Maine Outdoor Brands

Workforce Needs Assessment Survey Report

March 2021

Acknowledgements

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Prepared for

Maine Outdoor Brands

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Contents

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Introduction

This report summarizes a workforce needs assessment survey conducted by the Survey Research Center (SRC) on behalf of Maine Outdoor Brands (MOB). The survey was intended to achieve three primary purposes:

- To gain a better understanding of the workforce needs of Maine's outdoor industry over the next five years,
- To gain a better understanding of the positions that are the most difficult to fill, and
- To gather information to help align education and training programs in Maine with employer workforce needs.

Methodology

The survey instrument was designed by MOB with input from the SRC and was conducted using Qualtrics, an online survey platform. The survey was distributed in two different ways. First, MOB provided the SRC with a list of email addresses for each of their member brands and non-profits, and personal links were sent directly to these contacts. Next, an anonymous link was generated, which MOB passed along to its associates to share with their members as well. This latter step was taken to increase the number of responses.

Prior to sending the survey to brands and non-profits, the SRC sent advance emails announcing the upcoming survey. Two days later another email was sent containing the survey link. Those who did not complete the survey received two email reminders. Those who still had not completed the survey received phone calls. Three calls were made in all unless recipients completed the survey and did not require all three. In total, 92 personal links were distributed, and of these, 69 completions were obtained. This resulted in a response rate of 75%.

The anonymous link was sent by MOB to its associates via email with a cover letter for the associates to forward along to their members. MOB sent two reminders to its associates for forwarding as well. A total of 9 additional responses were obtained through the anonymous link.

Survey Summary

Response Type
The majority of responses, 78%, came from brands, while the remaining portion came from non-profits.
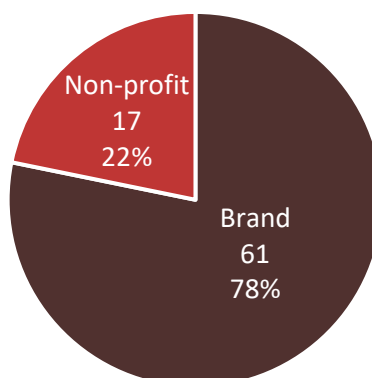
Location

Respondents were asked to provide the zip code of their primary location in Maine. All respondents answered this question, and their responses are plotted in the map below. While most responses came from the southern and coastal parts of Maine, there were responses from across the state.
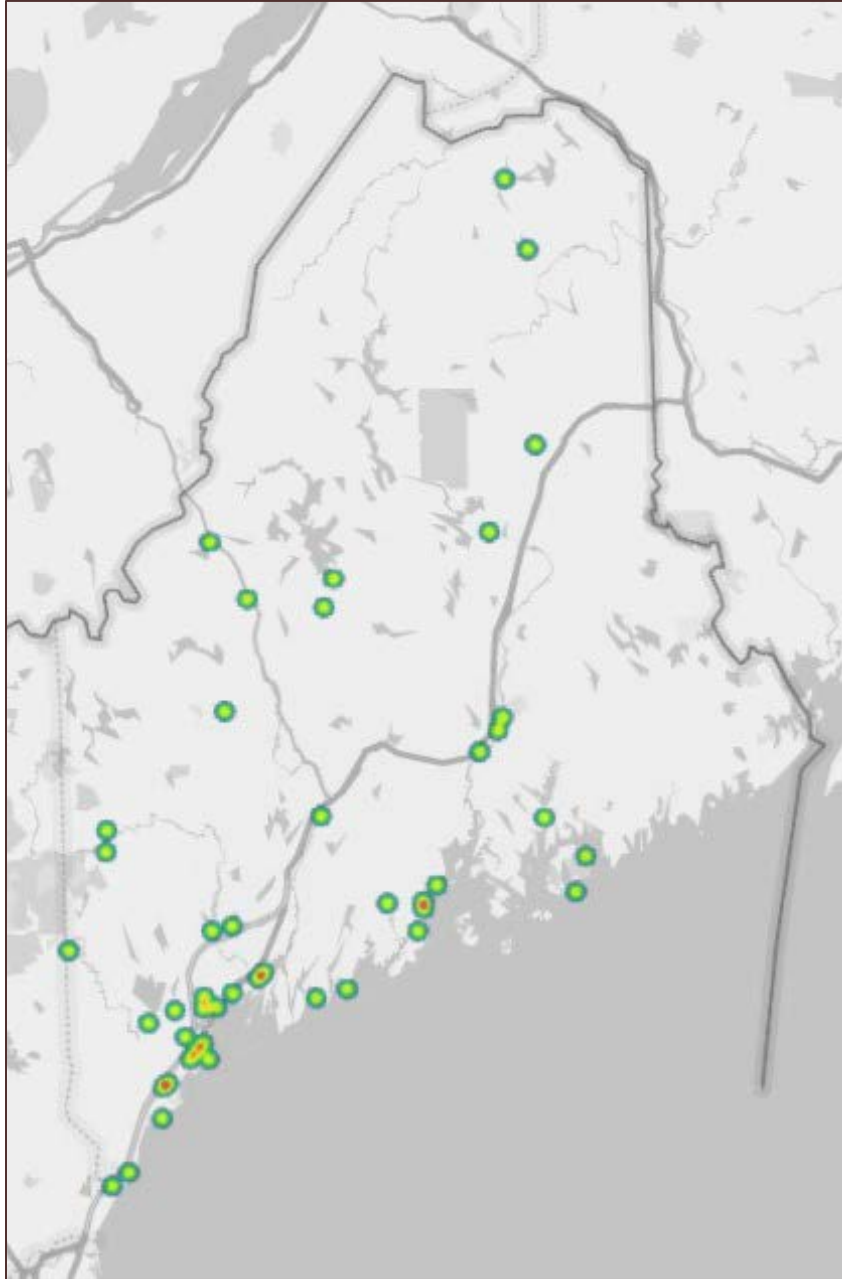
Size of Organization

