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EXECUTIVE SUMMARY

MLSS began fieldwork for its second labour market study in December 2011. The survey covered the entire country and captured the perspectives of employers from various industries. A total of six hundred and six (606) organisations participated. The aim of the study was to identify:

- Areas of employment in the economy
- Gaps in the labour force as it relates to skilled labour
- Anticipated changes in the workforce
- The extent to which migrant skilled workers are employed
- Employment opportunities for persons with disabilities

Areas of Employment in the Economy

Of the 606 respondents, 218 or 36% reported that they had at least one vacant position during December 2010 to November 2011. The analysis revealed that half of the businesses in Kingston and St. Andrew had at least one vacancy. This was followed by Manchester with 41% and St. Catherine with 38%. Additionally, employment opportunities were greater in well established entities (over 25 years old) as 49% of these organisations indicated that they had at least one vacancy during December 2010 to November 2011. Additionally, 70% of the large enterprises reported at least one job opening.

At least half of the companies in the “Manufacturing” and “Transport, Storage and Communication” sectors and 41% in “Education”, 34% in “Hotel and Restaurant” had at least one vacancy. In order to enhance growth and remain viable, some organisations invested in new machinery, engaged in staff restructuring exercises or focused on core business. More than half of the businesses in the “Manufacturing” sector indicated that they had reorganised their operations during 2009 to 2011. In addition approximately 40% of establishments in “Education”, and “Other Community Social and Personal Services” sectors indicated that they had reorganised their operations.

The types of workers which were mostly needed as a result of the reorganisation were in the “Professional, Senior Officials and Technicians”, “Clerks” and “Service Workers, Shop and Market Sales Workers” occupational groups. In addition, most of the vacancies were associated with the “Professional, Senior Officials and Technicians” with 42.3%.

Skill gaps in the Labour Force

Approximately 8% of the employers who reported that they had vacancies had unfilled positions after November 2011. This was mainly attributed to an inability to find the skills needed for the positions and a decline in business operations. The respondents stated that they needed workers with for example administrative, portfolio management, driving, accounting, customer service and teaching skills. They also indicated the need for skilled workers such as Forklift Operators, Urologists, Curators for Museums and Pharmacists. Skill shortage was predominantly in “Wholesale and Retail” and “Manufacturing” sectors.

Approximately 58% of the employers reported that they provided skills training for their staff. Most of the training was done in-house (49.7%). Training needs were identified by 34% of the employers. They indicated that training was needed in areas such as Upholstering, Mechanical Engineering, Welding, Geographic Information System, Customer Service, Accounting, Financial Management and Risk Management.

Anticipated Changes in the Workforce

Approximately 33% of the employers indicated that they anticipated an increase in the number of workers over the next two years, 26% indicated no change and 7% projected a decrease. The types of occupations that were expected to increase included auto mechanics, Chinese chefs, electrical technicians, engineers, machine operators and registered nurses. Meanwhile those forecasted to decrease included dressmakers, laundry attendants and records clerks. Almost half of the employers who anticipated an increase in employment foresaw an expansion in business. Employers who expected a decrease in the number of workers attributed it to the lingering effects of the global recession and a need for restructuring. A large percentage of the organisations in the “Electricity, Water and Gas” sector projected an increase in the number of employees.

Employment of Migrant Workers

Eight per cent (8%) of the employers indicated that they recruited workers from abroad. Almost half (46%) cited an inability to find suitable candidates locally while 17.5% stated that local workers had poor work ethic. Most of the employees from overseas (85%) were recruited to fill positions in the “Professional, Senior Officials and Technicians” occupational group. They included Gemmologists, Medical Officers, Senior Executives/Managers, Engineers and Teachers.

Employment Opportunities for Persons with Disabilities

A small number of the participants (8%) indicated that at least one person with a disability was employed to their organisations. These workers were deaf and hearing impaired; had a physical disability or were intellectually impaired. The respondents indicated that persons with disabilities were employed as both high and low skilled workers. The positions in the high skilled areas included Lawyers, Accountants, Managers, Teachers and Medical Technologists. Positions in the low skilled areas included Office Attendants, Ancillary Workers, Cane Cutters, Packers and Janitors. More than a third of the employers who did not employ persons with disabilities, expressed a willingness to employ at least one such person in the next 12 months.

1.0 INTRODUCTION

Jamaica's economy is susceptible to external shocks such as the global recession which negatively impacted employment. The rate of unemployment in Jamaica declined from 15.1% in 2002 to 9.7% in 2007. However this was followed by three successive years of increase as a result of the global recession with unemployment moving from 10.6% in 2008 to 12.4% in 2011 as there was reduced demand for locally produced goods.

Despite the high unemployment rate there are skills gap in the local labour force. Information is needed on these gaps in order to inform policy makers, students, guidance counsellors, career developers and employers. The Ministry of Labour and Social Security (MLSS) has been mandated to provide labour market information (LMI) to the stakeholders. Labour market studies are designed to provide LMI data about the gaps in the labour market. Consequently information was sought on:

- The sectors which are growing in order to identify employment opportunities
- Skills gaps in the Jamaican economy
- The types of occupations which will be in demand over the next 2 years
- Opportunities for employment for persons with disabilities

2.0 METHODOLOGY

A quantitative establishment survey was conducted island wide in order to identify employment opportunities as well as the skills which were needed by employers. In addition secondary data was used to illustrate the trends in the labour market from 2008 to 2011.

2.1 Quantitative Methodology

The sample frame which comprised organisations from the National Insurance Scheme (NIS) database was stratified by parish and sector. The NIS database was used as it included establishments with one employee or more. This was done to facilitate the inclusion of establishments from rural Jamaica.

In order to ensure a representative sample, 1200 organisations were targeted. The sample included 300 organisations from Kingston and St. Andrew, 100 from St. Catherine, 100 from St. James and 70 each from all the other parishes. In addition, an attempt was made to ensure that each sector was represented. A total of 606 entities from all 15 sectors participated. The field work began in December 2011 and lasted for three months. The information was collected through the administration of questionnaires via face-to-face and telephone interviews.

2.2 Secondary Data

Secondary data were gleaned from publications by Planning Institute of Jamaica (PIOJ) and MLSS. This was used to assist in identifying trends in the labour market by providing information on the supply side of the labour market.

2.3 Constraints

The limitations of the study included an inadequate sample frame. Attempts were made to remove establishments which were no longer in operation from the sample frame by using the telephone directory to confirm their existence[1]. Additionally, most of the establishments were in Kingston and St. Andrew (KSA) and some of the establishments in the rural areas asked the interviewers to contact their head offices (which in many instances were located in KSA) for the information required. This proved to be problematic as in some instances the headquarters had limited information about the parish office and provided general information about the entire business.

[1] The ideal verification would have been to visit the location of the establishment on the NIS listing

The data gathering was negatively impacted by the unavailability of prospective respondents. In some cases interviews were re-scheduled which led to an extension in the time allocated for interviews although there were cancellations. This contributed to low response rates in parishes such as Clarendon and St. Elizabeth which were therefore excluded from various aspect of the analysis.

3.0 LABOUR MARKET TRENDS: 2008 - 2011

Several labour market indicators were reviewed for the period 2007 to 2011 in order to highlight the gaps in the labour market. The following labour force indicators and related areas were examined:

- Labour force distribution
- Employment by sector and occupational group
- Informal employment
- Unemployment distributed by age
- Certification in Jamaica
- Migration and work permit
- Real Gross Domestic Product (GDP)
- Poverty

3.1 Labour Force Indicators

Table 1 shows the labour market statistics for the period 2007 to 2011. The Jamaican labour force and the number of persons employed declined during the period 2009 to 2011. On the other hand the unemployed labour force increased steadily during 2007 to 2011 with the unemployment rate increasing from 9.7% in 2007 to 12.4% in 2011.

LABOUR FORCE INDICATORS: 2007 - 2011

Table 1

Labour Market Indicators	2007	2008	2009	2010	2011
Labour Force	1,261,686	1,285,253	1,254,021	1,230,501	1,229,253
Employed Labour Force	1,149,975	1,162,175	1,126,075	1,094,925	1,093,533
Unemployed labour Force	111,711	123,078	127,946	135,576	135,720
Unemployment Rate	9.71	10.59	11.36	12.38	12.41

Source: ***The Labour Force*** (various editions)

3.1.1 Employed Labour Force by Sector

The average statistics computed for each sector in Table 2 for the period 2007 to 2011 shows that the "Wholesale & Retail, Repair of Motor Vehicle & Equipment" sector had the largest share of employed labour force (19.3%). This was followed closely by "Agriculture, Hunting, Forestry & Fishing" (19%) and then "Construction" (8.9%). The "Mining & Quarrying" employed the smallest number of workers (0.6%).

On closer examination of the trends in employment only two sectors recorded increased growth in 2010 relative to 2009. These were "Real Estate, Renting and Business Activities" and "Public Administration and Defence; Compulsory Social Security". The general decline was associated with the global recession which led to decreased demand for local goods and services and the subsequent closure of some businesses. This was particularly evident in the "Mining and Quarrying" sector where for example the West Indies Alumina Company (WINDALCO) closed in 2009.

EMPLOYED LABOUR FORCE BY SECTOR: 2007 - 2011

Table 2

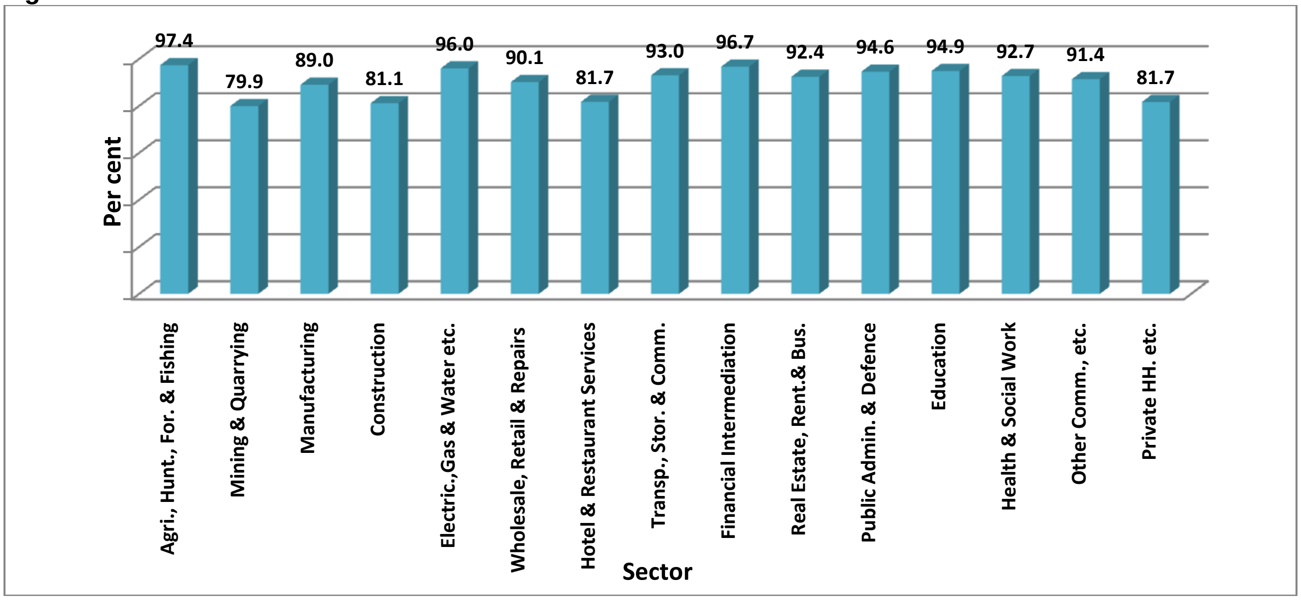
Sector	2007 ('000)	2008 ('000)	2009 ('000)	2010 ('000)	2011 ('000)	Average number of workers (%)
Agriculture, Hunting, Forestry & Fishing	210.1	216.9	227.4	221.7	192.4	19.0
Mining & Quarrying	8.3	9.8	5.6	3.8	4.3	0.6
Manufacturing	85.5	85.3	77.7	74.2	74.8	7.1
Electricity, Gas and Water Supply	7.8	7.6	8.1	6.7	8.3	0.7
Construction	117.3	109.0	96.0	89.6	88.2	8.9
Wholesale and Retail, Repair of Motor Vehicle and Equipment	217.5	223.4	214.8	211.4	219.2	19.3
Hotels and Restaurants Services	81.4	80.2	78.9	74.4	74.8	6.9
Transport, Storage and Communication	81.3	82.4	76.5	74.3	72.3	6.9
Financial Intermediation	19.5	22.3	25.7	24.3	25.3	2.1
Real Estate, Renting and Business Activities	45.7	50.2	48.2	52.0	59.0	4.5
Public Administration and Defence; Compulsory Social Security	60.1	55.2	51.1	54.6	55.8	4.9
Education	57.9	64.9	67.2	66.2	70.0	5.8
Health and Social Work	28.9	31.1	29.1	25.3	28.8	2.5
Other Community, Social and Personal Service Activities	54.1	55.3	56.6	54.3	59.2	5.0
Private Households with Employed Persons	67.6	62.6	59.5	58.5	59.0	5.5
Industry Not Specified (including Extra-Territorial Bodies)	7.2	6.3	3.8	3.7	2.4	0.4

Source: ***The Labour Force*** (various editions)

The employment statistics which are represented in Figure 1 shows that the "Agriculture, Hunting, Forestry and Fishing" sector had the highest employment rate with 97.4% and Financial Intermediation was next with 96.7%. The two sectors with the lowest employment rates were "Construction" with 81.1% and "Mining and Quarrying" with 79.9%.

EMPLOYMENT RATE BY SECTOR: 2008 - 2011

Figure 1



Source: ***The Labour Force*** (various editions)

The average figures for 2007 to 2011 showed that the largest percentage of employed persons belonged to the "Professionals, Senior Officials and Technicians" occupational group (19.8%). (See Table 3). "Service Workers, Shop and Market Sales Workers" was next with 19.3%. The smallest occupational group was "Plant and Machine Operators and Assemblers" with an average of 5.9% of the labour force.

EMPLOYED LABOUR FORCE BY OCCUPATIONAL GROUP: 2007 - 2011

Table 3

Occupational Group	2007	2008	2009	2010	2011	Average number of workers
	('000)	('000)	('000)	('000)	('000)	(%)
Professionals, Senior Officials and Technicians	220.3	227.2	220.3	212.9	235.1	19.8
Clerks	100.8	102.4	105.4	98.6	100.2	9.0
Service Workers, Shop and Market Sales Workers	209.5	216.3	216.3	220.5	220.2	19.3
Skilled Agricultural and Fishery Workers	201.8	208.6	221.1	217.7	190.8	18.5
Craft and Related Trades Workers	177.3	170.1	152.3	146.2	145.9	14.1
Plant and Machine Operators and Assemblers	69.4	71.2	65.2	64.1	63.5	5.9
Elementary Occupations	172.5	163.9	144.7	134.3	136.8	13.4

Source: ***The Labour Force*** (various editions)

3.1.2 Informal Employment

Four groups of workers – "Own account workers and employers who own informal businesses", "Employees who work in enterprises with nine or less employees", "Contributing family members" and "Employees in jobs who do not contribute to NIS" – were used as the proxy for the informal sector. The labour force statistics indicate that "Wholesale and Retail, Repair of Motor Vehicle and Equipment" sector had the largest number of informal workers (153,200 or 36%) followed by "Construction" (73,200 or 17%). The occupational group with the largest number of workers in the informal sector was "Service Workers, Shop and Market Sales Workers" with 30%. "Craft and Related Trade Workers" was next with 27%.

