TRIANGLE TALENT
A 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.

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

- Critical Thinking: 75
- Self-discipline: 68
- Taking Initiative: 60
- Creative Thinking: 44
- Interpersonal Skills: 43

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

- 4-year Colleges & Universities: 102
- Professional Certifications & Training: 89
- Community College, Associates Degrees, & Certificates: 82
- Apprenticeship Programs: 25
- Other: 18

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

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

What skills are the most important for hiring?

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

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

- 55% Expect their Workforce to Grow
- 41% Expect to Maintain their Current Workforce
- 4% Expect their Workforce to Downsize

Key Takeaway

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

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**RESTAURANTS, LODGING, & HOSPITALITY SERVICES**

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

<table>
<thead>
<tr>
<th>Skill</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility &amp; Self-discipline</td>
<td>37</td>
</tr>
<tr>
<td>Taking Initiative</td>
<td>32</td>
</tr>
<tr>
<td>Willingness to Work</td>
<td>25</td>
</tr>
<tr>
<td>Varied or Long Hours</td>
<td>22</td>
</tr>
<tr>
<td>Time Management</td>
<td>20</td>
</tr>
<tr>
<td>Punctuality</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Credentials</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community College, Associates Degrees, &amp; Certificates</td>
<td>28</td>
</tr>
<tr>
<td>Professional Certifications &amp; Training</td>
<td>26</td>
</tr>
<tr>
<td>Apprenticeship Programs</td>
<td>19</td>
</tr>
<tr>
<td>4-year Colleges &amp; Universities</td>
<td>16</td>
</tr>
<tr>
<td>Other</td>
<td>12</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Position</th>
<th>% of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Preparation Staff</td>
<td>85</td>
</tr>
<tr>
<td>Wait/Banquet Staff</td>
<td>76</td>
</tr>
<tr>
<td>Dishwasher/Bus Boy</td>
<td>63</td>
</tr>
<tr>
<td>Guest Services Staff</td>
<td>54</td>
</tr>
<tr>
<td>Supervisors &amp; Managers</td>
<td>51</td>
</tr>
</tbody>
</table>

**What skills are the most important for hiring?**

<table>
<thead>
<tr>
<th>Skill</th>
<th>% of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commitment to Customer Service</td>
<td>83</td>
</tr>
<tr>
<td>Effective Communication &amp; Negotiation Techniques</td>
<td>64</td>
</tr>
<tr>
<td>Application of Appropriate Food, Health &amp; Safety Practices</td>
<td>62</td>
</tr>
<tr>
<td>Knowledge of Relevant Computer Software</td>
<td>45</td>
</tr>
<tr>
<td>Effective Allocation of Resources</td>
<td>45</td>
</tr>
</tbody>
</table>

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

- **46%** Expect their Workforce to Grow
- **42%** Expect to Maintain their Current Workforce
- **12%** Expect their Workforce to Downsize
**LIFE SCIENCES & BIOSCIENCES**

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

<table>
<thead>
<tr>
<th>Skill</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical Thinking</td>
<td>6</td>
</tr>
<tr>
<td>Taking Initiative</td>
<td>4</td>
</tr>
<tr>
<td>Strong Writing Skills</td>
<td>3</td>
</tr>
<tr>
<td>Responsibility &amp; Self-discipline</td>
<td>3</td>
</tr>
<tr>
<td>Creative Thinking</td>
<td>3</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Education Experience</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-year Colleges &amp; Universities</td>
<td>6</td>
</tr>
<tr>
<td>Professional Certifications &amp; Training</td>
<td>5</td>
</tr>
<tr>
<td>Apprenticeship Programs</td>
<td>2</td>
</tr>
<tr>
<td>Community College, Associates Degrees, &amp; Certificates</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Position</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality Assurance/Quality Control Professionals</td>
<td>14</td>
</tr>
<tr>
<td>Project Managers</td>
<td>14</td>
</tr>
<tr>
<td>Plant Operations &amp; Manufacturing Support Workers</td>
<td>11</td>
</tr>
<tr>
<td>Regulatory Professionals</td>
<td>9</td>
</tr>
<tr>
<td>Research Associates/Scientists</td>
<td>8</td>
</tr>
</tbody>
</table>

What skills are the most important for hiring?

