

THE FUTURE OF WORK ON THE NORTH SHORE

A North Shore opinion survey of the
FUTURE OF WORK
and how we might prepare for it!



Presented June 22, 2017

This publication is made possible by the generous
support of the Eastern Bank Charitable Foundation.



INTRODUCTION

The North Shore Workforce Investment Board (NSWIB) and the North Shore Alliance for Economic Development (Alliance) joined forces in the early winter of 2016 to lead the North Shore community on an 18 month research and planning initiative called "The Future of Work on the North Shore".

The Alliance and NSWIB are responsible for providing economic and workforce services to all North Shore companies and residents. Both organizations recognize the pace of social and economic change happening now and into the future. Together they are committed to understanding the vision, goals, barriers, and challenges that North Shore businesses are experiencing, or anticipate experiencing, and to developing solutions that result in continued growth and prosperity.

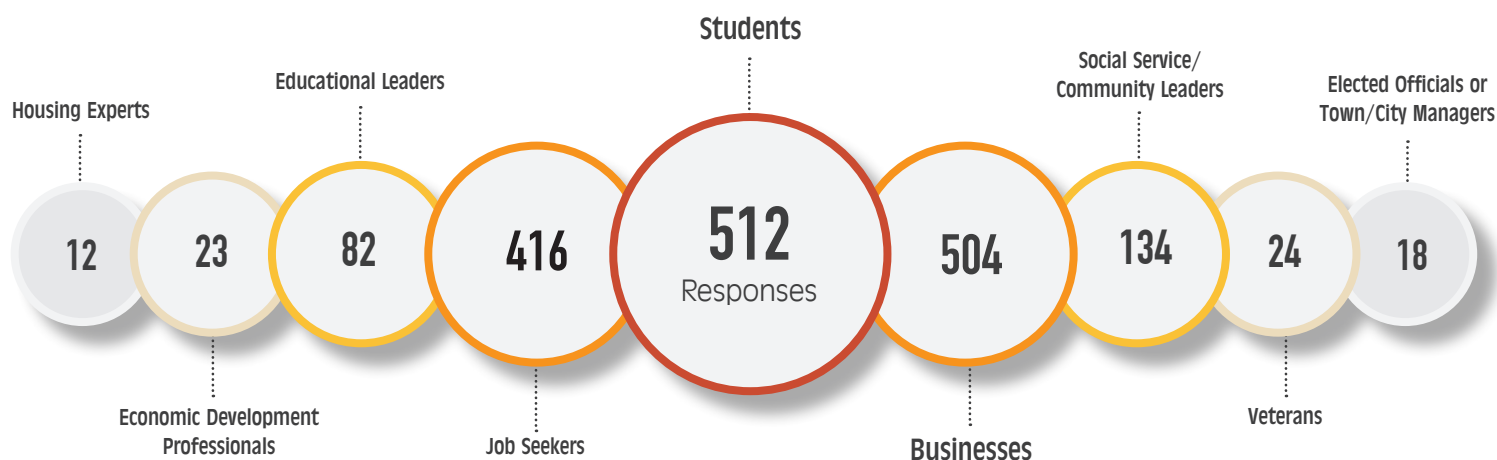
The NSWIB Labor Market Blueprint and Economic Development Snapshot, prepared in partnership with the Alliance in late 2015, provided a status report of the North Shore economy. This included a historic review of how the economy has been supported to date, what has and has not worked, and how the lessons learned can be innovated for greater levels of success.

More importantly, The Future of Work on the North Shore sought out the opinions, ideas, and priorities of various North Shore industry sector leaders and stakeholders as they look forward. This information is being used to develop an Action Plan through which workforce and economic resources are used efficiently and expediently.

The Future of Work on the North Shore initiative was an opinion gathering effort, using the following methods:

- ◆ An online survey
- ◆ A paper survey, mimicking the online effort, and distributed at targeted events for immediate response by stakeholders in attendance, and then entered into the online data base
- ◆ Focus groups of specific stakeholders where input and ideas were solicited using a conversational method

FINDINGS:



IN THEIR OWN WORDS

By gathering the opinions of over 1600 North Shore leaders from various walks of life, The Future of Work on the North Shore initiative revealed how these leaders are viewing the future; where differences in expectations and priorities exist; where there is optimism and where there are concerns; and what steps must be taken to ensure a strong and successful future economy.