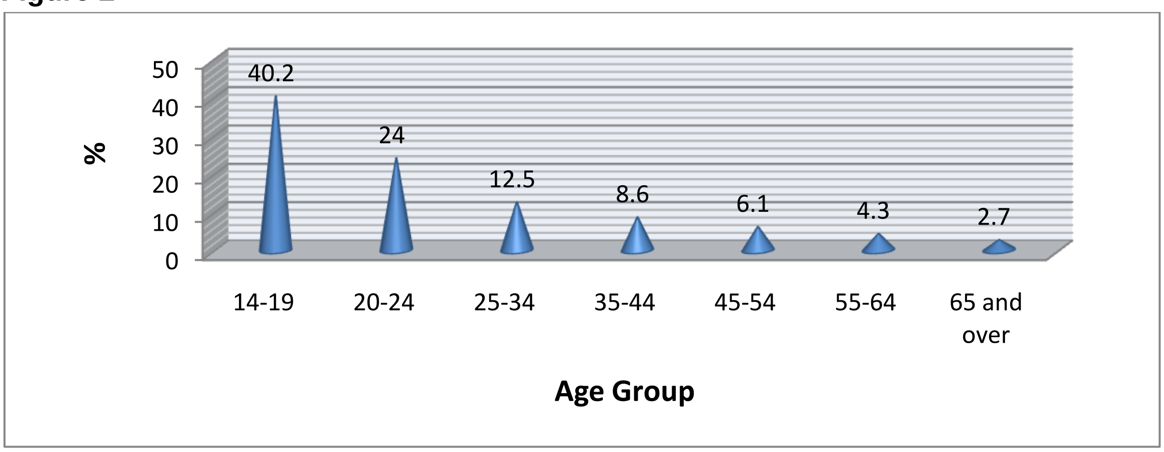
3.1.3 Unemployment by Age Group

As seen in Figure 2 the unemployment rate for the youth aged 14-19 years averaged 40.2% for the period 2007-2011 (***The Labour Force***, various editions). This was followed by the older youth cohort 20-24 years with 24%. A Youth Activity Survey conducted in 2002 revealed that unemployment was the number one concern among youths. Additionally, the ***National Employment Report*** (2006) stated that factors which contribute to the high unemployment rate among Jamaican youth included:

- Lack of jobs generated though aggregate demand
- Peer pressure and socio-cultural norms which devalue education and learning
- A large segment of the youth labour force is unemployable due to a lack of basic competences as well as poor attitude towards work
- Inadequate work experience

UNEMPLOYMENT RATE BY AGE GROUP: 2007 - 2011

Figure 2



Source: ***The Labour Force*** (various editions)

3.2 Certification of the Jamaican Labour Force

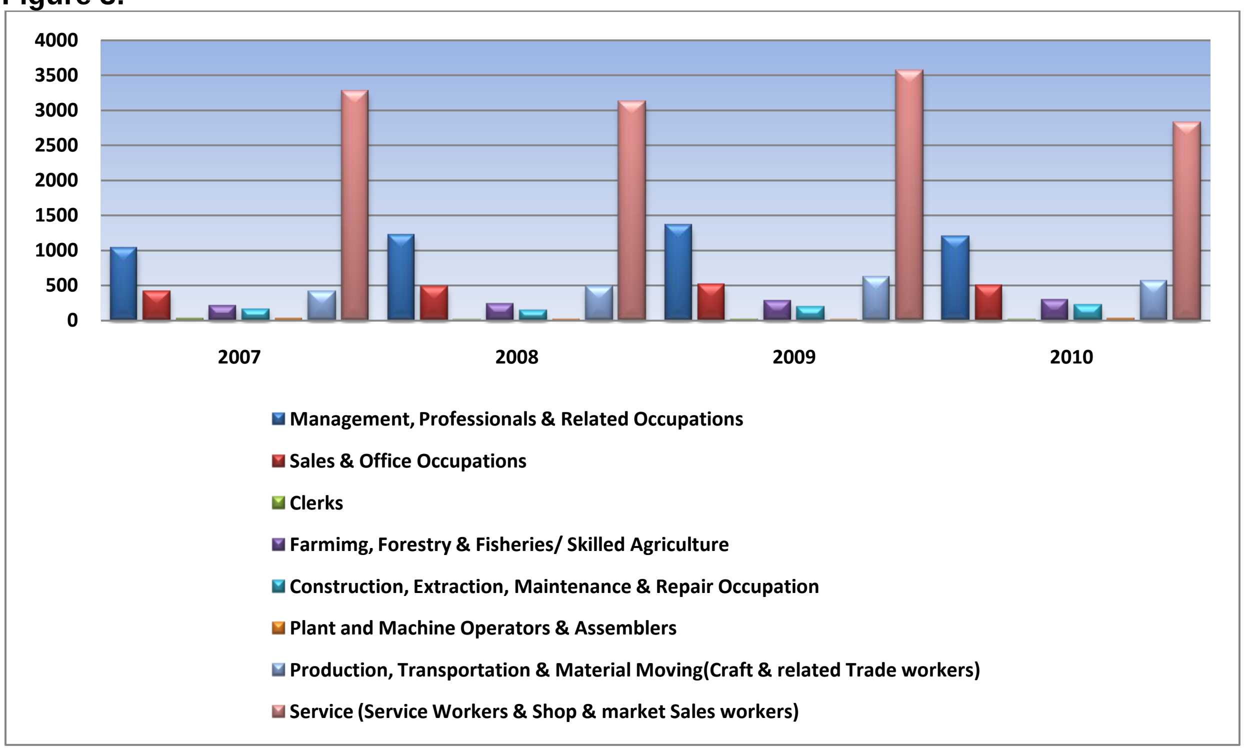
In addition to high unemployment, according to the ***Jamaica Survey of Living Conditions*** (JSLC) in 2010 approximately 71% of the Jamaican labour force was not certified. The proportion of persons who were certified varied according to socio-economic status and age. In 2010 at least 89.8% of the persons from the poorest quintiles were not certified compared to 52.5% of the wealthiest. Meanwhile 60% of persons who belonged to the 14-19 years cohort, 46% of those who were 20-24 years and 89% in the 60 years and over age group did not have certified skills.

3.3 Migration and Work Permit[2]

Data from the ***Economic Social Survey Jamaica*** for the period 2007-2010 showed that most of the workers who emigrated belonged to the "Service Workers and Shops and Market Sales Workers" occupational group (See Figure 3). Next was the "Management, Professionals and Related Occupations". A small proportion of the workers were in the "Clerks" and "Plant and Machine Operators and Assemblers" occupational groups.

MIGRANTS FROM JAMAICA BY OCCUPATION: 2007 - 2010

Figure 3:



Source***: Economic and Social Survey Jamaica*** (various editions)

[2] Statistics for 2011 were not available.

As seen in Table 4 the majority of work permit issued were to persons in the "Professionals, Senior Officials and Technicians" occupational group. This was followed by "Service Workers, Shops and Market Sales Workers" and "Craft and Related Trade Workers".

WORK PERMITS GRANTED: 2010 AND 2011[3]

Table 4

Occupational Group	2010	2011
Professionals, Senior Officials & Technicians	2,610	2,519
Clerks	84	66
Service Workers, Shops and Market Sales Workers	289	252
Skilled Agricultural & Fishery	38	27
Craft & related trade Workers	200	200
Plant & Machine Operators	58	14
Elementary	113	64

Source: Ministry of Labour and Social Security

During the period 2007-2011 there was a steady decline in the number of work permits granted by the Government of Jamaica (See Table 5). Most of the work permits were issued to organisations in the "Wholesale and Retail, Repair of Motor Vehicle and Equipment" sector while "Construction and Installation" was next.

WORK PERMITS APPROVED BY SECTOR: 2007 - 2011

Table 5

Sector	2007	2008	2009	2010	2011
Agriculture, Forestry & Fishing	51	108	125	41	114
Mining and Quarrying	139	60	19	22	16
Manufacturing	109	175	75	58	38
Construction and Installation	1,958	1,475	570	374	426
Electricity, Gas and Water Supply	184	24	59	67	92
Transport, Storage & Communication	260	346	259	285	172
Wholesale and Retail, Repair of Motor Vehicle and Equipment	2,285	2,313	2035	2,120	1,887
Financing, Insurance, Real Estate & Business Services	131	144	74	83	90
Community, Social and Personal Services	458	439	353	343	306
TOTAL	**5,575**	**5,084**	**3569**	**3393**	**3141**

Source: Ministry of Labour and Social Security

3.4 Real Gross Domestic Product (GDP) of Select Sectors

Statistics published by STATIN from 2007-2011 indicated that real GDP averaged $743.50 billion with an annual growth rate of 0.62%. During the five year period, the real GDP of the Service Industry was higher than the Goods Producing Industry. The average percentage contribution of the Services Industry to GDP growth was 79.4% while the Goods Producing Industry contributed 25.10%. The sectors which are being highlighted are "Agriculture, Forestry and Fishing", "Mining and Quarrying", "Manufacturing" and "Construction".

[3] Statistics were not available for the calendar years 2007 to 2009.

AVERAGE GROWTH AND CONTRIBUTION TO GDP (2007 PRICES) BY SECTOR: 2007 - 2011

TABLE 6

Industry Group	Average GDP		2007-2011
	Total $b)	Average % Change	% Contribution. to GDP
Agriculture, Forestry & Fishing	43	2.0	5.8
Mining, Quarrying	22.5	-8.2	3
Manufacture	64.8	-1.2	8.7
Construction	56.7	-2.5	7.6
GOODS PRODUCING	187.01	-2.27	25.1
Electricity & Water Supply	24.6	0.2	3.3
Transport Storage & Communication	84.8	-1.8	11.4
Wholesale & Retail Trade; Repair and Installation of Machinery	136.6	1.2	18.4
Financing and Insurance Services	80.1	0.9	10.8
Real estate, Renting and Business Activities	79.8	0.4	10.7
Producers of Government Services	96.2	0.3	13
Hotels & Restaurant	37.8	2.0	5.1
Other Services	50.3	0.4	6.8
SERVICES	590.24	-0.16	79.4
Less Financial Intermediation Services Indirectly measured (FISIM)	33.8	-2.6	4.5
TOTAL GDP at Basic Prices	**743.5**	**0.62**	**100**

Source: ***Economic and Social Survey Jamaica*** and Statistical Institute of Jamaica (various editions)

According to the ***Economic and Social Survey Jamaica*** (ESSJ) throughout the period output of the "Agriculture, Forestry and Fishing" sector was negatively impacted by adverse weather conditions including droughts and storms. The sector was also affected by competition from imported agricultural products, praedial larceny and the high cost of fertilizer.[4] Despite these setbacks in 2011 its output was valued at $48.1 billion, an increase of 10% relative to 2010. The increase was attributed to a 1.0% expansion in export crops and 16% growth in other agricultural crops.

During the five year period GDP for the "Mining" sector declined. The sector was negatively impacted by the global recession which resulted in a decline in the demand for aluminium products, especially from the automobile industry. Three bauxite/aluminium plants were closed. This resulted in a 50.4% reduction in GDP in 2009 compared to 2008.

[4] Jamaica Country Assessment, Preliminary Draft (April 2012)-Vision 2030. Planning Institute of Jamaica. Retrieved on January 10, 2013@www.vision2030.gov.jm/.../ ...

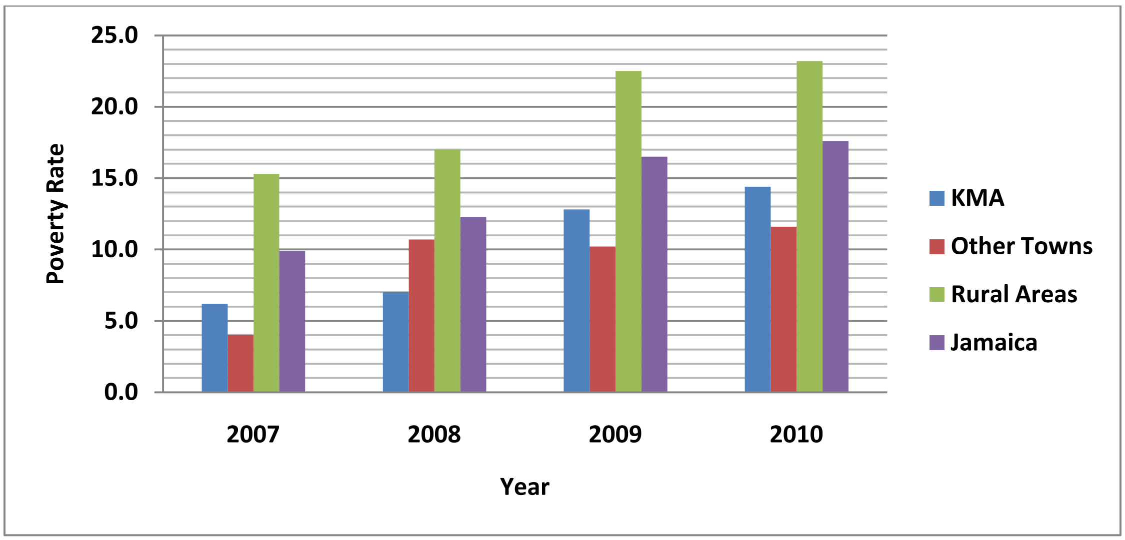
The contribution of organisations in the “Manufacturing” and “Construction” sectors was negatively affected by a number of factors. Entities in the “Manufacturing” sector were impacted by high operational costs associated with increased electricity and oil prices as well as competition from cheaper imported products. The situation was exacerbated by the global economic crisis which resulted in a decline in the demand for Jamaican products locally and internationally. The “Construction” sector also contracted as there was reduced demand for residential construction as well as private and public projects.

3.5 Poverty

Statistics released by the Planning Institute of Jamaica (PIOJ) indicated that 17.6% or 475,864 Jamaicans were living below the poverty line in 2010. The poverty rates in descending order by regions were rural areas (23.2%), Kingston Metropolitan Area (14.4%) and Other Towns (11.6%). Figure 4 shows that the number of persons living in poverty increased steadily throughout the period.

POVERTY RATE BY JAMAICAN REGION: 2007 - 2010[5]

Figure 4



Source: ***Economic and Social Survey Jamaica*** (various editions)

[5] The data for 2011 were not available.

4.0 FINDINGS

4.1 Profile of the Establishments

Most of the organisations that participated were located in Kingston and St. Andrew, St. Mary and Westmoreland (See Table 7). The parishes with the smallest representation were St. Elizabeth and Clarendon with 2% and 1.5% respectively.

PARTICIPATING ORGANISATIONS BY PARISH

Table 7

Parish	Participating Organisations		Response Rate (%)
	Number	%	
Kingston & St. Andrew	131	21.7	44
St. Thomas	51	8.4	73
Portland	43	7.1	61
St. Mary	64	10.6	91
St. Ann	21	3.5	30
Trelawny	19	3.1	27
St. James	44	7.3	44
Hanover	60	9.9	86
Westmoreland	61	10.1	87
St. Elizabeth	12	2.0	17
Manchester	32	5.3	46
Clarendon	9	1.5	13
St. Catherine	59	9.7	59

Approximately 568 or 94% of the employers identified their business activity. A large proportion was engaged in “Wholesale and Retail” (41.2%); followed by “Hotel and Restaurant” (11.8%); and “Manufacturing” 11.6% (See Table 8). Only two organisations each in the “Mining” and “Quarrying” and “Public Administration” industries participated.

