



STATE OF THE AMERICAN WORKFORCE AND ITS IMPACT ON TRAVEL

U.S. TRAVEL
ASSOCIATION*

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INTRODUCTION

With 11 million job openings, the COVID-19 pandemic undoubtedly left drastic and long-lasting impacts on the American workforce. **The loss of jobs, however, was most severe among our very own industry**—total travel and tourism supported jobs plummeted 34% between 2019 and 2020—declining from 16.7 million in 2019 to 11.1 million, on average, in 2020.¹ And despite gains through the summer, leisure and hospitality still falls nearly 8% below its pre-pandemic levels and accounts for nearly one in six (1.8 million) of the 11 million job openings as of the end of October.²

The percent of Americans in the labor force has dramatically declined due to early retirements, working mothers leaving the workforce, an increase in self-employment and an influx of talent migration to different jobs and industries. There are many factors contributing to the shortage of labor across industries, including childcare challenges, health and safety concerns, a severe lack of temporary foreign workers and a re-prioritization of employment motivations.

Separately, a widespread trend of individual introspection and a re-evaluation of long-term career goals combined with a new generation of workforce that has a different value system is having an impact.

Travel employment has suffered within the context of the overall labor market shortages, but also has to overcome its own challenges. Not all these challenges we face are new. Travel and tourism jobs have long battled a reputation of low paying jobs, long hours and limited upward mobility.

The pandemic's effect on the stability of a job in the travel industry has only exacerbated these vulnerabilities making it clear that a shift in thinking and strategy around rebuilding the travel workforce is critical—for now and far into the future.



THE EFFECT OF COVID-19 ON THE U.S. ECONOMY, TRAVEL AND TOURISM

The COVID-19 pandemic had a swift and steep impact on the entire U.S. economy, but its impact on the travel and tourism industry was unmatched. As the economy essentially shut down all in-person services and Americans were locked down at home, the pandemic and the resulting closures resulted in the highest unemployment rate since the Great Depression. The loss of jobs was severe both in its scope and its speed. To put the devastation in perspective, nine million jobs were lost over two years during the financial crisis of 2008, compared to 22 million jobs lost in just two months during the COVID-19 pandemic.³

Total travel and tourism supported jobs plummeted 34% between 2019 and 2020—declining from 16.7 million in 2019 to 11.1 million, on average, in 2020.⁴ Direct travel jobs fell from nine million to six million.⁵

Prior to the pandemic, direct travel jobs accounted for 6% of the workforce and total travel-supported jobs accounted for 11%.⁶ But in 2020, direct travel jobs accounted for a disproportionate 35% of jobs lost and total travel supported jobs accounted for a staggering 65% of all jobs lost.⁷

After reaching a 50-year low at the end of 2019, the U.S. unemployment rate saw a steep increase in just a few months—reaching a high of 14.8% in April 2020.⁸ The travel-dependent leisure & hospitality (L&H) industry suffered significantly more than the overall economy.⁹ Nearly half of the 16.9 million jobs in the L&H industry were lost in March and April 2020 and L&H unemployment reached a devastating 39.3%.¹⁰ **L&H accounted for 11% of pre-pandemic employment in the U.S. yet represents 34% of all jobs lost and not yet recovered through November.**¹¹

WHAT IS THE DIFFERENCE BETWEEN **TOTAL TRAVEL** AND **LEISURE & HOSPITALITY (L&H)** EMPLOYMENT?

Leisure & Hospitality is an official 'subsector' of the economy defined by the Bureau of Labor Statistics and includes:

Accommodation and food services

Arts, entertainment and recreation

L&H accounts for 77% of travel employment

L&H includes spending by both local residents and travelers

L&H is often used as a proxy for the travel industry since this data is updated monthly and is more accessible than total travel industry employment

Total travel employment includes air and auto transportation, retail and travel planning that is NOT included in L&H

TRAVEL EMPLOYMENT IMPACTS ALL SECTORS OF THE U.S. ECONOMY, 2019

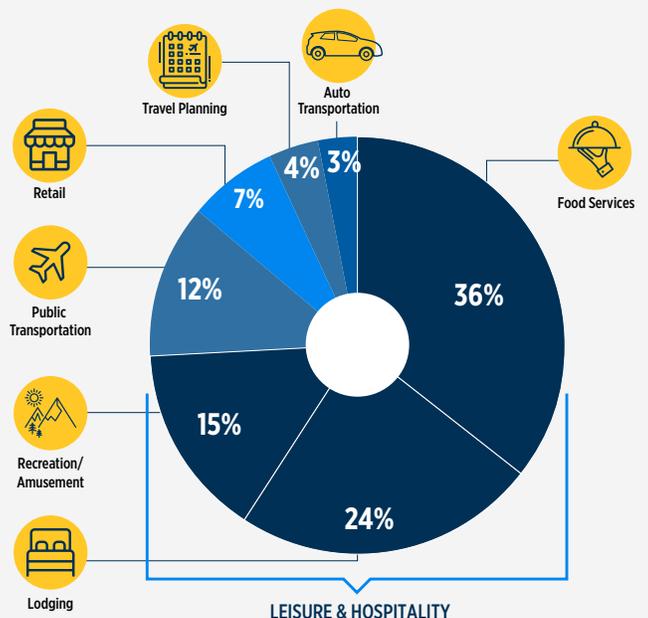


CHART 1 | Source: U.S. Travel Association

CURRENT STATE OF WORKFORCE – WHERE ARE WE NOW?

Leisure & Hospitality (L&H) employment remains 8% below its pre-pandemic levels as of the November 2021 jobs report.¹² (Chart 2) Within L&H, employment in the accommodation subsector, remains down 14% while air transportation employment remains 9% below pre-pandemic levels.¹³ In comparison, employment in the overall economy is just 3% below pre-pandemic levels.¹⁴

Overall, the unemployment situation has gradually improved since its April 2020 peak and total unemployment declined to just 4.2% in November and L&H unemployment rate eased downward to 7.5%.¹⁵ While some of the improvement can be attributed to job growth, the falling rate of unemployment is also influenced by a shrinking labor force.

As of November, 48% of small businesses could not fill all job openings—significantly higher than the historical average of 22%.¹⁶ Since small businesses employed over 60% of the overall L&H workforce prior to the pandemic, this has a significant impact on travel and tourism’s recovery.¹⁷ Small business owners are also raising compensation to increase their competitiveness—32% plan to raise compensation in the next three months—even though this likely will result in higher prices.¹⁸

There are now 11 million job openings in the United States—roughly one in six, or 1.8 million, in leisure and hospitality alone—as of the end of October.¹⁹ Additionally, openings continue to grow because job hirings are simply not keeping up with openings.

WORKFORCE CHURN

Some 4.2 million Americans (2.8% of the workforce) quit their jobs but remained in the workforce in October.²⁰ Workers know that jobs are plentiful and that they can secure another job easily if they leave theirs. The lack of workers is widespread across industries with only the construction and mining industries not experiencing a worker shortage.



