# POST-PANDEMIC WORKFORCE SURVEY

EMERGENCY MANAGEMENT
ANNE ARUNDEL COUNTY

ANNE ARUNDEL
ECONOMIC DEVELOPMENT CORPORATION

AAWDC
ANNE ARUNDEL
WORKFORCE DEVELOPMENT
CORPORATION

# BACKGROUND

The COVID-19 pandemic sent shock waves through the world economy, triggering the largest global economic crisis in more than a century. In February 2020, when an Anne Arundel County resident first tested positive for the virus, the nation was experiencing the largest economic expansion in history, dating back to 2009. As the pandemic spread, local, state, and global economies all dealt with supply chain disruptions, inflation, and workforce shortages. State and local governments grappled with business and building closures, social distancing guidelines, and service delivery reductions in different ways creating an uneven recovery trajectory. An analysis of the post-pandemic environment suggests that the economic recovery from the crisis did not follow the same trajectory as the medical recovery and that many of the economic inequities that existed before the pandemic were exacerbated by it.

## THE COVID-19 PANDEMIC DISRUPTS ANNE ARUNDEL COUNTY JOB GROWTH AND WORKFORCE AVAILABILITY

Data from the US Bureau of Labor Statistics shows that in the decade leading up to the beginning of the pandemic, Anne Arundel County recorded the second largest number of jobs added among all Maryland counties, fueled in large part by the opening of Maryland Live!, growth in the distribution industry, and expansions at Fort George G. Meade. Due to COVID-19 being transmitted communally, the hospitality industry - which includes restaurants, hotels, and tourism - was hit especially hard. Anne Arundel's reliance on tourism as a major economic driver meant that numerous industries felt the impact of the County's economic disruption.

## SEEKING ANSWERS

The lack of qualified candidates was among the many challenges facing the business community as a result of the pandemic. Anne Arundel Workforce Development Corporation (AAWDC), Anne Arundel Economic Development Corporation (AAEDC), and the Anne Arundel County Office of Emergency Management (OEM) conducted a survey to examine what factors impacted the decline in participation in the workforce. Though the pandemic was the triggering event, the group sought to look at reasons why people did not return to the workforce in the post-pandemic environment. AAWDC serves as the "bridge between understanding the workforce and talent development needs of local and regional businesses," so understanding the motivations of the post-pandemic workforce is vital information. In addition to gathering information on the people who left the workforce, the group also surveyed those trying to re-enter and those seeking to enter for the first time. As the pandemic changed the way many people relate to their job, it is important for the business community to understand what workforce participants are looking for in their next employer.

## SURVEY BASICS

The survey was opened on September 23, 2024 and remained open through October 17, 2024. The survey produced 5,006 unduplicated responses. Not all questions were answered in all questionnaires and some questions allowed for multiple responses creating some discrepancies when total numbers are compared across charts. The questionnaire is provided in the Appendix.

The survey results provided data unavailable elsewhere as it generated responses directly from former employees and job seekers. Many surveys and countless informal discussions that drove policy changes during and immediately following the pandemic were from the perspective of the employers as their insights were more easily accessible. In Maryland, the small number of statewide surveys that gathered data directly from employees centered around specific industries facing the most serious challenges such as healthcare, childcare, and eldercare.

The survey questioned two groups of people: those opting not to return to the workforce and those looking to re-enter or join for the first time. Respondents who chose not to return to the workforce were asked which factors played the most important role in that decision. Those re-entering the workforce or entering for the first time were asked which factors are most responsible for influencing their career choices. Other questions were asked to gather additional insight.

## WHO RESPONDED

This section will first break down all respondents as a whole and then look at the demographics of the two main groups surveyed. The survey generated 5,006 unduplicated responses, an unusually large response rate for a survey of this subject matter. This analysis does not incorporate any random sampling. By not sampling, the group will better understand the population it serves and better frame policy decisions and outreach strategies moving forward. Exhibits A, B, and C show the age, ethnicity, and education attainment distribution of the respondents.