PARTICIPATING ORGANISATIONS BY SECTOR

Table 8

Sector	Number of Organisations	%
Agriculture	11	1.9
Mining & Quarrying	2	0.4
Manufacturing	66	11.6
Construction	18	3.2
Electricity, Gas & Water Supply	5	0.9
Wholesale & Retail	234	41.2
Transport, Storage & Communication	30	5.3
Hotel & Restaurant	67	11.8
Financial Intermediation	10	1.8
Real Estate, Renting	6	1.1
Business Services	16	2.8
Public Administration	2	0.4
Education	51	9.0
Health	13	2.3
Other CSPS[6] Activities	37	6.5

[6] CSPS means Other Community, Social and Personal Services

The majority of the entities were from the private sector (See Table 9). A little over half or 52.8% were private profit entities, followed by sole proprietors with 29%. The smallest group was statutory bodies with approximately 2%.

OWNERSHIP STRUCTURE AND SECTOR OF THE PARTICIPATING ORGANISATIONS

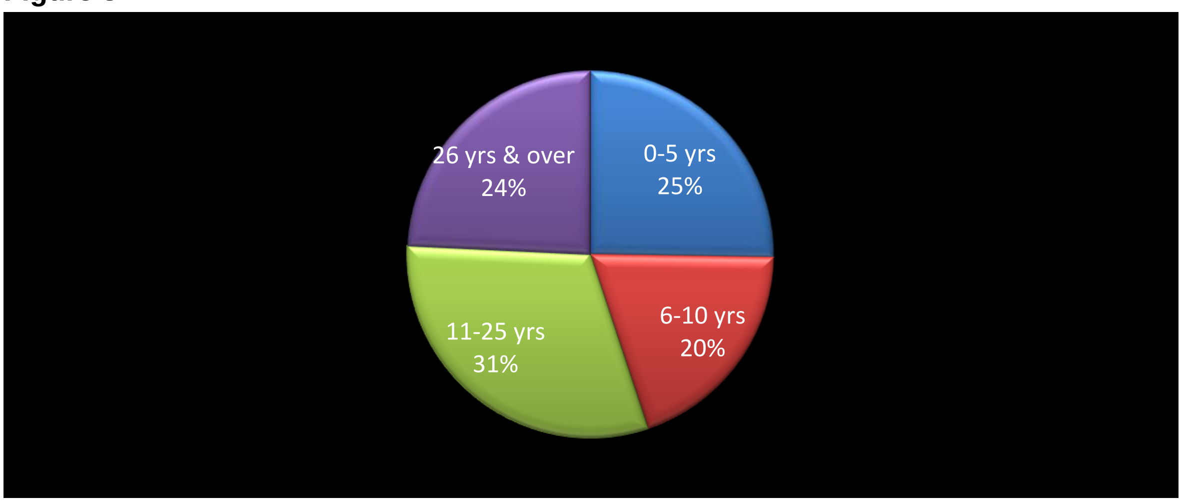
Table 9

Ownership Structure	Number of Organisations	%	Sector
Private Profit (LLC[7] & Partnerships)	320	52.8	Private 538 (88.8%)
Private Profit (Sole Proprietor)	176	29.0	
Private Non-Profit	42	6.9	
Government (Non Statutory)	46	7.6	Public 57 (9.4%)
Government (Statutory)	11	1.8	
No Response/Unspecified	11	1.8	

The ages of the organisations ranged from less than a year to 182 years. Figure 5 shows that most of the establishments or 55% had been operational for more than 10 years.

LENGTH OF TIME ORGANISATIONS WERE OPERATIONAL

Figure 5



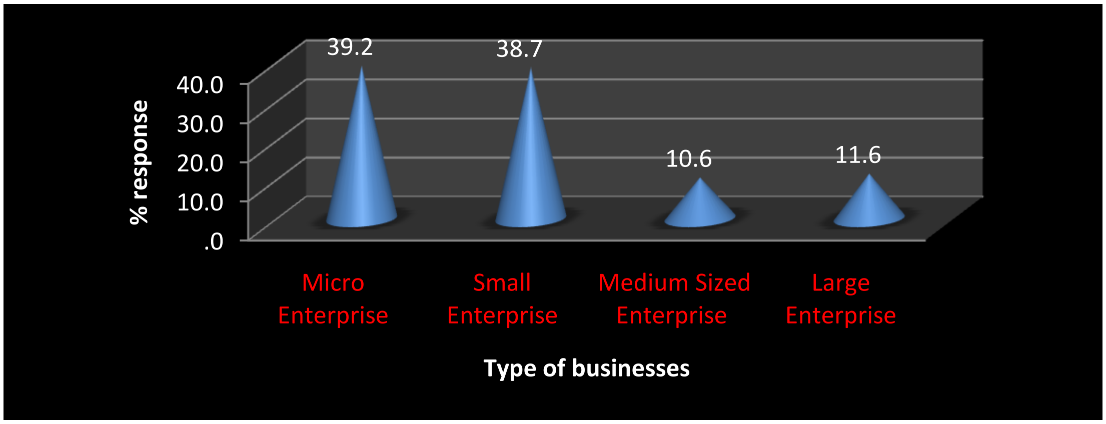
The number of workers employed to the participating organisations ranged from three to 1,880 employees. The organisations were classified as micro, small, medium and large enterprises based on the number of employees.[8] Entities with five or less employees were classified as micro enterprises, those with 6 to 20 were regarded as small, medium-sized were those with 21 to 50 and organisations with more than 50 workers were regarded as being large. More than three-quarters of the employees were attached to micro and small enterprises (See Figure 6).

[7] LLC means Limited Liability Company

[8] Classification was created from the Ministry of Industry, Investment and Commerce MSME & Entrepreneurship Policy

EMPLOYEES BY TYPE OF BUSINESS

Figure 6



Approximately 46% of employers indicated that all of their workers were permanent employees, 5.8% employed only contract workers, 3.2% offered part time employment and 1.5% seasonal jobs (See Table 10). More than one-third or 39.9% offered a combination of permanent and other types of employment arrangements. A little less than 4% offered other types of employment.

TYPES OF EMPLOYMENT

Table 10

Types of Employment	Number of Organisations[9]	%
Permanent only	279	46.4
Permanent & Other employment arrangements	240	39.9
Contract only	35	5.8
Part time only	19	3.2
Seasonal only	9	1.5
Other employment arrangements	19	3.3
Total	601	100

4.2 Labour/Skills Demand and Availability

Employers were asked about the number and types of vacancies in their organisations during the period December 2010 to November 2011. Approximately one-third or 36% indicated that they had vacancies during that period. Most of the vacancies or 42.3% were for workers in the “Professional, Senior Officials and Technicians” occupational group (See Table 11). “Clerks” and “Service Workers, Shop and Market Sales Workers” were next with 21.6% and 12.8% respectively. The occupational group with the smallest number of vacancies was “Skilled Agricultural and Fishery Workers.”

[9] Some organisations did not indicate the types of employment arrangements.

TYPES OF VACANCIES BY OCCUPATIONAL GROUP: DECEMBER 2010 TO NOVEMBER 2011

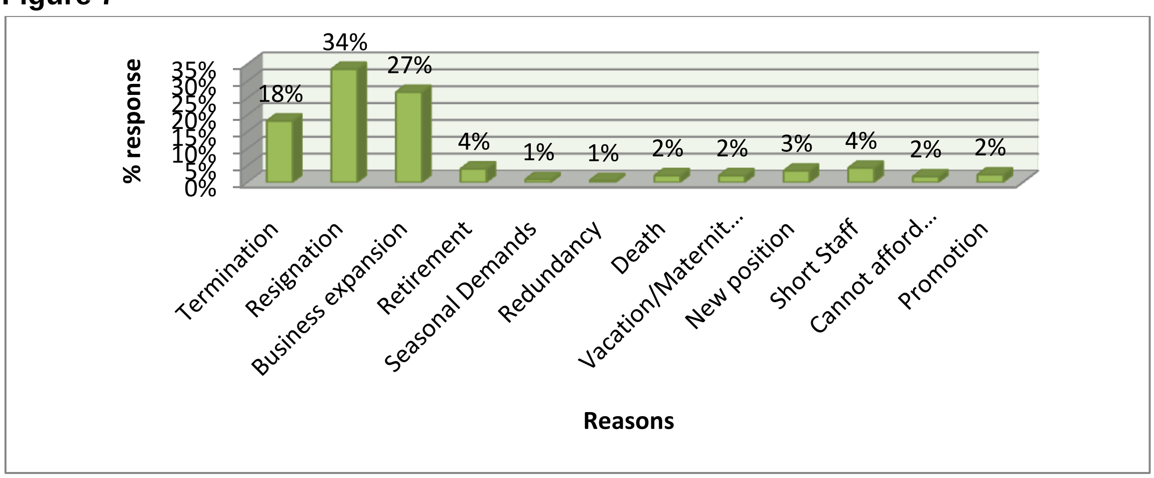
Table 11

Occupational Group	Vacancies (%)	Type of Vacancy
Professionals, Senior Officials and Technicians	42.3	Accountants, Administrative Assistants, Graphic Artists, Communications Officers, Lecturers, Managers (Branch, Information Technology, Laboratory, Inventory, Human Resources, Public Relations), Lawyers, Teachers, Audio Visual Technicians, Bursars, Purchasing Officers, Registered Nurses, Risk Officers, Research Officers, Statistical Analysts, Internal Auditors
Clerks	21.6	Accounting Clerks, Cashiers, Counter Clerks, Front Desk Clerks, Office Clerks, Secretaries, Sales Clerks, Store Clerks, Warehouse Clerks, Wholesale Clerks, Receptionists
Service Workers, Shop and Market Sales Workers	12.8	Bartenders, Chefs, Cooks, Hairdressers, Sales Representatives, Security Officers, Waiters, Waitresses, Bartenders
Plant and Machine Operators	5.7	Drivers, Machine Operators, Pump Attendants, Equipment Operators
Craft and Related Trade Workers	6.6	Jewellery Technicians, Bakers, Butcher, Cabinet Makers, Engravers, Millers, Technicians (Cable, Maintenance), Tailors, Mechanics
Elementary Occupations	10.4	Housekeepers, Casual Workers, Factory Workers, General Workers, Janitors, Packers, Room Attendants, Shelf Attendants, Watchmen, Caregivers, Housemen, Office Attendants
Skilled Agricultural and Fishery Workers	0.5	Food Technologists, Dairy Farmers

Two hundred and eighteen (218) entities indicated that they had vacancies. The reasons given ranged (in number of responses) from resignation to redundancy. The majority of the employers (118 or 34%) attributed the vacancies to resignations (See Figure 7). Increase in business was next with 94 or 27% followed by termination of the services of the employees with 64 or 18%.

REASONS FOR POSITIONS REMAINING UNFILLED: DECEMBER 2010 TO NOVEMBER 2011

Figure 7

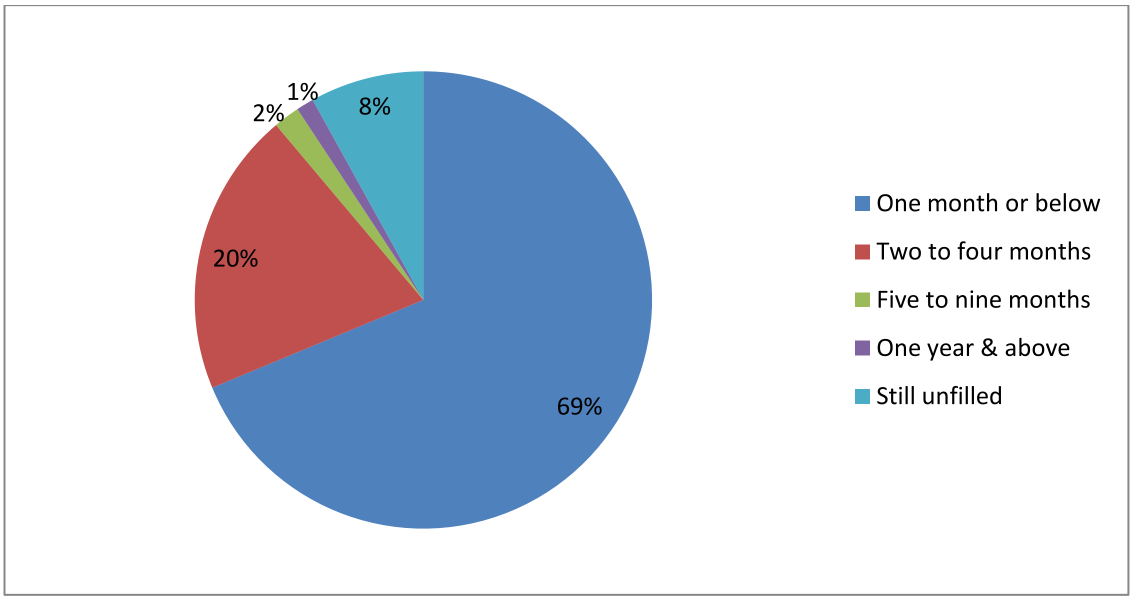


More than two-thirds of the respondents or 69% indicated that vacancies in their organisations were filled in one month or less (See Figure 8). Approximately 22% indicated that the average time taken to fill vacancies was two to nine months, while 8% stated that they still had unfilled positions.

The respondents indicated that recruitment for positions such as Accounting Clerk, Chef, Operations Manager, Guidance Counsellor, Wealth Advisor as well as Administrative and Supervisory positions were filled in five to nine months. Several organisations indicated that it took over one year to recruit Retail Managers. The positions that remained vacant included Gardener, Information Technology Manager, Site Manager, Internal Auditor, Technician, Surveyor, Graphic Artist, Welder, Accountant, Hairdresser, Teacher and Assistant Pastor.

AVERAGE TIME TAKEN TO FILL VACANCIES

Figure 8



More than half of the respondents who still had vacant positions attributed this to skill shortage (See Table 12). The skills which were identified as being in short supply included Accounting, Graphic Art, Masonry, Cosmetology, Administrative, Engineering, Horology, Carpentry, Clerical, Driving, Machinist, Customer Service, Multilingual, Electrical, Sales, Baking and Teaching. Some employers indicated that the positions remained vacant as they were experiencing a decline in business (39%), while a few cited high wage cost.

REASONS FOR VACANT POSITIONS

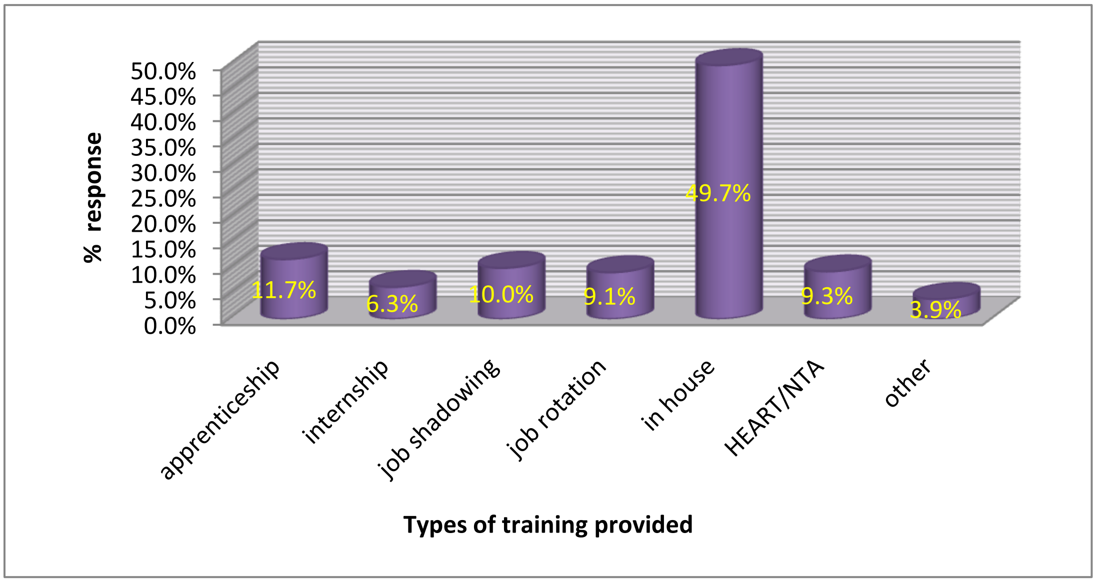
Table 12

Reasons For Unfilled Positions	Response (%)
Skill shortage	55
High wage cost	4
Declining business	39
More affordable to outsource	1

More than half of the participating organisations (347 or 58%) indicated that they provided training for their employees. Approximately 50% stated that they provided in-house training and 19.1% practised job shadowing and job rotation (See Figure 9). Additionally, almost one-fifth of the employers indicated that they provided training through internship and apprenticeship.