The survey asked respondents how many people they employ during the busiest time of year. They were instructed to include all employees (full-time, part-time, temporary, seasonal, etc.) across all locations in Maine. All respondents gave a response to this question. The largest proportion of responses, 42%, fell into the *1 to 5 employees* category. The remaining responses were fairly evenly distributed among the remaining categories, ranging from 13% to 16%.
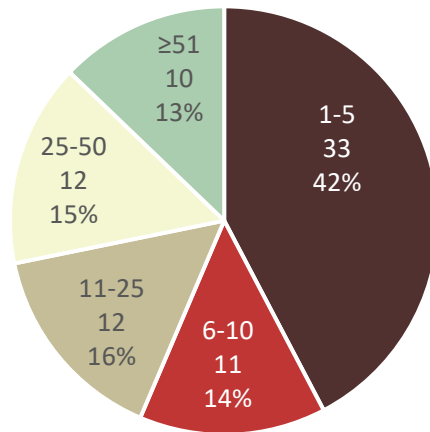
Changes Due to Pandemic

The survey asked respondents whether the total number of employees changed as a result of the pandemic. Ninety-nine percent (99%) of respondents answered this question. Of these, the majority (58%) reported that the total number had changed. The percentage who reported a decrease was 40%, while 18% experienced an increase. These proportions varied, however, based on the size of the organization. At 68%, larger organizations (those with 25 or more employees) were more than twice as likely to report a decrease than smaller organizations, at 29%.
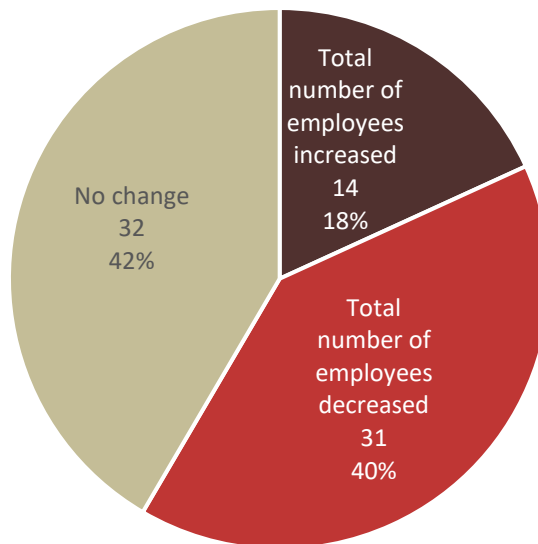
Age of Organization

Respondents were asked to report the age of their business or organization. All respondents supplied a response to this question. The chart below separates these responses into quartiles and includes three measures of central tendency—the mean, median, and mode. The mean, or average, which is a widely understood way to describe a distribution, was 23 years. This measure, however, is less appropriate for data that are skewed such as these. A better measure for skewed distributions is the median, or middle value, which is 15 years. Yet another measure is the mode, or the value that appears most frequently in the data. In this distribution the mode is two years; eight respondents reported that their business or organization was two years old.
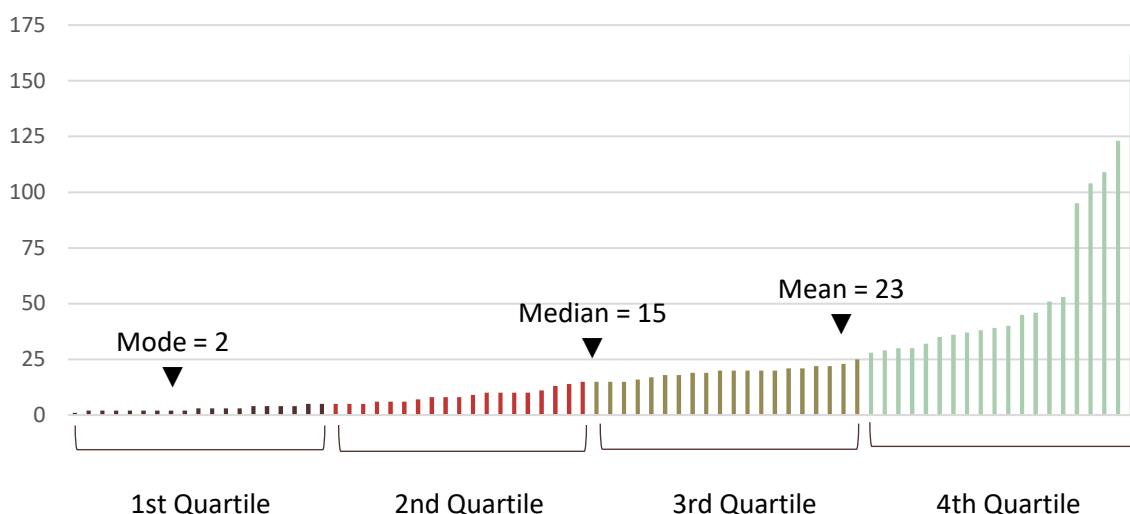
Age of Typical New Hire

The survey asked respondents to report, to the best of their knowledge, the age range of the typical new hire. Ninety-six percent (96%) of respondents answered this question. With 47% of the responses, the 25 to 34 age group captured the largest portion. This category combined with the 20 to 24 age group was twice the size of the remaining age groups put together, indicating a relatively young population of new hires among survey respondents.
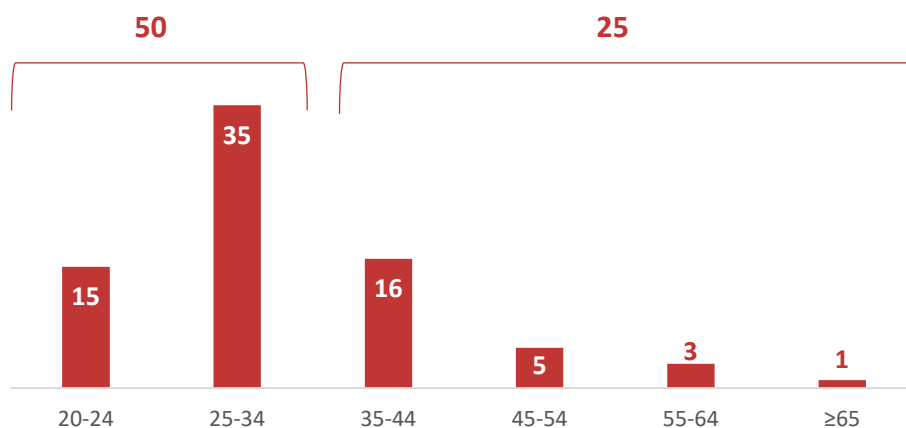
Type of Industry

Survey respondents were asked to choose the industry that best described their business or organization from a list provided. All respondents provided a response to this question. Over a quarter of respondents (26%) indicated that *arts, entertainment, and recreation* best described their business or organization, followed by *manufacture* at 23% and *retail trade* at 13%.