ONE IN 12 LEISURE AND HOSPITALITY JOBS REMAIN LOST

% OF INDUSTRY JOBS STILL LOST FROM FEB. 2020 - NOV 2021

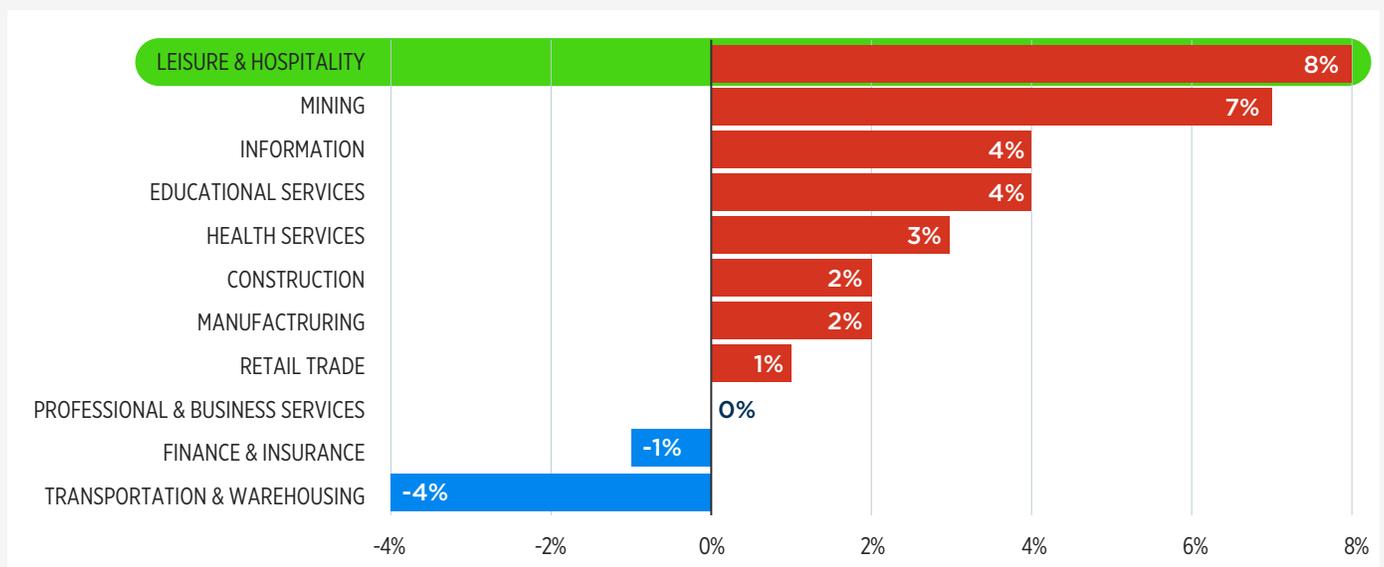


CHART 2 | Source: Bureau of Labor Statistics

DEMOGRAPHIC DIFFERENCES

Travel jobs have historically been uniquely diverse, welcoming and accessible to all Americans. Travel employs a greater share of Hispanics, African Americans and multi-ethnic individuals than the rest of the economy. For example, while blacks accounted for 12% of overall employment in the U.S. in 2019, they accounted for 19% of employment in accommodations and 20% of employment in air transportation.²¹ Similarly, while Asians accounted for 7% of overall employment in the U.S., they accounted for 10% of accommodations employment. Hispanics made up 24% of leisure and hospitality employment in 2019 compared to just 18% of the overall economy.²²

Job losses in low wage occupations and service-related industries were hit particularly hard. In fact, the percentage decline of low-wage occupations was more than twice as great as middle-wage occupations while high-wage occupations increased marginally.²³ And, unfortunately, the reality is that even within L&H, minority workers are more likely to be found in lower-paying positions that were more vulnerable to cutbacks.²⁴ As a result, the

TRAVEL INDUSTRY IS DIVERSE

Percent of total employed, 2019	Women	White/ Non-Hispanic	Black/ African American	Asian	Hispanic/ Latino
Overall U.S. economy	47%	78%	12%	7%	18%
Leisure & Hospitality	51%	75%	13%	7%	24%
Traveler accommodation	59%	66%	19%	10%	30%
Air transportation	41%	68%	20%	7%	14%

Source: Bureau of Labor Statistics

pandemic more negatively impacted minorities and women.²⁵ Unemployment among Blacks, Asians and Hispanics remain 48-74% higher than the same quarter in 2019 while White unemployment is just 39% higher.²⁶ As L&H employment remains 8% below pre-pandemic levels and many of these minority workers remain unemployed.²⁷ (Chart 3)

“Occupational segregation—the fact that these workers are less likely to be found in higher-paid management professions, even within leisure and hospitality—exposed them to the worst of the job losses.”²⁸ – Economic Policy Institute

MINORITIES DISPROPORTIONATELY IMPACTED



UNEMPLOYMENT RATE BY RACE AND ETHNICITY

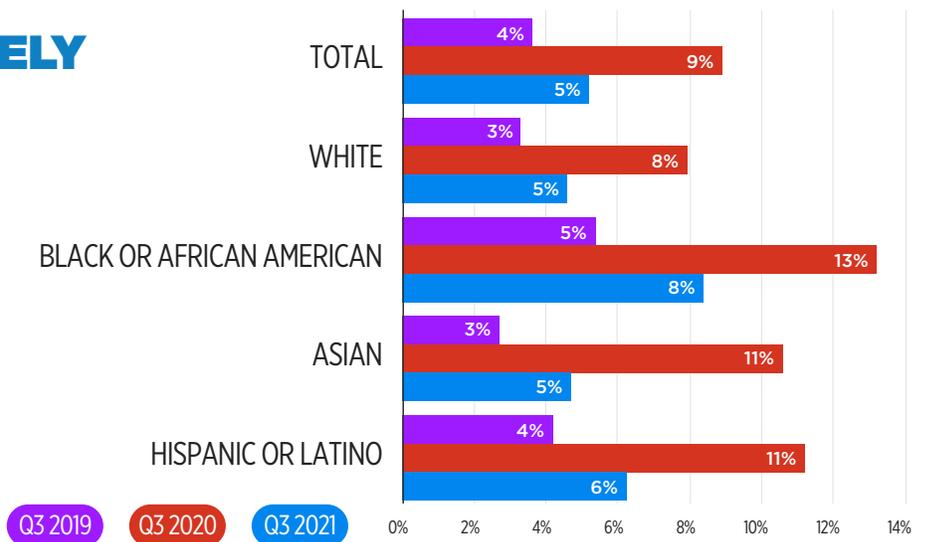


CHART 3 | Source: Bureau of Labor Statistics

Employment Shifts as a Result of COVID-19

Four in 10 of full-time employed Americans experienced some sort of employment change during the pandemic—most commonly lay-offs or a reduction of hours (Chart 4).²⁹ More than five million Americans left the workforce during the pandemic including more than three million early retirees—double the number in 2019.³⁰ Some voluntarily retired, opting to spend more time enjoying life, while other retirements were involuntary.

“The COVID-19 recession was abnormal in the sense that it featured a sharp downturn in real economic activity but also rising asset values, such as for housing and stocks. That may have made early retirement possible for many.” – Miguel Faria e Castro, senior economist, St. Louis Fed³¹

FOUR IN 10 EMPLOYED AMERICANS EXPERIENCED EMPLOYMENT SHIFTS DURING THE PANDEMIC

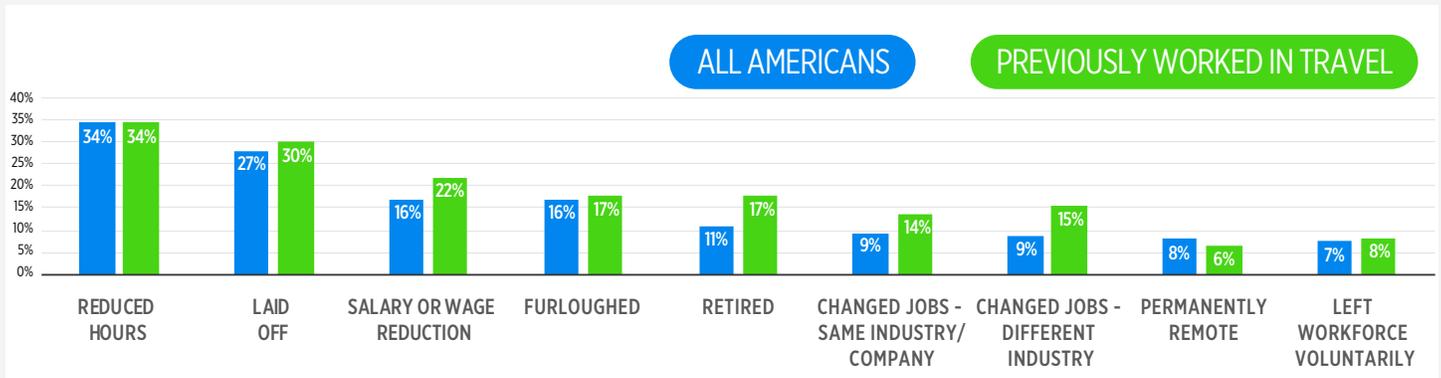


CHART 4 | Source: Destination Analysts, 2021

Remote Work

With nearly one in 10 Americans permanently remote, many chose to move locations to be closer to family, away from dense urban areas or to a less expensive destination.³² Close to four in 10 employed Americans either moved or plan to move.³³ And of those who have moved, 44% changed their employment situation as a result.³⁴

The travel and tourism workforce was more negatively impacted than most other industries. **Six in 10 Americans who previously worked in travel and tourism experienced employment changes since the start of the pandemic.**³⁵ More than four in 10 of those currently employed in travel were laid off during the pandemic and 44% of those employed in travel related jobs had their hours reduced.³⁶



Travel Employment Impacts All Regions of the U.S. and Sectors of the U.S. Economy

Pre-pandemic, in 2019, the travel industry generated \$2.6 trillion for the U.S. economy, supporting 16.7 million American jobs.³⁷ One in 10 U.S. jobs directly or indirectly relied on the travel industry.³⁸ As a service orientated, labor-intensive industry, travel has a greater ability to create jobs compared to other industries.