<table>
<thead>
<tr>
<th>Skill</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Communication Appropriate to Intended Audience</td>
<td>18</td>
</tr>
<tr>
<td>Experimental Design</td>
<td>12</td>
</tr>
<tr>
<td>Current Good Manufacturing Practice</td>
<td>11</td>
</tr>
<tr>
<td>Project Management Skills</td>
<td>9</td>
</tr>
<tr>
<td>Experience with Specific Lab</td>
<td>8</td>
</tr>
</tbody>
</table>

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

- 88% Expect their Workforce to Grow
- 13% Expect to Maintain their Current Workforce

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

Responsibility & Self-discipline 29
Taking Initiative 24
Critical Thinking 23
Strong Writing Skills 21
Collaboration/Teamwork 21

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

4-year Colleges & Universities 59
Professional Certifications & Training 46
Community College, Associates Degrees, & Certificates 42
Apprenticeship Programs 17
Private Vendor Training 6

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?

43% Expect their Workforce to Grow
50% Expect to Maintain their Current Workforce
7% Expect their Workforce to Downsize

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?

<table>
<thead>
<tr>
<th>Skill</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility &amp; Self-discipline</td>
<td>22</td>
</tr>
<tr>
<td>Taking Initiative</td>
<td>21</td>
</tr>
<tr>
<td>Willingness to Work</td>
<td>17</td>
</tr>
<tr>
<td>Varied or Long Hours</td>
<td>17</td>
</tr>
<tr>
<td>Critical Thinking</td>
<td>16</td>
</tr>
<tr>
<td>Time Management</td>
<td>12</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Experience</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprentice-ship Programs</td>
<td>33</td>
</tr>
<tr>
<td>Community College, Associates Degrees, &amp; Certificates</td>
<td>31</td>
</tr>
<tr>
<td>Professional Certifications &amp; Training</td>
<td>27</td>
</tr>
<tr>
<td>Private Vendor Training</td>
<td>13</td>
</tr>
<tr>
<td>4-year Colleges &amp; Universities</td>
<td>11</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Position</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>34</td>
</tr>
<tr>
<td>Plumbers</td>
<td>30</td>
</tr>
<tr>
<td>Commercial Construction Project Managers</td>
<td>30</td>
</tr>
<tr>
<td>HVAC Installers &amp; Maintenance Workers</td>
<td>28</td>
</tr>
<tr>
<td>Commercial Construction Field Supervisors</td>
<td>28</td>
</tr>
</tbody>
</table>

What skills are the most important for hiring?

<table>
<thead>
<tr>
<th>Skill</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication &amp; Visualization of Proposed Work</td>
<td>87</td>
</tr>
<tr>
<td>Selection &amp; Effective Use of Appropriate Tools, Machinery, Equipment, etc.</td>
<td>80</td>
</tr>
<tr>
<td>Efficient Completion of Tasks</td>
<td>66</td>
</tr>
<tr>
<td>Participate &amp; Contribute to a Safe Work Environment</td>
<td>58</td>
</tr>
<tr>
<td>Interpretation of Drawings Used in Project Planning</td>
<td>52</td>
</tr>
</tbody>
</table>

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

- **59%** Expect their Workforce to Grow
- **41%** Expect to Maintain their Current Workforce

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?

<table>
<thead>
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<tbody>
<tr>
<td>Critical Thinking</td>
<td>22</td>
</tr>
<tr>
<td>Responsibility &amp; Self-discipline</td>
<td>17</td>
</tr>
<tr>
<td>Professionalism</td>
<td>14</td>
</tr>
<tr>
<td>Understanding &amp; Participation in Company Culture</td>
<td>13</td>
</tr>
<tr>
<td>Taking Initiative</td>
<td>13</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Education</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community College, Associates Degrees, &amp; Certificates</td>
<td>29</td>
</tr>
<tr>
<td>Professional Certifications &amp; Training</td>
<td>27</td>
</tr>
<tr>
<td>4-year Colleges &amp; Universities</td>
<td>26</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
</tr>
<tr>
<td>Private Vendor Training</td>
<td>4</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Position</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Aides &amp; Assistants, Including Home &amp; Health Aides</td>
<td>40</td>
</tr>
<tr>
<td>Nurses (RN &amp; LPN)</td>
<td>39</td>
</tr>
<tr>
<td>Case &amp; Care Managers</td>
<td>29</td>
</tr>
<tr>
<td>Social Workers</td>
<td>27</td>
</tr>
<tr>
<td>Professional Managers, Administrators</td>
<td>23</td>
</tr>
</tbody>
</table>

What skills are the most important for hiring?

<table>
<thead>
<tr>
<th>Skill</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>53</td>
<td>Effective Communication &amp; Appropriate Documentation</td>
</tr>
<tr>
<td>51</td>
<td>Efficient Response to Patient/Client Health Changes</td>
</tr>
<tr>
<td>46</td>
<td>Implementation of Treatment Plans</td>
</tr>
<tr>
<td>31</td>
<td>Analysis of Information Gathered from Patient Evaluation</td>
</tr>
<tr>
<td>29</td>
<td>Treatment Plan Creation Using a Problem-Solving Model</td>
</tr>
</tbody>
</table>

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

- 62% Expect to Maintain their Current Workforce
- 38% Expect their Workforce to Grow

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?