TYPES OF TRAINING PROVIDED BY EMPLOYERS

Figure 9



Approximately 34% or 204 of the employers indicated that there was a need for skills training in their organisations.[10] A large percentage of the employers revealed that customer service training was very important (See Table 13). They also felt that training was also necessary in the areas of Geographic Information System, Strategic Management, Analytical, Critical Thinking, Portfolio Management and Information Technology.

[10] This figure includes employers who provided skills training for staff as well as those who did not.

SKILLS NEEDED

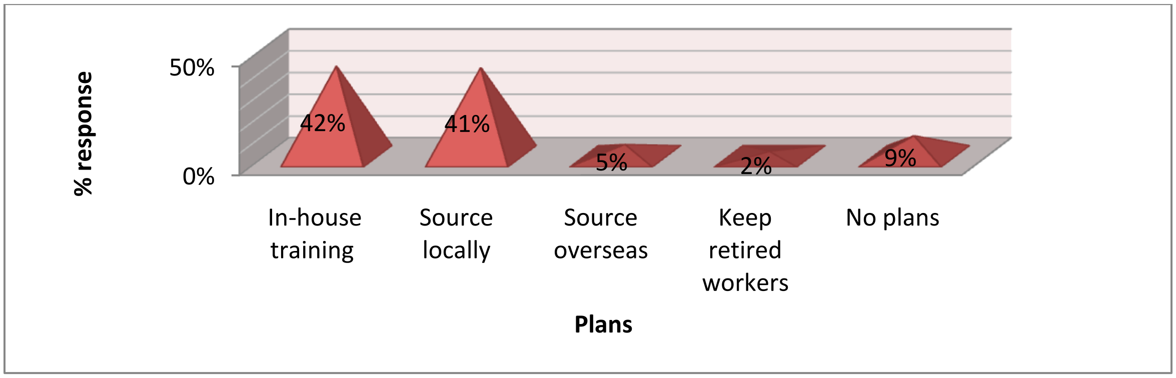
Table 13

Accounting	Mechanical Engineering
Administrative	Mining Engineering
Aircraft Mechanic	Phlebotomy
Analytical	Plumbing
Anti-money Laundering	Portfolio Management
Baking	Project Management
Basic Literacy	Quality Control
Book keeping	Report Writing
Butchering	Risk Management
Carpentry	Sales
Chef	Secretarial
Clerical	Shoe Making
Computing	Strategic Management
Critical Thinking	Supervisory Management
Customer Service	Teaching
Dog Handling	Technical
Driving	Training in Pruning of Trees
Electrical Repairing	Upholstering
Filing	Web Developing
Financial Management	Welding
Food Handling	
Forklift Operating	
Gardening	
Geographic Information System	
Geological field mapping and reporting	
Graphic Art	
Housekeeping	
Inventory Management	
Information Technology	
Janitorial	
Knowledge of Plant and Pest Control	
Knowledge of Tariff and Customs Laws	
Management	
Machine Operating	
Meat Cutting	
Mechanic	

The employers who needed skilled workers indicated that they would use several strategies to fill the void as shown in Figure 10. Most of the responses suggested that employers would rely on the local labour market to satisfy their demand for skills. This is implied in responses such as “in-house training”, “source locally” and “keep retired workers”. Nine per cent did not plan to get the skilled workers that their organisations needed.

PLANS FOR SKILLS TRAINING

Figure 10

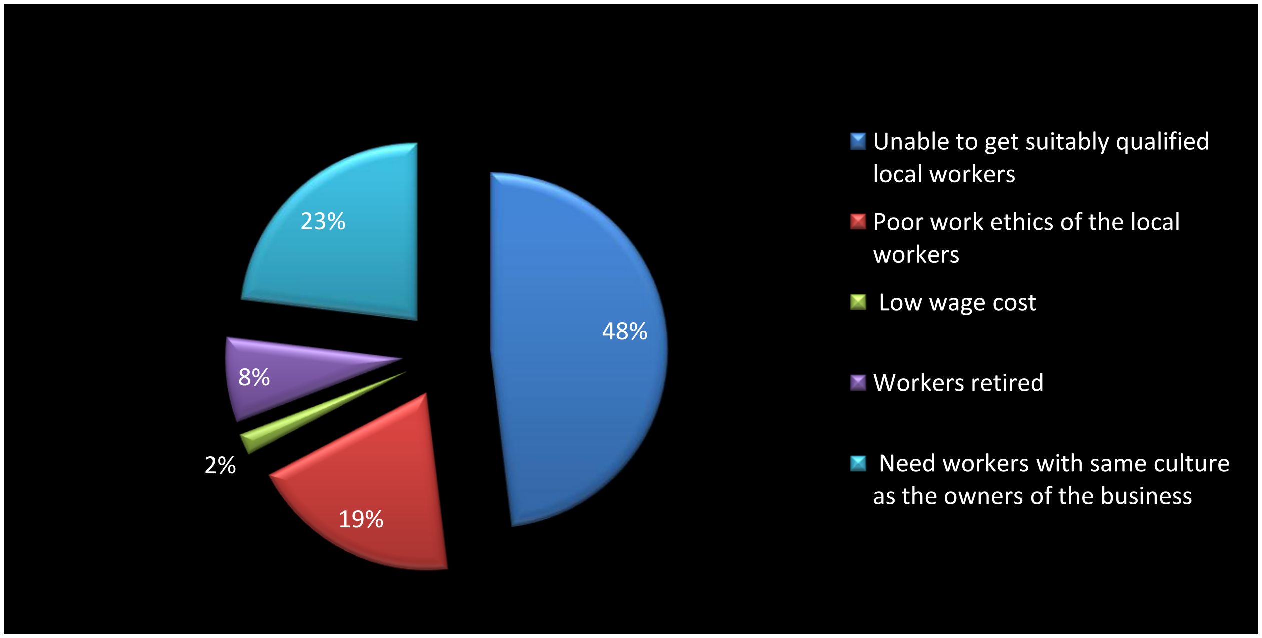


Employers were asked to indicate if their employees were Jamaicans only. Approximately 90% or 547 of the participants who responded indicated that they recruited workers from Jamaica only while (8.4% or 51) stated that they employed expatriates.[11] Most of the employees from overseas (85%) were recruited to fill positions which are in the "Professional, Senior Officials and Technicians" occupational group. They included Gemmologists, Director of Museum History and Ethnography, Senior Manager, Production Manager, Plant Manager, Director of Operations, Food and Beverage Manager, General Manager, Senior Executive, Urologists, Teachers of science subjects, Optical Dispenser Receptionist, Engineers and Medical Officers.

The reasons given for recruiting workers from abroad implied that employers felt that local workers were unsuitable. Figure 11 shows that approximately two-thirds indicated local workers did not have the required qualifications or that they had poor work ethic. A small percentage of the employees (2%) stated that the wages for expatriates was lower.

REASONS FOR RECRUITING WORKERS FROM ABROAD

Figure 11

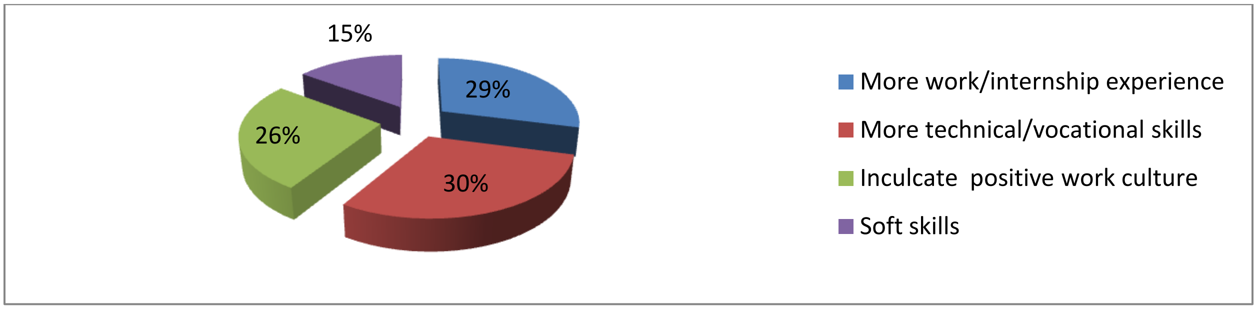


[11] Eight employers did not provide information on this issue

Employers were asked to identify the types of changes they would like to see in the curricula of local education and training institutions. A large percentage of the entities indicated that they wanted the education and training institutions to include more technical/vocational training, and work experience in their programmes (See Figure 12). The remainder wanted an emphasis on positive work culture and soft skills.

CHANGES TO THE LOCAL CURRICULA PROPOSED BY EMPLOYERS

FIGURE 12



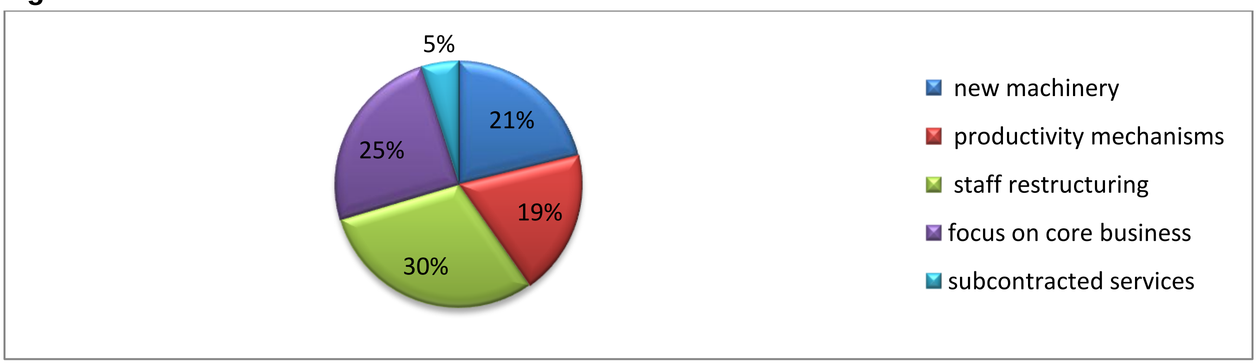
4.3 Changes in the Demand for and Supply of Occupations and Skills

Information was requested on changes in the demand for and supply of occupations and skills during the period 2009-2011. The participating entities were asked to indicate whether they had restructured their operations. The respondents were to identify the occupations for which there was an increase in demand and the ones for which there was a decline. Employers were also asked to state the reasons for the increase or decrease in demand for identified categories of workers.

Approximately 192 or 31.7% of the participants stated that their entities operations had been re-organized. Figure 13 shows that almost one-third or 30% engaged in staff restructuring and approximately one-fourth returned to core business. A small percentage indicated that they were sub-contracting services.

TYPES OF REORGANISATION

Figure 13



Employers were asked to indicate the occupations for which there was an increase in demand as well as those for which there was a decrease during 2009 to 2011. The occupations identified are listed in Table 14. The occupations for which employers perceived an increase in the demand included Accountants, Insurance Brokers and Operations Coordinators. Some participants needed less Project Officers, Aircraft Pilots and Tailors. In a few cases some employers indicated an increase in the demand for some workers while others signalled a decline for the same categories of workers. The affected occupations were Housekeepers, Public Relations Officers and Photographers.

CATEGORIES OF WORKERS FOR WHICH DEMAND INCREASED AND DECREASED: 2009 - 2011

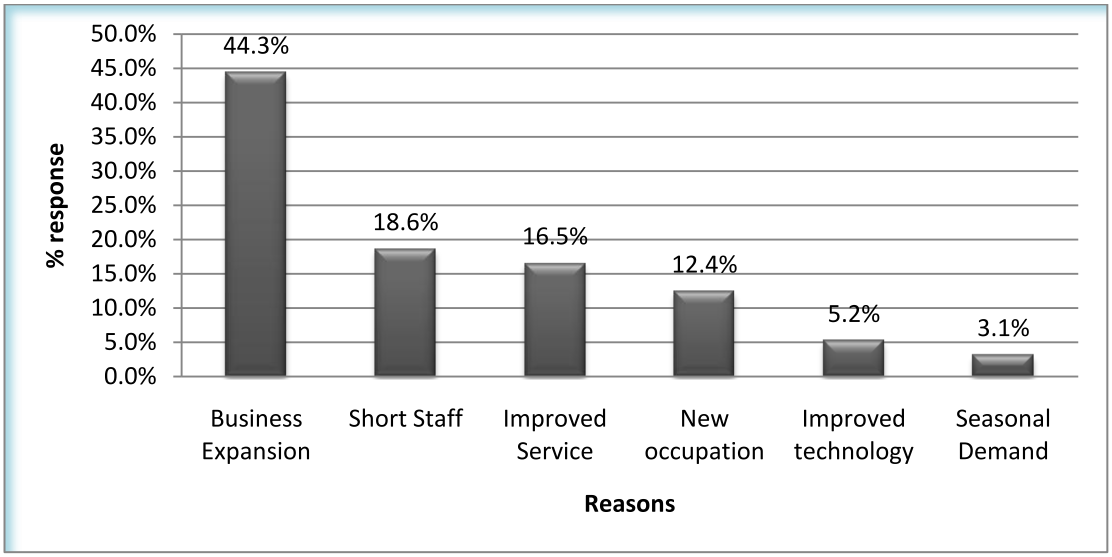
Table 14

Increase in Demand	Decrease in Demand
Accountants	Air Conditioning repair
Accounting Clerk	Aircraft Pilot
Ackee Seeding	Assistant Manager
Administrative Assistant	Casual worker
Auto Mechanic	Communications Officer
Baker	Computer Technician
Butcher	Cook
Cane Cutter	Counter clerk
Caregiver	Dispatcher
Carpenters	Dress maker
Cashier	Financial Controller
Chef	Food & Beverage Manager
Customer Service Manager	General Manager
Customer Service Representative	Human Resource Manager
Dean of Discipline	Image Graphic Specialist
Driver	Metal Fabricator
Economist	Plumber
Electrician	Porter
Engraver	Project Officer
Equipment Operator	Pump Attendant
Factory Staff	Sales Clerk
Front Desk Clerk	Tailor
General Maintenance	Travel Agent
Glass Cutter	Welding instructor
Glass Installer	Writer
Guidance Counsellor	
Insurance Broker	
Janitor	
Teacher	
Lab Technician	
Legal Officer	
Manager	
Mason	
Merchandiser	
Operations Coordinator	
Packer	
Painter	
Pharmacy Technician	
Registered Nurse	
Production Supervisor	
Pharmacist	
Sales Representative	
Secretary	
Security Worker	
Shoe Maker	
Statistical Analyst	
Stock Room Manager	
Technician	

Employers were asked to provide the reasons for the increase in demand for the categories of workers identified. The majority (44.3%) cited business expansion as the main reason (See Figure 14). Other reasons included the organisations being short staffed (18.6%) and improvement in the services offered (16.5%).