“

Technology may eliminate some jobs....it will also create new positions that focus on special job duties.

”

“

Ability to think creatively...

”

“

Companies do not have the skilled labor they need...

”

“

I'd like to be able to avoid face to face communication, Customer Service, for example, would be nice.

”

“

Transportation continues to be the biggest barrier to employment I see...

”

“

Teenagers have to learn how to talk on the phone

”

“

Technology fluency is key to acquiring a new job as well as keeping it...

”

SUPPLY & DEMAND

The North Shore is defined for this survey as the 400,000 residents and 12,000 companies that exist in the 19 cities and towns between Saugus and Ipswich, Massachusetts. In general, on the Labor Market Supply side this region has fully recovered from the recession of 2010, with close to 36,000 additional people working now than in 2010, and close to 16,000 more working than in the economic surge of 2007.

The workforce is older than the state and nation as a whole, with workers over 45 representing a larger share of the labor market, and, vice versa, workers under 25 representing a smaller share. The North Shore, and the state as a whole, is higher educated than the rest of the country and has more foreign born, particularly Hispanic, residents.

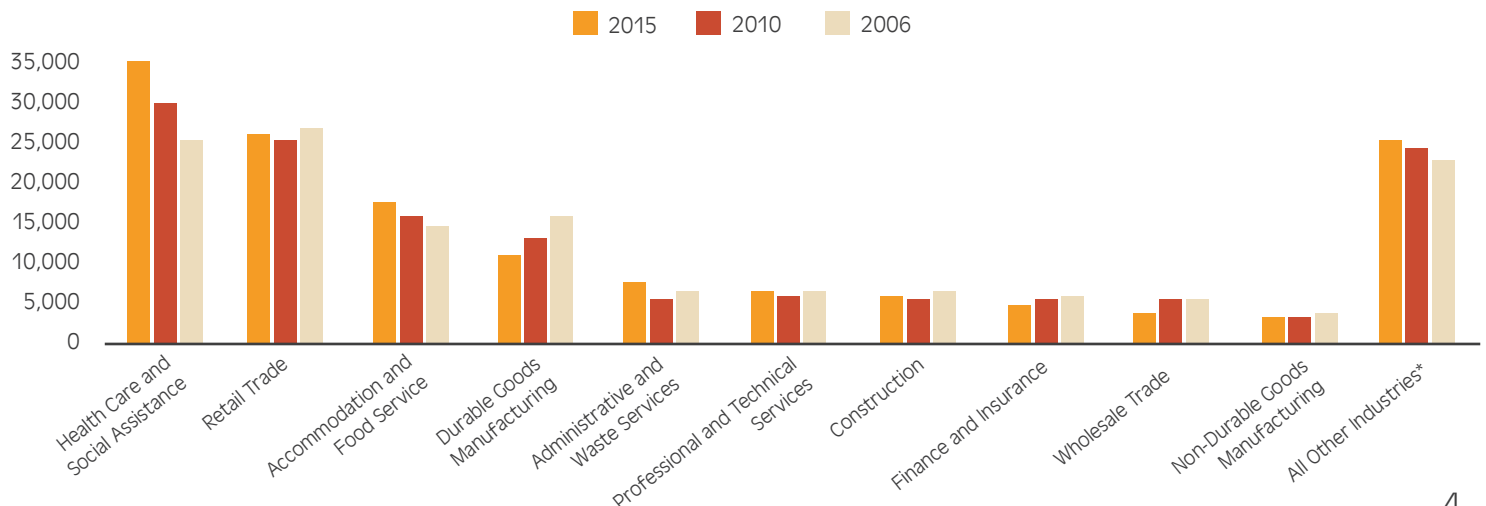


	45 and Older	24 and Under	High School Grad	Assoc. Degree or Higher	Foreign Born	Hispanic
North Shore	55.3%	14.8%	90.4%	63.5%	16.3%	12.2%
Mass	52.1%	15.9%	89.8%	64.4%	16.1%	10.6%
New England	53%	15.4%				
United States	51%	15.8%	86.7%	58.9%	14.9%	9.9%

This data indicates that we must have appropriate workforce responses to an aging workforce, and at the same time provide quality education and training to our emerging workforce as they are critically important to the future. While our immigrant population is relatively small, they are also critical to our labor force and need to receive similar education and training.

