

**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 early-July and early-September 2023. FutureMakers Coalition had two important goals for the 2023 Workforce Employer Survey: 1.) to reach as many SWFL organizations and businesses as possible; and 2.) to represent the important SWFL industry segments so the results accurately reflect the diverse SWFL workforce/employer environment. We are pleased that both of those goals were achieved.

One-hundred one organizations responded to the 2023 Workforce Employer Survey, which is just shy of last year’s (2022) total of 110 businesses and organization.<sup>1</sup> Among the 101 organizations that responded to the 2023 Workforce Employer Survey, approximately 63% were small employers (defined for the purposes of this report as having 100 full-time employees or less) and 37% were large employers (more than 100 employees). The SWFL organizations that responded to the 2023 Survey represent a broad mix of industry segments, including representation from the Healthcare or Social Services/Assistance (28%), Education (18%), Government (7%), Construction/the Trades (7%), and Manufacturing (4%) segments. Organizations in the Retail Trade (1%) and Accommodation/Hospitality/Food Services (3%) segments, which are among the largest employers in SWFL, were underrepresented in the 2023 Survey.

A combined 86% of the surveyed organizations (down slightly from 90% in 2022) reported that it is “very likely” or “likely” that recruiting and hiring new, qualified employees will be a priority in 2023. Similarly, as organizations grow their staffs, a combined 91% 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, 50% 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-six percent stated that the starting salary would depend on the specific job requirements and candidate, while only 14% 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.

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<sup>1</sup>The 2022 Survey results may not be completely comparable to the 2023 Survey results since a different mix of organizations responded to the Surveys between the two years.

When asked why employees left their organization, the responding organizations reported “new position offered more money” (61%), “moved out of the region” (57%) and the “cost of housing too high” (42%) as the top three reasons. Compared to the 2022 Survey results, “Moved out of the region” jumped 23 percentage points (from 34% to 57%) to the #2 position. Four organizations in this category specifically mentioned the changes in Florida’s political climate and new employment laws (e.g. the new E-Verify law). The impact of Hurricane Ian (27%) also played an important role in why employees left the responding organizations.

Ninety-seven 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 (91%), personal time off (84%), and paid vacation (80%). It is interesting to note that compared to last year’s Survey results, the proportion of organizations offering housing cost assistance decreased from 22% in 2022 to 5% in 2023. However, over half of the organizations (48%) indicated that financial assistance for housing would be “very helpful” toward assisting their organizations in recruiting, hiring, or retaining qualified employees. These divergent findings, in combination with the 23 percentage point increase in organizations reporting employees leaving the region noted above, reflect the evolving needs of the SWFL workforce and one of the challenges businesses are having in recruiting (and retaining) qualified employees to the region.

Sixty-seven 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. Offering student internships/preceptorships/co-ops (75%) and participating in recruiting activities (70%) were the most often reported partnerships or collaborations.

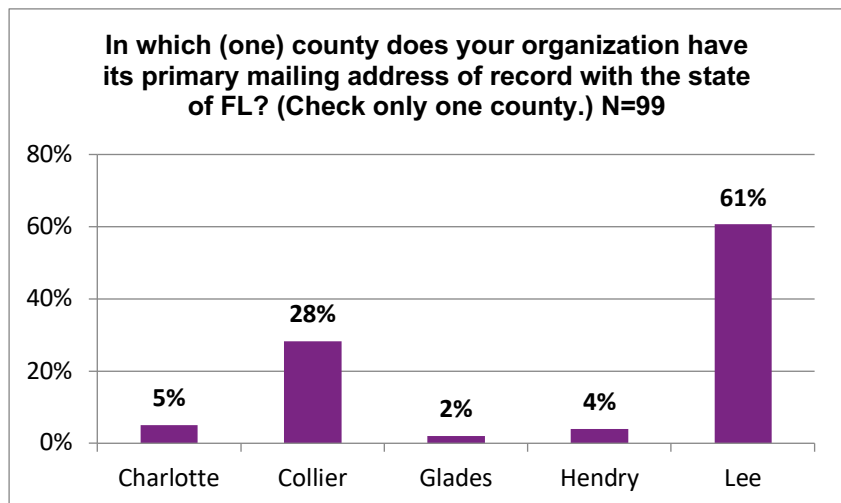
FutureMakers Coalition will continue to analyze the Survey data and publish new results in the FutureMakers Coalition newsletter to hopefully provide new insights into the needs of the region’s employers and how to gain better access to a qualified workforce.

## 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 2023 Survey is particularly important as it provides a snapshot the employment climate as SWFL continues to recover from Hurricane Ian in September 2022, as well as adjusting to a “post-COVID world”. 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 early-July and early-September 2023.

## RESULTS

One-hundred one organizations and businesses responded to the 2023 Workforce Employer Survey, which is just shy of last year’s (2022) total of 110 businesses and organization.<sup>2</sup> 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.*