Industry		
Arts, entertainment, and recreation	(n=20)	26%
Manufacturing	(n=18)	23%
Retail trade	(n=10)	13%
Accommodation and food services	(n=8)	10%
Information/media	(n=6)	8%
Conservation and stewardship	(n=4)	5%
Educational services	(n=4)	5%
Other	(n=3)	4%
Professional and business services		3%
Agriculture, forestry, fishing, and hunting		1%
Real estate and rental and leasing		1%
Wholesale trade		1%

Type of Employees Needed

Survey respondents were asked to project the types of employees they would need over the next five years for *full-time, part-time, year-round,* and *seasonal positions*. Ninety-six percent (96%) of respondents answered this question. More than two-thirds (69%) reported that they would need *full-time year-round* employees, followed by *part-time year-round* at 53%, *part-time seasonal* at 51%, and *full-time seasonal* at 42%. An additional 5% reported needing another type of employee (*contract workers, interns,* and *J-1 exchange workers*), while 1% anticipated needing no new employees in the coming five years.

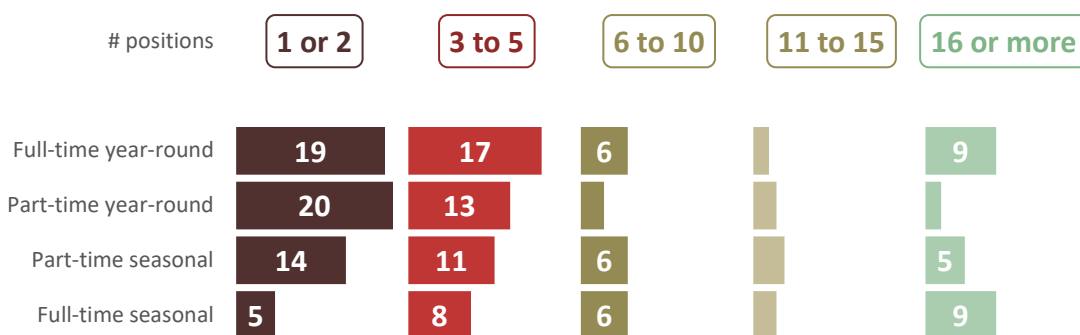|	
Full-time year-round	(n=54) **69%**
Part-time year-round	(n=41) **53%**
Part-time seasonal	(n=40) **51%**
Full-time seasonal	(n=33) **42%**
Other	(n=4) **5%**
None	(n=1) **1%**
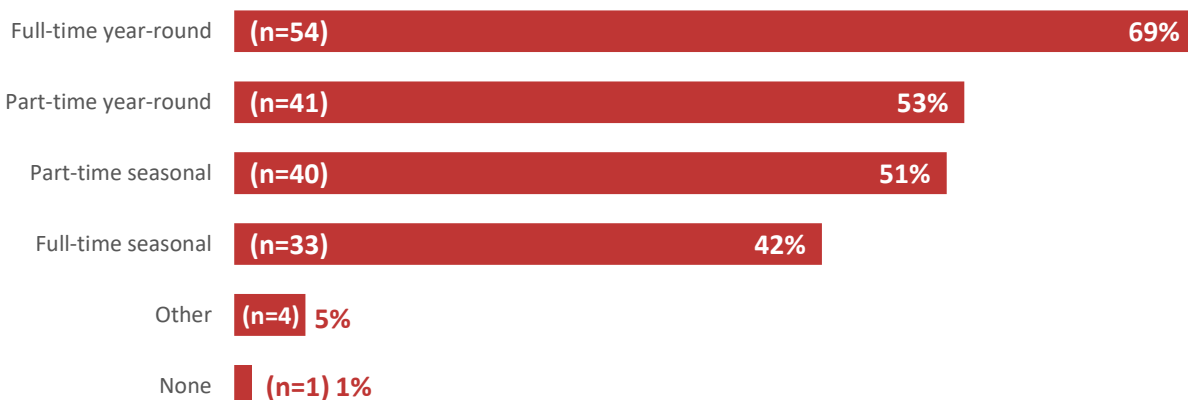
Number of Positions Needed

Respondents who reported needing a particular type of employee (e.g., full-time year-round) over the next five years were then asked how many employees they anticipated needing. The largest responses came from the *1 or 2* and *3 to 5 categories*, capturing nearly two-thirds (65%) of the total responses.

# positions	1 or 2	3 to 5	6 to 10	11 to 15	16 or more
Full-time year-round	19	17	6		9
Part-time year-round	20	13			
Part-time seasonal	14	11	6		5
Full-time seasonal	5	8	6		9

Note: Data points with counts smaller than 5 are not labelled with counts.

Preferred Education Level

The survey asked what the most preferred level of education was for employees. Ninety-six percent (96%) of respondents answered this question, with the largest portion (43%) reporting that they preferred employees with a *bachelor's degree*. Responses to this question can be collapsed into two categories—employees with a credential (certificate or degree) beyond the high-school diploma and employees with just a high school diploma or some college. Fifty-five percent (55%) of responses fell into the first category, requiring some type of advanced credential, while 45% fell into the latter category, requiring a high school diploma or some college.