On the Labor Market Demand side, the North Shore has a highly diversified economy with most industry sectors doing very well in our current low unemployment situation. The NSWIB has designated Health Care, Manufacturing, (including Life Sciences), Financial Services and Construction as critical to the region, providing solid career pathways that allow those employed in these industries with an opportunity for wage growth. In addition, Information Technology career opportunities across all industries are increasing, providing solid jobs for workers at different levels of education.

TOP 10 INDUSTRIES OF PRIVATE SECTOR EMPLOYMENT ON THE NORTH SHORE¹



¹ Total North Shore Employment in 2015 was 152,426

DEMAND SIDE

Over 500 North Shore businesses responded to our survey, providing their opinions on skill needs now and into the future and other thoughts on maintaining and expanding a business friendly environment.

Only 7% of business respondents indicated that they would need fewer workers in the future.

Many indicated actual job titles disappearing (teller, cashier, secretary, fast food worker, even customer service representatives perhaps not disappearing but becoming purely technologically driven) and new job titles (universal banker, social media manager, cyber security professional, adult autism specialist) being created. Jobs with current skill shortages but remaining vital into the future include machinists, engineers, tradespeople, nurses and CDL drivers.

Companies discussed the rise of different business models, more international work, and greater efficiencies from technology, with some replying that entry-level jobs, such as those listed above, are being replaced by automation.

The top two future skill sets needed, and very closely aligned, are the **Ability and Willingness to Learn** and **Technology Fluency**. The ability to **Work with Diverse Colleagues** and customers is a close third. Comments made in this section indicate the need for written and oral English language skills along with the ability to speak multiple languages.

Quality of life in the region is the number one driver for business development, but a strong workforce, improved transportation, and more affordable housing are all needed to keep the economy growing.

Future Skill Sets Needed	
Ability/Willingness to Learn	80%
Technology Fluency	72%
Work with Diverse Colleagues	48%
Better Math Skills	30%
Speak a Foreign Language	30%

Changes Your Company/Industry Anticipates	
New Jobs Created	54%
Fewer Jobs Needed	7%
Different Business Models	50%
Greater Efficiencies from Technology	46%

SUPPLY SIDE

Representing the workforce itself, the FOW survey heard from over:

500

Students

(generally high school and community college)

400

Job seekers

Most students express a desire to have a fulfilling career, but a close second choice is the desire to make money. Students feel they need more information about careers, either directly or through internships and job shadow experiences, as well as information on financial aid. Their overall ranking of potential future careers based on North Shore employment patterns reflects this need, as few students indicated a likelihood of pursuing careers in critical industries on the North Shore.

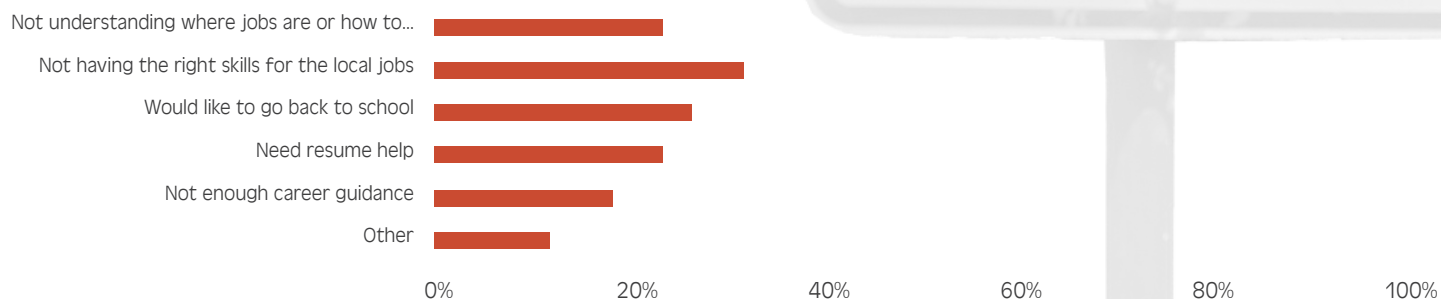
There were indications among our students of different work priorities, including the desire to have an employer that provides work in conjunction with the student's own schedule. Finally, the realities of technology came through clearly with one respondent indicating that a customer service job would be perfect as it doesn't require any face-to-face interaction.