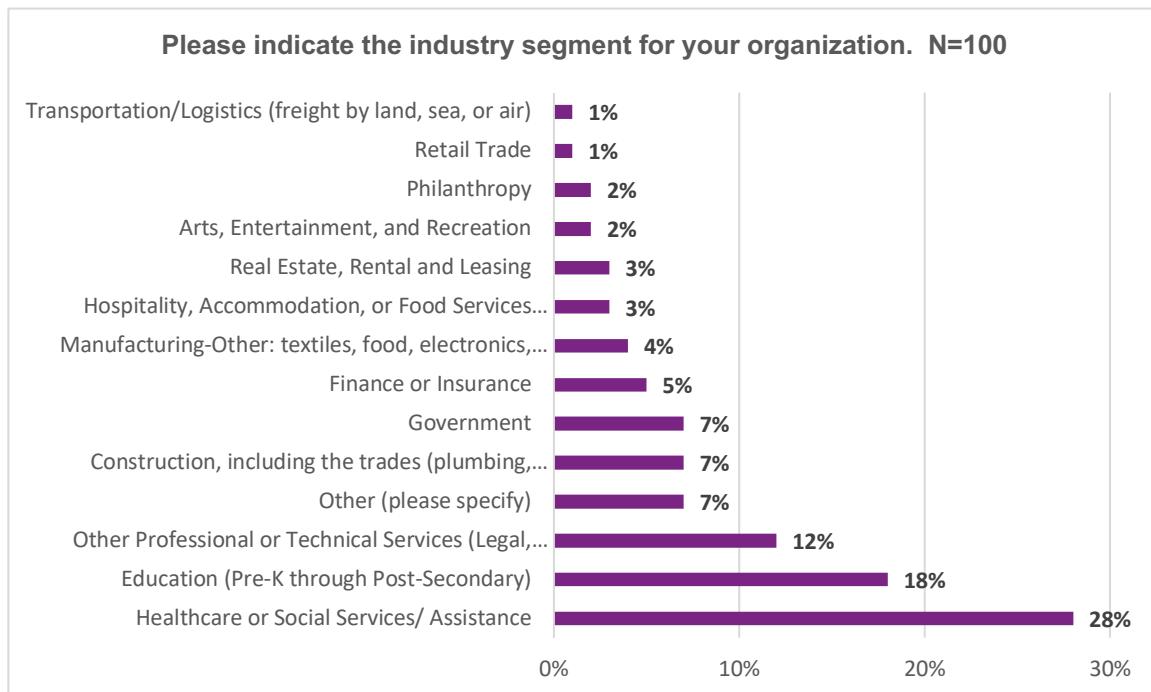
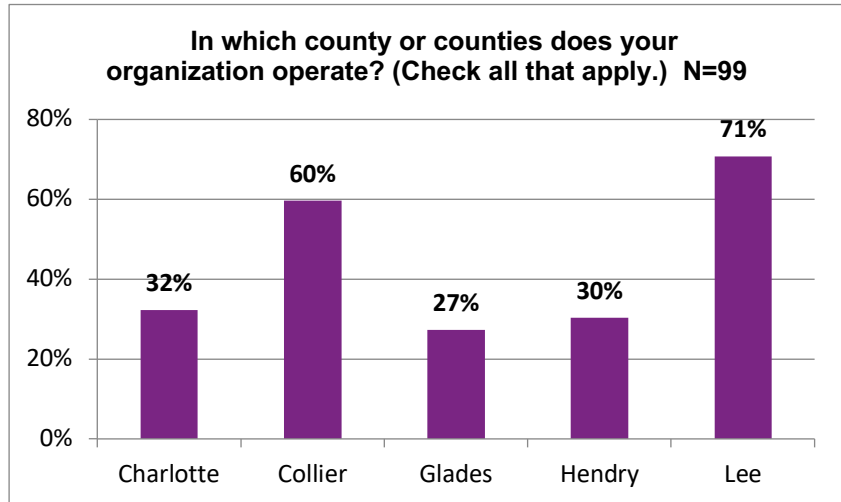
The participating organizations reported that Lee and Collier Counties had the highest concentrations of home (main) offices (61% and 28%, respectively) while Hendry and Glades Counties

<sup>2</sup> The 2022 Survey results may not be completely comparable to the 2023 Survey results since a different mix of organizations responded to the Surveys between the two years.

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

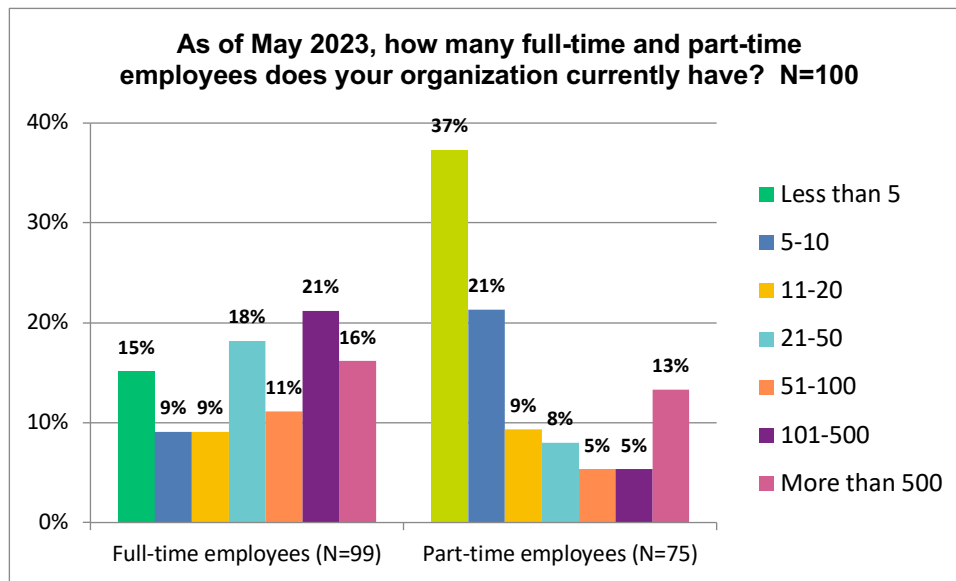


had the lowest concentrations of home offices (4% and 2% respectively).

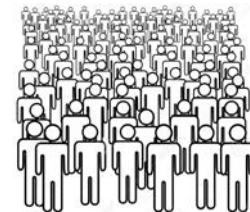
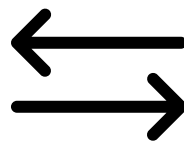
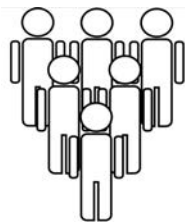


The SWFL organizations that responded to the 2023 Survey represent a similar mix of industry segments compared to the 2022 Survey. Of note, increased representation was seen from the Healthcare or Social Services/Assistance (28%) remains as the largest proportion of responding