At the national level, travel was America’s seventh-largest employer, directly employing nine million Americans³⁹ across

transportation, entertainment and recreation, retail, lodging and restaurants in occupations such as hotel managers, chefs, international marketing representatives, graphic designers, urban planners, public relations managers, budget analysts, and even mechanical engineers.

The benefits of travel extend to every state, impacting large and small towns alike. In fact, travel was a top 10 employer in 49 states and Washington, D.C. and employed more than 100,000 workers in 25 states prior to the pandemic.⁴⁰

UNEVEN REGIONAL EMPLOYMENT IMPACTS % CHG IN UNEMPLOYMENT (OCT 2019 VS OCT 2021)

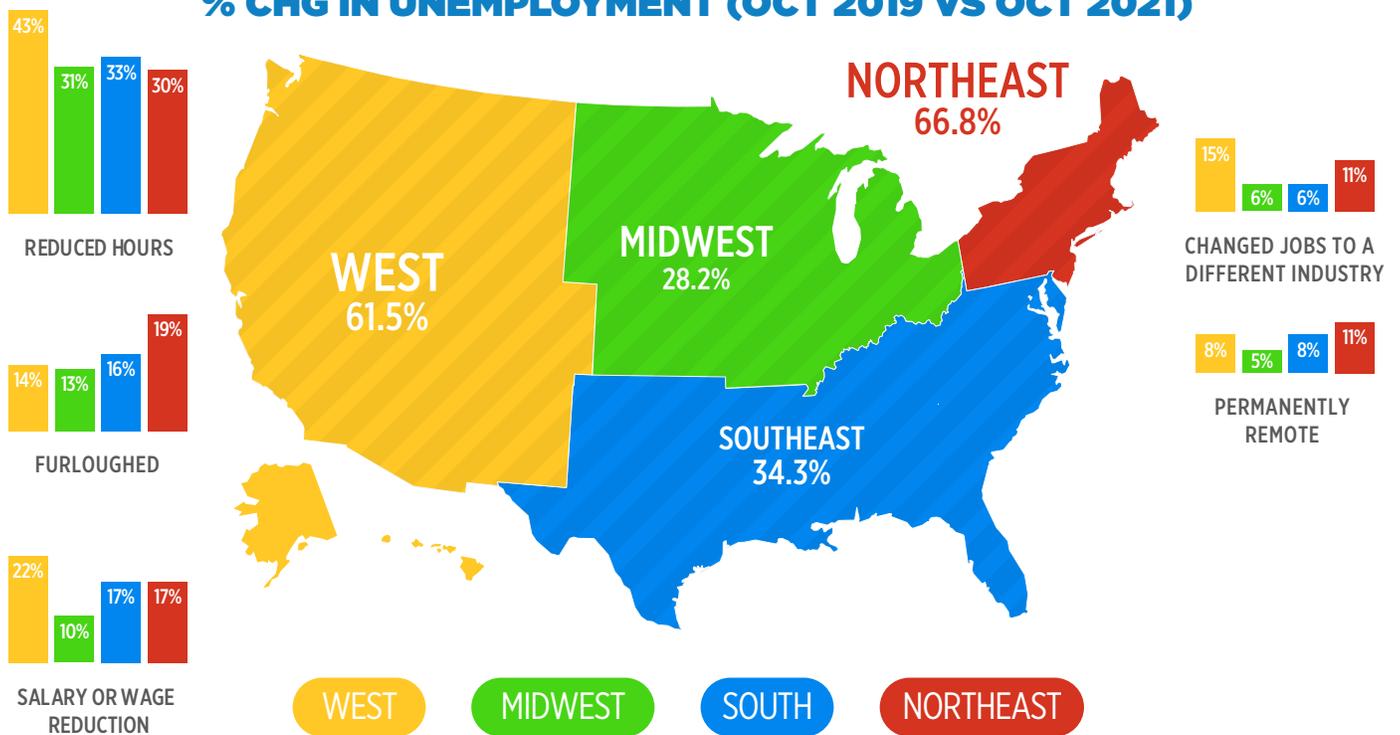


CHART 5 | Source: Bureau of Labor Statistics (map) Destination Analysts (bars)

Workforce Shifts Have Unevenly Impacted the Geography of the U.S.

Unemployment remains above 6% in the Northeast and West – typically more urban parts of the country, while unemployment in the Midwest and Southeast stands at 4.5%.⁴¹

More than one-third of Americans residing in the Northeast (35%) experienced employment shifts as a result of the pandemic – most commonly they were furloughed or became a permanent remote employee.⁴² While 27% of Americans in the West experienced employment changes they were much more impacted by reduced hours.⁴³ (Chart 5)

A greater percentage of Americans residing in the West and

Midwest indicated they are unemployed and currently seeking work or unemployed and NOT looking for work.⁴⁴

While employment is nearly fully recovered in many Midwest states that are generally more manufacturing, engineering and construction focused, states on the West coast and in the Northeast that are more reliant on service industries — particularly tourism dependent ones such as Hawaii, New York, Nevada and Alaska continue to struggle.⁴⁵

Additionally, more rural states with higher COVID rates such as Georgia, Kentucky, Idaho, South Dakota and Iowa are experiencing a more tumultuous job market with higher hiring and quit rates than the rest of the country.⁴⁶



REASONS FOR WORKER SHORTAGES

Now that the economy has largely reopened, consumers are spending and prioritizing in-person services, experiences and travel. Yet, the American economy's recovery is hindered by an unprecedented workforce shortage.

From 2016 through 2019, the labor force participation rate averaged 62.9%, but the onset of the pandemic sidelined workers with health, safety and childcare concerns.⁴⁷ As of November 2021, the labor force participation rate was 61.8% - equating to 2.4 million fewer Americans in the workforce than the same time in 2019.⁴⁸ (Chart 6)

Other than the additional financial cushion many Americans received from unemployment benefits and government relief funding, Americans continue to hold off on job searches due to a lack of childcare and other family care needs, self-reflection and reevaluation of priorities, a skills mismatch between employer needs and unemployed Americans, international worker shortages and ongoing COVID-19 concerns.⁵⁵

“ The U.S. does not have a labor shortage as much as it has a shortage of workers willing to accept the working conditions that today's economy often demands.⁵⁶ Whether defined as [‘the revolt of the American worker’](#), [the Great Resignation](#), or [‘take this job and shove it’](#), the U.S. economy is undoubtedly at a turning point.⁵⁷

DECLINING LABOR FORCE PARTICIPATION RATE

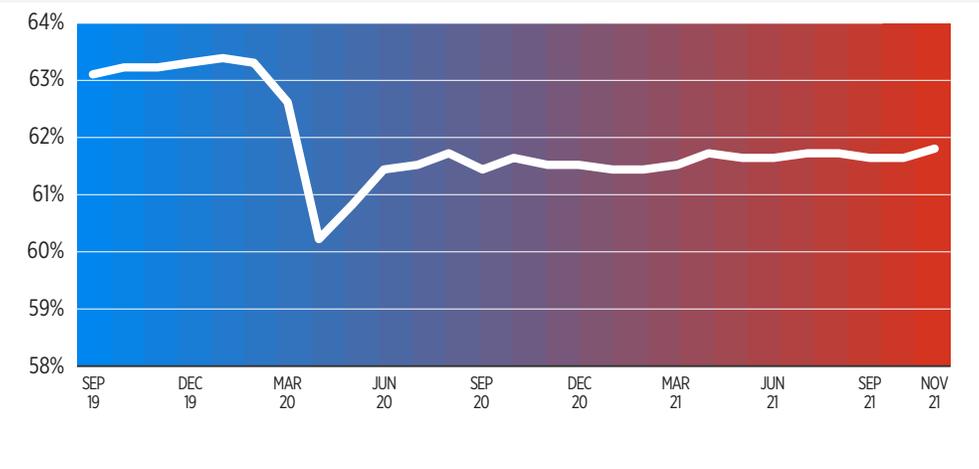


CHART 6 | Source: Bureau of Labor Statistics

“Workers are holding out until their savings disappear. Businesses are holding out until their customers disappear.” - Ben Casselman, economics reporter, *The New York Times*⁵⁹

Financial Cushion

While federal stimulus measures and unemployment benefits contributed to many workers remaining on the sidelines at the height of the pandemic, there are numerous other factors contributing to a lack of participation in the workforce. Many furloughed and laid off Americans were able to take the time to re-evaluate their career paths and priorities.