REASONS FOR INCREASED DEMAND FOR WORKERS

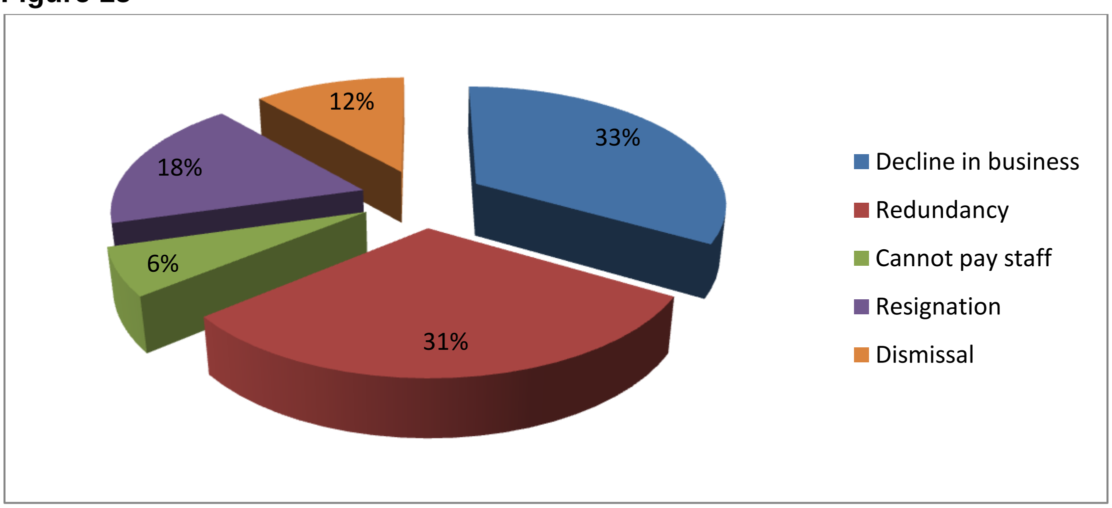
Figure 14



A number of reasons were given for a reduction in the demand for some categories of workers. Almost two-thirds attributed the reduction to a decline in business and redundancy (See Figure 15). Less than 10% attributed the reduction to an inability to pay.

REASONS FOR DECREASED DEMAND FOR OCCUPATIONS

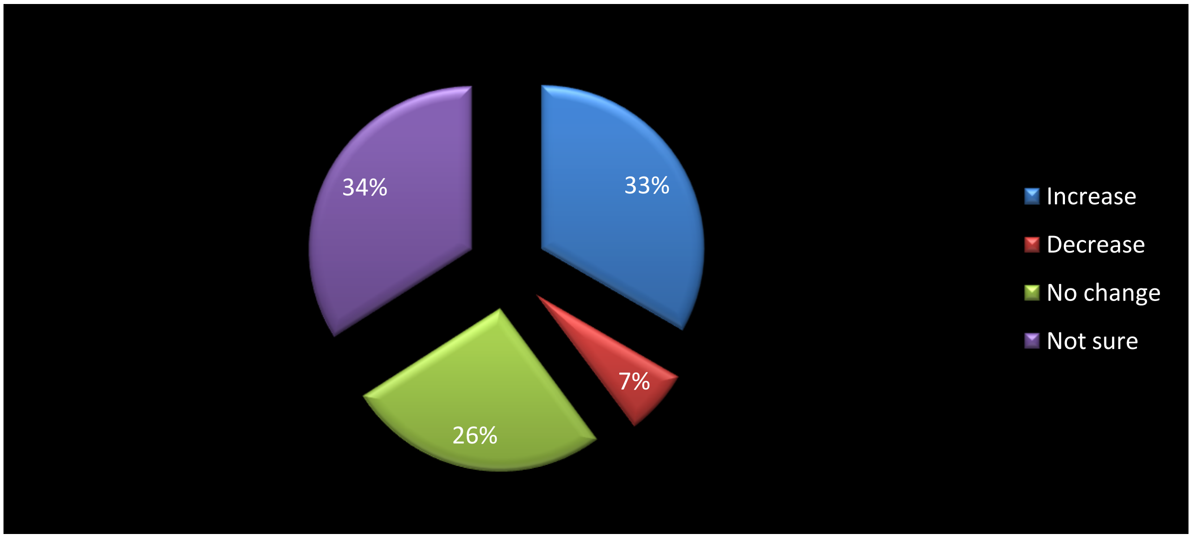
Figure 15



The participants were asked whether they anticipated an increase in their workforce over the next two years. Figure 16 shows that 34% expressed uncertainty, 33% anticipated an increase and 26% expected no change.

EXPECTED CHANGE IN WORKFORCE

Figure 16



The opinions expressed by the participants were influenced by several factors including business expansion, restructuring and retooling. Approximately 46% cited expansion in business, 24.3% referred to restructuring and retooling and 7% mentioned downsizing of their operations (See Figure 17).

REASONS FOR ANTICIPATED CHANGES IN STAFF COMPLIMENT

Figure 17

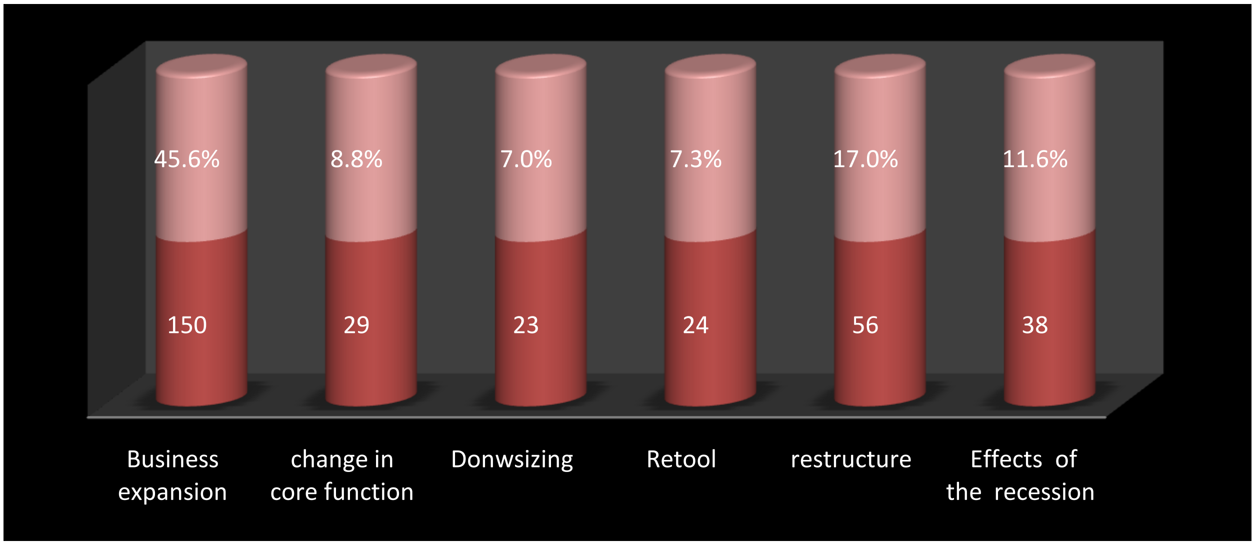


Table 15 lists the categories of workers for which employers anticipate increased and decreased demand in the next two years. The list of occupations for which demand is expected to increase in the next two years comprised both low and highly skilled workers. The low skilled workers included Pump Attendants, Store Clerks and Packers while among the highly skilled workers were Accountants, Web Developers and Medical Technologists. Reduction in demand was anticipated for various occupational groups. These occupations included Chefs, Dressmakers, Early Childhood Practitioners, Janitors and Household/Kitchen Helpers.

CATEGORIES OF WORKERS PROJECTED TO INCREASE AND DECREASE DURING THE PERIOD 2012-2014

Table 15

Anticipated Increase	Anticipated Decrease
Accountant	Chef
Accounting Clerk	Dressmaker
Baker	Driver
Banker	Early Childhood Practitioner
Carpenter	Food & Beverage Manager
Cashier	Household Helper/ Kitchen Helper
Chinese Chef	Janitor
Clerical Merchandiser	Labourer
Data Entry Clerk	Laundry Attendant
Economist	Project Officer
Electrical Technician	Public Relations Officer
Engineer	Records Clerk
Field Technician	Security Guard
Financial Analyst/Risk Analyst	Travel Agent
Fund Manager	
Hairstylist	
Instructor	
Lawyer	
Machine Operator	
Mason	
Mechanical Technician	
Medical Technologist	
Merchandiser	
Office Administrator	
Operations Coordinator	
Packer	
Paralegal Officer	
Pharmacy Technician	
Pilot	
Pump Attendant	
Real Estate Agent	
Receptionist	
Registered Nurse	
Researcher	
Server	
Store Clerk	
Store Manager	
Supervisor	
Teacher	
Technician	
Videographer	
Waiters	
Warehouse Personnel	
Web Developer	

4.4 Employment Opportunities for Persons with Disabilities

Employment opportunities for persons with disabilities were also explored. Forty-six or approximately 8% of the employers indicated that at least one person with disability was employed to their organisations. These categories of persons with disabilities which they employed were the deaf and hearing impaired; persons with physical disabilities and those who were intellectually impaired. Table 16 shows that they were employed in various capacities ranging from Manager to Sanitation Worker. Most of the employment opportunities were available to the deaf and hearing impaired, and persons with physical disabilities.

EMPLOYMENT OPPORTUNITIES FOR PERSONS WITH DISABILITIES BY TYPE OF DISABILITY

Table 16

Deaf and Hearing Impaired	Physically Disabled	Intellectually Impaired
Accountant	Accountant	Ancillary worker
Ackee Seeder	Cook	Cleaner
Administrator	Driver	Office Attendant
Auxiliary Worker	Labourer	Sanitation Worker
Cane Cutter	Lawyer	
Data Entry Clerk	Manager	
Field Worker	Merchandiser	
Grounds Man	Office Administrator	
Information Technology	Sales Associate	
Janitor	Receptionist/Bearer	
Mason	Sales Representative	
Office Attendant	Teacher	
Packer		
Picture Processor/Framer		
Press Operator		
Sales Clerk		
Sales Consultant		
Security Guard		
Side Man		
Typist/Billing Clerk		

The entities which did not employ persons with disabilities were asked about their willingness to employ such persons. Table 17 shows the types of occupations that the participants considered being suitable for each of the four categories of disabilities. The responses indicate that the employers were more inclined to employ persons with physically disabled, and the deaf and hearing impaired.

POSSIBLE AREAS OF EMPLOYMENT FOR PERSONS WITH DISABILITIES BY TYPE OF DISABILITY

Table 17

Blind and Visually Impaired	Deaf and Hearing Impaired	Physically Disabled	Intellectually Impaired
Ancillary Worker	Accountant	Accountant	Farmer
Announcer	Accounting Clerk	Accounting Clerk	Gardener
Clerk	Administrative Assistant	Ackee Seeder	Grounds men
Counsellor	Cane Cutter	Administrative Assistant	Handy man
Receptionist	Caretaker	Air Conditioning Repairs	Housekeeper
Sales Person	Carpenter	Sales Person	Janitor
Social Worker	Mason	Auxiliary Worker	Labourer
Teacher	Cashier	Caregiver/Facilitator	Office Attendant
Telephone Operator	Casual Labourer	Cashier	Store Clerk
	Cook	Casual Labourer	Packers
	Eyebrow Specialist	Record Keeping	Storehouse
	Factory Worker	Counsellor	Worker
	Farm Assistant	Counter Clerk	Warehouse Clerk
	Field Worker	Customer Service	
	Filing Clerk	Representative	
	Florist	Food and Beverage Manager	
	Gardener	Front Desk Clerk	
	Grounds Man	Graphic Artist	
	Hair Dresser	Grounds Man	
	Handyman	Hair Dresser	
	Housekeeper	Handyman	
	Janitor	Janitor	
	Jeweller	Labourer	
	Office Administrator	Lawyer	
	Office Attendant	Medical Technologist	
	Office Clerk	Neurologist	
	Packer	Office Administrator	
	Painter	Office Attendant	
	Plastic Restoration	Office Clerk	
	Receivables Clerk	Paralegal Officer	
	Secretary	Plastic Restoration	
	Store Clerk	Receptionist	
	Teacher	Reservation Officer	
	Technician	Sales Representative	
	Typist	Shoe Maker	
	Sidemen	Store Clerk	
	Warehouse Worker	Teacher	
		Telephone Operator	
		Typist	

5.0 ANALYSIS AND DISCUSSION

The data were examined to determine the skill gaps and vacancies in the Jamaican labour market by sector, parish and occupational group. Skill shortages were identified by sector and types of businesses. Additionally, employment opportunities for persons with disabilities were examined by sector and occupational group.

5.1 Areas of Employment in the Economy

An analysis was done to determine the parishes which provided the best employment opportunities.[12] The data presented in Table 18 suggests that most of the employment opportunities (31.1%) were in the parishes of Kingston and St. Andrew (KSA).[13] Both Westmoreland and St. Catherine had the second highest number of vacancies. In relation to vacancies in each parish, half of the businesses in Kingston and St. Andrew had at least one vacancy. This was followed by Manchester (41%) and then St. Catherine (38%). In general vacancy levels were lower in rural parishes. The trend analysis has shown that poverty is highest in rural Jamaica and consequently greater investment is needed in these areas in order to increase employment opportunities. Employment opportunities in rural areas could be facilitated through the expansion of the agricultural sector to create more jobs.

ORGANISATIONS AND VACANCIES BY PARISH: DECEMBER 2010 TO NOVEMBER 2011

Table 18

Parish	Total Number of Organisations	Organisations with at least one vacancy	Percentage of Total vacancies	Vacancies in each parish (%)
Kingston & St. Andrew	131	68	31.1	50.4
St. Thomas	51	15	6.9	29.4
Portland	43	16	6.9	37.2
St. Mary	64	17	7.8	26.6
St. Ann	21	7	3.2	33.3
Trelawny	19	5	2.3	26.3
St. James	44	13	6.0	29.5
Hanover	60	15	6.9	25.0
Westmoreland	61	23	10.6	37.7
St. Elizabeth	12	3	1.4	25.0
Manchester	32	13	6.0	40.6
St. Catherine	59	23	10.6	39.0

Few of the vacancies identified were new positions. Most of them were existing positions which had become vacant due to attrition, promotion or persons proceeding on leave. Although most of the organisations which reported vacancies (67) belonged to “Wholesale and Retail”, they represented less than one-third of the entities in the sector (See Table 19). The second largest number was from the “Manufacturing” where more than half of the participants (36) reported vacancies. The “Hotel and Restaurant” sector was next however these organisations (23) represented approximately one-third of the

[12] Clarendon was not included in the analysis due to insufficient data

[13] The percentage of vacancies was impacted by the large number of organisations from each parish which was included in the sample as well as referrals from branch offices to their headquarters which were usually located in KSA

employers. The small number of organisations which reported vacancies highlights the need for a growth strategy by the Government of Jamaica (GOJ) to create employment opportunities which should be driven by the private sector. The Government could also provide incentives for employers to participate in programmes geared towards providing on-the-job training. This would assist the youth who have difficulty finding employment due to lack of experience.