High school diploma or equivalent
15
20%

Bachelor's degree
32
43%

Some college
19
25%

Associate's degree
1
1%

Technical or occupational certificate
8
11%
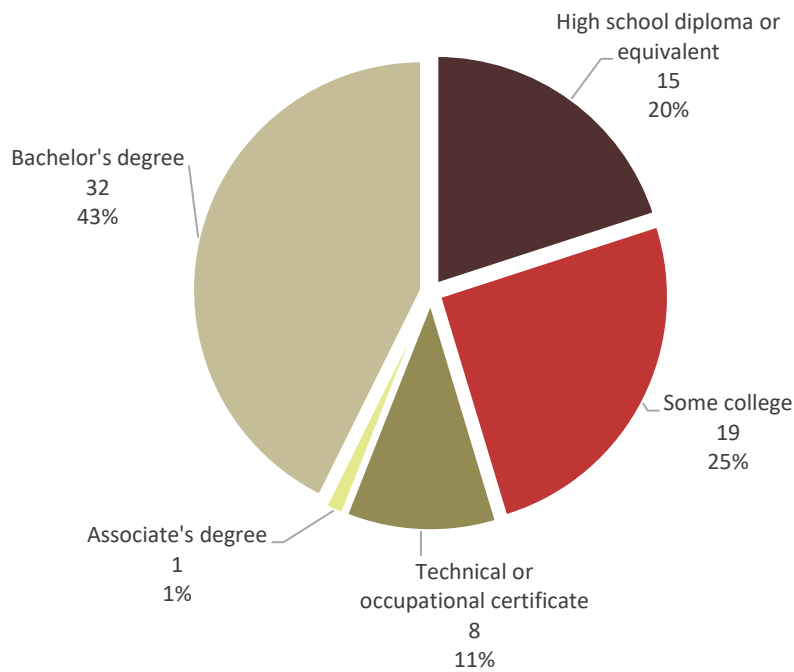
Position Types Most Needed

The respondents who reported that they would need some type of new employee over the next five years were asked to choose the five positions that would be most needed. All those who reported needing new employees responded to this question. The position chosen most frequently was *market/digital marketing*, with 48% of respondents selecting this position, followed by *customer service/hospitality* at 38%, and *guide/instructor* at 36%.

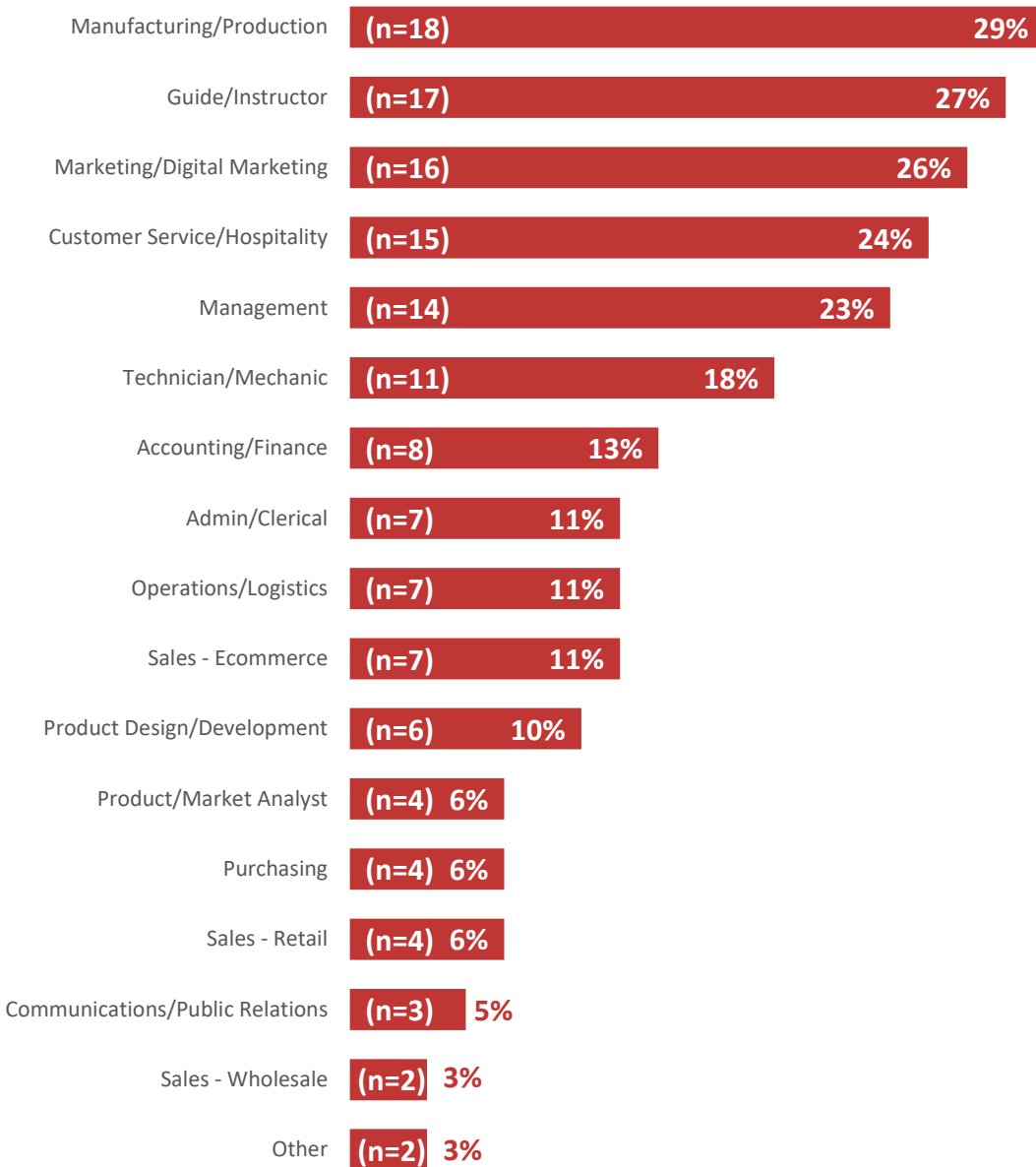| Position	n	Percent
Marketing/Digital Marketing	(n=37)	48%
Customer Service/Hospitality	(n=29)	38%
Guide/Instructor	(n=28)	36%
Admin/Clerical	(n=27)	35%
Operations/Logistics	(n=25)	32%
Management	(n=23)	30%
Manufacturing/Production	(n=21)	27%
Technician/Mechanic	(n=17)	22%
Communications/Public Relations	(n=15)	19%
E-commerce Sales	(n=14)	18%
Product Design/Development	(n=14)	18%
Retail Sales	(n=13)	17%
Accounting/Finance	(n=9)	12%
Product/Market Analyst	(n=5)	6%
Other	(n=4)	5%
Wholesale Sales	(n=4)	5%
Purchasing	(n=4)	5%

Rank of Most Needed Position Types

Respondents were asked to rank the five positions selected in the previous question. Position types that were not selected were assigned a value of zero, while position types that were the most desired were assigned a value of five. (Note: responses were flipped for analysis; the original survey question asked respondents to assign the most desired type a value of one.) The average of each position type's ranking is presented in the chart below beginning with the highest ranked position, *marketing/digital marketing*, at 1.43, followed by *customer service/hospitality* at 1.38, and *guide/instructor* at 1.36.