Thanks to pandemic stimulus programs, many households received additional income and have more of a financial cushion than they are used to. Savings increases have been even more pronounced for lower income earners.⁵⁸ With this cushion, some workers, especially those in the service industry, decided they did not want to return to their old jobs. Many realized they were unwilling to take a job with low pay, no benefits, little flexibility and no career progression. With the time to self-reflect, many woke up with the realization that their job and lifestyle was unsustainable, unfulfilling and detrimental to their well-being.

FEDERAL STIMULUS PROVIDES FINANCIAL CUSHION

As of early-September federal stimulus measures have ended in all states—impacting an estimated **7.5 million** Americans.⁵⁰ The federal government provided over **\$850 billion** in direct payments to taxpayers.⁵¹ On average, Americans received **\$3,200** from three rounds of stimulus checks⁵² and a typical family of four received an additional **\$3,200** as a result of the child tax credit.⁵³ Unemployed Americans received a weekly supplemental benefit of **\$300** on top of the regular **\$400** benefit.⁵⁴

	TOTAL	MEN	WOMEN
LABOR FORCE DECLINES SINCE FEB. 2020 - NOV 2021	2,396	903	1,493
SHARE OF TOTAL LABOR FORCE DECLINE		38%	62%



TABLE 3 | Source: Bureau of Labor Statistics

Childcare Challenges

With day-care centers shuttered or severely restricting enrollment, and school aged children learning remotely, many working parents—particularly women—found it impossible to make their job, parenting and educating work. More than 800,000 women left the workforce between August and September 2020.⁶⁰ And women made up nearly two-thirds of the decline in total workforce between February 2020 and November 2021. One out of four women who reported becoming unemployed during the pandemic said it was because of lack of childcare—twice the rate among men.⁶¹ And many are not returning. While labor force participation is slowly improving again, nearly 300,00 women dropped out of the workforce entirely in September 2021 alone.⁶² Just as college-educated women were making significant progress balancing both their careers and families, the pandemic magnified gender inequality yet again.

As women tend to gravitate towards service-based occupations such as education, healthcare and travel and tourism, they are more likely to be required to work in person. Women are considered essential workers in both the work and the home and diminishing quality childcare options and availability forced women to choose between work and family.⁶³ As of this past June, close to four in 10 (37%) unemployed women were not actively seeking new work and likely not coming back at all compared to one-quarter

of unemployed men.⁶⁴ Some research indicates that the current child-care crisis could set women back a generation.⁶⁵

Parents with children under the age of 14 make up nearly one-third of the workforce or roughly 50 million workers.⁶⁶ Americans cannot get back to work if they do not have access to stable, good childcare—which is essential in order for the economy to fully recover.

To add flames to the fire, as a result of stagnating wages, demanding job responsibilities and an increased risk of COVID-19, the childcare industry is also struggling to retain and hire reliable and quality workers.⁶⁷ Employment in the industry remains more than 10% lower than what it was pre-pandemic—resulting in fewer childcare options for working parents.⁶⁸

Small-business owner Bridget McGinty made the painful decision to close her restaurant in May 2020 after two decades, partially because she and many of her staff have small children they couldn't find care for.

“I’m a single mom, and my son won’t be in school. It was just impossible to take on that much work physically and mentally of reopening”

- Bridget McGinty, owner, *Tastebuds*, Cleveland⁶⁹

Self-reflection

The pandemic took a psychological and emotional toll on the American workforce.

More than two-thirds of Americans seeking new employment are seriously considering changing their occupation or field of work and 64% have altered their expectations for what they want in a job.⁷⁰

Many are reassessing what they want to do and how and where they want to work. For many leisure and hospitality employees who were laid off early on the pandemic, unemployment benefits and the economic shutdowns allowed them the time to take a breath and evaluate their life priorities and career goals.

Yet, increased uncertainty has resulted in many other employed Americans to stay in place and 62% believe job security outweighs the desire to leave.⁷¹

Others are reassessing how much they want to work and are prioritizing greater work/life balance and more control of their careers.

Additionally, Americans who lost their job during the pandemic have altered their career paths and personal goals. Now close to one-quarter are moving to part-time work, nearly one in 10 are starting their own businesses and another 9% are retiring altogether.⁷³ (Chart 7)

Defined as ‘COVID clarity’ – one-third of Americans cited the ‘desire to make a career change’ as the top reason for leaving their current job.⁷²

“ The problem is we are not making enough money to make it worth it to go back to these jobs that are difficult and dirty and usually thankless. You’re getting yelled at and disrespected all day. It’s hell”

- Sara, a former retailer. She added that with two young kids, finding childcare has also been a huge issue lately.⁷⁴

UNEMPLOYED WORKER STATUS

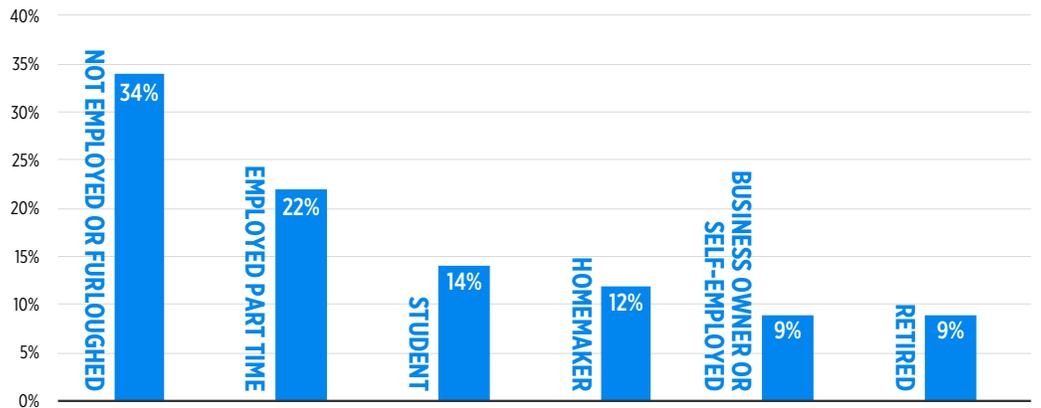


CHART 7 | Source: U.S. Chamber of Commerce, May 2021



LEISURE & HOSPITALITY EXPERIENCING ELEVATED QUIT RATES



CHART 8 | Source: Bureau of Labor Statistics

People who previously worked in restaurants, retail or other travel related industries are finding higher paying jobs in logistics, technology or real estate—opting for jobs that are more stable, less stressful with fewer health risks. More than one in five of the 4.2 million Americans who quit their job in October were employed in retail, restaurants and hotels.⁷⁵ Workers in the hospitality sector quit their jobs at a rate of 5.7% — nearly twice the private sector average of 3.1%. While much lower than leisure and hospitality, even workers employed in transportation are quitting

at elevated levels — 3.3% in October, down from 5.0% in April 2021.⁷⁶ With job openings continuing to outnumber unemployed workers, many are remaining on the sidelines reevaluating what they want to do. (Chart 8)

The burnout factor was evident through a survey of Americans, showing that individuals who have previously worked in the travel industry and decided to change jobs disproportionately switched to work in a **different industry** (15% compared to 9% overall).⁷⁸ Others employed in hospitality have explored real estate licenses, certificates and associate degrees to diversify their skills and make their resumes more attractive.



RECORD RESIGNATIONS

At the Gettysburg Battlefield café, food service manager, Christine Garrett had to hire 13 people to staff just one position. Even though she has raised wages and offered bonuses and other incentives, of those 13 hires, eight either quit without notice or never showed up in the first place.⁷⁷

Serena Couch, who lost her job at Disney World in Orlando in April 2020 initially held out hope that she would be called back, but as the months went by, it became clear that was unlikely. She spent her down time searching for jobs and learning to code by watching YouTube videos and reading blogs.⁷⁹



Reallocation Friction

The idea that the array of jobs in the economy are changing and workers are taking time to figure out what new jobs they want—or what skills they need for different roles, economist describe this phenomenon as reallocation friction.⁸⁰ Many workers who lost their job during the pandemic are seeking out jobs that do not require long commutes, are unstable with unattractive hours or high levels of stress, in favor of greater stability, better work/life balance and fewer health risks - even if it means they must acquire new skills.

Inexperienced workers require training to build up the necessary skills in an unfamiliar industry or perhaps a job in another industry may require them to move to another city or state.⁸¹ When jobs go unfilled and unemployment remains elevated, even though there is demand for the jobs, it results in a disconnect or friction between the labor supply and workforce demands. As a result, there are worker shortages across the economy including restaurants, hospitality, grocery stores and even health care - nursing care facilities, etc. The U.S. economy is faced with a very uneven recovery with some industries such as tech, finance, logistics largely recovered and others - particularly in the service industry are still struggling.⁸²

Skills Gap

Even though there are plentiful job openings, there is too often a skills gap between the employee and the employer's job requirements. And one in four say they lack the skills or experience necessary for most of the jobs available right now.