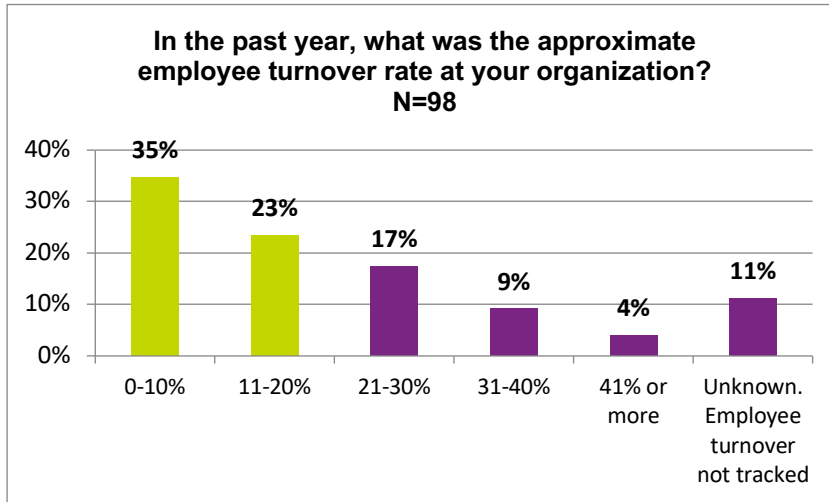
organizations, followed by Education (18%), and Other Professional or Technical Services (12%). The “Other” segment (7%) represents utilities, sand mining, and other recreation/education organizations. Responding organizations in the Accommodation/Hospitality/Food Services (3%) and Retail Trade (1%) segments, which are among the largest employers in SWFL<sup>3</sup>, were underrepresented in the 2023 Survey since distributing surveys to the many individual businesses in these segments is challenging.



One hundred organizations in total responded to this question with almost all (99/100) reported having full-time employees and 75/100 reported having part-time employees. Interestingly, 13% of the responding organizations with part-time employees reported having more than 500 part-time employees. The largest proportion of the responding organizations with full-time employees (21%) reported having 101-500 full-time employees. Over one-third (37%) of responding organizations with part-time employees reported having less than 5 part-time employees.



<sup>3</sup> U.S. Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*



A combined 58% 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.<sup>4</sup>



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 (61%), moved out of the region (57%) and the cost of housing too high (42%).

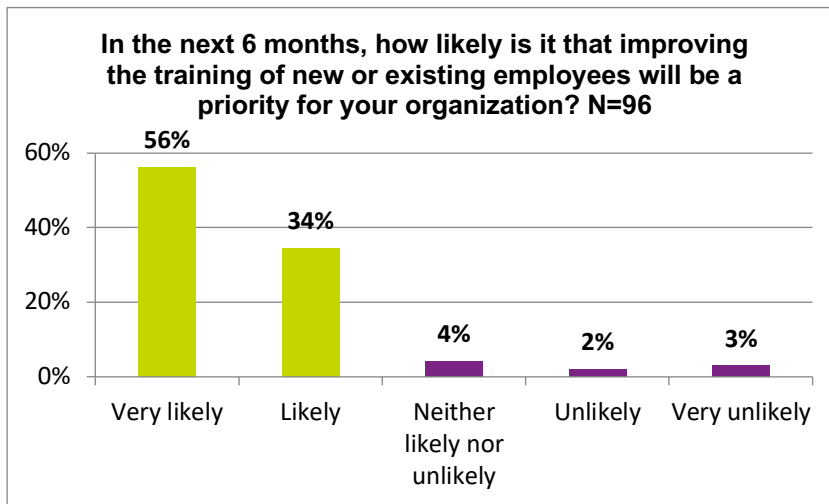


These top three reasons in 2023 were the same as in the 2022 report; however, Moved Out of the Region jumped 23 percentage points to the #2 position, from 34% to 57%. Four organizations in this category specifically mentioned the changes in Florida’s political climate and new employment laws (e.g. the new E-Verify law). The impact of Hurricane Ian (27%) also played an important role in why employees left the responding organizations.

<sup>4</sup><https://www.creditdonkey.com/average-turnover-rate.html#turnover-rate>



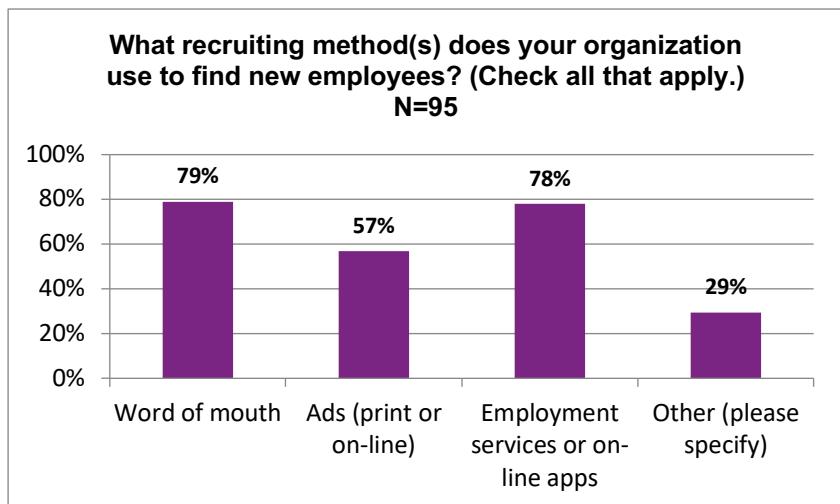
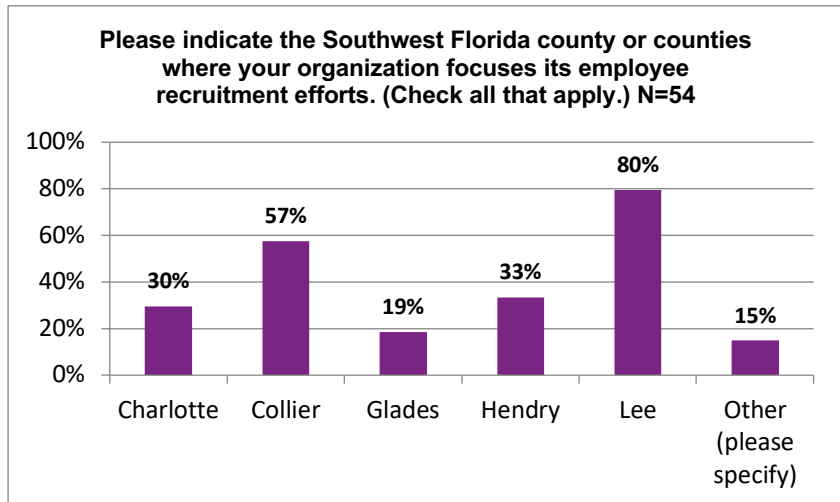
In the next 6 months, as SWFL continues to recover from Hurricane Ian, a combined 86% of the surveyed organizations (down slightly from 90% in 2022) reported that it is “very likely” or “likely” that recruiting and hiring new, qualified employees will be a priority in 2023. Only 9% of organizations reported that it is “unlikely” or “very unlikely” that recruiting and hiring new, qualified employees will be a priority in the next six months of 2023.



