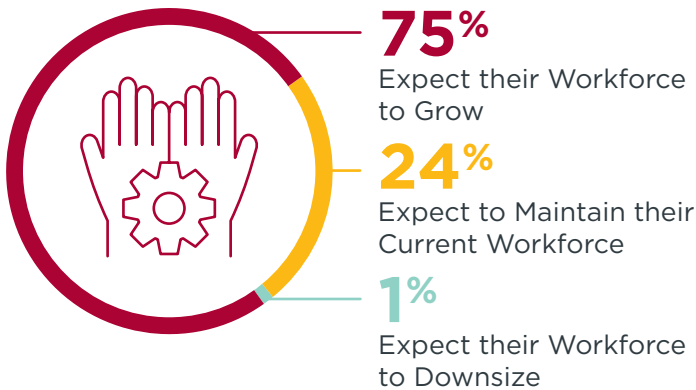
Which positions do you expect to have the most openings in the next 3 years?

- 99** Supervisors & Managers
- 78** Engineers
- 76** Front-line Production Workers
- 57** Maintenance & Repair Personnel
- 52** Machine Operators (Not Computerized)

What skills are the most important for hiring?

- 93** Effective Communication to Share the Status of Work & Problems
- 91** Effective Use of Resources, Limiting Waste, Continuous Improvement
- 77** Participates & Contributes to a Safe Work Environment
- 62** Effective Implementation of Operational Manuals & Instructions
- 54** Quality Control Analysis

Do you expect your workforce to grow in the next 3 years?

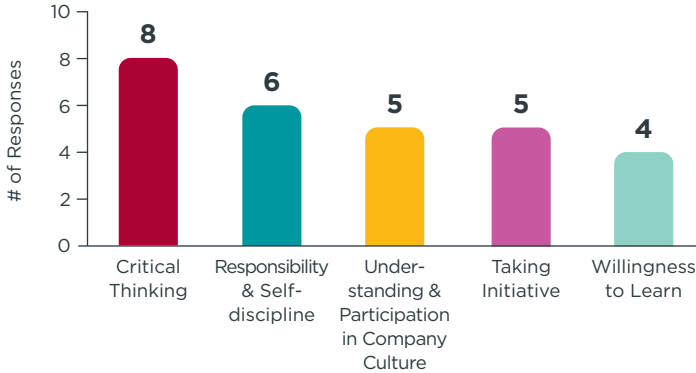


Key Takeaway

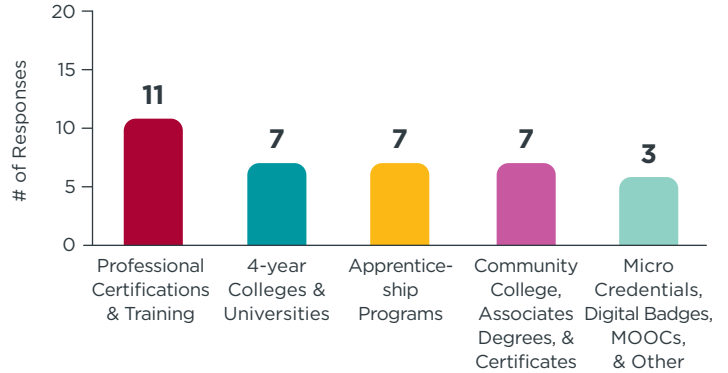
Respondents in this category place **equal weight on four-year college and community college credentials.**