**ORGANISATIONS WITH VACANCIES BY SECTOR:
DECEMBER 2010 TO NOVEMBER 2011**

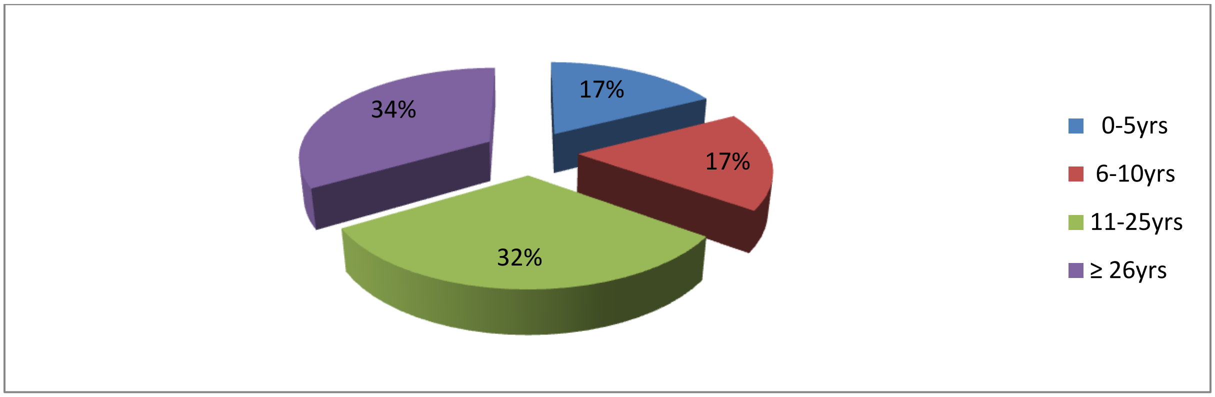
Table 19

Sector	Organisations		
	Number	Percentage by sector	Percentage in each sector
Agriculture	2	1.0	18.2
Mining & Quarrying	2	1.0	100
Manufacturing	36	17.5	54.5
Construction	7	3.4	38.9
Electricity, Gas & Water Supply	3	1.5	60.0
Wholesale & Retail	67	32.5	28.6
Transport, Storage & Communication	15	7.3	50.0
Hotel & Restaurant	23	11.2	34.3
Financial Intermediation	6	2.9	60.0
Real Estate, Renting	2	1.0	33.3
Business Services	6	2.9	37.5
Public Administration	1	0.5	50.0
Education	21	10.2	41.2
Health	4	1.9	30.8
Other CSPS Activities	11	5.3	29.7

A large proportion of the vacancies or 66% were reported by organisations which had been in existence for 11 years or more (See Figure 18). These entities comprised 55% of the sample. Less than a fifth of the vacancies were attributed to newer organisations although they comprised a quarter of the sample.

VACANCIES BY THE AGE GROUP OF THE ESTABLISHMENT

Figure 18



The vacancy levels were directly related to the size of the establishments. Approximately 20% were attributed to micro enterprises with 0-5 employees, 34.6% to small enterprise with 6-20 employees, 64.1% to medium-sized enterprises with 21-50 employees and 70% to large enterprises with 50 or more employees. This shows that employment opportunities were greater in larger establishments.

Employment opportunities could be facilitated through the re-organisation of business operations. Table 20 indicates that more than half of the organisations in the "Manufacturing" and "Financial Intermediation and Education" sectors reorganised their operations. "Business Services" had the smallest proportion with 12.5%. The re-organisation could also result in improve their productivity levels.

REORGANISATION OF OPERATIONS BY SECTOR: 2009 - 2011

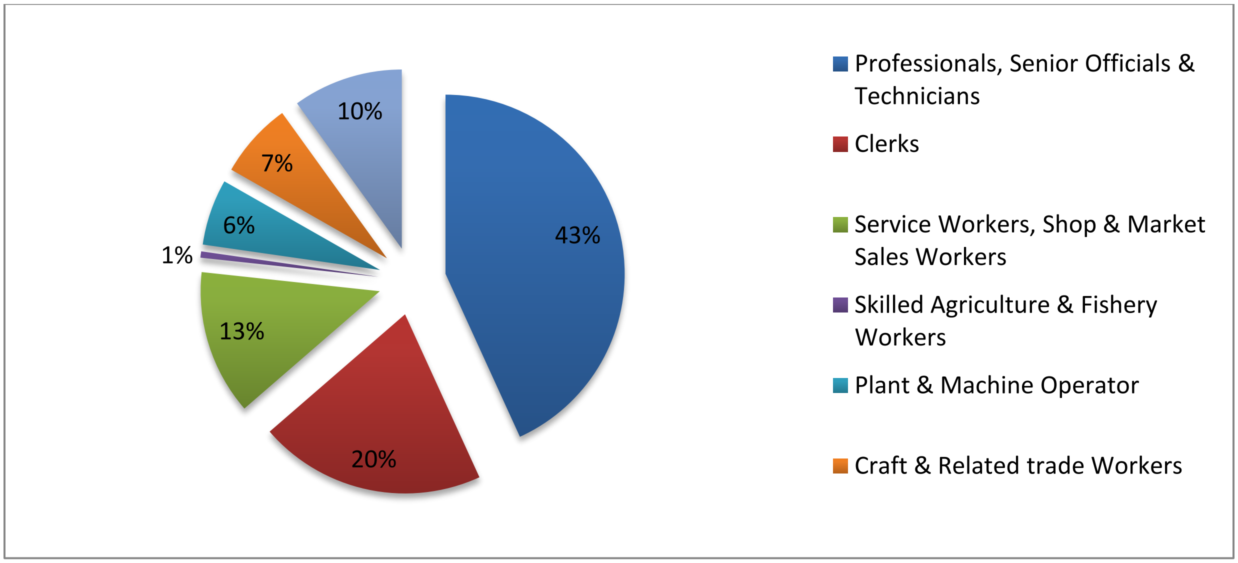
Table 20

Sector	Percentage of Entities which Reorganised Operations
Agriculture	27.3
Manufacturing	54.5
Construction	33.3
Wholesale & Retail	26.5
Transport, Storage & Communication	33.3
Hotel & Restaurant	26.9
Financial Intermediation	50.0
Real Estate, Renting	33.3
Business Services	12.5
Education	39.2
Health	23.1
Other CSPS Activities	37.8

Approximately 41% or 79 of the respondents indicated the types of skills they needed as a result of the reorganisation of their operations. Over 37% needed highly skilled persons. Figure 19 shows that the highest demand was for persons who are a part of the "Professional, Senior Officials and Technicians" occupational group (43%), "Clerks" was next with 20%, followed by "Service Workers, Shop and Market Sales Workers" with 13%. These results coincided with the labour force data which showed that employment opportunities were greater among "Professional, Senior Officials and Technicians". The demand for highly skilled workers underscores the need for more emphasis to be placed on the certification of Jamaicans.

SKILLS NEEDED BY OCCUPATIONAL GROUP DUE TO REORGANISATION

Figure 19

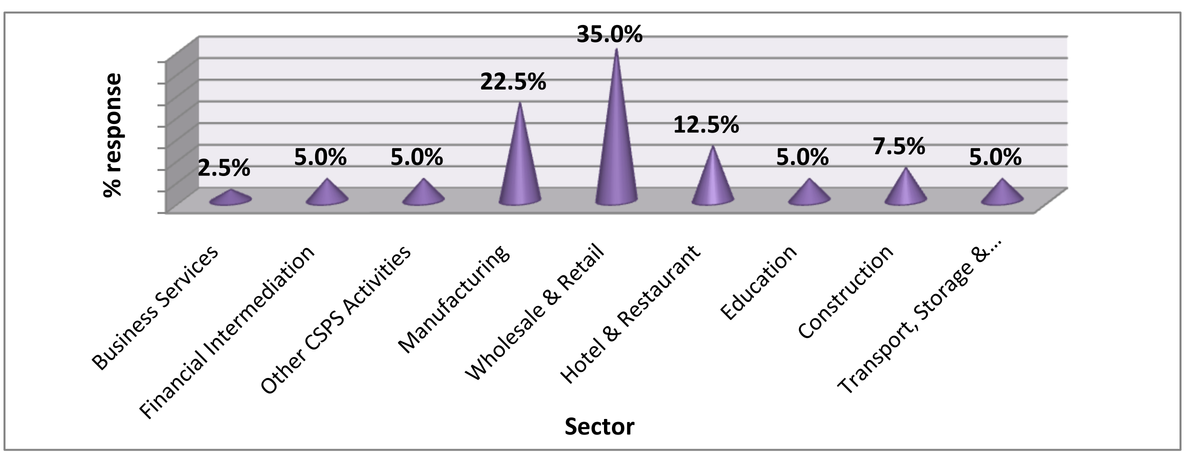


5.2 Skilled labour gaps

Approximately 46% of the employers reported that their entities were not experiencing a shortage of skilled labour. Establishments in nine of Jamaica's economic sectors attributed some of their vacancies to a shortage of the required skills. Figure 20 shows that 35% of the organisations with unfilled vacancies due to skills shortages were from "Wholesale and Retail" sector. "Manufacturing", and "Hotel and Restaurant" were next with 22.5% and 12.5% respectively.

VACANCIES ATTRIBUTED TO SKILL SHORTAGE BY SECTOR

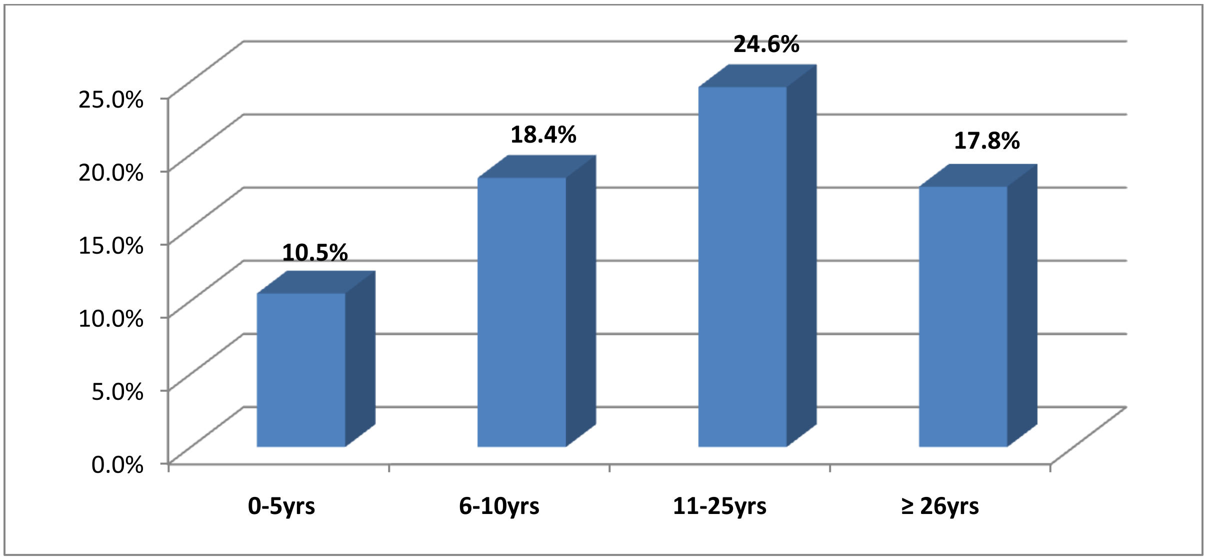
Figure 20



The data were examined to determine if there was a relationship existed between skill shortage and the ages of the participating organisations. Figure 21 shows that at least a quarter of the organisations with vacancies as a result of skill shortages were from the 11 to 25 years age group. Few of the organisations (10.5%) in the 0 to 5 years age group attributed their vacancies to skill shortages.

SKILL SHORTAGE BY THE AGE GROUP OF THE ORGANISATIONS

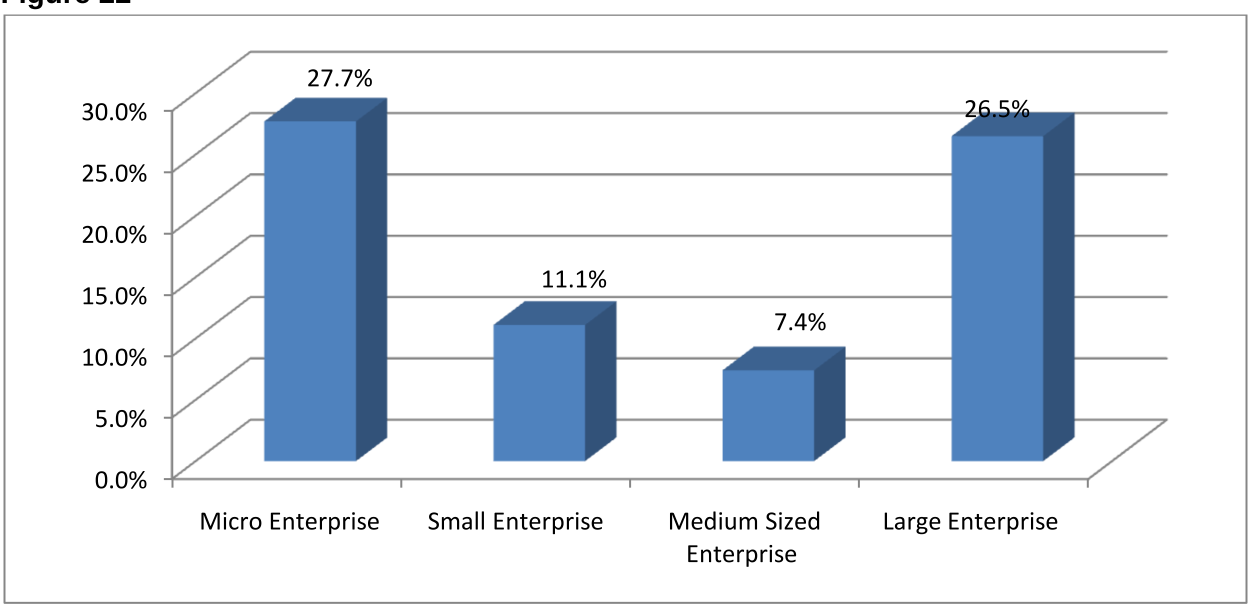
Figure 21



An analysis was done to ascertain the skill shortages of different types of businesses. Figure 22 reveals that almost 28% of the organisations with skill shortages were micro enterprises. This was followed by large enterprises with 26.5%.

SKILL SHORTAGE BY SIZE OF BUSINESS

Figure 22



It is also important to note that some small (54.5%) and micro enterprises (42.3%) indicted that they did not fill some of the vacancies due to declining businesses. This suggests that there is need for a policy to assist small and micro enterprises so that they can remain viable. A large percentage of the skilled persons which were in short supply belonged to the "Professionals, Senior Officials and Technicians" occupational group (See Table 21). They included portfolio management, investment banking, web development and horology. Service workers such as cooks, customer service representatives and cosmetologists were next with 21%. A small percentage of the employers or 2% indicated that they needed workers who belonged to the "Agriculture and Fishery" skill group.