Similarly, as organizations grow their staffs, a combined 90% 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.



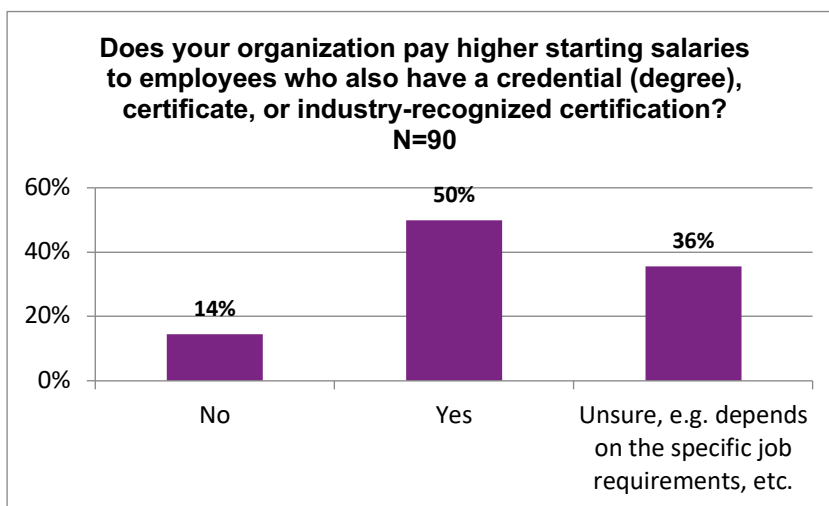
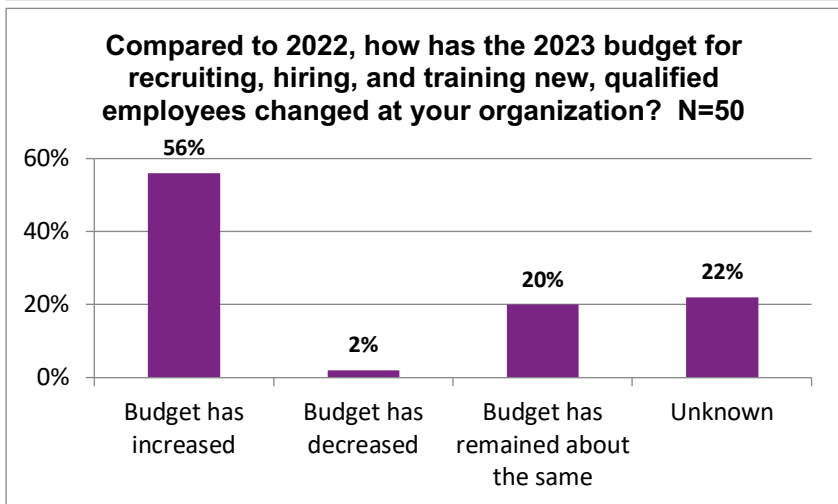
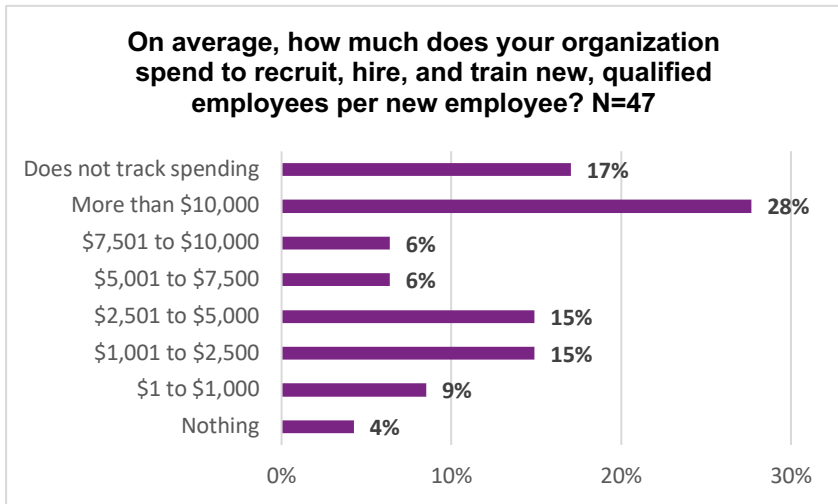
Just over half (56%) of the SWFL organizations reported that they focus their employee recruitment efforts across the 5-county region. Recruitment efforts, however, tend to be focused most in Lee County (80%) with the lowest recruitment focus in Glades County (19%). Responding organizations also reported recruitment efforts in DeSoto, Sarasota, Hardee, Highlands, and Manatee counties, as well as nationally.