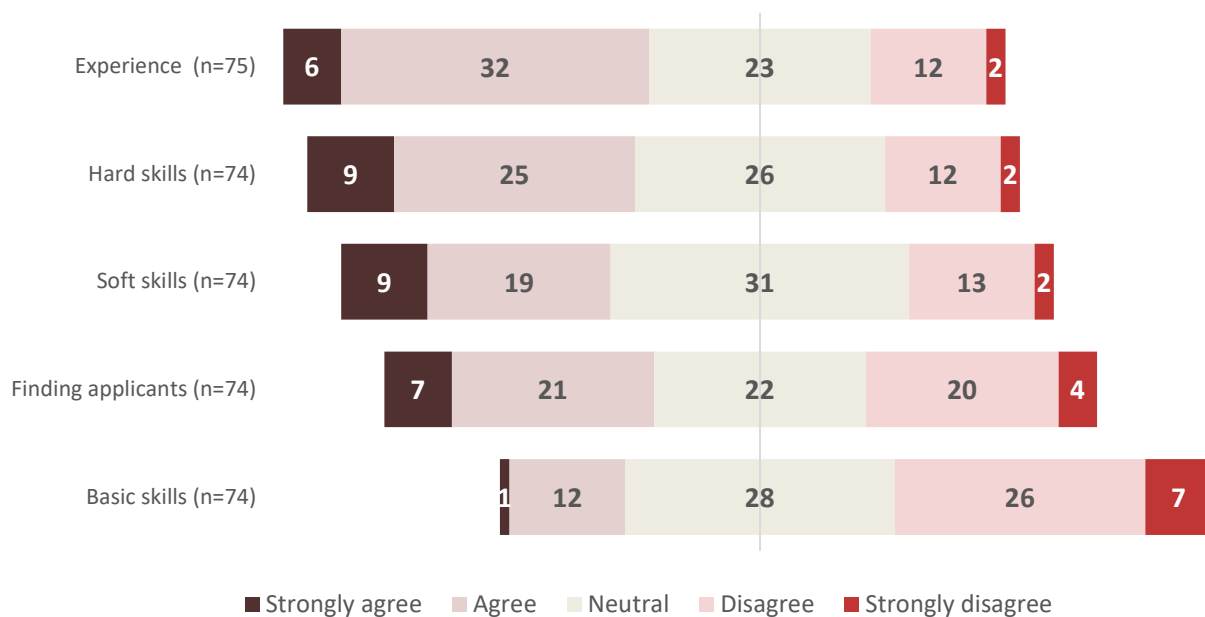| Position Type	Value
Marketing/Digital Marketing	1.43
Customer Service/Hospitality	1.38
Guide/Instructor	1.36
Manufacturing/Production	1.30
Admin/Clerical	1.12
Operations/Logistics	1.09
Management	0.88
Technician/Mechanic	0.68
E-commerce Sales	0.55
Retail Sales	0.55
Product Design/Development	0.51
Communications/Public Relations	0.51
Other	0.40
Accounting/Finance	0.31
Purchasing	0.17
Product/Market Analyst	0.16
Wholesale Sales	0.10

Most Difficult Positions to Fill

The survey asked respondents to choose up to five positions that they had difficulty filling. Seventy-nine percent (79%) of respondents provided a response to this question. *Manufacturing/production, guide/instructor,* and *marketing/digital marketing* positions were the hardest to fill, at 29%, 27%, and 26%, respectively.

Position	n	Percent
Manufacturing/Production	(n=18)	29%
Guide/Instructor	(n=17)	27%
Marketing/Digital Marketing	(n=16)	26%
Customer Service/Hospitality	(n=15)	24%
Management	(n=14)	23%
Technician/Mechanic	(n=11)	18%
Accounting/Finance	(n=8)	13%
Admin/Clerical	(n=7)	11%
Operations/Logistics	(n=7)	11%
Sales - Ecommerce	(n=7)	11%
Product Design/Development	(n=6)	10%
Product/Market Analyst	(n=4)	6%
Purchasing	(n=4)	6%
Sales - Retail	(n=4)	6%
Communications/Public Relations	(n=3)	5%
Sales - Wholesale	(n=2)	3%
Other	(n=2)	3%

Reasons Hiring Is Difficult

The survey asked respondents to indicate the extent to which they agreed with a handful of statements related to hiring new employees. The statement that achieved the highest agreement was related to applicants having enough *experience*, followed by *hard skills* (technical and know-how skills), *soft skills* (such as those associated with an individual's habits or interpersonal skills), *finding/reaching applicants*, and *basic* skills (such as locating information, reading for information, writing, arithmetic). Each of these statements with the exception of the one related to basic skills was met with more agreement than disagreement, suggesting that employers are experiencing difficulty hiring for a range of reasons.

Respondents were also provided with space to report other reasons for hiring difficulties. The majority of these reasons could be grouped into one of three additional categories. First, six of the responses were related to *location and housing*; four of the responses were related to *culture and diversity*, and three responses were related to the *seasonality* of the work.

|	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Experience (n=75)	6	32	23	12	2
Hard skills (n=74)	9	25	26	12	2
Soft skills (n=74)	9	19	31	13	2
Finding applicants (n=74)	7	21	22	20	4
Basic skills (n=74)	1	12	28	26	7

Highest Valued Skill Sets

The survey asked respondents to list their highest valued skill sets. This was an open-ended question, and 88% of respondents provided a response. Responses were coded into one (or more) of 17 skill set categories. The category with the highest number of responses was *particular skill or knowledge*, with 28 responses. Examples of responses coded into this category include *sewing*, *fundraising*, and *disability awareness*. A number of *soft skills* were also mentioned frequently; examples of this type of response include *professionalism, integrity,* and *reliability.*