ENERGY, UTILITIES, & CLEANTECH

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



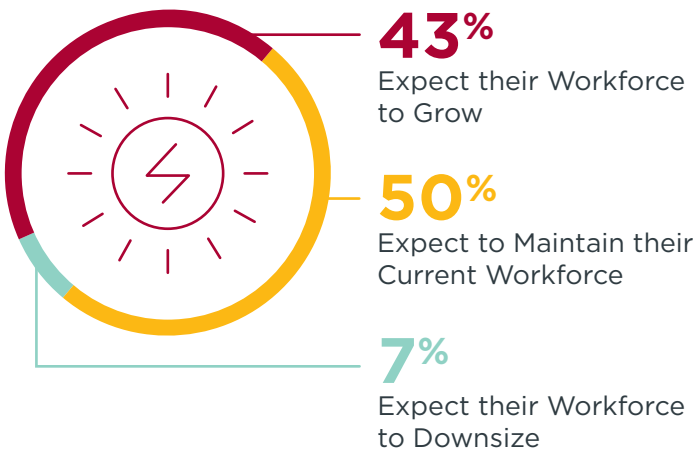
Which positions do you expect to have the most openings in the next 3 years?

- 17** Software Developers & Programmers
- 13** Technical Sales Representatives
- 12** Data Analysts
- 11** Field Technicians
- 11** Engineers

What skills are the most important for hiring?

- 28** Participates & Contributes to a Safe Work Environment
- 17** Project Management Skills
- 17** Knowledge of Relevant Computer Software
- 16** Effective Communication Appropriate to Intended Audience
- 13** Information Gathering & Analysis

Do you expect your workforce to grow in the next 3 years?

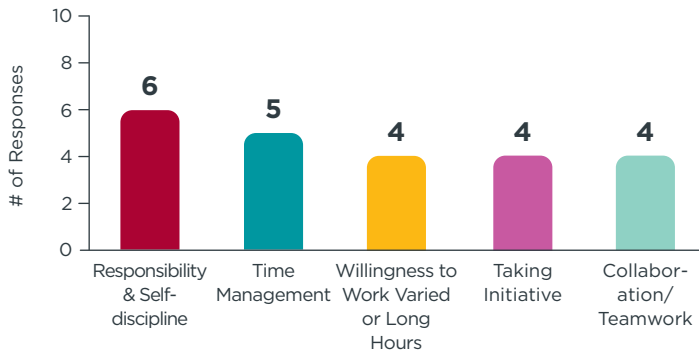


Key Takeaway

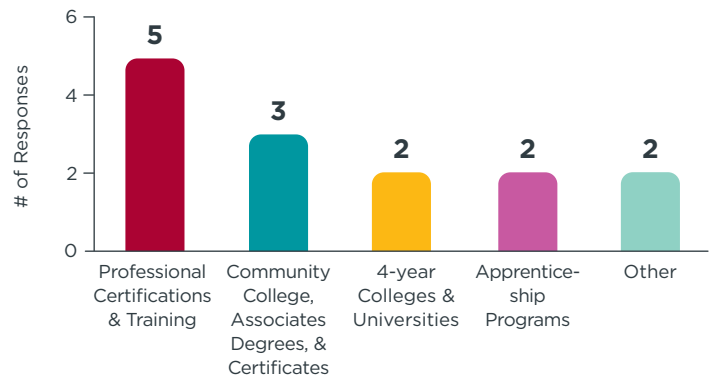
This category had the **second highest rating of the quality of the talent pipeline for well-trained workers**. Respondents ranked quality at 3.5 of 5.

LOGISTICS, TRANSPORTATION, & WAREHOUSING

What qualities or soft skills are most difficult to find in the workforce?



What credentials or education experience are you seeking in your future workforce?



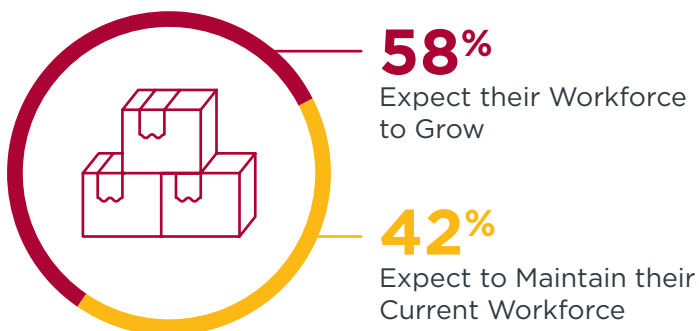
Which positions do you expect to have the most openings in the next 3 years?