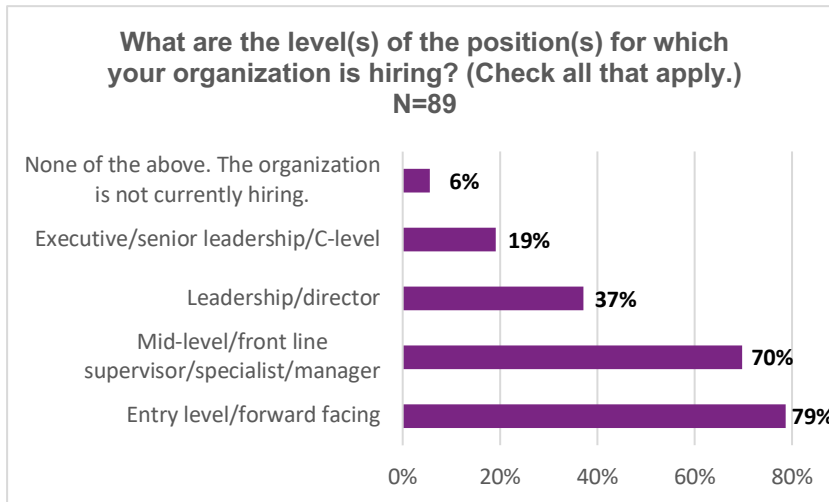
Seventy-nine percent of the responding SWFL organizations reported using word of mouth to find new employees, up from 36% from the 2022 survey. The use of employment services or other on-line apps also increased from 39% in 2022 to 78% in 2023. Other methods included working with local colleges and universities, direct mail, in-store signage, electronic newsletters, social media, and job fairs. Most employers noted using more than one method.



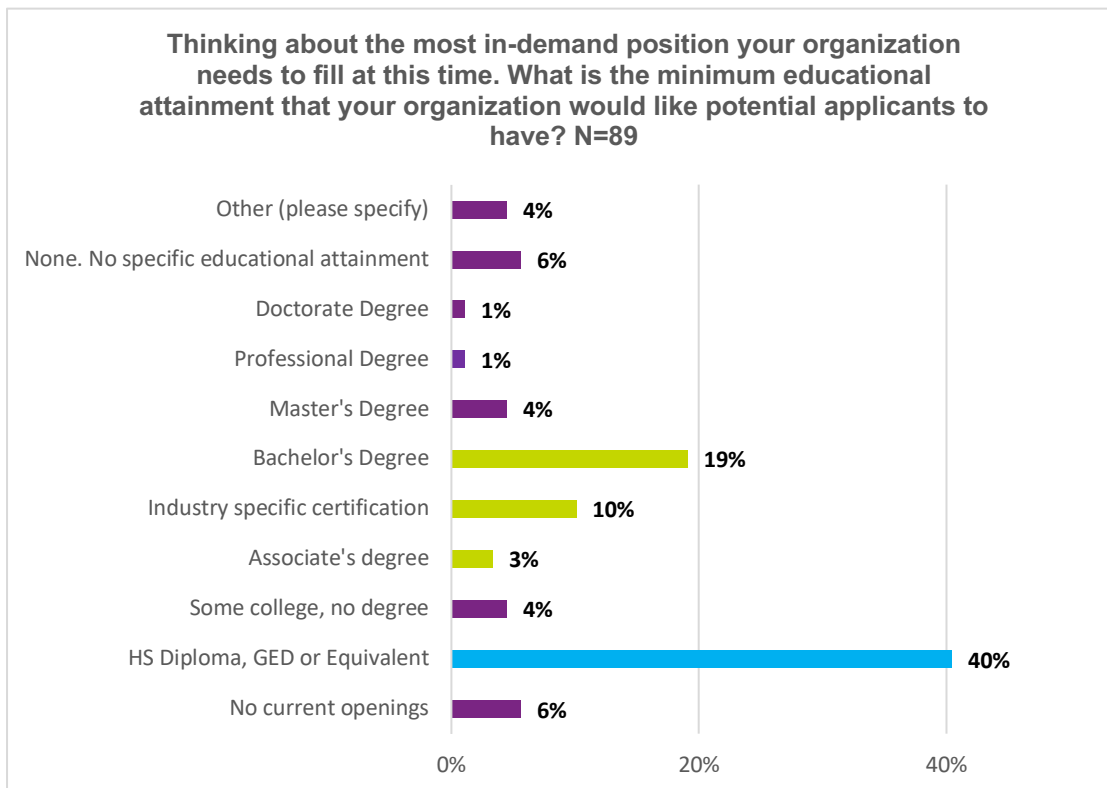
Among the SWFL organizations that responded to the question, 55% indicated that “yes” they have an annual budget for recruiting, hiring, and training new, qualified employees. Among those employers reporting a budget, 28% indicate that they spend more than \$10,000 per new employee. Seventeen percent reported that the organization does not track its budget per new employee. Furthermore, 56% of the organizations reported that their annual budgets for recruiting, hiring, and training new, qualified employees have increased since 2022.



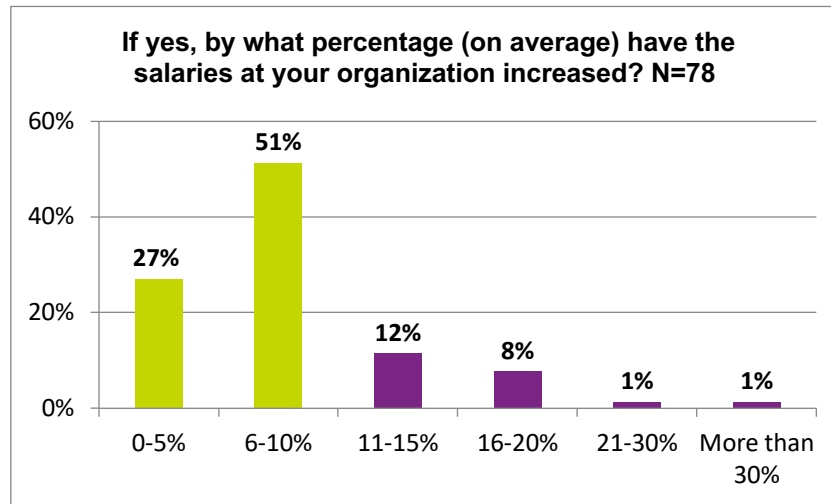
When asked about starting salaries, 50% of the responding organizations indicated that “yes” they would pay a higher starting salary to potential employees who have a credential (degree), certificate, or industry-recognized certification.