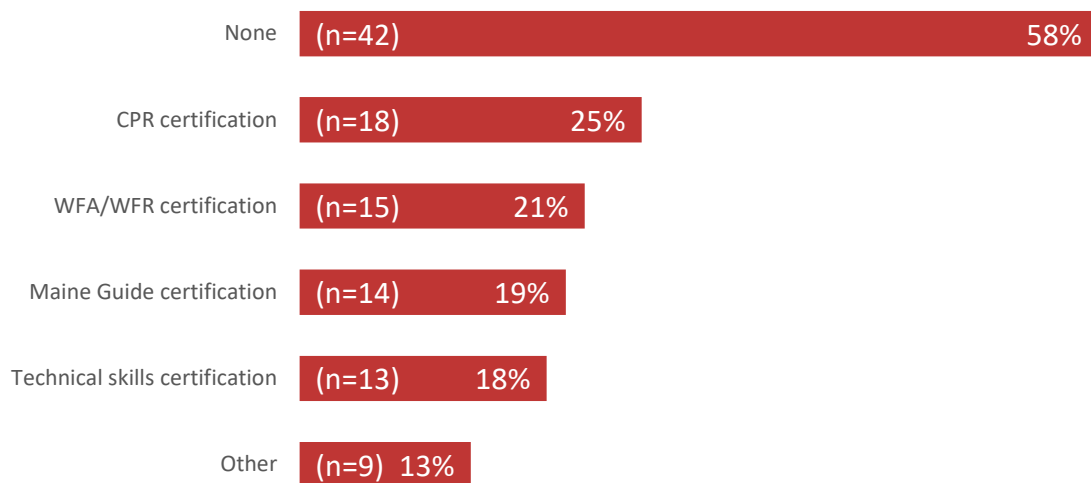| Highest Valued Skill Set	#
Particular skill/knowledge	28
Soft skills	19
Communications	13
Interpersonal/customer service	11
IT/ Computer/tech skills	11
Interpersonal/teamwork	10
Adaptability/flexibility	9
Marketing/sales	9
Attention to detail	8
Logistic/analytical skills	7
Critical thinking	5
Ability to learn	4
Management	4
Time management/multitasking	4
Financial skills	3
Passion/sense of urgency/success oriented	3
Self-motivated	3

Addressing Underqualified Applicants

Respondents were presented with a number of statements related to dealing with underqualified applicants. Twenty-four percent (24%) of respondents reported that they did not have difficulty filling positions due to underqualified applicants, and 5% did not respond to the question at all; the remaining 71% of respondents (n=55) provided at least one means of addressing the challenge associated with underqualified applicants. The most frequently selected response was to *hire underqualified applicant and do internal training* (n=34), followed by *allowing positions to go unfilled* (n=23), and *hiring underqualified applicants and doing mentoring* (n=19).

Hire underqualified applicant and do internal training — 34
Positions go unfilled — 23
Hire underqualified applicant and do mentoring — 19
Other — 6
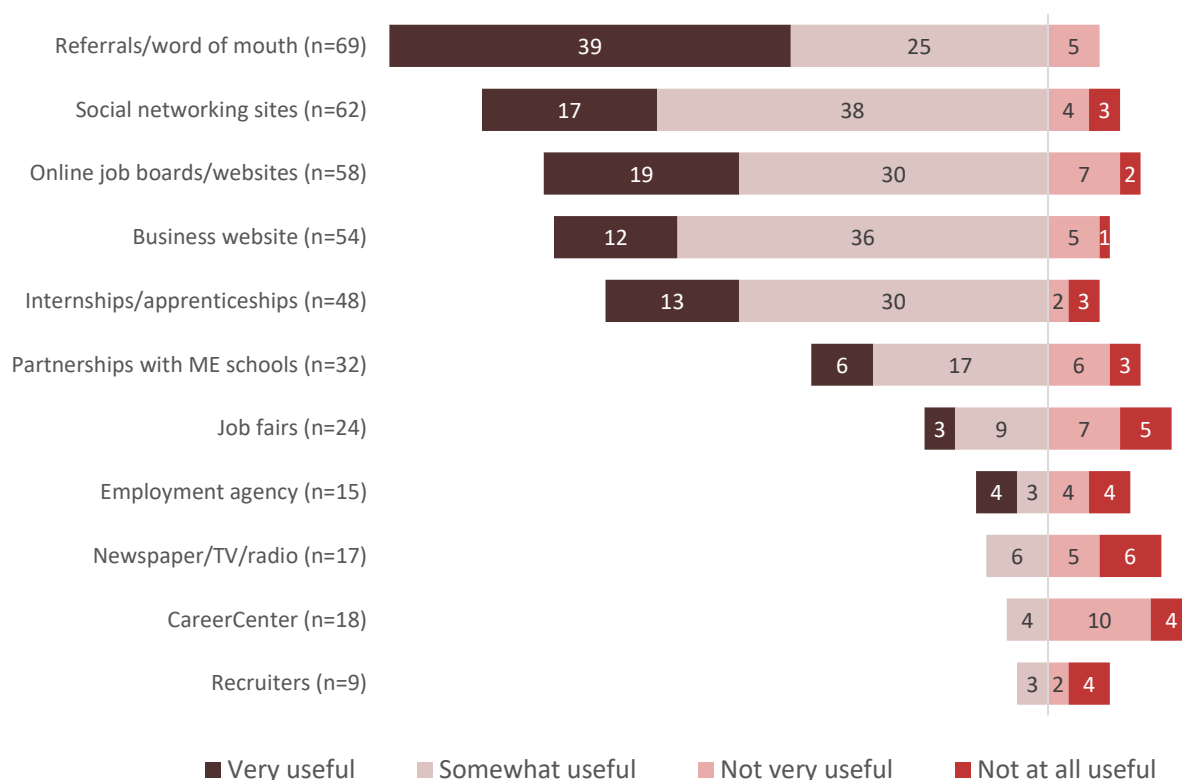Hire underqualified applicant and do external training — 2
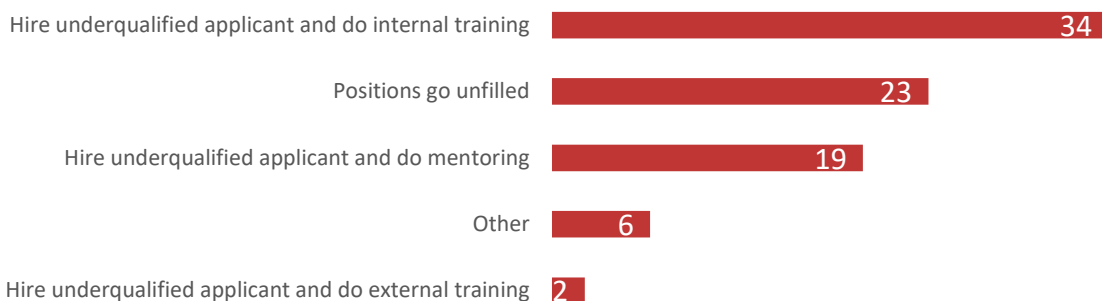
Certifications Required