- 15** Supervisors & Managers
- 12** Labors & Material Movers
- 9** Transportation & Drivers
- 9** Mechanics, Machinists, & Repair Personnel
- 8** Marketing Professionals

What skills are the most important for hiring?

- 10** Communication of Relevant Information for Decision Making
- 9** Implementation & Evaluation of Risk Management Strategies
- 8** Knowledge of Relevant Computer Software
- 7** Data Synthesis to Improve Performance & Increase Reliability
- 6** Allocation of Resources to Minimize Gaps in Operation for Decision Making

Do you expect your workforce to grow in the next 3 years?



Key Takeaway

This industry has an **even split of degree requirements in candidates** ranging from four-year, two-year, and professional certifications.



TOP 10
U.S. Cities Best Positioned to Recover from the Coronavirus (Raleigh-Durham, NC)
Forbes, 2020

SUMMARY

Based on the key themes described in the introduction and consensus from the data, the following items were identified as the strongest takeaways from the survey:

- ✓ Business growth is expected to continue, though it will be slower than what we've seen over the last two years.
- ✓ Positive trend towards acceptance of certifications and associates degrees across all industries among businesses sourcing talent.
- ✓ Traditional talent sourcing methods don't help diversify the workforce and other sourcing opportunities should be utilized.
- ✓ All industry sectors reported a favorable opinion of the overall quality of the local workforce.
- ✓ Manufacturing growth expectations have increased over the last three years, while public sector and education growth has decreased.

Overall, the Research Triangle region is positioned to continue growth and maintain a strong workforce. A critical question for the region's economic recovery will be understanding how we can elevate industries experiencing slower growth, connect the local workforce with training and job openings, and continue to diversify the pipeline. The regional skills analysis survey data will continue to drive momentum in developing a coordinated strategy between economic and workforce development partners.



Stay Connected & Keep the Conversation Going.

Visit our web page at Raleigh-wake.org/talent for updates on workforce needs as we take steps to strengthen and grow talent in the region.