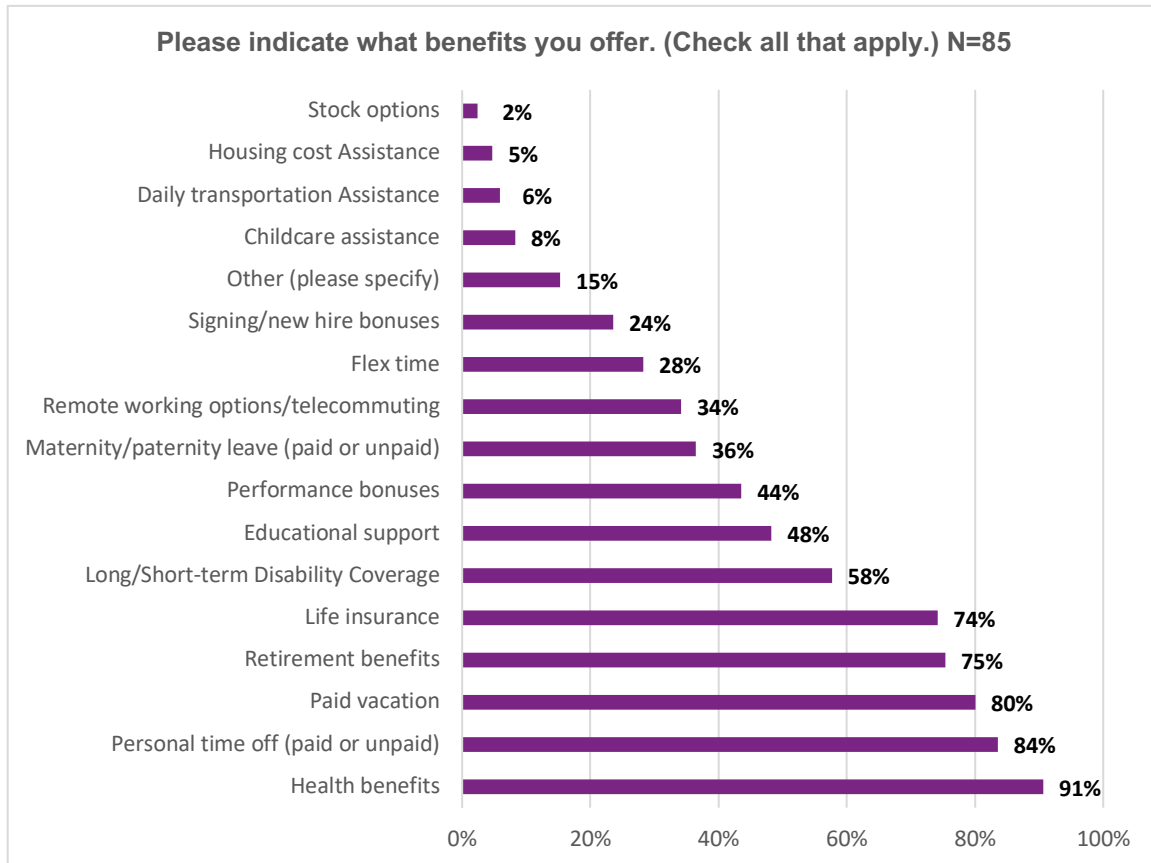
SWFL organizations are hiring for positions across the entire spectrum of levels. Only 6% of the responding organizations indicated that they are not currently hiring.



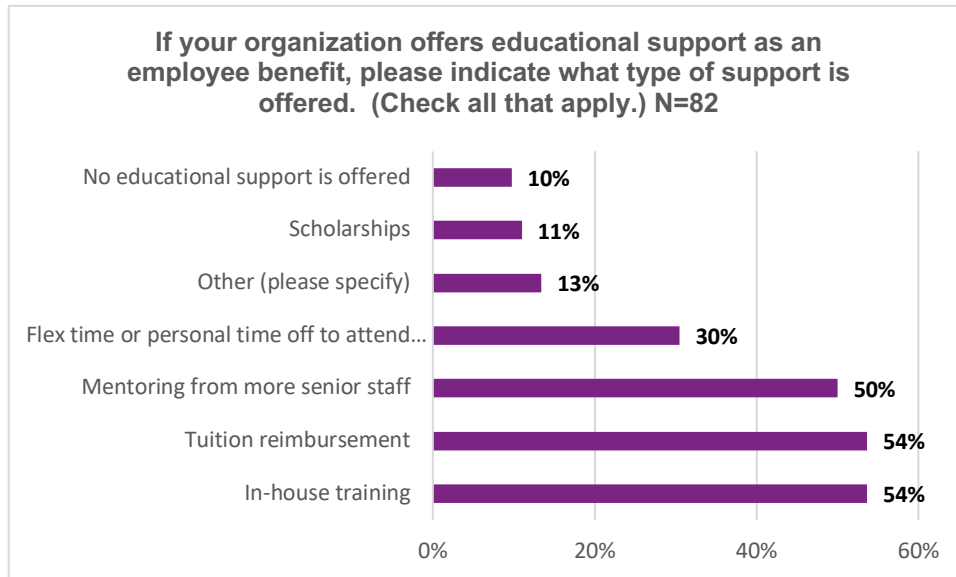
When the organizations considered their most in-demand position, 40% reported that a HS diploma, GED, or equivalent is the minimal educational attainment that is required. A combined 32% of the responding organizations reported requiring some degree (Associate's or Bachelor's) or an industry-specific certification.



Almost all responding organizations (91%) reported increasing their employees' wages in the past year. Among those organizations that reported increasing their employees' wages, a combined 78% reported increasing wages between 0-10%.



Ninety-seven percent of the responding 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 (91%), personal time off (81%), and paid vacation (80%). 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 decreased from 22% in 2022 to 5% in 2023. Similarly, remote working options as part of employee benefit packages decreased from 42% in 2022 to 34% in 2023 as more organizations (perhaps) are calling employees back to the office post-COVID .