There is a fundamental mismatch between the industries that currently have the most job openings and how many unemployed

people have experience in that industry.⁸³ There are nearly two million job openings in professional and business services, yet less than one million of Americans most recent job was in that sector.⁸⁴ Education, health services, leisure and hospitality, retail and wholesale trade also have more openings that workers with previous experience and many who previously worked in those industries are looking for career changes in entirely different sectors.⁸⁵ (Chart 9)

In order to recruit enough workers for the open positions, companies may need to entice people to switch careers or gain new skill sets, a process that requires time, especially in fields that demand special licenses and certifications.⁸⁶

Additionally, due to automation, many organizations are reassessing how many workers they need and in what capacities. While demand for basic cognitive and manual skills decline, the need for technological, social and emotional skills will increase.⁸⁸

McKinsey & Co estimates that more than 100 million workers may need to switch occupations by 2030, 12 million more than the pre-pandemic estimate.⁸⁷

It's typically low-skilled, low-wage jobs that require a high school diploma or less that are getting — and will continue to get — hit hardest, underscoring the need for the U.S. to train and upskill its workforce post-pandemic.⁸⁹ Job training and reskilling will be an essential part of America's post-pandemic economic recovery.

JOB OPENINGS OUTPACE UNEMPLOYED IN MANY SECTORS

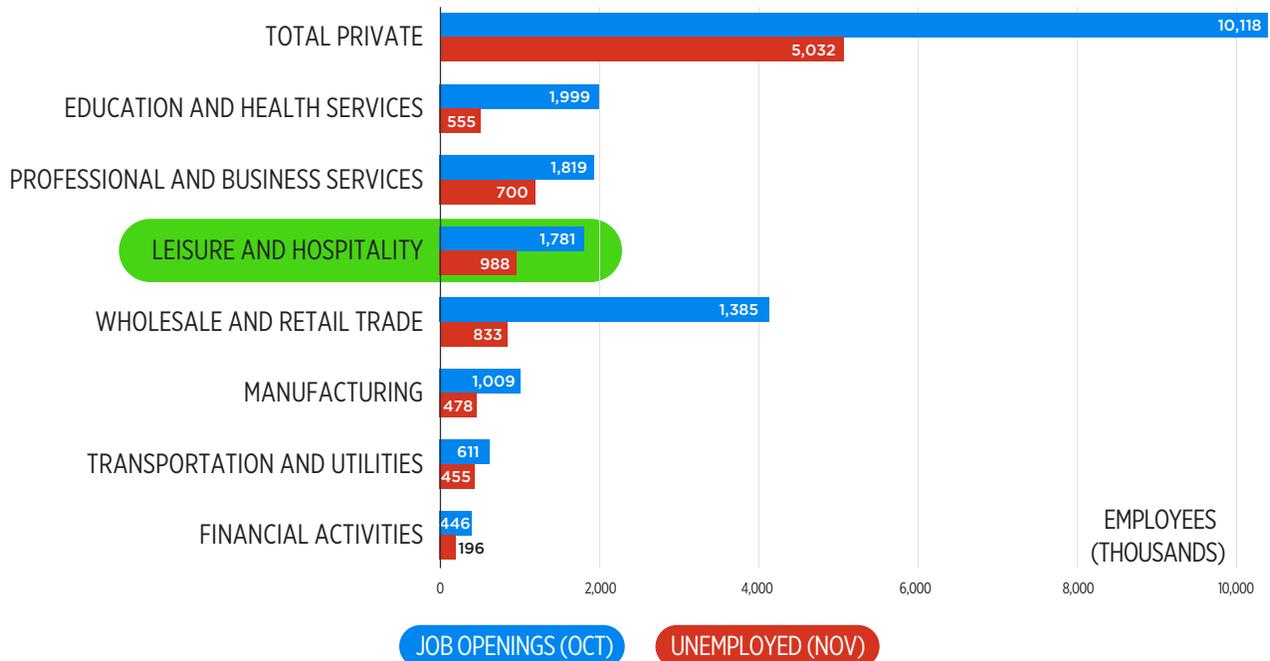


CHART 9 | Source: Bureau of Labor Statistics

International Visa Challenges

Even beyond the American workforce, continued restrictions and caps on temporary H-2B visas to support seasonal businesses across the country have severely hampered recovery. The program serves as a safety net for U.S. businesses to address seasonal labor needs when there are not sufficient numbers of American workers to meet the demand for short-term jobs.

Many organizations are struggling to fill open positions with the existing U.S. labor force. Prior to the pandemic, the cap on H-2B worker admissions was 66,000 and had not been raised or updated since 1992.⁹⁰ Even during the height of the pandemic, seasonal businesses in multiple industries were unable to find available U.S. workers.

Currently, U.S. Travel is working with Congress and pressing for a higher cap on H-2B and J-1 visas, as well as advocating for faster visa processing times for low-risk applicants.

In Maine, where the tourism economy is extremely seasonal, workers on J-1 or H-2B visas generally make up about 10 to 14% of the seasonal work force.⁹² In 2021, the state received half of their usual seasonal foreign workforce and those that were approved arrived later than normal due to processing delays.⁹³

Visa processing delays, backlogs and travel restrictions severely curtailed the ability of many international travelers to enter the U.S.—including students, visitors and seasonal workers. Even after applications are finally approved, many international workers are unable to travel to the United States. The labor force was reduced by more than 500,000 just from a decline in temporary workers alone.⁹¹



“ The fact remains that we had a worker shortage prior to the pandemic, and we have a worse worker shortage after the pandemic.” – Greg Dugal, director of government affairs, Hospitality Maine

NO SINGLE POSITIVE ATTRIBUTE DOMINATES TRAVEL AND TOURISM CAREERS



CHART 11 | Source: Destination Analysts, July 2021

And while positive attributes such as helpful, challenging and creative were used to describe careers in travel and tourism, no more than 35% of respondents identified with a single positive attribute.⁹⁸ (Chart 11)

Yet, four in 10 Americans currently employed in travel and tourism, view their jobs as rewarding.⁹⁹ (Chart 11)

Even though many associate positive attributes with travel and tourism employment, the numbers tell a different story. There is a disconnect between American's perceptions and understanding of careers in travel and tourism. While many view travel as exciting they are either not familiar with the industry or unlikely to consider a job in travel and tourism. Additionally, Americans who have prior

experience working in travel and tourism have both strong positive and negative perceptions of the industry.

Previous and potential employees do not want to experience travel and tourism employment first-hand themselves. More than half of U.S. hospitality workers would not go back to their old jobs for any reason and over a third aren't even considering re-entering the industry.¹⁰⁰ Due to record numbers of furloughs, layoffs, reduced hours and general uncertainty over the stability of travel, perceptions around jobs in travel and tourism and an understanding of career paths face greater challenges than ever before. This is especially true for ethnically diverse young people who watched family members work long hours for modest pay and unreasonable workloads. Additionally,

many are unaware of the advancement opportunities beyond entry level positions.

Physical and stressful service jobs often require long evening and weekend hours, dealing with demanding customers, lower wages and an inability to work remotely. In the current environment, these occupations will face an uphill battle when marketing their openings and recruiting to a low supply of workers.

And with continued economic uncertainty due to the pandemic, the industry struggles to offer a top employment requirement - stability. Many service industry jobs are dependent on the discretionary income of Americans and confidence of consumers. Often viewed as easily replaceable, many travel employees were furloughed or let go at

More than one-quarter of Americans identified healthcare, business consultancy or management and creative arts and design, education, and information technology or computing as the industries that are best representative of their professional and career goals.¹⁰¹ **Less than one in 10 – just 8% identified travel and tourism as an industry representative of their long-term goals.**¹⁰²

the onset of the pandemic and with continued uncertainty, jobs remain tenuous. Even after growing an average of 350,000 new jobs per month between January and July of 2021, the leisure and hospitality sector has averaged fewer than 100,000 new jobs between August and November.¹⁰³ Continued unpredictability and employees viewed as commodities will result in a struggling travel and tourism economy and workforce for years to come.