TYPES OF SKILLS NEEDED BY OCCUPATIONAL GROUP

Table 21

Occupational Group	Types of Skills Needed	Employers who needed skilled workers (%)
Professional	Accounting, Supervisory/Management, Web Development, Teaching, Engineering, Research, Investment Banking, Portfolio Management, Pilot, Physiotherapy, Graphic Artist, Speech Therapy, Public Relations, Human Resource Management, Foreign Languages, Horology, Computer Technician, Disc Jockey, Mechanical Technician, Optometry, Sales & Marketing, Financial Analyst, Nurse, Pharmacy Technician, Librarian	38
Service worker	Practical Nursing, Aesthetics, Chef, Waiter, Cosmetology, Sales Representative, Customer Service, Waitress, Manicurist, Cook, Florist	21
Craft and Trade Related	Electrical Installation, Welder, Carpenter, Tailor, Technician, Auto Mechanic, Shoe Maker, Butcher, Glass Cutter, Mechanic, Plumber, Mason, Jeweller	18
Plant and Machine operating	Tractor Operator, Machinist, Driver, Printer, Plant Operator	9
Clerical	Cashier, Sales Clerk, Typist	6
Elementary	Housekeeping, Caregiving, Sideman, Maintenance Worker	6
Agriculture and Fishery	Herdsman, Farmer	2

5.2.1 Skills Training Needs Identified by Employers

Employers indicated that their employees needed to be trained in a variety of areas (See Table 22). Most of the sectors indicated the need for employees to receive training in customer service, this was most evident in "Wholesale and Retail". Participants in four sectors highlighted the importance of training in accounting. The training needs of the "Mining and Quarrying" sector seemed to be highly specialised. Some of the skill areas that they identified included geological field mapping and reporting and mining engineering.

SKILLS TRAINING NEEDS OF EMPLOYERS BY SECTOR

Table 22

Sector	Skills Training Needs of Employers
Agriculture	Financial Management, Secretarial, Customer Service
Mining & Quarrying	Geographic Information System, Geological Field Mapping & Reporting, Mining Engineering
Manufacturing	Welding, Machine Operating, Butchering, Meat Cutting, Upholstering, Driving, Managerial and Supervisory, Analytical, Computing
Construction	Supervisory, Janitorial, Management, Business Operating, Masonry, Electrical, Plumbing, Carpentry, Technical, Information Technology, Graphic Art
Electricity, Gas & Water Supply	Technical, Clerical, Customer Service
Wholesale & Retail	Quality Control, Inventory Management, Sales, Clerical, Customer Service, Mechanical, Supervisory, Accounting, Graphic Art
Transport, Storage & Communication	Mechanical Engineering, Welding, Aircraft Mechanic, Knowledge of Tariff and Customs Laws, Project Management, Electrical Repairing, Customer Service
Hotel & Restaurant	Administrative, Customer Service, Chef, Shoe Making, Food Handling, Strategic Management, Supervisory, Housekeeping, Knowledge of Plant & Pest Control, Computing
Financial Intermediation	Portfolio Management, Anti-Money Laundering, Critical Thinking, Analytical
Real Estate, Renting	Gardening, Training in Pruning of Trees
Business Services	Customer Service, Book Keeping, Accounting
Education	Teaching, Management, Computing, Customer Service
Health	Accounting, Customer Service, Computing, Secretarial, Phlebotomy, Filing
Other CSPS Activities	Information Technology, Customer Service, Accounting, Dog Handling, Plumbing

5.3 Anticipated Changes in the Workforce

Feedback was sought on the types of changes that were envisaged in the Jamaican workforce. Approximately a third of the respondents anticipated an increase and 150 planned to expand their businesses. The sector which seemed to be most optimistic about an increase in the workforce was "Electricity, Gas and Water" (See Table 23). Additionally, more than half of the employers in the "Hotel and Restaurants", "Construction", "Financial Intermediation and Business Services" sectors had a positive outlook. All of the employers in the "Mining and Quarrying", and "Real Estate and Renting" sectors predicted a reduction in the labour force while those in "Public Administration", "Agriculture" and "Health" felt that there would be no change.

ANTICIPATED CHANGES IN THE WORKFORCE BY SECTOR

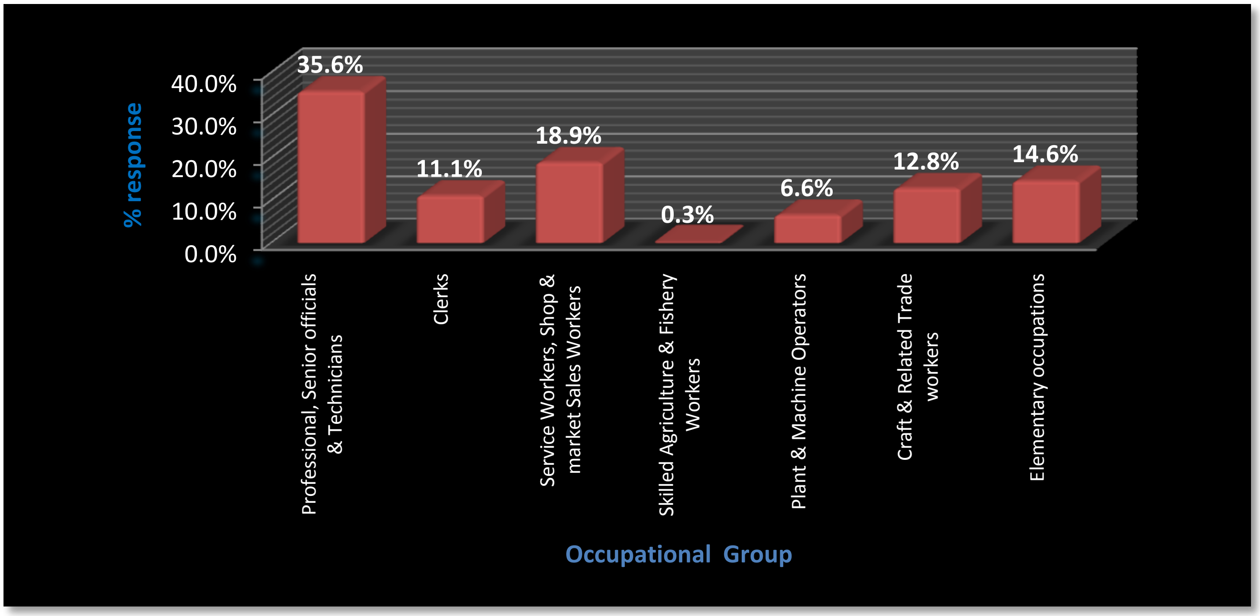
Table 23

Sector	Anticipated Increase %	Anticipated Decrease %	No Change %
Agriculture	33.3	0.0	66.7
Mining & Quarrying	0.0	100	0.0
Manufacturing	60	15.6	24.4
Construction	58.3	0.0	41.7
Electricity, Gas & Water Supply	75	0.0	25.0
Wholesale & Retail	46.8	10.1	43.2
Transport, Storage & Communication	38.1	9.5	52.4
Hotel & Restaurant	58.3	8.3	33.3
Financial Intermediation	57.1	0.0	42.9
Real Estate, Renting	0.0	100	0.0
Business Services	54.5	9.1	36.4
Public Administration	0.0	0.0	100
Education	50	7.9	42.1
Health	36.4	9.1	54.5
Other CSPS Activities	46.4	14.3	39.3

The participants were asked to identify the occupations for which they expected demand to increase and decrease in the next two years. The occupations were categorised into occupational groups. More than a third of the respondents anticipated an increase in the number of workers in the "Professionals, Senior Officials and Technicians" group (See Figure 23). Approximately 30% of the respondents anticipated a reduction in the employees in the "Service Workers, Shop and Market Sales Workers" group (See Figure 24). Occupations in this category include cooks, chefs, bartenders and waitresses.

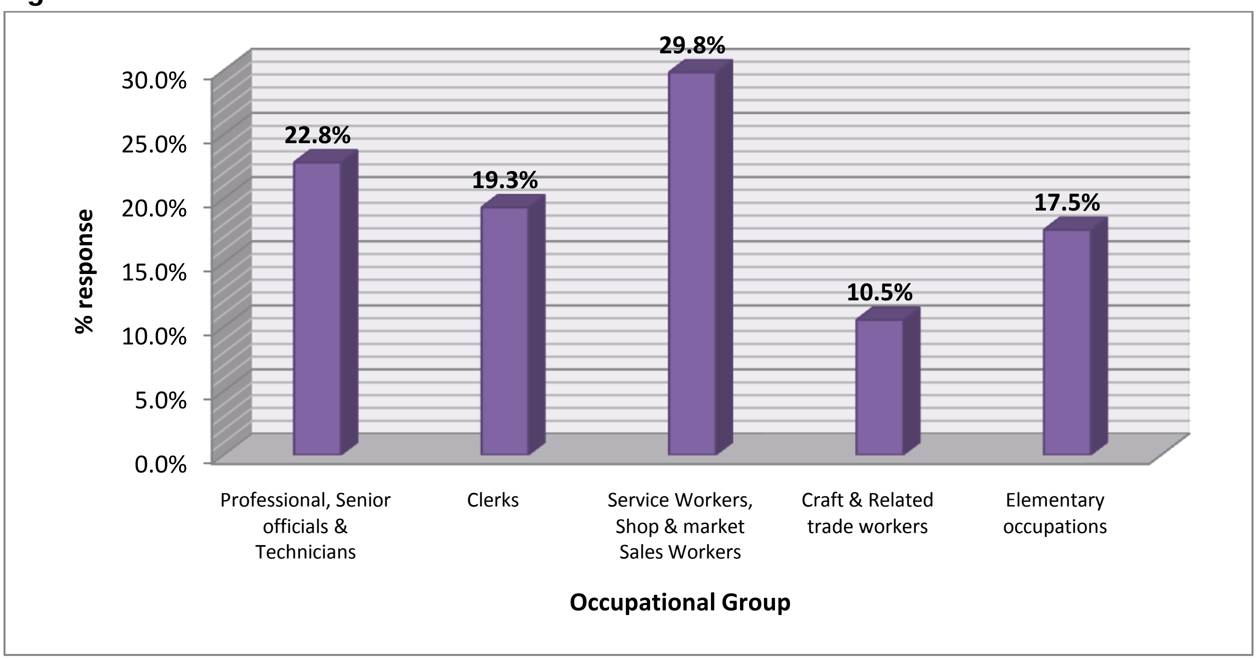
PROJECTED INCREASE IN THE WORKFORCE BY OCCUPATIONAL GROUP

Figure 23



PROJECTED DECREASE IN THE WORKFORCE BY OCCUPATIONAL GROUP

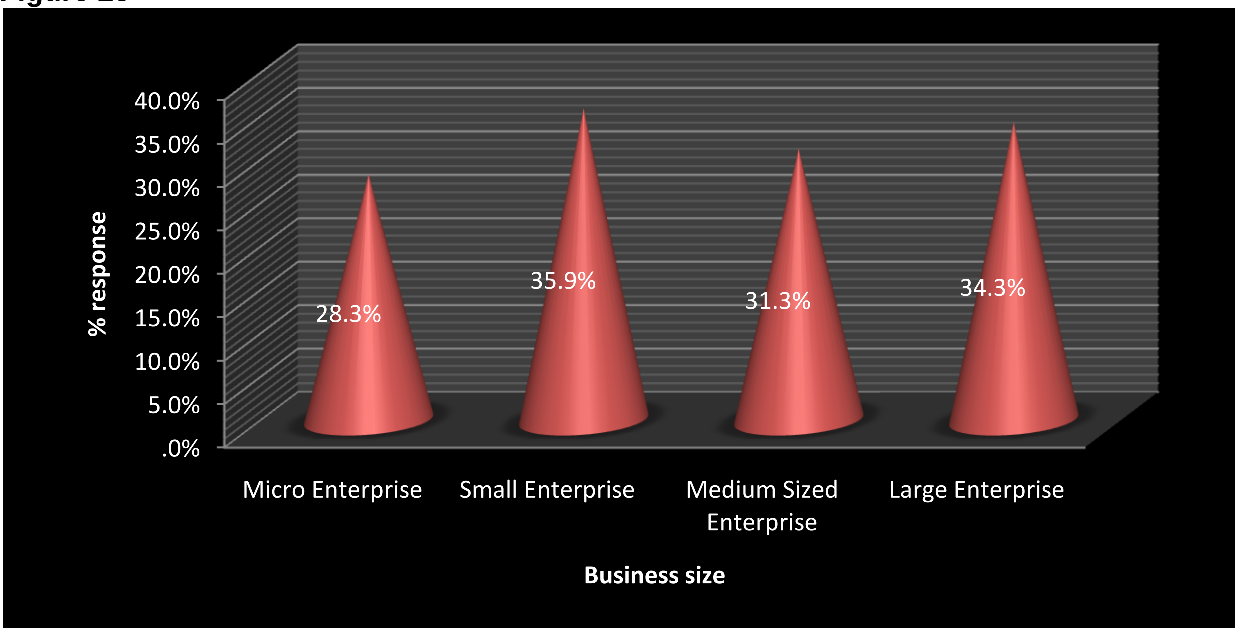
Figure 24



The participants were also asked to indicate the changes that they anticipated in the staff complement of their organisations during the period 2012-2014. Figure 25 shows that approximately 36% of the small enterprises had plans to increase their workforce. This was followed by 34.3% for large establishments and 31.3 % for medium-sized enterprises.

PLANS TO INCREASE STAFF COMPLEMENT DURING 2012 – 2014 BY TYPE OF ORGANISATION

Figure 25



5.4 The Extent to which Migrant Workers are Employed

The information provided by employers did not suggest that emigrants were employed at the expense of local workers. The positions that emigrant workers were recruited to fill were mainly in the “Professionals, Senior Officials and Technicians” occupational group. This could be due to challenges which the employers identified, such as; the inability to find local workers with the skills required and the poor work ethic of Jamaicans.

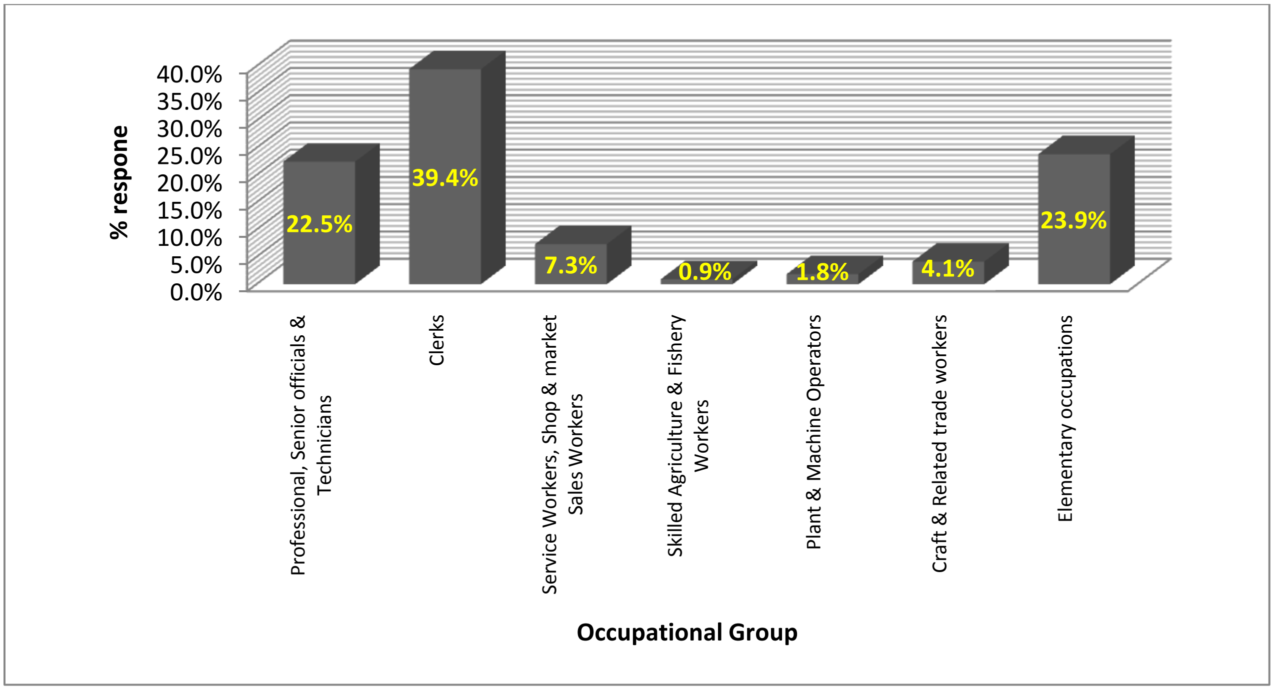
5.5 Areas of Employment for Persons with Disabilities

The data in relation to the employment of persons with disabilities indicated that the willingness of employers to hire these persons depended on the type of disability. The deaf and hearing impaired were employed in the largest number of occupations while persons with intellectual impairment seemed to have challenges finding work as they were employed in a few elementary occupations.