- Responsibility & Self-discipline: 35
- Taking Initiative: 22
- Punctuality: 20
- Critical Thinking: 20
- Collaboration/Teamwork: 17

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

- Community College, Associates Degrees, & Certificates: 40
- Apprenticeship Programs: 38
- 4-year Colleges & Universities: 27
- Professional Certifications & Training: 27
- Other: 11

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

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

What skills are the most important for hiring?

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

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

- 75% Expect their Workforce to Grow
- 24% Expect to Maintain their Current Workforce
- 1% Expect their Workforce to Downsize

Key Takeaway

Respondents in this category place equal weight on four-year college and community college credentials.
What qualities or soft skills are most difficult to find in the workforce?

- Critical Thinking: 8
- Responsibility & Self-discipline: 6
- Understanding & Participation in Company Culture: 5
- Taking Initiative: 5
- Willingness to Learn: 4

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

- Professional Certifications & Training: 11
- 4-year Colleges & Universities: 7
- Apprenticeship Programs: 7
- Community College, Associates Degrees, & Certificates: 7
- Micro Credentials, Digital Badges, MOOCs, & Other: 3

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

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

What skills are the most important for hiring?

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

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

- Expect their Workforce to Grow: 43%
- Expect to Maintain their Current Workforce: 50%
- Expect their Workforce to Downsize: 7%

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?

<table>
<thead>
<tr>
<th>Skill</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility &amp; Self-discipline</td>
<td>6</td>
</tr>
<tr>
<td>Time Management</td>
<td>5</td>
</tr>
<tr>
<td>Willingness to Work Varied or Long Hours</td>
<td>4</td>
</tr>
<tr>
<td>Taking Initiative</td>
<td>4</td>
</tr>
<tr>
<td>Collaboration/Teamwork</td>
<td>4</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Credential</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Certifications &amp; Training</td>
<td>5</td>
</tr>
<tr>
<td>Community College, Associates Degrees, &amp; Certificates</td>
<td>3</td>
</tr>
<tr>
<td>4-year Colleges &amp; Universities</td>
<td>2</td>
</tr>
<tr>
<td>Apprentice-ship Programs</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
</tr>
</tbody>
</table>

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?

- **58%** Expect their Workforce to Grow
- **42%** Expect to Maintain their Current Workforce

**Key Takeaway**

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

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 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)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage of Companies Responding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Durham County Total</td>
<td></td>
</tr>
<tr>
<td>IT Services</td>
<td><img src="chart1.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Life Science</td>
<td><img src="chart2.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Manufacturing</td>
<td><img src="chart3.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td><img src="chart4.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Professional &amp; Technical Services</td>
<td><img src="chart5.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Energy, Utilities, &amp; Cleantech</td>
<td><img src="chart6.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Restaurants &amp; Hospitality</td>
<td><img src="chart7.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Public Sector, Education, &amp; Nonprofit</td>
<td><img src="chart8.png" alt="Bar Chart" /></td>
</tr>
<tr>
<td>Construction &amp; Skilled Trade</td>
<td><img src="chart9.png" alt="Bar Chart" /></td>
</tr>
</tbody>
</table>

How many people does your organization currently employ?

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>How many people does your organization currently employ?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-4</td>
<td>34</td>
</tr>
<tr>
<td>5-9</td>
<td>17</td>
</tr>
<tr>
<td>10-19</td>
<td>18</td>
</tr>
<tr>
<td>20-49</td>
<td>23</td>
</tr>
<tr>
<td>50-99</td>
<td>19</td>
</tr>
<tr>
<td>100-249</td>
<td>22</td>
</tr>
<tr>
<td>250-499</td>
<td>18</td>
</tr>
<tr>
<td>500-999</td>
<td>4</td>
</tr>
<tr>
<td>1,000+</td>
<td>24</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>2</td>
<td>16%</td>
</tr>
<tr>
<td>3</td>
<td>37%</td>
</tr>
<tr>
<td>4</td>
<td>36%</td>
</tr>
<tr>
<td>5</td>
<td>10%</td>
</tr>
</tbody>
</table>

Average Pipeline Rating: 3.4

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 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

Wake County Economic Development
Capital Area Workforce Development
RTI International
Raleigh
Raleigh Chamber
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  |  @RaleighChamber  |  @WorkTriangleNC

Phone
919.664.7000