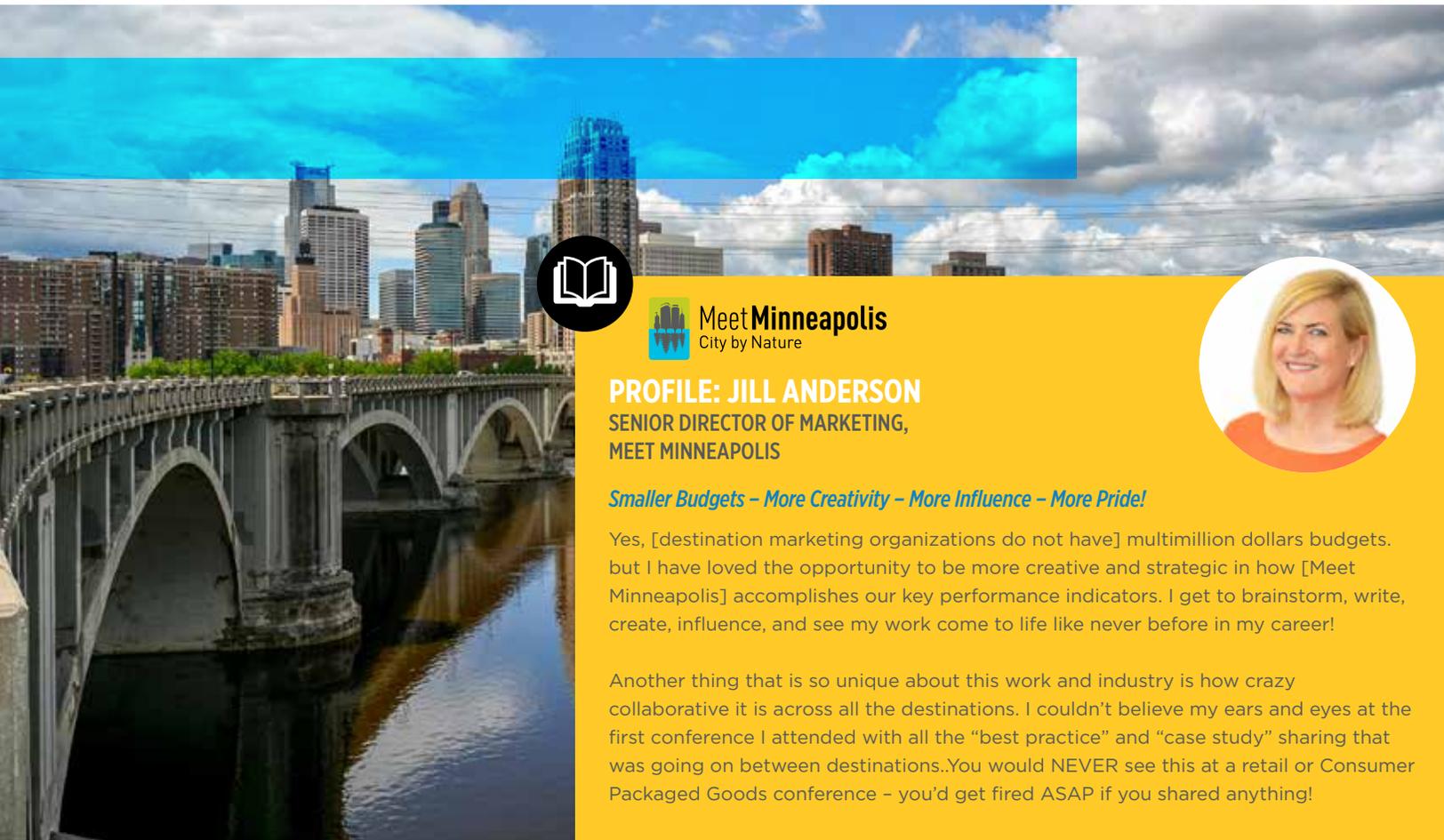
More than one-quarter of the American workforce would NOT consider working in travel and tourism and another 25% are uncertain.¹⁰⁴ Entry level Americans are less likely to consider a job in travel and tourism than middle to upper managers – just 42% of entry level workers would consider a travel and tourism job.¹⁰⁵

And even among Americans seeking employment, one in five would not consider an opportunity and travel and tourism and nearly one-third are unsure.¹⁰⁶ Those not interested most commonly mentioned disliking being away from home, stress, low income, long hours and instability.¹⁰⁷ Misperceptions and a lack of familiarity of travel and tourism careers remain as there is little understanding of the job requirements, career opportunities, compensation, stress level and time away from home.



“ For years, the industry has struggled with a public relations problem of long hours, low pay and demanding guests. Now those who work in the business have an even more tarnished image from the pandemic’s impacts. The industry needs more than just a PR campaign. It needs a full overhaul in its staffing levels, pay rates and employee treatment.”¹⁰⁸

– Peter Ricci, Ed.D., director of Florida Atlantic University’s hospitality and tourism management program



Meet Minneapolis
City by Nature



PROFILE: JILL ANDERSON
SENIOR DIRECTOR OF MARKETING,
MEET MINNEAPOLIS

Smaller Budgets – More Creativity – More Influence – More Pride!

Yes, [destination marketing organizations do not have] multimillion dollars budgets. but I have loved the opportunity to be more creative and strategic in how [Meet Minneapolis] accomplishes our key performance indicators. I get to brainstorm, write, create, influence, and see my work come to life like never before in my career!

Another thing that is so unique about this work and industry is how crazy collaborative it is across all the destinations. I couldn’t believe my ears and eyes at the first conference I attended with all the “best practice” and “case study” sharing that was going on between destinations..You would NEVER see this at a retail or Consumer Packaged Goods conference – you’d get fired ASAP if you shared anything!



EMPLOYMENT CONSIDERATIONS:

Four in 10 U.S. workers are actively searching for a new job right now, or plan to soon—twice the rate of 2019.¹⁰⁹ And nearly half of U.S. executives reported that they have experienced higher turnover than normal in the past six months.¹¹⁰

Beyond Compensation

While compensation will always be a key consideration, there are many factors beyond salary and benefits employees are considering and prioritizing when evaluating potential positions and organizations.

Regardless of employment status, **wages** were rated the most important factor but were only marginally more essential than **quality healthcare** and **paid time off**. Today, these key factors are considered basic employment needs. Better compensation was also cited as the top reason for leaving current jobs.¹¹¹

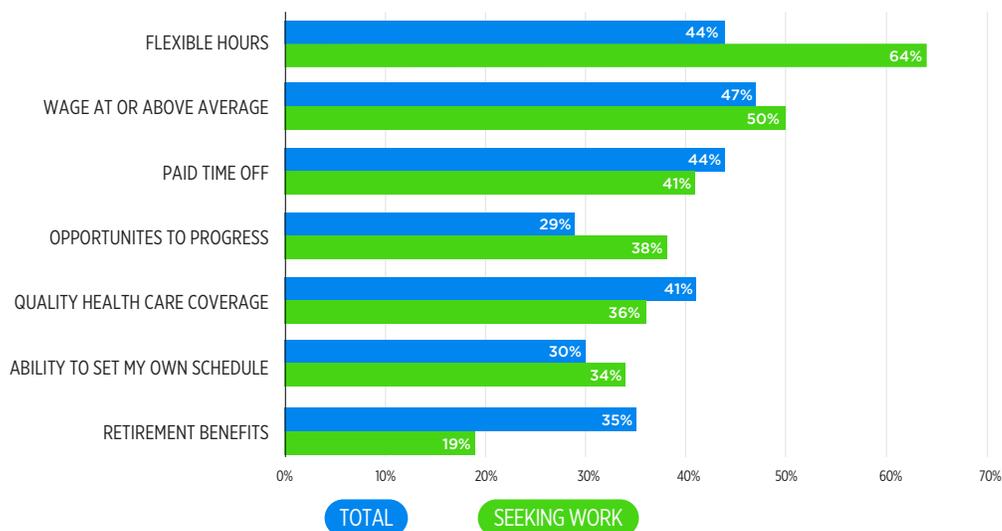
Despite the fact that the hourly earnings of leisure and hospitality workers has increased rapidly alongside the rise in demand and job openings, reaching 14.5% above 2019 levels in November – ahead of 9.5% for the total private sector the level of job openings has not declined.¹¹² Earnings for leisure and hospitality workers have been outpacing the economy overall. As of November, the

average hourly wage for L&H employees was more than \$19 – more than \$2 more than the average \$16.68 at the same time in 2019.¹¹³ Still severe staffing shortages remain and there is no end in sight for the current workforce shortage.