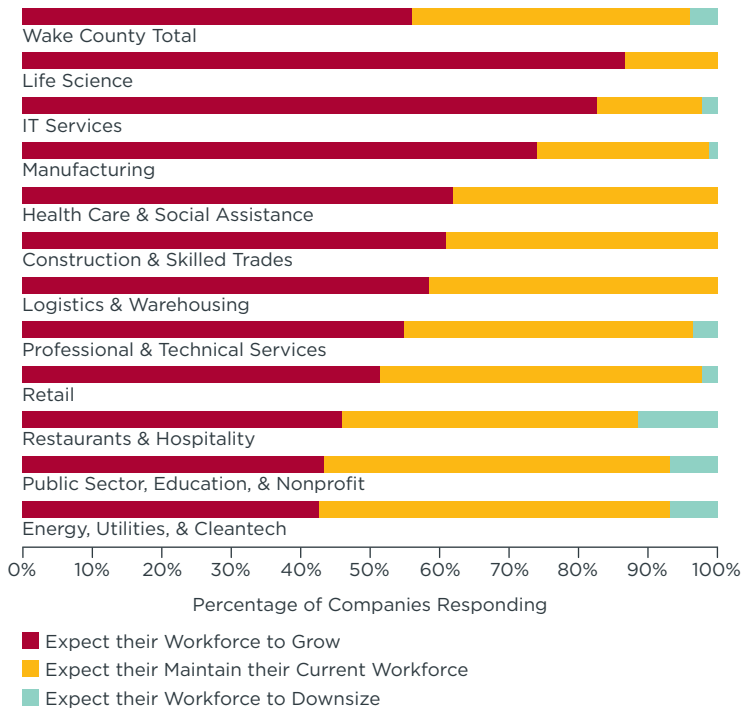


WAKE COUNTY DATA OVERVIEW

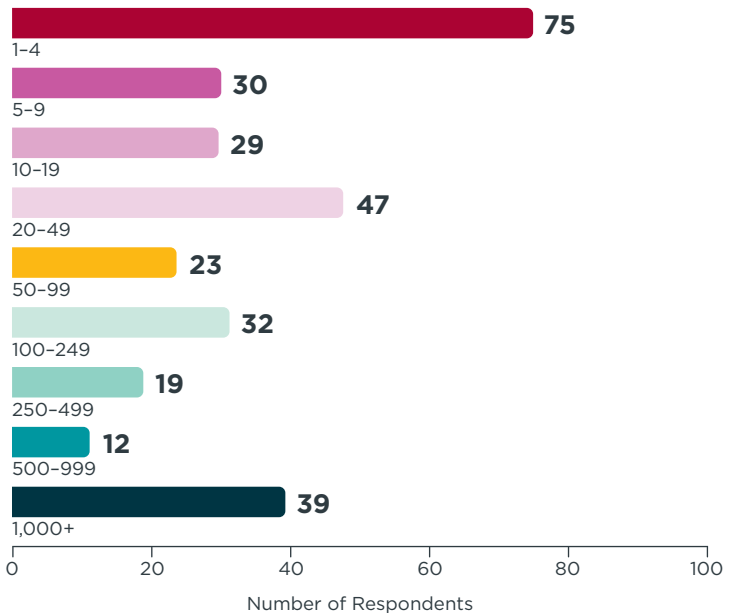
Wake County Results

Wake County is located in the northwestern region of North Carolina and is a short drive from Durham and minutes from the Research Triangle Park. With a workforce of over 580,000, the largest industry sectors are technology, life sciences, advanced manufacturing, and cleantech. Below is a snapshot of the data collected from the regional skills analysis specific to Wake County.

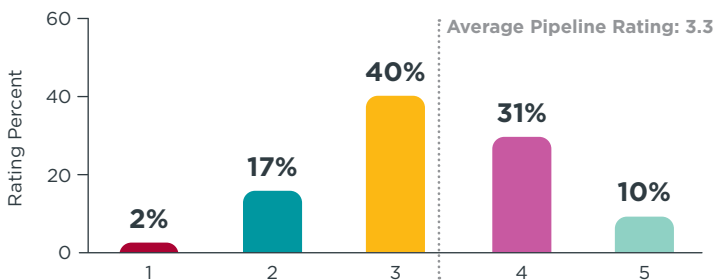
Do you expect your workforce to grow in the next 3 years? (308 responses)



How many people does your organization currently employ?



On a scale of 1-5 (with 5 being the best), how would you rate the quality of the local pipeline supplying well-trained workers?



Key takeaways:

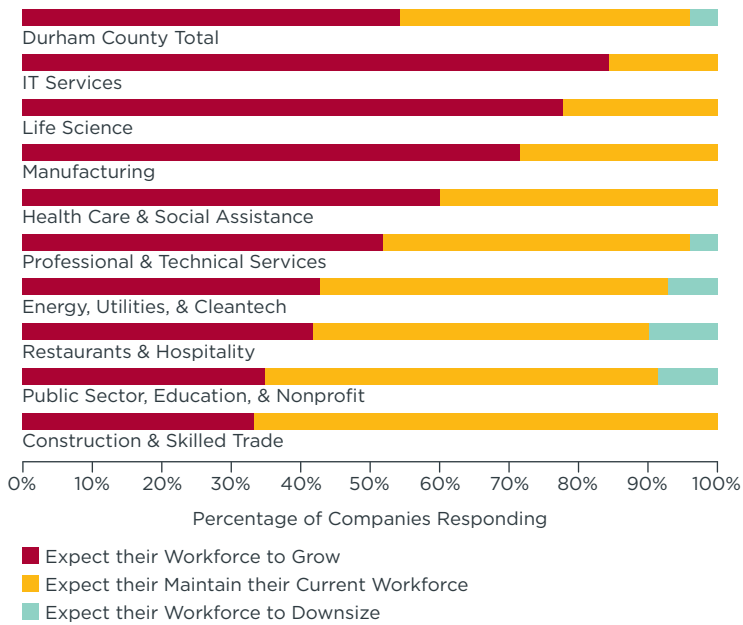
- Highest optimism from IT, life science, and healthcare sectors
- Above average evaluation of the talent pipeline (3.30 out of 5) with especially strong life science, professional services, IT workforce
- Highest number of companies asking for community college programs, associate's degrees and certificates