EXHIBIT A
### AGE RANGE OF RESPONDENTS

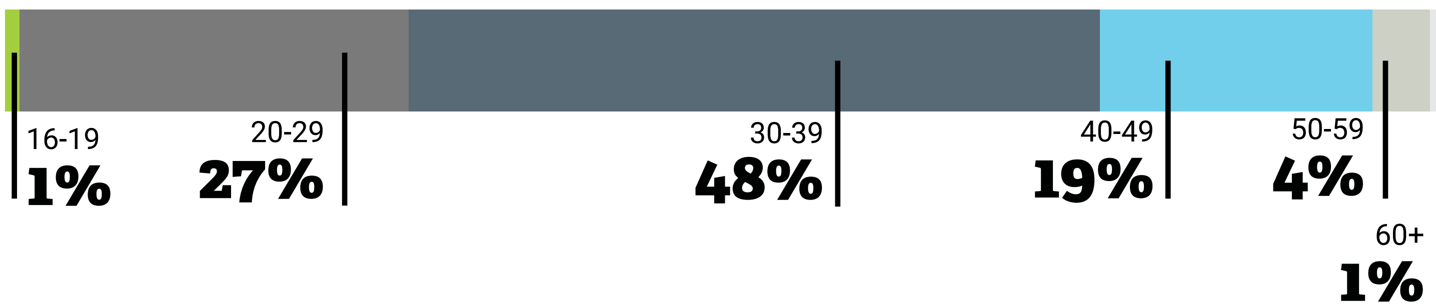



EXHIBIT B
### ETHNICITY OF RESPONDENTS

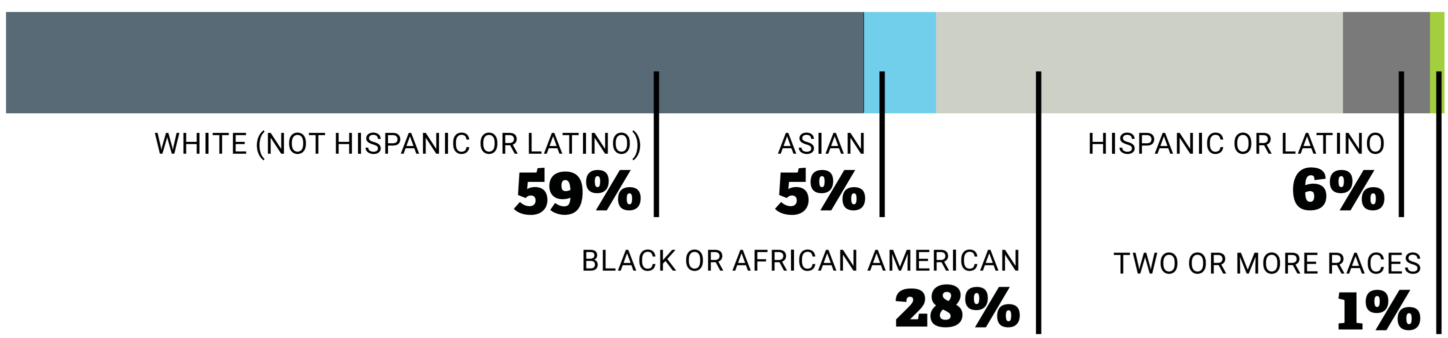
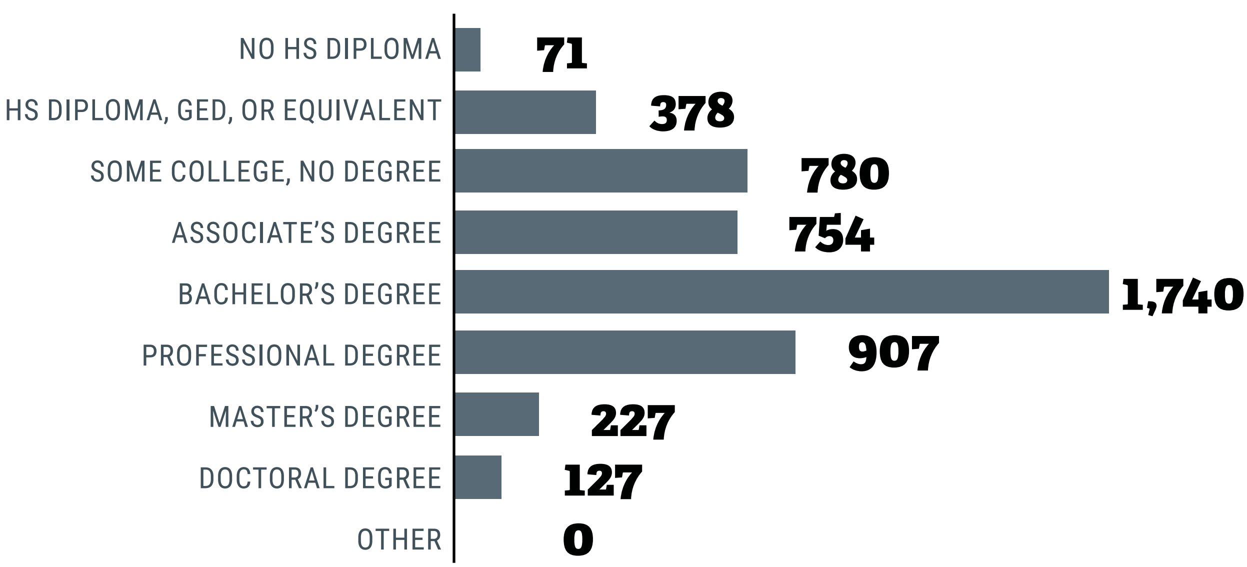



EXHIBIT C
### EDUCATIONAL ATTAINMENT OF RESPONDENTS

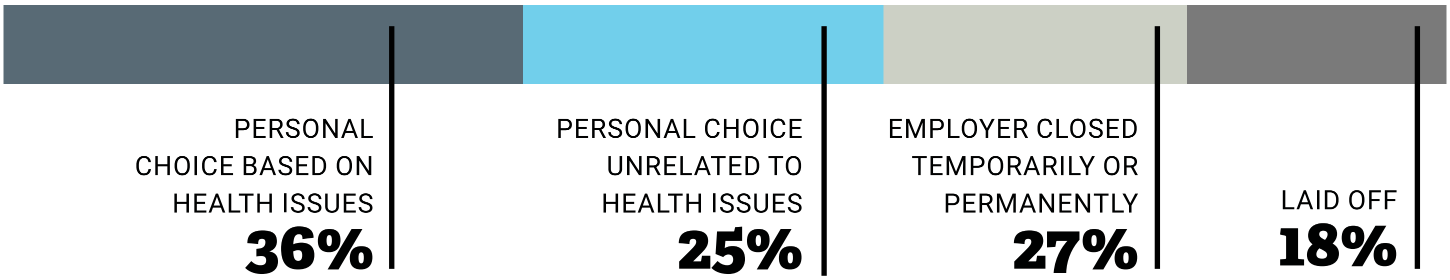


### WHY DID SURVEY RESPONDENTS LEAVE THE WORKFORCE?

As illustrated in Exhibit D, the most common response when asked why they left the workforce during the pandemic was personal choice based on health issues, while the least common was being laid off.