Virtually all adult job seekers express a desire for fulltime traditional employment into the future, and feeling a mismatch between their current skill sets and what is and/or will be asked of them by hiring companies. Job seekers appear ready to go back to school so long as employment will be the result, reflecting a willingness to continue learning. Some express a sense of being over-qualified for available work now and in the future. Career guidance is needed by many in the job seeking mode.

On a scale of 1 to 5 with 5 being highly likely, **HOW LIKELY ARE YOU TO PURSUE EMPLOYMENT IN THE FOLLOWING?**

- 3.0** Health Care
- 2.2** Construction
- 2.4** Financial Service
- 2.3** Manufacturing
- 2.2** Food Service
- 2.4** Retail
- 2.6** Education
- 2.8** Administration
- 2.5** Arts and Entertainment
- 3.1** Professional and Technical Services

WHAT HAVE YOU ENCOUNTERED AS BARRIERS TO EMPLOYMENT? (CHOOSE ALL THAT APPLY)



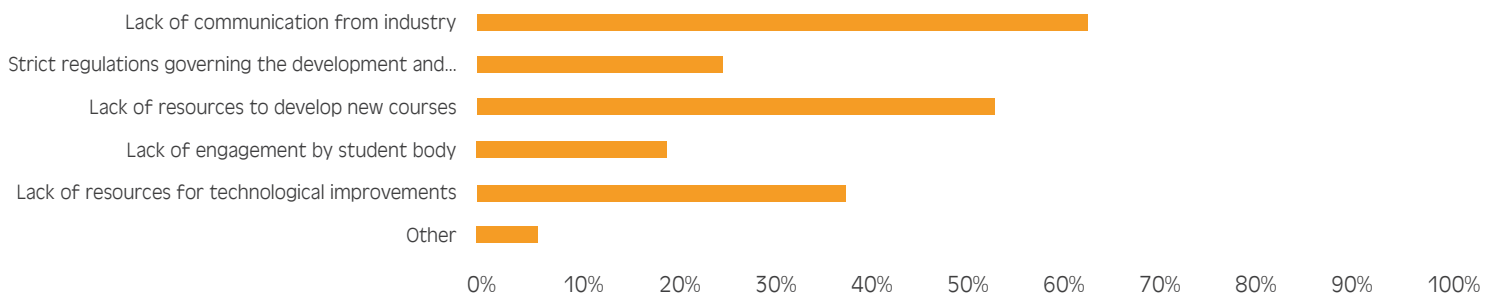
INTERMEDIARY SIDE

Approximately 251 workforce and economic intermediaries responded to the survey including educators, social service leaders, housing specialists, and economic development experts.

Educators feel challenged with meeting future needs as they feel not coordinated sufficiently with business. They know their students need to be learning outside the classroom – and they also need communication with the business world to better meet current and future college and career readiness standards.

WHAT DID EDUCATORS TELL US?

What challenges do your faculty face in keeping up with the new and changing skill requirements of today's global economy? Please choose all that apply.

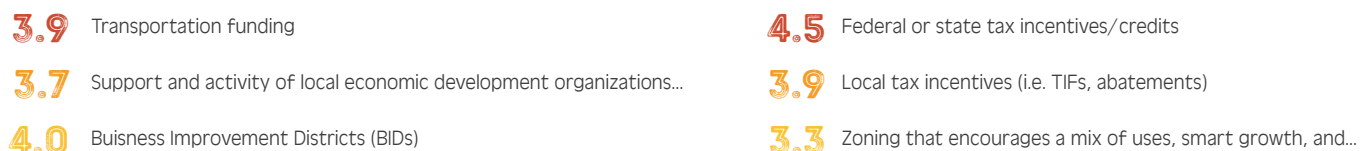


Economic Development experts see the need for improved transportation around the North Shore in order to strengthen the current, and build the future, economy. This transportation need is also stressed by social service organizations. In addition, social service organizations express a need for on-the-job training programs that prepare workers in a hands on manner for the future job skill sets. Housing experts indicate that the cost of housing is and will continue to be a great burden on the workforce.