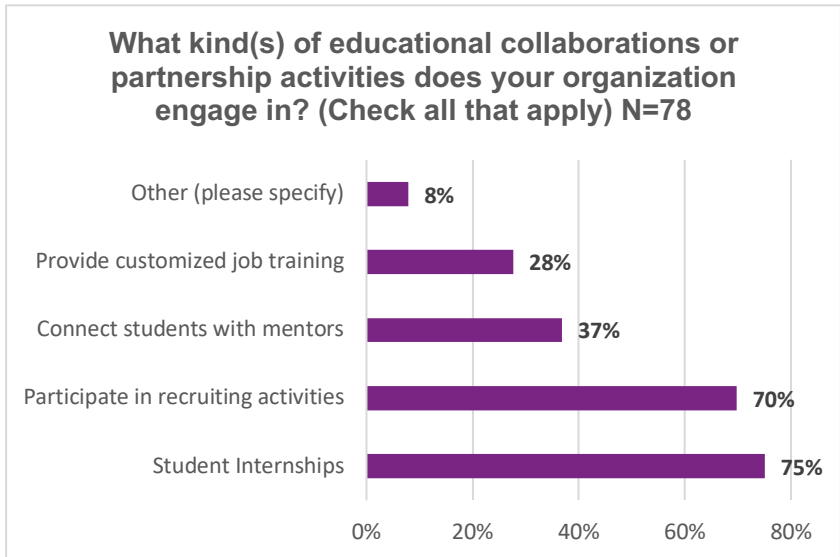
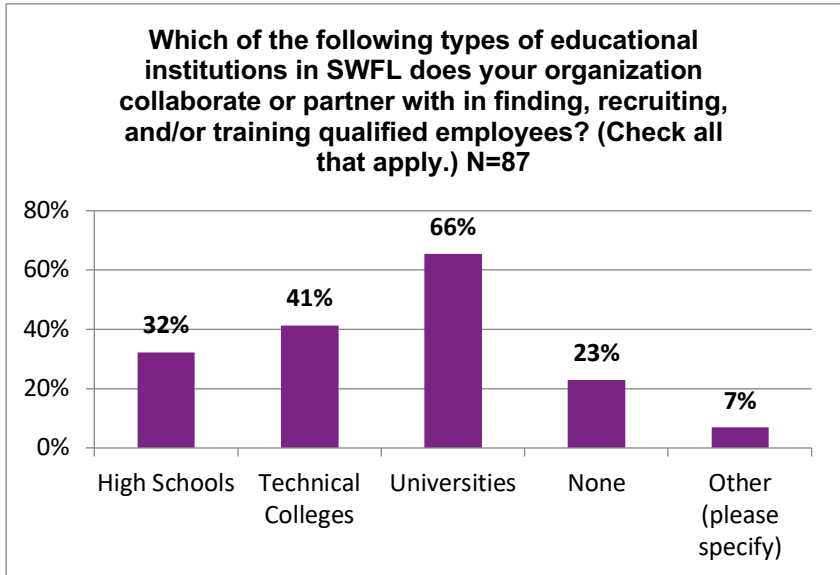


Among all organizations that offer educational support to their employees, the most offered support included tuition reimbursement (54%), in-house training (54%), and mentoring from more senior staff (50%).

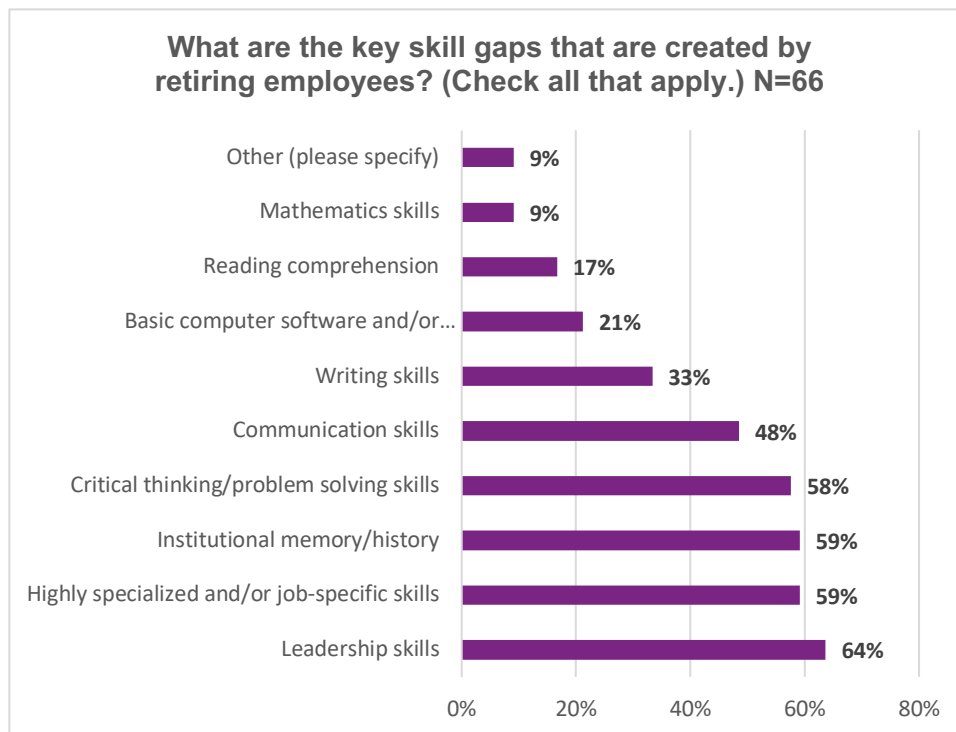
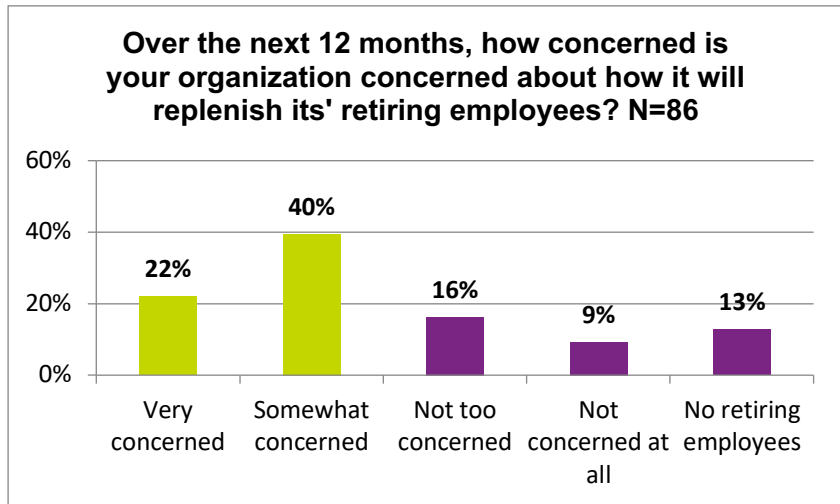


Sixty-six percent of the organizations reported that they partner or collaborate with one or more of SWFL’s universities to assist in finding, recruiting, and/or training qualified employees. Twenty-three percent of responding organizations indicated that they partner with none of the regional educational institutions. The “Other” category includes community organizations and various employment services.