EXHIBIT D

### REASONS FOR LEAVING THE WORKFORCE DURING THE PANDEMIC

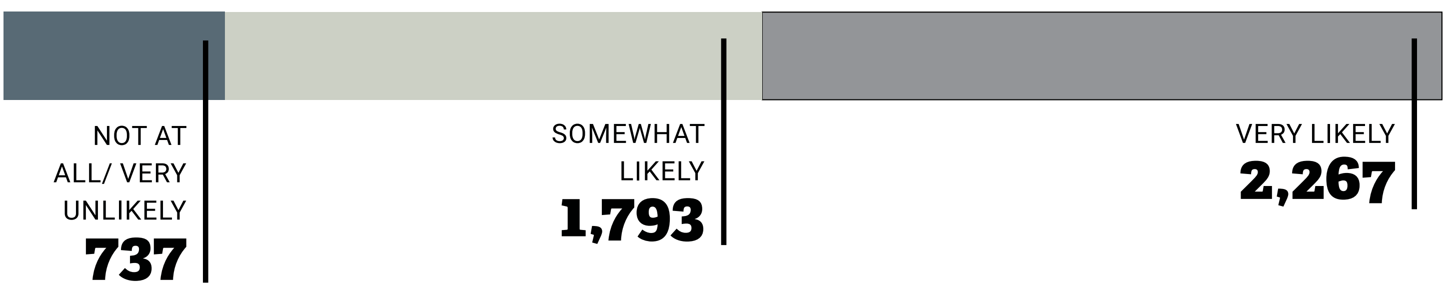


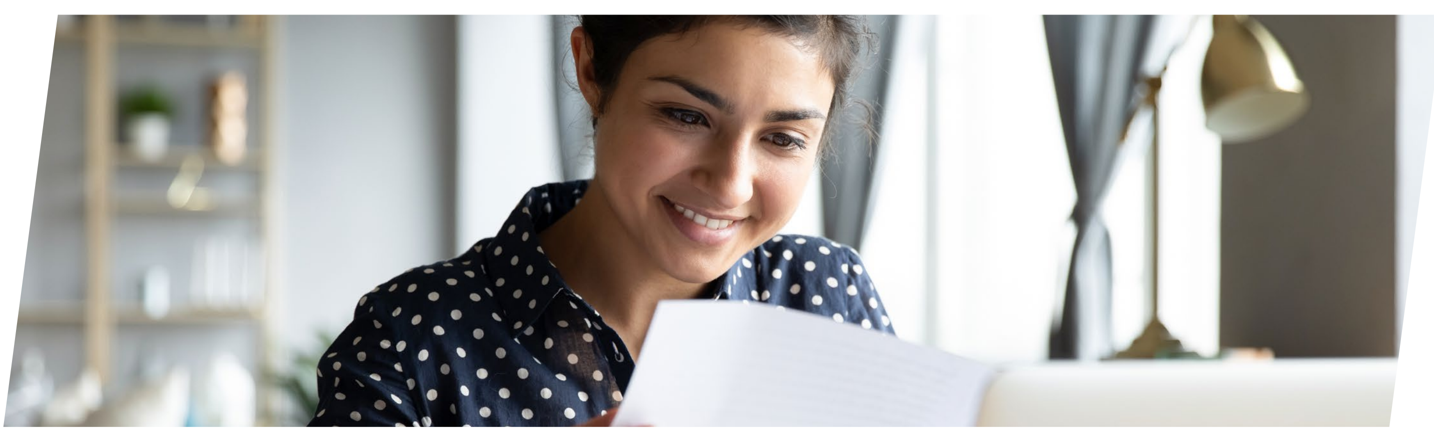

### COMPARING THE OPT-OUTS AND THE JOINERS

Survey participants can be broken down based on their responses to the question related to how likely they are to join/rejoin the workforce. The respondents stating that they were not re-entering or not likely to re-enter are treated as one group and the respondents stating they are somewhat likely or very likely are treated as a separate group. For simplicity, the respondents not seeking to re-enter the workforce are referred to as “Opt-outs” and those likely or definitely seeking employment will be referred to as “Joiners.” Exhibit E shows the breakout of the two groups on the left, and on the right shows how the Joiners break out according to “Somewhat Likely” and “Very Likely” seeking employment.

EXHIBIT E

### DISTRIBUTION OF NOT LIKELY AND LIKELY JOB SEEKERS



The number of Joiners is much larger than the number of Opt-outs. From a demographic standpoint, there is little to distinguish who is more likely to fall into either category of respondent. Exhibit F shows a demographic comparison of the two respondent groups.

EXHIBIT F

## DEMOGRAPHIC COMPARISON OF JOINERS AND OPT-OUTS

| Educational Attainment | Unlikely | Likely | | Race | Unlikely | Likely | | Age | Unlikely | Likely |
|---|---|---|---|---|---|---|---|---|---|---|
| NO HIGH SCHOOL DIPLOMA | 1% | 1% | | ASIAN | 7% | 5% | | 16-19 | 2% | 1% |
| HIGH SCHOOL DIPLOMA, GED, OR EQUIVALENT | 8% | 8% | | BLACK OR AFRICAN AMERICAN | 24% | 29% | | 20-29 | 31% | 26% |
| SOME COLLEGE, NO DEGREE | 16% | 15% | | HISPANIC OR LATINO | 8% | 6% | | 30-39 | 41% | 49% |
| ASSOCIATE'S DEGREE | 15% | 14% | | TWO OR MORE RACES | 1% | 1% | | 40-49 | 16% | 20% |
| BACHELOR'S DEGREE | 35% | 35% | | WHITE (NOT HISPANIC OR LATINO) | 59% | 59% | | 50-59 | 7% | 4% |
| DOCTORAL DEGREE | 3% | 3% | | | | | | 60+ | 3% | 1% |
| GRAND TOTAL | 100% | 100% | | GRAND TOTAL | 100% | 100% | | GRAND TOTAL | 100% | 100% |

As the data demonstrates, the distribution by demographic group is remarkably similar when comparing the Joiners and the Opt-outs. The only notable exception is with age where respondents in the 20-29 and 30-39 age groups were slightly more represented in the Joiner group than the Opt-out group. Though there is nothing obvious to explain why these distributions are so similar, it does simplify communication strategies since messages to job seekers and non-job seekers are similar profiles.