DURHAM COUNTY DATA OVERVIEW

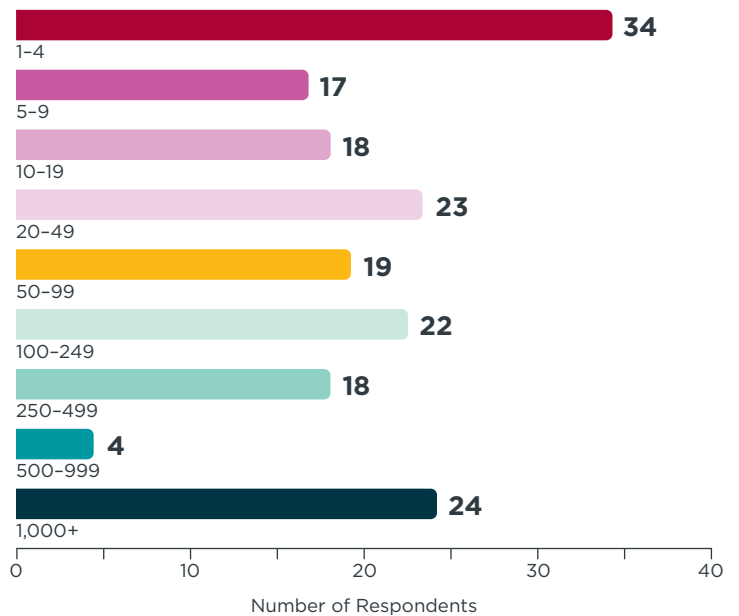
Durham County Results

Durham County is located in the northern half of North Carolina and is a short drive away from Raleigh and minutes from the Research Triangle Park. With a workforce of over 167,000, the largest industry sectors are life sciences, healthcare, biotech, and technology. Below is a snapshot of the data collected from the regional skills analysis specific to Durham County.

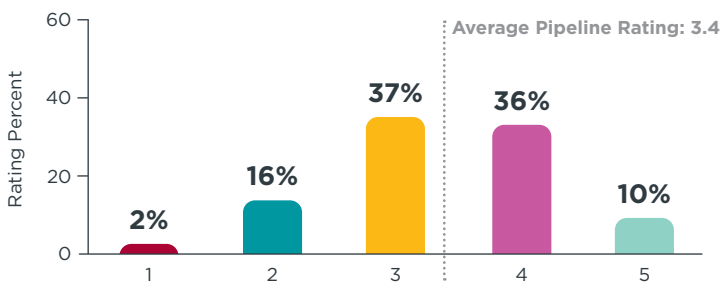
Do you expect your workforce to grow in the next 3 years? (180 responses)



How many people does your organization currently employ?



On a scale of 1-5 (with 5 being the best), how would you rate the quality of the local pipeline supplying well-trained workers?