The survey asked respondents to report the types of certification required for the jobs for which they hired. Ninety-two percent (92%) of respondents gave a response to this question. Fifty-eight percent (58%) of those who responded reported that no certification was required. The remaining respondents selected as many certifications as applied. The certification type with the highest response was *CPR* certification at 25%, followed by *Wilderness First Aid/Responder* certification at 21%, *Maine Guide* certification at 19%, and *technical skills* certification at 18%. Thirteen percent (13%) reported another type of certification, including *ServSafe* certification.

None — (n=42) 58%
CPR certification — (n=18) 25%
WFA/WFR certification — (n=15) 21%
Maine Guide certification — (n=14) 19%
Technical skills certification — (n=13) 18%
Other — (n=9) 13%

Usefulness of Recruiting Methods

Respondents were asked how useful a variety of recruiting methods were to them. Ninety-four percent (94%, n=73) of respondents provided at least one response. *Referrals/word of mouth* received the most responses (n=69) as well as the most positive responses (n=64), as shown in the chart below. While the number of responses and positive responses decrease with subsequent methods through the list below, responses are still weighed more heavily toward usefulness through *partnerships with ME schools*. *Job fairs* broke even between useful and not useful, and subsequent responses were deemed mostly not useful. In addition to the categories provided, respondents could report other methods used. These methods included *Common Threads of Maine, Jobs for Maine Graduates (JMG), LinkedIn,* and *Live and Work in Maine.*

	Very useful	Somewhat useful	Not very useful	Not at all useful
Referrals/word of mouth (n=69)	39	25	5	
Social networking sites (n=62)	17	38	4	3
Online job boards/websites (n=58)	19	30	7	2
Business website (n=54)	12	36	5	1
Internships/apprenticeships (n=48)	13	30	2	3
Partnerships with ME schools (n=32)	6	17	6	3
Job fairs (n=24)	3	9	7	5
Employment agency (n=15)	4	3	4	4
Newspaper/TV/radio (n=17)		6	5	6
CareerCenter (n=18)		4	10	4
Recruiters (n=9)		3	2	4

Interest in Future Participation

Respondents were asked if they were interested in participating in employer forums with college/university programs or in helping move identified solutions forward in some other way. Forty-four percent (44%) replied *yes*, with an additional 42% replying *maybe*.
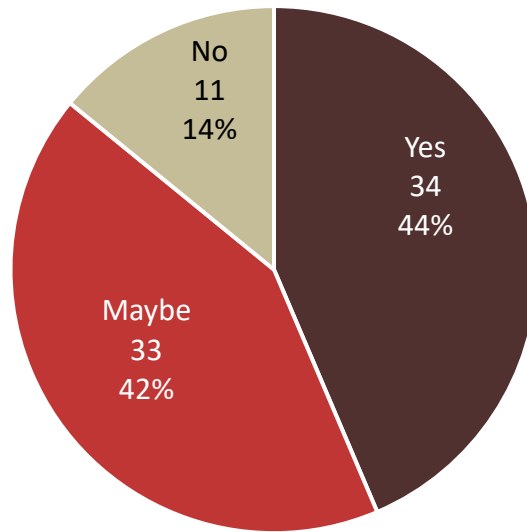
Maine Outdoor Brands Survey

Welcome. This survey will assess workforce demands for Maine's outdoor industry—what are your immediate and future job needs as an outdoor business or organization in Maine? Your participation is voluntary—you don't have to do the survey, and your relationship with Maine Outdoor Brands, the Maine Office of Outdoor Recreation, and the University of Southern Maine will not be affected in any way whether you do it or not.

If you come to a question you don't want to answer, just go on to the next one. Survey responses will only be reported and shared in the aggregate; your individual responses will not be identified.
If you have any questions about this survey, please contact Danielle Ward at [*email*] or [*phone*].
Thanks in advance for your time.

What is the name of your business or organization?

_____

What is the zip code of your primary location in Maine?

_____

What types of employees do you project you'll need for your business or organization over the next 5 years? (Please check all that apply.)

☐　Part-time seasonal
☐　Full-time seasonal
☐　Part-time year-round
☐　Full-time year-round
☐　Other (please specify): _____
☐　None
☐　I don't know

How many positions do you expect you'll need to fill over the next 5 years?

	1 or 2	3 to 5	6 to 10	11 to 15	16 or more
Part-time seasonal	○	○	○	○	○
Full-time seasonal	○	○	○	○	○
Part-time year-round	○	○	○	○	○
Full-time year-round	○	○	○	○	○
Other	○	○	○	○	○

Overall, what level of education is most preferred for the employees of your business or organization?

○　Less than high school
○　High school diploma or equivalent
○　Some college
○　Technical or occupational certificate
○　Associate's degree

○ Bachelor's degree
○ Master's degree
○ Doctorate degree

Please choose the five (5) types of positions that will be the most needed for your business or organization over the next 5 years.

☐ Accounting/Finance
☐ Admin/Clerical
☐ Customer Service/Hospitality
☐ Product Design/Development
☐ Guide/Instructor
☐ Management
☐ Manufacturing/Production
☐ Marketing/Digital Marketing
☐ Operations/Logistics
☐ Product/Market Analyst
☐ Communications/Public Relations
☐ Purchasing
☐ Sales - Ecommerce
☐ Sales - Retail
☐ Sales - Wholesale
☐ Technician/Mechanic
☐ Other (please specify): _____

Please rank the positions in order of need, starting with 1 for the position you need most. [Note: Only the 5 responses selected in previous question appeared here.]