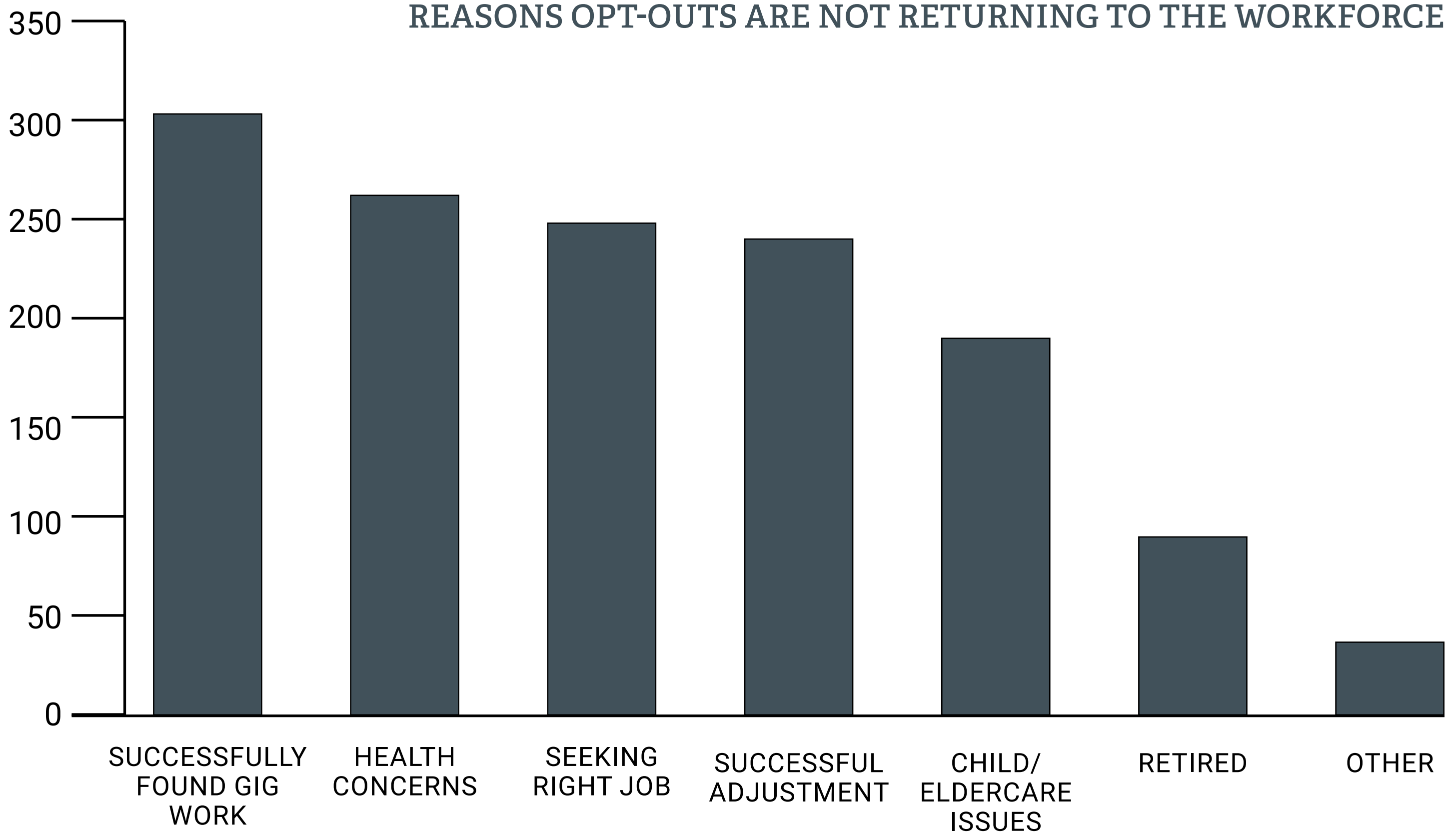
## THE OPT-OUTS: WHY HAVEN'T THEY RE-ENTERED THE WORKFORCE?

In the survey, 737 respondents (19%) identified themselves as not at all likely to return to the workforce or somewhat unlikely to return to the workforce. For simplicity's sake, the "not at all likely to return" group will be described as "very unlikely to return" for the rest of this report. The survey sought to identify both the reasons they left the workforce and their reasons for choosing not to return.

Respondents classified as Opt-outs were asked why they have not returned to the workforce. They were allowed to provide multiple answers which accounts for a higher number of responses than the number respondents providing reasons. Exhibit G shows the reasons why respondents are very or somewhat unlikely to return to the workforce for all age groups combined. The responses are in descending order of the cumulative rankings across all age groups, with finding gig work being the most common response and retirement being the least common besides Other.

EXHIBIT G

## REASONS OPT-OUTS ARE NOT RETURNING TO THE WORKFORCE




When respondents were asked why they did not plan to return to the workforce, answers varied by age group. Exhibit G showed the rank order of each of the options provided for all age groups combined. Exhibit H divides the Opt-outs into various age brackets, examining the rank order for each age group. Nearly half of survey respondents fall into the 30-39 age group, so the rank order looks quite different than the prior Exhibit G. The order differs from the order above because each age group is weighted equally though almost half of all respondents fall into the 30-39 age bracket.

EXHIBIT H

## RANK ORDER OF WHY PEOPLE DO NOT PLAN TO RETURN TO WORKFORCE BY AGE GROUP

| | 16-19 | 20-29 | 30-39 | 40-49 | 50-59 | 60+ |
|---|---|---|---|---|---|---|
| HEALTH CONCERNS | 1 | 3 | 3 | 3 | 2 | 2 |
| FOUND SUFFICIENT GIG WORK | 2 | 2 | 2 | 1 | 4 | 4 |
| ADJUSTED SUCCESSFULLY TO NEW CIRCUMSTANCES | 3 | 1 | 1 | 4 | 3 | 6 |
| LOOKING FOR THE RIGHT JOB | 4 | 4 | 4 | 2 | 1 | 3 |
| UNABLE TO FIND SUFFICIENT CHILD/ELDERCARE | 5 | 5 | 5 | 5 | 5 | 5 |
| RETIRED | 7 | 7 | 6 | 7 | 6 | 1 |
| OTHER | 6 | 6 | 7 | 6 | 7 | 7 |