Flexibility and Stability Emerge as Top Considerations Post-Pandemic

Flexibility is the top factor Americans are seeking in potential job positions.¹¹⁴ After a year of uncertainty, juggling multiple responsibilities and re-evaluating life priorities, more than anything Americans desire control of their situation and a choice. More than paid time off or an above average wage, flexible hours are the top incentive Americans seeking employment are looking for.¹¹⁵ Flexibility means more than working remotely or having flexible hours and includes other dimensions, such as training opportunities, job sharing, upward mobility or even business travel. (Chart 12)

TOP EMPLOYMENT FACTORS



“As an industry, we tend to put the words flexibility and work life balance into the bucket of “not willing to work hard.” Remote work seems to go into that same bucket. This could not be further from the truth. The workforce of tomorrow wants to find work that blends well with their life. Just ask your next Uber driver why they joined that “gig workforce.” - Mike Gamble, CEO Searchwide

Far and away, stability—more so than health and safety, reputation or work-life balance, was the top mentioned most important factor when deciding to work for a specific company or organization.¹¹⁶ In addition to stability, Americans value an organization that can provide security and safety, has a positive reputation and a strong culture of work-life balance.¹¹⁷ A lack of flexibility and stability are not only job turn-offs in the short-term but also highly valued long-term career goals for all Americans. (Chart 13)¹¹⁸

Work/Life Balance

Achieving work/life balance was cited as the number two long-term career goal overall, after job stability but ahead of compensation and flexibility.¹²² For Americans seeking employment, job stability, achieving work/life balance and flexibility were even more highly valued long-term career goals.¹²³ (Chart 13)



STABILITY IS KEY

Many workers were jolted into a career change during the pandemic causing them rethink travel and tourism job prospects.¹¹⁹ Jon Yagin, who managed to hold on to his job as a chef at the employee restaurant of Dropbox until January 2021, was traumatized by the constant fear of being laid off. Now, instead of using his two decades of experience in the business and his degree in culinary arts to land a job at another San Francisco restaurant, he’s decided to explore drop-shipping and digital marketing.¹²⁰

“I’ve already seen it upfront, where — bam — your job just gets taken away from you. That was such a shocking experience. Do I want to put myself in that situation again?” - Jon Yagin, restaurant chef¹²¹

LONG-TERM CAREER GOALS

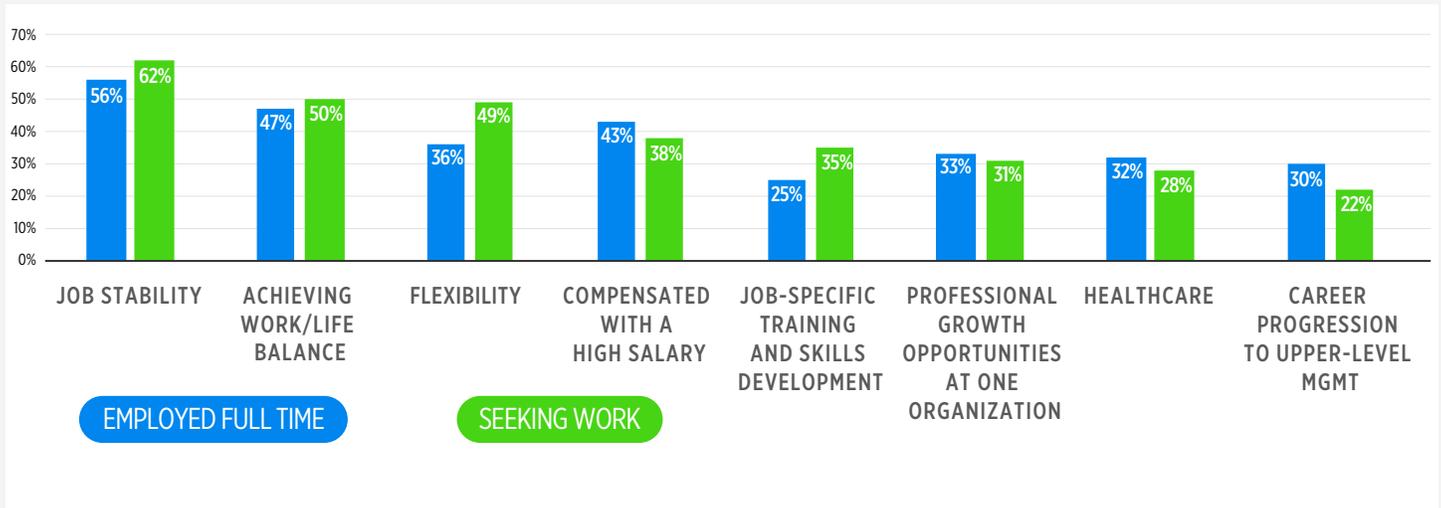


CHART 13 | Source: Destination Analysts, July 2021

As stress and anxiety levels reached all-time highs in 2020, well-being has never mattered more. Employees of all generations value an organization that cares about employees' wellbeing and for younger generations, it is their top workplace desire.¹²⁴ Even more than compensation and benefits, an employees' wellbeing is a top consideration for today's workforce. It is imperative for leaders to not only care but also work to improve their employee's wellbeing. And if employers are not positively contributing to an employee's well-being they are significantly more willing to leave their current job.¹²⁵ Following compensation, **'better work/life balance' was the second top reason for employees to leave their current job.** (Chart 14) While not the top factor, an organization and work that makes a positive impact to society is also important for three in 10 Americans.¹²⁶

And as a result, of greater stress levels, burn out and disregard for employees' overall welfare, Americans are quitting at historical levels. More than four million quit their jobs in October driven in part by workers who are less willing to endure long, inconvenient hours, stress and/or poor compensation.¹²⁸ Many are quitting to find better opportunities. Employees who feel tense or stressed during the workday are three times more likely to seek employment elsewhere.¹²⁹

Job Deterrents

Related to an increased desire for a strong culture of work/life balance, an overly stressful work environment, disregard for health and safety and lack of stability are top job turn offs for all Americans.¹³⁰ Unfortunately for current employees there continues to be additional stress, strain and burnout from those that weathered the pandemic and now have to work even harder with limited resources to ramp back up and recover.

Work-life balance is here to stay which may require a significant mindset shift for the travel and tourism industry - particularly for Baby Boomer leaders. Many older leaders are looking for the younger generation to have the same values as they did early in their career, but this is just not reality. The Y and Z generations have differing viewpoints, priorities and background and travel and tourism will continue to lose top leadership talent to other industries if the industry does not embrace their desire for greater balance.

Many talented workers are leaving for workplaces that align with their personal belief system and show an authentic concern for individual employee well-being. People want a good job and a life well-lived. ¹²⁷ - Gallup



RECOMMENDATIONS TO IMPROVE EMPLOYEES' WELL-BEING

PRIORITIZE

- A healthy workplace
- Employee's mental health
- Flexible hours

ENCOURAGE EMPLOYEES TO

- Take care of their health
- Use paid time off
- Take breaks during the workday

ENSURE

- Clear boundaries between work and home/family life

KEEP EMPLOYEES

- Engaged
- Motivated
- Fulfilled

TOP REASONS FOR LEAVING CURRENT JOB

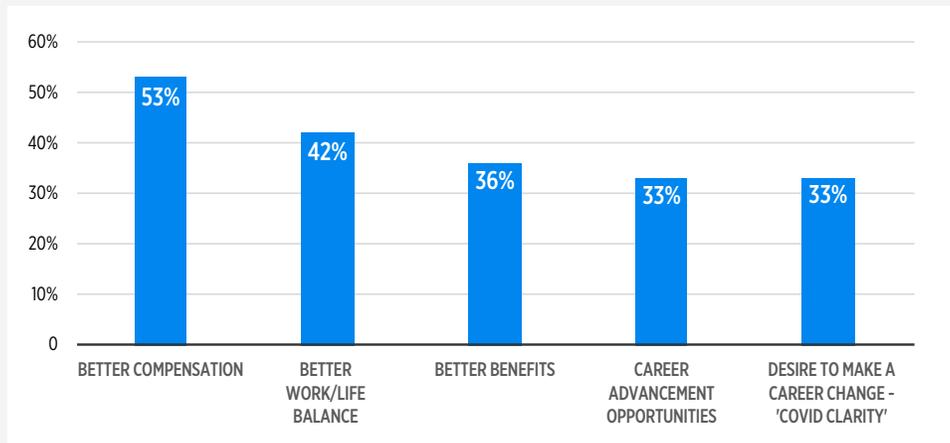


CHART 14 | Source: SHRM, Sept 2021

YOUNGER WORKERS HAVE DIFFERENT EXPECTATIONS

Never before have there been five generations in the workforce at the same time. Differing background, experiences, values and mindsets are creating misunderstandings and disconnects between employer and employee or potential employee. In particular, there are some notable differences in the values of Millennials compared to other generations.

