BREAKOUT OVERVIEWS

12:30–1:00 PM  WORKING LUNCH
12:30 PM  SETUP OF INFRASTRUCTURE BREAKOUT
12:45 PM  SETUP OF WORKFORCE BREAKOUT
1:00 PM  BREAK INTO GROUPS
1:15–3:15 PM  GROUP DISCUSSION
FRIDAY  REPORT OUT FROM EACH GROUP
BREAKOUT:
TRAVEL INFRASTRUCTURE
AND THE FUTURE OF MOBILITY
EXISTING PRIORITIES

Modernizing U.S. airports

Focusing DOT programs and leadership on travel and tourism

National Parks
BUILDING AN AGENDA FOR THE NEXT DECADE

- The future of sustainable travel.
  - EV charging infrastructure
  - Sustainable aviation fuels
  - LNG for cruise ships

- Ensuring seamless and secure travel
  - Biometrics and the future of travel identity.
  - Global passports.
  - Consolidating trusted traveler programs.

- Innovative technologies and the future of travel mobility
  - Hyperloop
  - Boring Company
  - Boom
  - Driverless vehicles
Board of Directors Breakout Discussion:

INDUSTRY WORKFORCE CHALLENGES
War on Talent

• We are in the midst of nothing less than a talent revolution and the war for talent is on. (Forbes)

• Globally, 43% of organizations say they plan to increase headcounts over the next six months, according to a study by McKinsey.

• 81% of employers report having a difficult time finding talent at all levels right now. (Goldman Sacks Survey)
Florida Atlantic University Poll Tells Disturbing Tale Of Hospitality And Tourism Employment

“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.” said Peter Ricci, Ed.D., director of FAU’s hospitality and tourism management program.
• 40.1% of Americans who have traveled this summer agree that it feels like businesses in the travel industry are having trouble providing adequate service

• 69.9% said they had an unsatisfactory experience on their most recent trip and 15.3% experienced people behaving badly in the destination on their most recent trip

• 16.1% now feel less enthusiastic about traveling after their most recent trip
Survey of American Workers

• Survey of employed and employment-seeking Americans
  o Sample Size = 1,200

• Purpose:
  o Understand existing perceptions of employment and career opportunities in travel, tourism & hospitality
  o Benchmark travel, tourism & hospitality as a career brand

• Analysis by:
  o Current Employment Status
  o Tourism Job Experience
  o Generation
  o Management experience
The Punishing Impact of the Pandemic on American Workers

- 3-in-10 experienced employment change in the past 16 months due to COVID
  - Of these, 6-in-10 have worked in the travel industry before
  - 36% are Millennial generation or younger

- Of those who experienced employment changes:
  - 34% had hours reduced
  - 27% laid off
  - 16% salary or wage reduction
  - 11% of full-time workers became permanently remote
  - 63% of Americans currently seeking work were laid off

- Travel industry workers who changed jobs disproportionately switched to a different industry (15% compared to 9% overall)

- Nearly 4-in-10 full-time employed Americans moved or are planning to move residences
  - Of those who have moved, 44% changed their employment situation
**LONG-TERM CAREER GOALS**

**Question:** Which of the following represent your long-term professional/career goals? Please select all that apply.

(Base: All respondents, 1,203 completed surveys.)

- Job stability: 54.9%
- Achieving work/life balance: 45.7%
- Compensated with a high salary: 40.0%
- Flexibility: 38.9%
- Professional growth opportunities at one organization: 32.0%
- Having company-sponsored healthcare: 28.2%
- Career progression to upper-level management/executive role: 26.5%
- Job-specific training and skills development: 25.4%
- Entrepreneurship – starting my own company: 19.9%
- Diversified experience at different companies and industries: 17.3%
Wages are relatively less important to Millennials and most important to Boomers.

Millennials more interested in professional growth opportunities at one organization and career progression to upper-level management than other generations.

Millennials and younger Americans place more emphasis on opportunities to progress and remote work options.

Millennials more turned off from employment opportunities by lack of flexibility.
**PERCEPTIONS OF CAREERS IN THE TRAVEL AND TOURISM INDUSTRY**

**Question:** On a scale of 1-10, with 10 being “Excellent” and 1 being “Poor,” please rate your perceptions of each of the following regarding employment/careers in the travel and tourism industry.

(Base: All respondents, 1,203 completed surveys.)
TOP ATTRIBUTES TO DESCRIBE CAREERS IN THE TRAVEL INDUSTRY

Question: Which of these attributes accurately describe how you perceive careers and career opportunities in the travel and tourism industry? Please select those that apply.

(Base: All respondents, 1,203 completed surveys.)
25.7% of the American Workforce Would NOT Consider Working in the Travel & Tourism Industry

Another 25.4% Are Uncertain
Question: Earlier you said “No” when asked if you would consider a job in the travel and tourism industry. In a few words, could you explain why?
Question: Earlier you said “Maybe/Uncertain” when asked if you would consider a job in the travel and tourism industry. In a few words, could you explain why?
Question: Earlier you said “Yes” when asked if you would consider a job in the travel and tourism industry. In a few words, could you explain why?
Question: When you are seeking employment, what are the most important factors you look for in a potential job position? Please select your top 5.