Key takeaways:

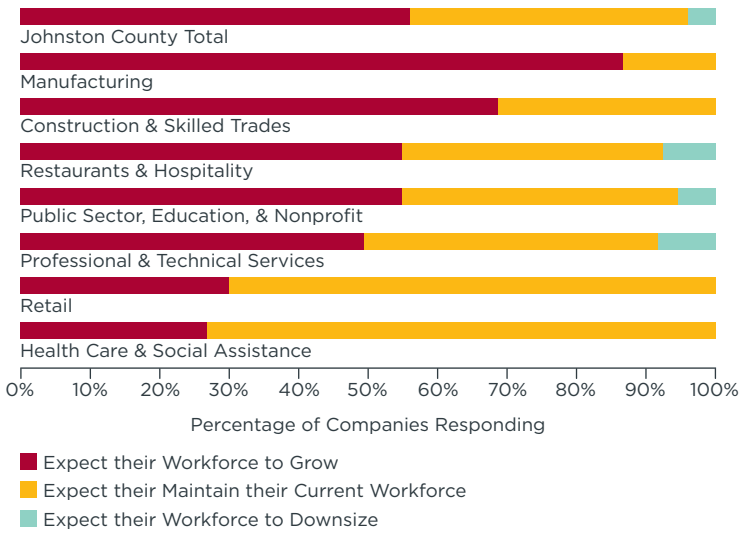
- Highest optimism from IT, life science, and manufacturing sectors
- Above average evaluation of the talent pipeline (3.35 out of 5) with especially strong life science, professional services, and IT workforce
- Highest number of companies asking for four-year degrees

JOHNSTON COUNTY DATA OVERVIEW

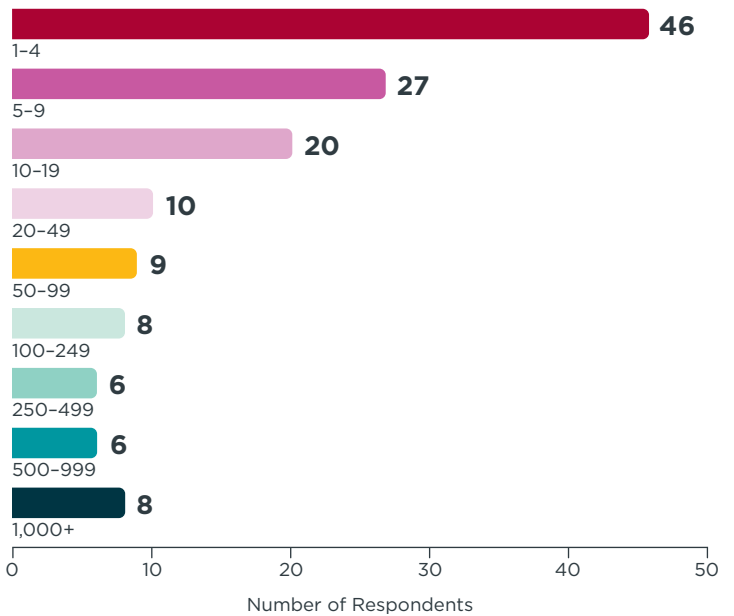
Johnston County Results

Johnston County is located in the eastern half of North Carolina and is minutes away from Raleigh and the Research Triangle Park. With a workforce of over 93,000, the largest industry sectors are manufacturing, retail trade, education, and health services. Below is a snapshot of the data collected from the regional skills analysis specific to Johnston County.

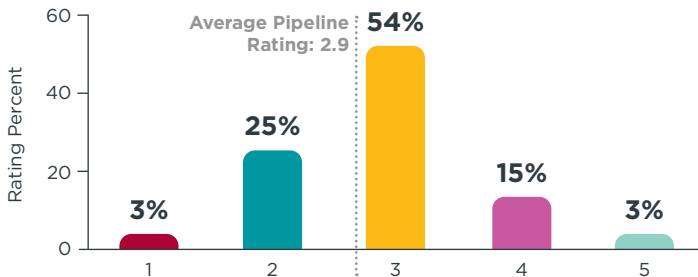
Do you expect your workforce to grow in the next 3 years? (141 responses)



How many people does your organization currently employ?