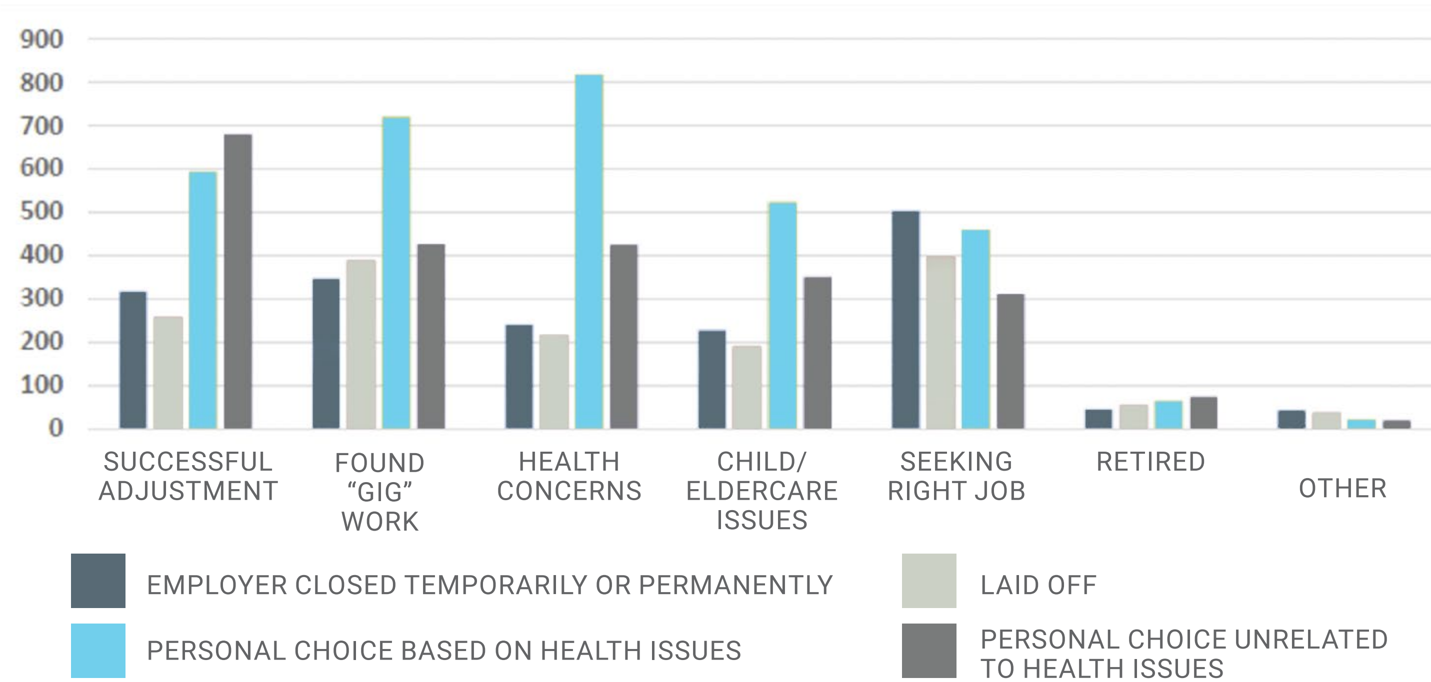
1 = RANKED HIGHEST FOR THE AGE GROUP 7 = RANKED LOWEST FOR THE AGE GROUP

Lack of affordable and available care for children and the elderly is an issue that preceded the pandemic. While respondents did not identify child/eldercare as a main reason for not returning to the workforce, the pandemic did exacerbate the problem. However, lower availability of care has driven costs to high levels. While the data does not support the lack of affordable and available care as one of the main drivers for workforce decisions, the problem has not yet been resolved.

The survey sought to more closely examine the Opt-out population, by looking at each reason for not returning to the workforce and breaking it down into why those respondents left the workforce. For example, for those who successfully adjusted outside of the regular workforce, they identified “personal choices unrelated to health issues” as the most frequent reason for leaving their job and being “laid off” as the least common reason. Exhibit I breaks down each category identifying the reasons for not returning to the workforce into the four reasons the respondents left the workforce.

EXHIBIT I

## REASONS RESPONDENTS HAVE NOT RETURNED TO THE WORKFORCE BY JOB LOSS CATEGORY




## THE JOINERS: DO THEY WANT PART-TIME OR FULL-TIME WORK?

Respondents indicating they were seeking to enter or re-enter the workforce are about four times more likely to do so on a full-time basis than a part-time basis. Exhibit J shows the breakdown of the desired work type for likely and very likely job seekers.

EXHIBIT J

## INTENTION TO WORK FULL-TIME VS. PART-TIME FOR JOINERS

## THE JOINERS: DO THEY WANT PART-TIME OR FULL-TIME WORK?

Joiners were asked to rank which factors were most important in seeking the right job. Of the 3,537 respondents that provided rankings from 1-7 (with 1 being the most important), they considered salary and benefits as the two top priorities. Exhibit K provides the average score ranking with a low score indicating the stronger preference.

EXHIBIT K

### AVERAGE RANK SCORE OF WHAT APPEALS TO JOINERS

| | |
|---|---|
| SALARY | 1.9 |
| BENEFITS | 2.7 |
| GROWTH OPPORTUNITIES | 3.2 |
| ADJUSTABLE HOURS | 4.1 |
| COMPANY CULTURE | 4.9 |
| OPPORTUNITY TO WORK FROM HOME | 5.4 |
| WORK ENVIRONMENT | 5.8 |

## THE JOINERS: WHAT IMPACTS THE DECISION TO RE-ENTER THE WORKFORCE FOR DISPLACED JOINERS?

Joiners who were laid off or whose employer closed due to the pandemic were then asked what factors impacted their decision to re-enter the workforce (displaced Joiners). Exhibit L shows responses from the displaced Joiners but excludes those who left the workforce voluntarily and first-time job seekers. The purpose of this analysis is to determine what future employment factors are most important to those who lost their jobs due to the pandemic.