(Base: Respondents who would consider a job in travel and tourism, 904 completed surveys.)
**Question:** When you are seeking employment, what are the most important factors you seek in a company or organization to work for? Please select your top 5.

(Base: Respondents who would consider a job in travel and tourism, 904 completed surveys.)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stability</td>
<td>59.1%</td>
</tr>
<tr>
<td>Health and safety of the workplace</td>
<td>43.1%</td>
</tr>
<tr>
<td>Company’s reputation</td>
<td>40.8%</td>
</tr>
<tr>
<td>Culture of work-life balance</td>
<td>37.9%</td>
</tr>
<tr>
<td>Positive reviews by current/former employees</td>
<td>34.1%</td>
</tr>
<tr>
<td>Company/work makes a positive impact to society</td>
<td>30.6%</td>
</tr>
<tr>
<td>Company aligns with my personal values</td>
<td>28.6%</td>
</tr>
<tr>
<td>Strong growth in profits</td>
<td>28.0%</td>
</tr>
<tr>
<td>Diversity and inclusion across workforce</td>
<td>27.0%</td>
</tr>
<tr>
<td>Culture fit</td>
<td>24.9%</td>
</tr>
<tr>
<td>Belief in company’s mission</td>
<td>24.4%</td>
</tr>
<tr>
<td>Workforce size</td>
<td>18.7%</td>
</tr>
<tr>
<td>Other</td>
<td>4.8%</td>
</tr>
</tbody>
</table>
**TOP DETERRENTS TO A JOB OPPORTUNITY**

**Question:** What are the things that would most turn you off from a job or job opportunity? Please select your top 5.

(Base: Respondents who would consider a job in travel and tourism, 904 completed surveys.)
Question: What are the top incentives a company can provide you to entice you to apply for a job with them? Please select your top 3.

(Base: Respondents who would consider a job in travel and tourism, 904 completed surveys.)
**INDUSTRIES THAT BEST REPRESENT THEIR CAREER GOALS**

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business, consultancy or management</td>
<td>27.9%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>27.1%</td>
</tr>
<tr>
<td>Creative arts or design</td>
<td>22.3%</td>
</tr>
<tr>
<td>Information Technology or Computing</td>
<td>22.0%</td>
</tr>
<tr>
<td>Education</td>
<td>19.8%</td>
</tr>
<tr>
<td>Retail</td>
<td>19.7%</td>
</tr>
<tr>
<td>Accountancy, banking or finance</td>
<td>17.3%</td>
</tr>
<tr>
<td>Charity and non-profit</td>
<td>16.5%</td>
</tr>
<tr>
<td>Public services or administration</td>
<td>16.0%</td>
</tr>
<tr>
<td>Media or digital</td>
<td>15.6%</td>
</tr>
<tr>
<td>Energy and utilities</td>
<td>15.2%</td>
</tr>
<tr>
<td>Hospitality or events</td>
<td>14.8%</td>
</tr>
<tr>
<td>Engineering or manufacturing</td>
<td>14.2%</td>
</tr>
<tr>
<td>Marketing, advertising or PR</td>
<td>13.6%</td>
</tr>
<tr>
<td>Government or social services</td>
<td>12.1%</td>
</tr>
<tr>
<td>HR or recruitment</td>
<td>11.7%</td>
</tr>
<tr>
<td>Restaurants or food service</td>
<td>10.6%</td>
</tr>
<tr>
<td>Construction</td>
<td>10.3%</td>
</tr>
<tr>
<td>Real Estate</td>
<td>10.3%</td>
</tr>
<tr>
<td>Science or pharmaceuticals</td>
<td>10.2%</td>
</tr>
<tr>
<td>Travel and tourism</td>
<td>10.1%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>7.4%</td>
</tr>
<tr>
<td>Law enforcement and security</td>
<td>7.3%</td>
</tr>
<tr>
<td>Transportation</td>
<td>7.0%</td>
</tr>
<tr>
<td>Law</td>
<td>5.7%</td>
</tr>
</tbody>
</table>

**Question:** Which of these industries do you think BEST represent your being able to achieve your professional/career goals? Please select the top 5.

(Base: Respondents who would consider a job in travel and tourism, 904 completed surveys.)
Rebuilding Travel and Tourism Workforce

Made In America
Travel's Contribution to Workforce Development and Career Advancement

Travel Matters to Jobs.
Travel's Role in Achieving the American Dream

Travel jobs are a gateway to capturing the American dream.
The travel industry provides Americans a foothold toward financial success. For millions of Americans, employment in the travel industry is not just a first job; it leads to a future of financial security and economic prosperity.

Travel jobs provide essential skills for a successful career.
First jobs provide Americans with essential skills, confidence, and experience that lead to meaningful careers. Employees in the travel industry develop practical skills such as communication, customer service, and problem solving through on-the-job training.

Travel jobs help return Americans to the workforce.
Americans leave the workforce for many reasons, such as a lack of available work or wage rates, choosing to stay at home with children, or pursuing other interests. Due to its flexibility, travel offers a sustainable path back to work for those who wish to return to the workforce.

BREAKOUT 1: Travel Infrastructure and the Future of Mobility
West Ballroom AB (Zoom Access)

BREAKOUT 2: Industry Workforce Challenges
Frontline: West Ballroom CD
Management: Rocky Mountain Ballroom (Zoom Access)