Likely due to the fact that they are further away from retirement, wages are relatively less important to Millennials and most important to Boomers.¹³¹ Opportunities to progress and professional development is important to younger Americans—whether at one organization or the ability to progress to upper-level management at different organizations.¹³² In general, younger workers can afford to take on more risk are more likely to be actively searching for new opportunities than Gen Xers or Boomers. Younger generations have always been more likely to change jobs – on average, millennials and Gen Z tend to leave their job roughly every two years compared to over eight years for baby boomers – the pandemic exacerbated these differences.¹³³ Even now, nearly two-thirds of GenZ and Millennials who are not satisfied with their companies back to work policies are more likely to leave compared to just 33% of Gen X and 17% of Baby Boomers.¹³⁴

Flexibility is key and Millennials will leave an existing job and seek out new opportunities with the flexibility they are looking for. Flexibility is defined differently by each individual but ultimately comes down to a desire for control – whether that is remote work options, job sharing, business travel opportunities or professional development.

And younger employees are burnt out. Stress was high even before the pandemic thanks to climate change, racial tensions and gender inequity and now 80% of 18 to 39 old's report feeling burnt out because of work whether due to demanding and hostile front line service jobs, an inescapable and isolating desk job or the expectation of being 'always on'.¹³⁵ Yet even more validation for healthy work/life balance. Gen Z and Millennials are changing their lifestyles and even their career paths or employer to cope with stress and achieve greater well-being.

“ In the wake of the pandemic and months of uncertainty, high workloads and hiring freezes, millennials are rethinking their work-life balances and taking advantage of the fact that they are in demand as mid-level employees, especially with about 72 million millennials in the U.S., this generation is a huge part of the working population.”

– Sara Skirboll, VP, CareerBuilder

If organizations want to retain current employees or gain new ones, it's important to offer young talent benefits that help and support their mental health and provide the flexibility that they are clearly seeking elsewhere.¹³⁶ - YPulse

REGIONAL DIFFERENCES

While flexibility and stability are important to all workers, Americans residing in the Midwest who are more likely to be employed in food production, manufacturing and construction industries more highly value flexible hours, stability and work/life balance than other regions.¹³⁷ Perhaps due to the fact that they experienced greater employment shifts than other regions, the Northeast more highly values stability and work/life balance – both for current employment considerations and long-term professional/career goals. Paid time off and flexible hours are highly incentivizing to Northeast employees when seeking new employment opportunities.¹³⁸

Southern and Westerners have more firsthand experience in the travel and tourism industry than those in the Northeast and Midwest.¹³⁹ Nearly one-quarter indicated they previously worked in travel and tourism compared to 19% of those in the Northeast and 17% of those in the Midwest.¹⁴⁰

More than half of Southern Americans (53%) would consider a job in the travel and tourism industry compared to 40% of Northeasterns. Americans in the Northeast were more likely to associate 'thankless' attributes with careers in travel and tourism while Americans in the South viewed travel and tourism careers as 'challenging' and associated more positive perceptions with travel and tourism careers than most other regions, including 'diverse', 'fulfilling' and 'opportunities to progress'.¹⁴¹





WHAT'S NEXT

The inability to meet increasing travel demand with a diminished labor supply threatens to hinder the overall industry's recovery. Workforce shortages have negatively impacted the travel experience just as Americans are ready for a change of scenery, to reconnect, hit the road and get out and explore.

While there are significant headwinds, and the workforce is drastically different than it was less than two years ago, the travel and tourism industry has always been resilient and has many unique and powerful benefits that can and should be touted to meet the needs of today's workforce.

INDUSTRY RECOMMENDATIONS

HIGHLIGHT THE UNIQUE BENEFITS AND VALUE OF TRAVEL EMPLOYMENT

While most current employees and travel organizations are well aware of the unique benefits of travel employment, it is clear there is a disconnect between reality and perceptions of those who have not had firsthand experience in travel and tourism. Unfortunately, many of the perceived attributes of careers and opportunities in the industry do not align with the current workforce's top employment considerations. And that is simply untrue. In fact:

TRAVEL JOBS ARE ACCESSIBLE

- » Americans leave and reenter the workforce for a variety of reasons throughout their careers - whether for education, raising a family, early retirement, furloughed, etc. The travel industry is a supportive bridge for Americans looking to reenter the workforce in a dynamic economy
- » Due to its flexibility, number of entry level positions, welcoming culture, acceptance of all backgrounds, diversity of work available, the travel industry is the number one industry for Americans returning to the workforce





TRAVEL JOBS ARE FLEXIBLE

- » Travel and tourism provide a variety of employment options including part time, flexible hours and full time – more than half of the part time workers in 2019 were employed in travel related industries
- » Flexible hours allow travel industry workers the opportunity to gain additional knowledge, skills and training while employed part time or full time
- » Travel employment also provides options for working parents who may be striving for better work life balance and more time at home with their family



TRAVEL JOBS ARE DIVERSE

- » The travel industry is much more reflective of demographic shifts in the United States than the overall economy, employing a younger and more diverse workforce than many other sectors
- » Travel employs a greater share of Hispanics, African Americans and other minorities than the rest of the economy
- » Travel employment includes career opportunities in multiple industries in a wide variety of occupations across all areas of the country



TRAVEL JOBS PROVIDE TRAINING

- » First jobs provide Americans with essential skills, confidence and experience that lead to successful and rewarding careers. As travel jobs are often entry level, they offer the much-needed training and to cultivate essential soft skills such as communication, dedication, confidence, leadership, flexibility, customer service and problem solving



TRAVEL JOBS FOSTER ENTREPRENEURSHIP AND EXPANDS SMALL BUSINESS

- » The experience, transferable skills and knowledge gained from travel employment opens doors for individuals to own their own business and become entrepreneurs
- » The number one small-business employer in the United States is the travel-dependent leisure and hospitality sector – small businesses employed nearly 10 million L&H workers in 2019 or 60% of the overall workforce
- » Small businesses employed 60% of the overall workforce in leisure and hospitality prior to the pandemic



Meet **Minneapolis**
City by Nature



Courtney Ries, senior vice president of destination branding and strategy, Meet Minneapolis on hiring industry outsider, Jill Anderson from Target Corporation where she worked on big consumer brands like Wrigley's and Kellogg's.

“When I was looking for a marketing leader for Meet Minneapolis, it was critical that they knew marketing and they knew Minneapolis. People who have agency experience are used to learning quickly and becoming experts, and Jill's [Anderson, senior director of marketing] experience with the fast-paced world of demanding clients and diverse projects [at Target Corporation] allowed her to quickly shift between the various marketing objectives and the nuances of each customer, be it meeting planners or leisure travelers or meeting attendees. Combined with her experience gleaned from working within large corporations with sophisticated research and marketing channels, it allowed her to bring more advanced marketing strategy to our own internal processes.”



FOUNDATION FOR UPCOMING INDUSTRY WIDE CAMPAIGN

It may take a promotional campaign and a shift in messaging but there are numerous benefits the industry can promote when recruiting, hiring and retaining the next generation of travel and tourism employees.



PROMOTE DIVERSE, EQUITABLE AND INCLUSIVE TRAVEL CAREER OPPORTUNITIES

- » Embrace diversity, new values, mindsets and expectations of the new workforce
- » Elevate importance of DE&I and ensure it is at the core of organization charts, strategic plan and recruiting strategy



EXPAND HORIZONS

- » Look for talent beyond travel and tourism
- » Redefine flexibility
- » Understand needs and values of emerging workforce
- » Improve access to international workers through U.S. Travel's policy recommendations

U.S. Travel and Tourism Diversity Matters launched a new strategic partnership that will strengthen the association's focus and support of the industry on issues related to diversity, equity and inclusion (DEI) and provide greater access to Tourism Diversity Matters' subject matter expertise, research and resources.

Founded in 2021 to address blind spots in ethnic disparities within the travel industry Tourism Diversity Matters provides industry leaders with resources to develop more effective DEI strategies to engage, recruit and retain a diverse workforce. DEI is a core priority of the U.S. Travel Association, which is committed to having a vital role in affecting lasting change and supporting the development of industry wide DEI plans.

tourismdiversitymatters.org



U.S. Travel is currently working with Congress to pass the H-2B Returning Worker Exception Act.

- The bill would create a permanent H-2B returning worker cap exemption and include some program efficiency and integrity measures
- U.S. Travel is exploring different avenues to expand access to international workers and are advocating to separate worker visas from immigration to continue to fulfill the travel and tourism industry's need
- Additionally, we are also pressing for a higher cap on H-2B and J-1 visas, as well as advocating for faster visa processing times for low-risk applicants

The state of our workforce is very different today than it ever has been... and we must work collectively to address the challenges—all of which require greater understanding and re-positioning of just why a career in our industry is so rewarding.

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