EXHIBIT L

### FACTORS IMPACTING DECISIONS FOR PEOPLE SEEKING TO RE-ENTER THE WORKFORCE

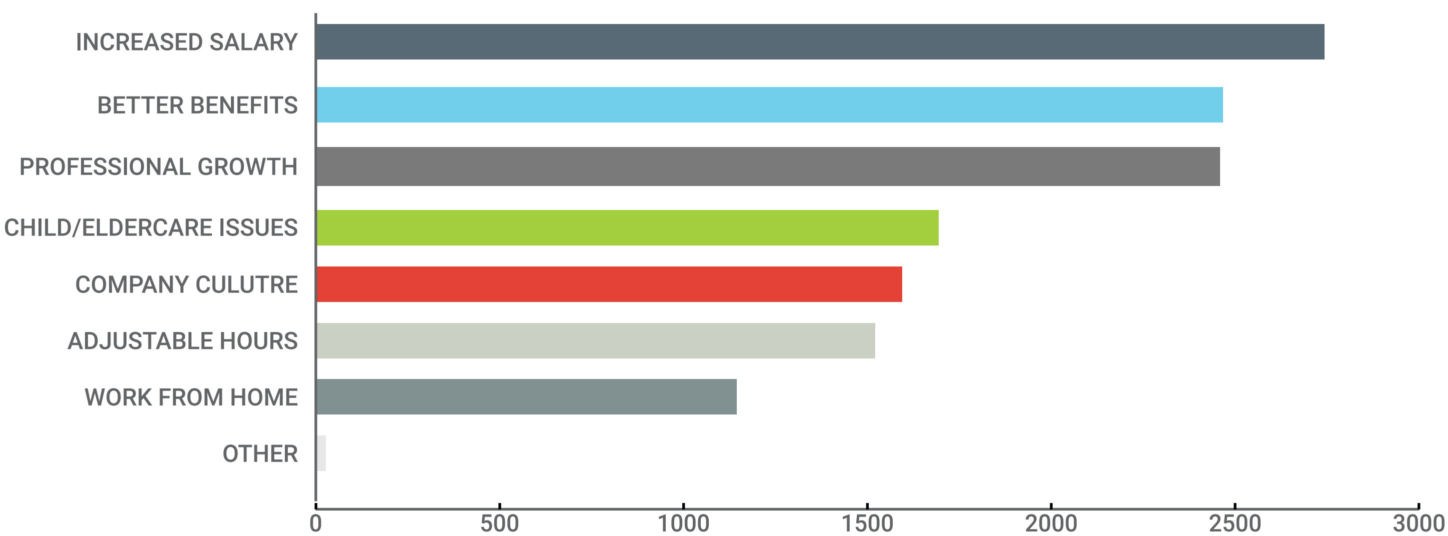



Exhibit L does not support the continued importance of many of the factors that emerged from the pandemic (telework, flexible hours) which were assumed to be a permanent part of the job market. Traditional responses (salary, benefits, professional growth) appear to be enduring.

## TRANSPORTATION: COMPARING RESPONSE OF THE JOINERS AND THE OPT-OUTS

Access to reliable transportation is an important component of workforce development strategies. The ability to get to and from work in a reasonable amount of time can impact job decisions. When the cost of owning and maintaining a personal vehicle is too high, public transit is essential to connecting workers to their workplace, as well as for access to job training programs, vocational schools, and other educational institutions that can help individuals acquire the skills they need to compete in the workforce.

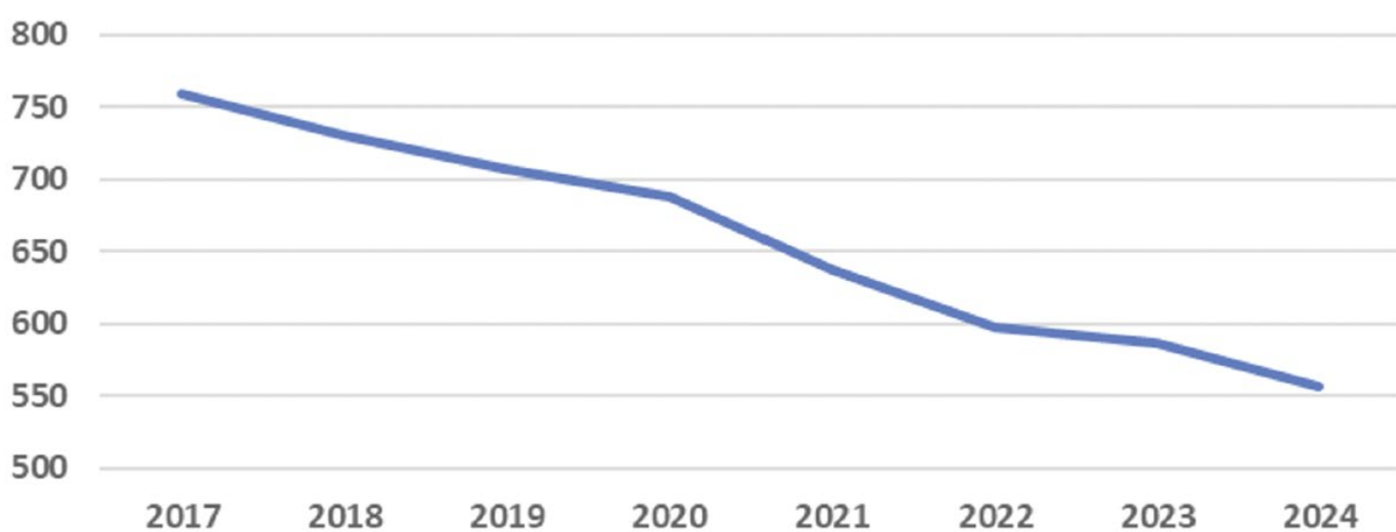
The survey asked respondents if transportation was a factor in their job search. When asked, 84% of Joiners responded Yes, transportation played a role. Though they are not actively seeking employment, 84% of Opt-outs also said that transportation is an important issue. Overall, the demographics of those indicating transportation is a factor are almost identical to the demographics and job-seeking factors of the entire sample.

## HOW DID CHILDCARE AND ELDERCARE IMPACT RESPONSES?

On March 16, 2020, Maryland Governor Hogan issued an Executive Order that required all K-12 schools to close and also established restrictive guidelines on how childcare facility operations if the owner chose to remain open. Recent reporting in Maryland Matters indicates that since the pandemic began and the new guidelines were implemented, there has been statewide decrease of 15% in the number of childcare providers and 7% of childcare slots. Rural counties experienced drops of total providers and available slots as large as 25%. Exhibits M and N show the number of childcare providers and available slots, respectively, in Anne Arundel County from 2017 through 2024. The data shows that childcare accessibility issues predate the pandemic and the COVID crisis exacerbated the shortage. Though the number of available slots showed slight growth in the three years prior to the pandemic and the issuance of the Executive Order, the declining number of providers indicates that fewer providers were serving more children during that time.