Among responding organizations, offering student internships / preceptorships / co-ops (75%) and participating in recruiting activities (70%) were the most often reported partnerships or collaborations with regional educational institutions.



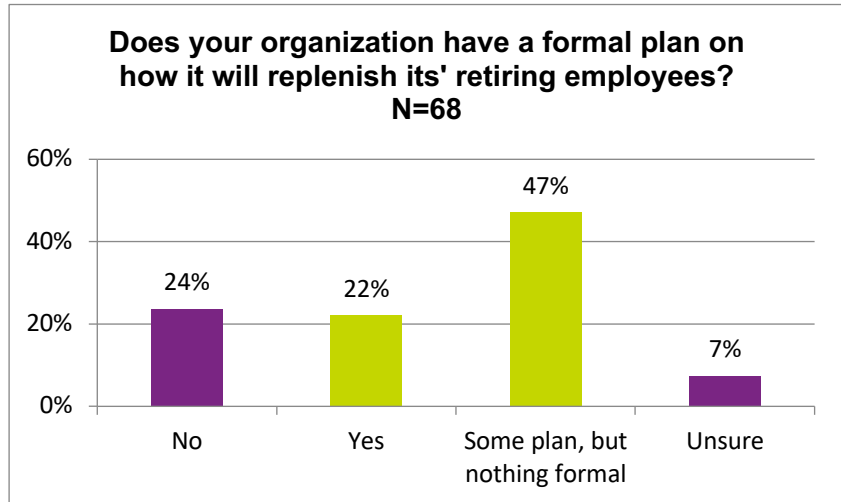
A combined 62% of responding organizations indicated that they are “very concerned” or “somewhat concerned” about replenishing their retiring employees.



Across all organizations, leadership skills (64%), highly specialized or job-specific skills (59%), loss of institutional memory / history (59%), and critical thinking/problem solving skills (58%) were identified most often by the organization as the skill gaps created by retiring employees. Other skill

gaps identified by the organizations included appropriate workplace behavior, professionalism, self-initiative and regulation, and a culture of cooperative pride, ownership, accountability.

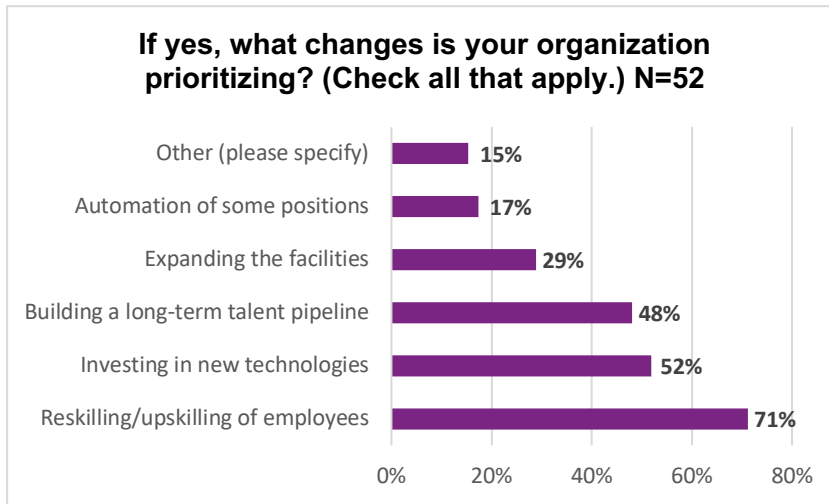
A combined 69% of responding organizations stated that “yes” they have a formal plan to replenish their retiring employees or “some plan, but nothing formal”. Twenty-four percent of the organizations reported “no” as to whether they have a formal plan to replenish their retiring employees.



Nearly half of the organizations (48%) 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 (37%) and the private sector (32%), 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% and 31% of the organizations, respectively.







Sixty-five percent of the responding organizations reported prioritizing changes to their structure or processes.

Reskilling/upskilling employees (71%), investing in new technologies (52%), and building a long-term talent pipeline (48%) were the most reported changes that organizations are prioritizing.

Finally, the 101 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
  - ✓ Lack of unskilled workers to recruit/hire.
  - ✓ Localized recruiting efforts are seasonal and dependent on business need.
  - ✓ Finding the aptitude within the candidates.
  - ✓ Full time needs vs part time needs. Our biggest need to fill are our part time staff positions at less than 20 hours a week and afternoon positions.
  - ✓ Specialized training, i.e. CDL requirements.
  - ✓ Talent pool - people are not wanting to apply.
  - ✓ Finding a more diversified and qualified work force is a challenge. Just limited talent pools.
  - ✓ The number of young people entering the construction industry is shrinking thus reducing the talent pool. Ways in which we can fill the pipeline with applicants would be extremely helpful.
  - ✓ Willingness to actually work, although measuring that is very hard to do.
  - ✓ Finding people who actually show up for a scheduled interview and/or their first day of work is a challenge.
- Cost of housing in the region
  - ✓ Cost of living is too high in the Naples area.



- ✓ We all know that the cost of housing is one of our biggest issues, so thank you for putting that one first!
- Work options
  - ✓ Competition from remote only companies is a struggle for attracting/retaining human services staff who need to have a physical presence in the office.