_____ Accounting/Finance
_____ Admin/Clerical
_____ Customer Service/Hospitality
_____ Product Design/Development
_____ Guide/Instructor
_____ Management
_____ Manufacturing/Production
_____ Marketing/Digital Marketing
_____ Operations/Logistics
_____ Product/Market Analyst
_____ Communications/Public Relations
_____ Purchasing
_____ Sales - Ecommerce
_____ Sales - Retail
_____ Sales - Wholesale
_____ Technician/Mechanic
_____ Other [text from previous question]

Please choose up to five (5) positions that you typically have difficulty filling.

☐ Accounting/Finance
☐ Admin/Clerical

- ☐ Customer Service/Hospitality
- ☐ Product Design/Development
- ☐ Guide/Instructor
- ☐ Management
- ☐ Manufacturing/Production
- ☐ Marketing/Digital Marketing
- ☐ Operations/Logistics
- ☐ Product/Market Analyst
- ☐ Communications/Public Relations
- ☐ Purchasing
- ☐ Sales - Ecommerce
- ☐ Sales - Retail
- ☐ Sales - Wholesale
- ☐ Technician/Mechanic
- ☐ Other _____

Please indicate the extent to which you agree or disagree with the following statements.

	Strongly Agree	Agree	Neutral	Disagree
I have difficulty finding/reaching applicants	○	○	○	○
Applicants don't have necessary basic skills (locating information, reading for information, writing, arithmetic)	○	○	○	○
Applicants don't have necessary hard skills (technical and know-how skills)	○	○	○	○
Applicants don't have necessary soft skills (skills associated with an individual's habits or interpersonal skills)	○	○	○	○
Applicants don't have necessary experience	○	○	○	○
I have other difficulties hiring (please specify)	○	○	○	○

What are the highest valued skill sets in demand in your business?

_____

When you have difficulty filling positions due to underqualified applicants, how does your organization address this difficulty? (Please check all that apply.)

- ☐ Positions go unfilled
- ☐ Hire underqualified applicant and do internal training
- ☐ Hire underqualified applicant and do external training
- ☐ Hire underqualified applicant and do mentoring
- ☐ I don't have difficulty filling positions due to underqualified applicants
- ☐ Other _____

What certifications do you require for jobs for which you hire? (Please check all that apply.)

☐   WFA/WFR certification
☐   CPR certification
☐   Technical skills certification
☐   Maine Guide certification
☐   Other (please specify): _____
☐   None

How useful are each of the following methods of recruiting?

	Very useful	Somewhat useful	Not very useful	Not at all useful	Do not use this media
CareerCenter (Maine.gov)	○	○	○	○	○
Employment agency	○	○	○	○	○
Online job boards/websites (eg., MOB job board, JobsinME, Indeed, Other associations' job boards)	○	○	○	○	○
Social networking sites (eg., Facebook, LinkedIn, Instagram)	○	○	○	○	○
Your own business website	○	○	○	○	○
Job fairs	○	○	○	○	○
Partnerships with Maine schools	○	○	○	○	○
Internships/apprenticeships	○	○	○	○	○
Referrals/word of mouth	○	○	○	○	○
Recruiters	○	○	○	○	○
Newspaper/TV/radio	○	○	○	○	○
Other (please specify)	○	○	○	○	○

How many people are employed by your business or organization during your busiest time of year? Please include all employees (full-time, part-time, temporary, seasonal, etc.) at all locations in Maine.

○   1 - 5
○   6 - 10
○   11 - 25
○   25 - 50
○   51 or more

Did your total number of employees change as a result of the pandemic?

○   Yes, the total number of employees increased
○   Yes, the total number of employees decreased
○   No change

We are almost done! We just have a few questions about the make-up of your business or organization. How old is your business/organization? (Please enter the approximate number of years.)

_____

To the best of your knowledge, which age range best describes the typical new hire at your business or organization?

○ 16-19 years old
○ 20-24 years old
○ 25-34 years old
○ 35-44 years old
○ 45-54 years old
○ 55-64 years old
○ 65 years and over

Please choose the industry that best describes your business or organization from the list below.

○ Accommodation and food services
○ Agriculture, forestry, fishing, and hunting
○ Arts, entertainment, and recreation
○ Conservation and stewardship
○ Educational services
○ Government
○ Information/media
○ Manufacturing
○ Professional and business services
○ Real estate and rental and leasing
○ Retail trade
○ Transportation and warehousing
○ Wholesale trade
○ Other (please specify): _____

MOB and our affiliate organization, the Maine Outdoor Foundation, has made it a priority to strengthen the pipeline of talent into the outdoor industry in Maine. Are you interested in participating in employer forums with college/university programs or helping move identified solutions forward in some other way?

○ Yes
○ Maybe
○ No

Please provide us with your email address. This will prevent duplications of surveys and will allow us to share the results of the survey with you directly. The individual responses will be kept confidential and the results will be reported in aggregate.

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About the Survey Research Center

The Survey Research Center provides technical expertise and assistance to support the generation, processing, and analysis of quantitative data in the social sciences, human services, and public opinion fields. The Center provides a wide range of research and technical assistance services to federal, state, and municipal governments, private nonprofit agencies, businesses, and University faculty and departments. Services include proposal preparation, market research, needs assessments, program evaluation, policy analysis, and information system design.

About the Cutler Institute for Health and Social Policy

The Cutler Institute for Health and Social Policy at the Muskie School of Public Service is dedicated to developing innovative, evidence-informed, and practical approaches to pressing health and social challenges faced by individuals, families, and communities.

About the Muskie School of Public Service

The Muskie School of Public Service is Maine's distinguished public policy school, combining an extensive applied research and technical assistance portfolio with rigorous undergraduate and graduate degree programs in geography-anthropology; policy, planning, and management (MPPM); and public health (MPH). The school is nationally recognized for applying innovative knowledge to critical issues in the fields of sustainable development and health and human service policy and management and is home to the Cutler Institute for Health and Social Policy.

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