EXHIBIT M

### NUMBER OF CHILDCARE PROVIDERS IN ANNE ARUNDEL COUNTY 2017-2024

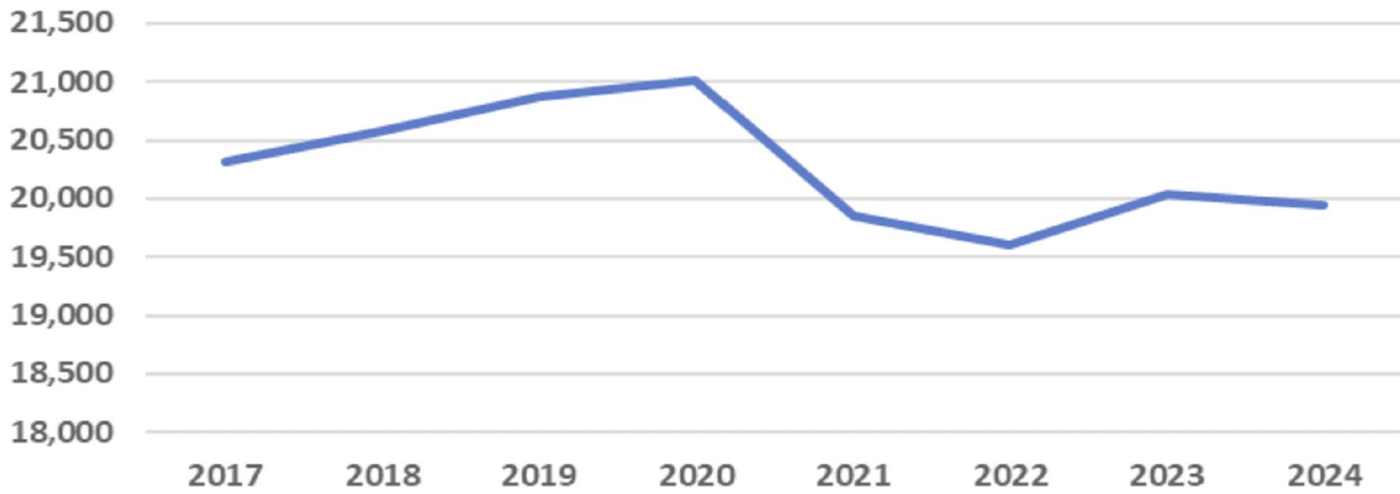



*Source: Maryland State Department of Education*

## HOW DID CHILDCARE AND ELDERCARE IMPACT RESPONSES?

EXHIBIT N

NUMBER OF CHILDCARE SLOTS IN ANNE ARUNDEL COUNTY 2017-2024




*Source: Maryland State Department of Education*

Data on eldercare reveals numerous problems in the industry prior to the pandemic, of which many were more severe than in the childcare industry. A report by Element Care cites low pay for staff, a lack of benefits, and coverage gaps in the Medicaid reimbursement processes as the leading factors in the low number of providers and available slots. The report also highlights how those issues were made worse by the pandemic.

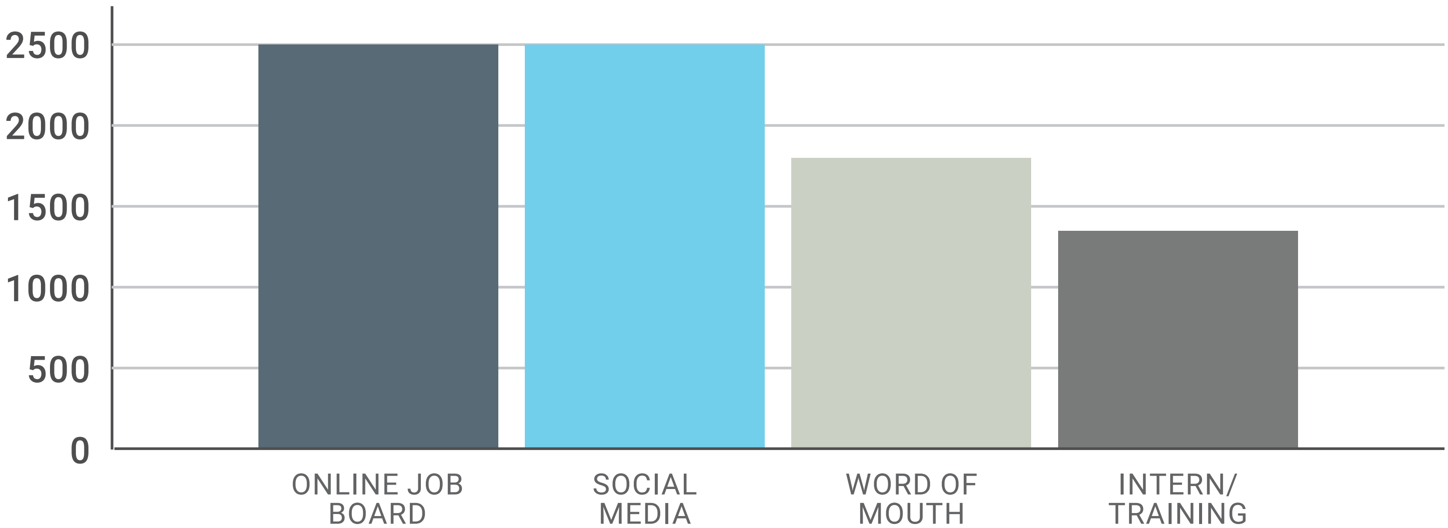
As with many factors mentioned previously there are few significant demographic differences when comparing respondents that identify childcare and eldercare as significant factors in their employment decisions against the entire sample. One exception is found among respondents who moved to the county since March 15, 2020, (the date used in the survey as the start of the pandemic as it coincides with school and government building closures) and currently identify as Opt-outs. Childcare and eldercare availability impacted employment decisions of 46% of the more recent resident Opt-outs versus 35% of the Opt-outs who were county residents prior to March 15, 2020.

Examining the survey results along with outside research illustrates that childcare and eldercare are very important issues but only apply to a small portion of those surveyed. As the survey indicates, newer Opt-out residents indicated those as important factors at a higher rate than pre-pandemic residents. As shown previously in Exhibit G, childcare and eldercare ranked fifth out of seven reasons for why Opt-outs are not returning to the workforce. Similarly, Exhibit H shows that Joiners across all age groups rank childcare and eldercare fifth among the priorities they will look for in their next job.

### THE JOINERS: JOB SEARCH TOOLS

The Joiners were asked which tools they have used in their job search. This is valuable information as the group implements job opportunities to job seeker and works with businesses to promote their opportunities. Exhibit O shows the count of how often different types of tools are utilized by Joiners.