On a scale of 1-5 (with 5 being the best), how would you rate the quality of the local pipeline supplying well-trained workers?



Key takeaways:

- Highest level of optimism hiring from manufacturing and construction sectors
- Above average evaluation of the talent pipeline (2.89 out of 5) with especially strong construction, public sector, and healthcare workforce
- Highest number of companies asking for community college programs, associate's degrees and certificates

PARTNERS

Regional

American Underground
Benson Chamber of Commerce
Black Wall Street
Cape Fear Collective
Cary Chamber of Commerce
Clayton Chamber
Chatham County
Durham Chamber of Commerce
Durham County
Downtown Raleigh Alliance
Five Points Business District
Franklin County
Granville County
Greater Wilmington Chamber of Commerce
Harnett County
Hillsborough St. Alliance
HQ Raleigh
Innovate Raleigh
Johnston County
Lee County
Loading Dock Raleigh
LGBT Center of Raleigh
Midtown Raleigh Alliance
NC Farm Bureau
NC Hispanic Chamber
NC Business Committee for Education
NC Chamber
NC Justice Center
Orange County
Person County

Raleigh Area Society for Human Resources Management
Research Triangle Regional Partnership
Sanford Area Growth Alliance
Shop Local Raleigh
Southeast Raleigh Promise
Town of Apex
Town of Clayton
Town of Garner
Town of Holly Springs
Town of Morrisville
Town of Rolesville
Town of Wake Forest
Town of Wendell
Triangle Commercial Real Estate Women
Triangle East Chamber
Wake County
Warren County
Wilmington Business Development
Wilson Economic Development Corporation

Healthcare & Social Assistance

DHIC
NC Academy of Family Physicians
NC Assisted Living Association
NC Healthcare Association
NC Healthcare Information & Communication Alliance
NC Nurses Association
UNC Health
WakeMed Health & Hospitals

Steering Committee



PARTNERS

Public Sector, Education, & Workforce

Campbell University
Cape Fear Community College
Central Carolina Community College
Columbus County Public Schools
District C
Duke University
Durham County Public School System
Durham Workforce Development Board
Durham Technical Community College
Harnett County Public School System
Jobs For Life
Johnston Community College
Johnston County Public Schools
Kerr Tar Council of Governments
Made In Durham
Meredith College
NC4ME
NC Central University
NC Community College System
NC Defense Alliance
NC Department of Commerce
NC Military Business Center
NC State University
Piedmont Community College
St. Augustine's University
Step Up Ministry
UNC System
United Way
Vance Granville Community College
Wake County Public School System
WakeEd Partnership
Wake Technical Community College
Western Governor's University
William Peace University
YMCA of the Triangle

Construction & Skilled Trades

Associated Builders and Contractors of the Carolinas
Carolinas Association of General Contractors
Home Builder's Association
Carolinas Ready Mix Concrete Association
Wake County Home Builders Association

Technology

NC Tech
RIoT

Restaurant, Lodging & Hospitality Services

NC Restaurant and Lodging Association
Discover Durham
NC Beverage Association
Greater Raleigh Convention and Visitors Bureau

Manufacturing

National Association of Manufacturing
NC Triangle Apprenticeship Program

Utilities, Energy & Cleantech

Duke Energy
Research Triangle Cleantech Cluster

Life Science

North Carolina Biosciences Organization (NCBIO)
North Carolina Biotechnology Center



Contact Us

Office Location

800 S. Salisbury St., Raleigh, NC 27601

Web

raleighchamber.org | raleigh-wake.org

Twitter

[@RaleighWake](https://twitter.com/RaleighWake) | [@RaleighChamber](https://twitter.com/RaleighChamber) | [@WorkTriangleNC](https://twitter.com/WorkTriangleNC)

Phone

919.664.7000



WAKE COUNTY
ECONOMIC DEVELOPMENT