Several organisations expressed a willingness to employ persons with disabilities. They identified 218 occupations for which they could be considered. As is shown in Figure 26, most of these occupations were in the “Clerical” (39.4%); and “Professionals, Senior Officials and Technicians” (22.5%) occupational groups. Table 24 indicated that the majority of the entities were willing to employ persons with physical disabilities (51.4%) and the Deaf and Hearing Impaired (28.4%). Employers should therefore be encouraged to recruit persons with disabilities. This could mean for example, building ramps for wheel chairs or adjusting the structure of buildings such as bathrooms. ***The Labour Force*** could also disseminate data on persons with disabilities as the extent to which they are employed is unknown.

PROJECTED OCCUPATIONS FOR PERSONS WITH DISABILITIES

Figure 26



NUMBER OF OCCUPATIONS FOR WHICH PERSONS WITH DISABILITIES WOULD BE CONSIDERED BY TYPE OF DISABILITY

Table 24

Type of Disability	Number of Occupations	%
Blind and visually impaired	23	10.6
Deaf and hearing impaired	62	28.4
Physical disability	112	51.4
Intellectual impairment	21	9.6

Less than 50% of the employers in each sector were willing to employ persons with disabilities. The sector which seemed to offer the most hope was “Wholesale and Retail” (See Table 25). “Manufacturing” and “Education” were next with 11% and 10.3% respectively. There were few employment opportunities for persons with disabilities in the “Electricity, Gas and Water”, “Mining and Quarrying”, and “Public Administration” which had a combined total of less than 1%.

POSSIBLE EMPLOYMENT OPPORTUNITIES FOR PERSONS WITH DISABILITIES BY SECTOR

Table 25

Sector	Employment opportunities (%)
Agriculture	1.0
Mining & Quarrying	0.3
Manufacturing	11.0
Construction	2.7
Electricity, Gas & Water Supply	0.3
Wholesale & Retail	42.2
Transport, Storage & Communication	4.7
Hotel & Restaurant	10.0
Financial Intermediation	2.3
Real Estate, Renting	1.7
Business Services	3.7
Public Administration	0.3
Education	10.3
Health	3
Other CSPS Activities	6.6

6.0 CONCLUSION

Vacancies were recorded in almost all of the parishes and in every sector however, they were greater in the parishes of Kingston and St. Andrew, St. Catherine and Manchester. The small number of vacancies in the rural areas signifies the need for job creation in these parishes. This is important since poverty is highest in the rural areas. The need for a focus on job creation was also underscored by job openings being dependent on existing positions becoming vacant instead of the creation of new position. A National Employment Policy could be used to address these problems with emphasis on unemployment among vulnerable groups such as the youths, persons with disabilities and unskilled workers.

The Manufacturing sector recorded the highest level of vacancies and more than half of the businesses in the sector had reorganised their operations. Reorganisation of these entities could lead to increased productivity and growth in the sector. However, the sector has been negatively impacted by the high cost of energy and raw material and so these issues should be addressed. The implementation of the energy policy is essential in order to address the high cost of energy to employers.

Positions which were identified as being vacant were linked primarily to the “Professional, Senior Officials and Technicians” occupational group. These workers were also mostly needed as a result of the reorganisation. In addition, most of the vacancies associated with skill shortages were related to this occupational group. This seemed to give legitimacy to the employment of expatriates to fill vacancies related to this group. The greater demand for “Professionals, Senior Officials and Technicians” suggests that there should be increased emphasis on training. There should be special provision for the youth who face challenges in obtaining employment because of lack of experience. The implementation of flexible work arrangements would also encourage increased employment and productivity.

Another observation was that skill shortages seemed to be more prevalent in micro and large businesses and entities which had been in operation for more than a decade. Micro and small businesses were also mostly featured among enterprises which indicated that vacancies were not filled due to declining businesses. The sustainability of these businesses could be supported by the implementation of a Micro, Small and Medium-sized enterprises policy.

A small segment of the employers, particularly larger establishments had persons with disabilities on staff. However, there seemed to be good prospects for the employment of persons with disabilities as many employers expressed a willingness to hire them. This could be facilitated if establishments make the necessary changes to buildings to create a more friendly work environment for persons with disabilities. There could also be a hastening of the enactment of the Disabilities Act.

Despite the increase in unemployment future prospects seem to be good as many employers anticipated an increase in demand especially for persons in the "Professional, Senior Officials and Technicians" group. The gaps in the labour force which were identified underscore the importance of more collaboration and communication in order to ensure that there is an adequate supply of skills.

7.0 RECOMMENDATIONS

The following are recommendations which can be implemented in the short, medium and long term[14].

Short Term

- Promote volunteerism among the youth and job seekers in order to increase work experience.
- Increase levels of literacy, numeracy and certification by harnessing the resources of community colleges, HEART Trust/NTA and Jamaican Foundation for Lifelong Learning. This could be facilitated through for example, flexible schedules for classes including night classes.
- Increase career counselling among jobseekers in order to employability skills identify gaps and allow for intervention strategies.

Short to Medium Term

- Place greater emphasis on continuous training of staff as a strategy to ameliorate skills shortages. This could be facilitated by collaboration among employers, MLSS; and education and training institutions. In addition, the Government could provide incentives in the areas of on-the-job training.
- Provide more resources such as Government scholarships and funds from the Students' Loan Bureau to train persons for occupations which are in short supply and high demand. In addition, the Government could use moral suasion to get the private sector to provide scholarships, bursaries and other forms of financial support for persons pursuing studies in these areas.
- Emphasis on soft skills in schools to facilitate a smoother transition from school to the world of work.
- Develop a better relationship between the Ministry of Labour and Social Security (MLSS) and employers in order to obtain information which will facilitate a more efficiently functioning labour market for example, disseminating information from the study to employers through workshops.
- Determine the skills and occupations which will be required for projects such as the logistics hub.

[14] Short term refers to one year, medium term is greater than one to three years and long term is more than three years.

Medium Term to Long Term

- Promote investment in rural areas to reduce the disparity between urban and rural areas. Agriculture could be expanded to provide raw materials for the “Manufacturing” and “Hotel and Restaurant” sectors. In addition, it could reduce the country’s food import bill

Long Term

- Promote entrepreneurship among employees, jobseekers and students in order to create more employment opportunities by focusing on niche markets such as honey, spices, and the production of flavours and fragrances. Emphasis should also be placed on the use of local plants to make teas, beverages, and pharmaceutical products as well as beauty products such as lotion and body wash

APPENDIX A

LABOUR MARKET QUESTIONNAIRE

The purpose of this questionnaire is to examine the labour market in Jamaica in order to determine the availability and shortages of skills and occupations in Jamaica.

Please note that it is your own experience that we need. Your response will only be assessed by the persons who are collating the answers. DO <u>NOT</u> write the name of your organisation on the questionnaire. All results will be presented in an anonymous statistical form, thus full confidentiality will be assured. We look forward to your cooperation.

Please read the following questions carefully and provide answers by placing a tick (✓) in the appropriate box <u>OR</u> in the blank spaces provided.

<u>SECTION A: PROFILE OF ENTERPRISE</u>

1. In which parish is your business located?

Kingston ☐	St Mary ☐	Hanover ☐	Clarendon ☐
St. Andrew ☐	St. Ann ☐	Westmoreland ☐	St. Catherine ☐
St. Thomas ☐	Trelawny ☐	St. Elizabeth ☐	
Portland ☐	St. James ☐	Manchester ☐	

2. What type of business activity are you engaged in?(Be specific) ______________________________________

3. What is the ownership structure of your business?

   a. Private Non-Profit ☐ b. Private Profit ☐
   c. Government ☐ d. Sole Proprietor ☐
   e. Statutory Body ☐

4. How long has your business been in operation?______________________________________

5. What is the current estimated size of your workforce? ______________________________________

6. What types of employment exist in your establishment? (**Tick all that apply**)

   a. Permanent ☐ b. Contract ☐ c. Part time ☐ d. Seasonal ☐
   e. Other (Please Specify) ________________________

SECTION B: LABOUR/SKILLS AVAILABILITY AND SHORTAGES

7. Has there been any vacancy in your organisation in the last twelve months (December 2010 to November 2011)?

   a. Yes ☐ **(Go to question 9)** b. No ☐

8. Why were new employees not needed? **(Tick all that apply and go to question 13)**

a. Had enough employees ☐ b. Overstaffed ☐
c. Could not afford new employees ☐ d. Other (Please specify):_____________________

9. Please indicate the type of job openings and the following information relating to each over the last 12 months.

Type of Job Openings	Reason (s) for Vacancies	Number of Vacancies	Number of Applicants	Number of Interviews conducted	Number of positions filled	Average time taken to fill vacancies

(NOTE: Go to question 13 if all positions were filled.)

10. Will you be seeking persons to fill the remaining position (s)?

a. Yes ☐ b. No ☐ **(Go to question 12)**

11. How soon do you plan to fill these vacancies?

a. 1-4 months ☐ b. 5-8 months ☐ c. 9-12 months d. Other ____________

12. What are the reasons for having unfilled posts in your organisation? **(Tick all that apply)**

a. Shortage of Skills ☐ b. High wage cost (**Specify annual salary range**):__________
c. Declining business ☐ d. More affordable to outsource services ☐
e. Other (Please specify): ____

13. Which skilled worker (s) is (are) in short supply in your organisation?

____

14. Does your organisation provide skills training for the staff?

a. Yes ☐ b. No ☐**(Go to question 16)**

15. How does your organisation provide training? **(Tick all that apply)**

a. Apprenticeship ☐ b. Internship ☐
c. Job Shadowing ☐ d. Job Rotation ☐
e. In-House Training ☐ f. HEART/NTA ☐
g. Other (specify): ____

16. Is there a need/additional need for skills training in your organisation?

a. Yes ☐ b. No ☐ (**Go to Question 19**)

17. Please state the type of skills that your employees need to be trained in and indicate whether or not there is a shortage of these skills locally.

SKILLS NEEDED	SHORTAGE (Please tick)	
	YES	NO

18. What plans do you have to recruit the workers with the required skills in your organisation? **(Tick all that apply)**
    a. In-house training ☐
    b. Source locally ☐
    c. Source overseas ☐
    d. Keep employees who have reached retirement age ☐
    e. No plans ☐
    f. Other: (Please specify) ________________________________

19. Do you recruit workers from Jamaica only?
    a. Yes ☐ **(Go to question 22)**
    b. No ☐

20. Which position(s) do you recruit persons from abroad to fill?

    ____

21. Why do you recruit workers from abroad? **(Tick all that apply)**
    a) Unable to get suitably qualified local workers ☐
    b) Poor work ethics of the local workers ☐
    c) Low wage cost ☐
    d) Workers retired
    e) Need workers with same culture as the owners of the business ☐
    f) Other (Please specify): ____

22. What changes would you like to see in the curricula of local education and training institutions so that graduates may better meet your job requirements? **(Tick all that apply)**
    a. Provide more work/internship experience ☐
    b. Provide more technical/vocational skills ☐
    c. Engender a positive culture towards the job ☐
    d. Soft/Employability skills ☐
    e. Other (Please specify): ____

23. Please specify the types of training programmes which you believe could be introduced in the educational and training institutions in order to effectively address the needs of your organisation.

____

____

24. On average what percentage of your workforce performs satisfactorily in the following areas?

AREAS	PERCENTAGE
Job Knowledge	
Job Attitude	
Customer Service Skills	
Problem Solving Skills	
Ability to act on own initiative	
Punctuality	
Trustworthiness	

SECTION C: CHANGES IN THE WORKFORCE

25. Has your company reorganised its operations in the last two (2) years?

a. Yes ☐ b. No ☐ **(Go to question 27)**

26. How did you reorganise your business operations? **(Tick all that apply)**

a. Invested in new machinery ☐
b. Introduced productivity mechanisms (not including new machinery) ☐
c. Engaged in staff restructuring exercise ☐
d. Focused on the core business ☐
e. Subcontracted other areas of your business ☐
f. Other (Please specify):____

27. Please state the occupations which increased or decreased in numbers in the last two years, the skills required for each occupation and the reasons for the change. (**If no change occurred go to question 28)**

CHANGE	OCCUPATIONS	MAIN SKILLS	REASON/S FOR CHANGE
INCREASE			
DECREASE			

SECTION D: PROJECTIONS

28. How do you expect the number of employees in your organisation to change in the next two (2) years?

   a. Increase ☐
   b. Reduce ☐
   c. No change ☐ **(Go to question 32)**
   d. Not Sure ☐ **(Go to question 32)**

29. Why do you anticipate a change to take place? **(Tick all that apply)**

   a. Business Expansion ☐
   b. Change in core functions ☐
   c. Cannot afford to maintain the current staff complement ☐
   d. Retool ☐
   e. Restructure ☐
   f. Lingering effects of the global recession ☐
   g. Other (**Please specify**):____

30. Please state the occupations of the workers which are expected to change in numbers, their main skills and the approximate number of workers which are expected to increase or decrease for each occupation in the next two (2) years.

Change in Occupation of Workers (Tick)		**Occupation of Workers**	**Main Skill**	**Number of Workers**
Increase	**Decrease**			

(NOTE: If employers specify the number of workers, go to question 32)

31. Please indicate the category (occupation) of worker(s) which is expected to have the highest level of increase and/or decrease in the next two years and the reason for the change?

Change	**Category of Worker**	**Reasons for change**
Highest level of increase		
Highest level of decrease		

32. Which new occupations will be created in your organisation within the next two (2) years?

____

33. Which occupations do you see becoming obsolete in your organisation within the next two (2) years?

____

SECTION E: JOB OPPORTUNITIES FOR PERSONS WITH DISABILITIES

34. How many of your employees are persons with disabilities? _________________________ **(If none, go to question 36)**

35. Please state according to their nature of disability, the occupations and skills.

Nature of disability	Occupation	Skill
Blind and visually impaired		
Deaf and hearing impaired		
Physical disability		
Intellectual impairment		

36. Would you hire a person /additional persons with a disability?

a. Yes ☐ **(Go to question 38)** b. No ☐

37. State the reason why you would not employ a person/ addition with a disability

____

(End Interview)

38. How many persons with a disability would you employ in the next 12 months? _______________

39. Please state according to their nature of disability, the occupations and skills of workers who you would employ?

Nature of disability	Occupation	Skill
Blind and visually impaired		
Deaf and hearing impaired		
Physical disability		
Intellectual impairment		

END INTERVIEW