EXHIBIT O
**JOB SEARCH TOOLS USED BY JOINERS**




### KEY FINDINGS

## 1. WORKFORCE ENTRY AND RE-ENTRY

THE SURVEY REVEALED THAT TRADITIONAL JOB ATTRIBUTES REMAIN PARAMOUNT FOR JOINERS:

- **Top Priorities:** Salary and benefits ranked highest, followed by growth opportunities.
- **Less Influential Factors:** Surprisingly, pandemic-era preferences like telework and flexible hours were not as important to the Joiners

## 2. REASONS FOR NOT RETURNING TO WORK

AMONG THE 737 RESPONDENTS WHO REPORTED BEING UNLIKELY TO RETURN TO WORK, KEY REASONS INCLUDED:

- **Health Concerns:** This was the most commonly cited factor across age groups.
- **Gig Work:** Many adjusted successfully to alternative income sources.
- **Sufficient Circumstances:** A notable portion expressed satisfaction with their current non-traditional arrangements.

## 3. DEMOGRAPHICS OF SURVEY RESPONDENTS

The survey participants were mostly white (59%) and college educated (75%). Age was the only demographic factor that noticeably influenced workforce re-entry decisions, with younger respondents (20-39 years) more likely to seek employment than older individuals.

## 4. TOOLS AND TRENDS FOR JOB SEEKERS

For those pursuing employment, digital platforms and traditional networking emerged as critical tools. Understanding these trends is vital for tailoring outreach and connecting job seekers with opportunities.

### IMPLICATIONS AND RECOMMENDATIONS

The survey results provide actionable insights for workforce development policies:

- **Focus on Fundamentals**: Salary, benefits, and career growth remain critical to attracting and retaining talent.

- **Streamline Communication**: Since job seekers and nonseekers share similar demographic profiles, outreach efforts can be unified and data driven.

- **Promote Adaptability:** Supporting individuals transitioning from traditional jobs to gig-based or non-traditional work arrangements could address emerging workforce trends.

# SURVEY QUESTIONS

Q1

### WHAT IS YOUR AGE?

a. 20-29
b. 30-39
c. 40-49
d. 50-59
e. 60+

Q2

### WHAT IS YOUR RACE/ETHNICITY?

a. White (not Hispanic or Latino)
b. Black or African American
c. Asian
d. Hispanic or Latino
e. Two or more races

Q3

### WHAT IS THE HIGHEST LEVEL OF EDUCATION REACHED?

a. No high school diploma
b. High school diploma, GED, or equivalent
c. Some college, no degree
d. Associate's degree
e. Bachelor's degree
f. Master's Degree
g. Professional degree
h. Doctoral degree

Q4

### ARE YOU AN ANNE ARUNDEL COUNTY RESIDENT?

a. Yes
b. No

Q5

### IF YES, WHEN DID YOU MOVE TO THE COUNTY?

a. Prior to March 15, 2020
b. Between March 16, 2020 and July 1, 2021
c. After July 1, 2021

Q6

### WHAT RESPONSE BEST EXPLAINS WHY YOU LEFT YOUR JOB DURING THE COVID-19 PANDEMIC (MARCH 15, 2020 THROUGH JULY 1, 2021)?

a. Personal choice unrelated to health issues
b. Personal choice based on health-related issues
c. Laid off
d. Employer closed temporarily or permanently

Q7

### WHAT ARE THE MAIN REASONS FOR NOT RETURNING TO THE WORKFORCE?

a. Successfully adjusted with lower income
b. Engaged in part-time "gig" work
c. Health related matters
d. Childcare or eldercare issues
e. Haven't found the right job
f. Retired
g. Other (please specify)

Q8

### HOW LIKELY ARE YOU TO REENTER THE WORKFORCE?

a. Very likely
b. Somewhat likely
c. Somewhat unlikely
d. Not at all likely

Q9

### IF YOU REENTERED THE WORKFORCE, WOULD IT MORE LIKELY BE FULL-TIME OR PART-TIME?

a. Full-time
b. Part-time

# SURVEY QUESTIONS

Q10
## WHICH OF THE FOLLOWING CIRCUMSTANCES WOULD MOST LIKELY LEAD YOU TO REENTER THE WORKFORCE? A JOB WHERE... (MARK ALL THAT APPLY)
a. You experience an increase in salary
b. You receive benefits
c. There is a potential for professional growth
d. Company culture
e. Affordable and accessible child/eldercare
f. Adjustable hours
g. You have the ability to work from home
h. Other (please specify)

Q11
## ARE YOU CURRENTLY LOOKING FOR NEW OR BETTER EMPLOYMENT??
a. Yes
b. No

Q12
## WE ARE OFFERING YOU A $25 AMAZON GIFT CARD TO THE FIRST 100 RESIDENTS. PLEASE SHARE YOUR EMAIL ADDRESS

Q13
## WHICH OF THE FOLLOWING BEST DESCRIBES YOUR JOB SEARCH?
a. Unemployed, but actively looking
b. Looking for first full-time job
c. Employed, but looking for a better job

Q14
## PLEASE RANK THE FOLLOWING CONDITIONS AS THE MOST IMPORTANT WHEN YOU ARE SEEKING A NEW JOB:
a. Salary
b. Benefits
c. Potential for professional growth
d. Adjustable hours
e. Company culture
f. Ability to work from home
g. Work environment

Q15
## IS ACCESS TO TRANSPORTATION A CONCERN FOR YOUR JOB SEARCH?
a. Yes
b. No

Q16
## IS AFFORDABLE AND ACCESSIBLE CHILD/ ELDERCARE A CONCERN FOR YOUR JOB SEARCH?
a. Yes
b. No

Q17
## WHAT TOOLS ARE YOU USING IN YOUR JOB SEARCH? (MARK ALL THAT APPLY)
a. Online job boards
b. Social media
c. Word of mouth/referral
d. Participated in an internship/training program

Q18
## WHAT SERVICES WOULD FURTHER ASSIST YOU IN YOUR JOB SEARCH? (MARK ALL THAT APPLY)
a Resume/interview assistance
b. Job search assistance
c. Job skills training
d. Industry certification or credential
e. Connection to employers
f. Other (please specify)

Q19
## ARE YOU FAMILIAR WITH ANY OF THE FREE JOB SEEKING SERVICES OFFERED THROUGH THE CAREER CENTER/ANNE ARUNDEL WORKFORCE DEVELOPMENT CORPORATION?
a. Yes
b. No

PREPARED BY:

**POLICY NAVIGATORS L.L.C.**

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