WHAT DID ECONOMIC DEVELOPMENT TELL US?

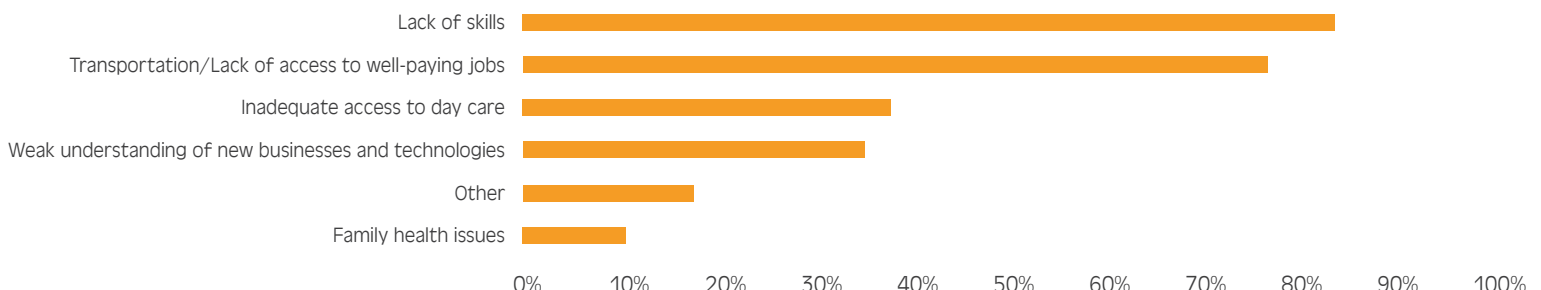
How helpful would each of the following initiatives or tools be for you as you develop the economy of your town or city?

1 = Not at all Helpful 2 = Not Very Helpful 3 = Somewhat Helpful 4 = Very Helpful 5 = Extremely Helpful



WHAT DID SOCIAL SERVICE AND COMMUNITY LEADERS TELL US?

What are the biggest barriers that are keeping your constituents from finding and keeping fulltime employment? Please choose all that apply.



FUTURE OF WORK

1. **Ability and Willingness** to be a constant learner is number one.
2. **Technology Skill** set and proficiency is a MUST.
3. **Respect and Comfort** with workplace and customer diversity is critical.

Emerging Workforce –

1. Is not interested in North Shore career opportunities (Is this an awareness issue?)
2. Different from current workforce in priorities and modes of operating
3. Wants fulfillment in a career on their own terms

Intermediaries –

1. Feel disconnected from the demand side of the labor market
2. Want to develop training programs with hands-on learning techniques
3. Are concerned about transportation and housing issues, now and into the future

ACTION PLANS

1. **Support Innovative Ways of Learning for Current Workforce**
 - Online anytime/anyplace
 - Quicker curriculum design and roll-out
 - Advocacy for alternative funding mechanisms for public colleges
 - o Help academia change
 - o Help business understand / relate to academia
2. **Support Innovative programming to bring employers and students together**
 - Internships
 - Company tours
 - Career Information
3. **Support Innovative programming to bring employers and educators together**
 - Teacher Externships
 - Sector-based public/private partnerships
 - Educator/Business Conferences
4. **Ensure technological literate and communicative workforce + Promote Diversity**

NEXT STEPS

STUDY and dive deeper into this data, particularly more in-depth conversations with the FOW stakeholders on what is behind their responses, and strategy development for addressing the challenges each stakeholder is facing either individually or with other stakeholders;

UPDATE the North Shore WIB/North Shore Alliance Strategic Plans to include goals and activities around these challenges; and

DEVELOP a new Northeast Regional Strategic Plan, including the workforce, education, and economic development leaders from the North Shore, Merrimack Valley and Greater Lowell regions, basing goals and activities on this and other Future of Work data.



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