

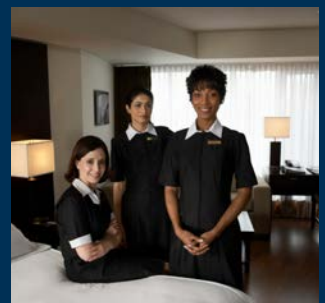


MADE IN ★ ★ AMERICA

Travel's Contribution to Workforce Development
and Career Advancement



U.S. TRAVEL
ASSOCIATION®



When I landed my first job—at a hotel in the summer of 1966—I wasn't expecting it to shape my entire career. Back then, working in the travel industry wasn't particularly on my radar.

I worked as a pool manager at a then-small hotel chain called Marriott for three summers, then moved up through housekeeping and into sales. From there, I headed up sales and marketing jobs at hotels in 12 different cities before joining Marriott's corporate headquarters in 1983 as head of marketing. Ten years later, I became the senior vice president of global sales leading a team of 10,000 sales people.

That first job I had at Marriott paved the way to a long, rewarding career in which I learned invaluable skills and met some incredible people. And the best part is that my story of moving up through the ranks of this terrific industry is not unique—38% of American workers got their start in the travel industry.

I couldn't be prouder to be a part of the travel industry, which generates \$2.5 trillion in economic output and supports 15.7 million American jobs.¹ These are good jobs, too, firmly steeped in American values: hard work, a positive attitude and a welcoming disposition.

Travel jobs are in every corner of this country, supporting the lives of Americans in each congressional district. Entry-level travel jobs lead to real, serious careers. One third of Americans who had their start in travel go on to earn a bachelor's degree or higher—and not only that, those whose first job is in travel go on to earn an average salary of \$82,400. These are hard-workers who started out similarly as I did: lifeguarding at pools, cleaning rooms and carrying luggage.

The travel industry—and those 8.9 million Americans who directly work in it—deliver serious results for our economy. In 2018, travelers spent \$1.1 trillion, which generated \$171 billion in tax revenue for federal, state and local governments.²

But we could be doing even more to grow the economy. We could be creating more American jobs. With the right policies in place—the policies that enhance our security, improve travel facilitation, modernize our infrastructure and welcome travelers from all over the world—we can continue to grow travel to and within the United States at a strong and steady pace.

Jobs in travel are accessible, providing a path to a good career, a strong salary and a stable life. **This is the kind of industry that allows a kid working at the hotel pool to climb the ranks and build a career for himself or herself.**



A stylized, handwritten signature of the name "Roger" in dark ink.

Roger Dow
President and CEO
U.S. Travel Association



Dedication. Confidence. Problem Solving. Communication. Leadership. Flexibility.



These are just a few of the skills that are cultivated working in the travel industry. And for millions of Americans, a career in the travel industry is not just a first job, it is the first step toward a stable, prosperous and rewarding life with an often-lucrative salary for employees and their families.

With nearly four in 10 Americans starting out their careers in a travel related job,³ travel is a gateway to gain experience, skills, confidence and training, ultimately leading to higher salaries, educational attainment and competitive careers across the economy. Travel jobs are accessible and diverse, providing a second chance or the flexibility to pursue education or raise a family and even opportunities to reenter the workforce for individuals receiving temporary government assistance. And with a healthy and growing travel industry, travel employment opportunities continue to increase. The travel industry welcomes all Americans, even the underserved, providing transferable essential skills and positions them on a path to independence and economic prosperity. For many, the travel industry is a ticket to the American dream leading to rewarding careers and financial success.



Travel is made in America. And with the right policies in place, the travel industry can continue to grow, creating new jobs and providing opportunities for millions of Americans.

When travel thrives, so does America.

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The travel industry's downstream impact creates jobs across practically all sectors of the U.S. economy

Travel generates
\$2.5 TRILLION
in economic output
&
15.7 MILLION
American jobs

Every
\$1 MILLION
in travel spending supports
8.2 JOBS

— compared to —

1.3 JOBS
Mining

2.1 JOBS
Manufacturing

2.2 JOBS
Finance and Insurance

3.2 JOBS
Agriculture

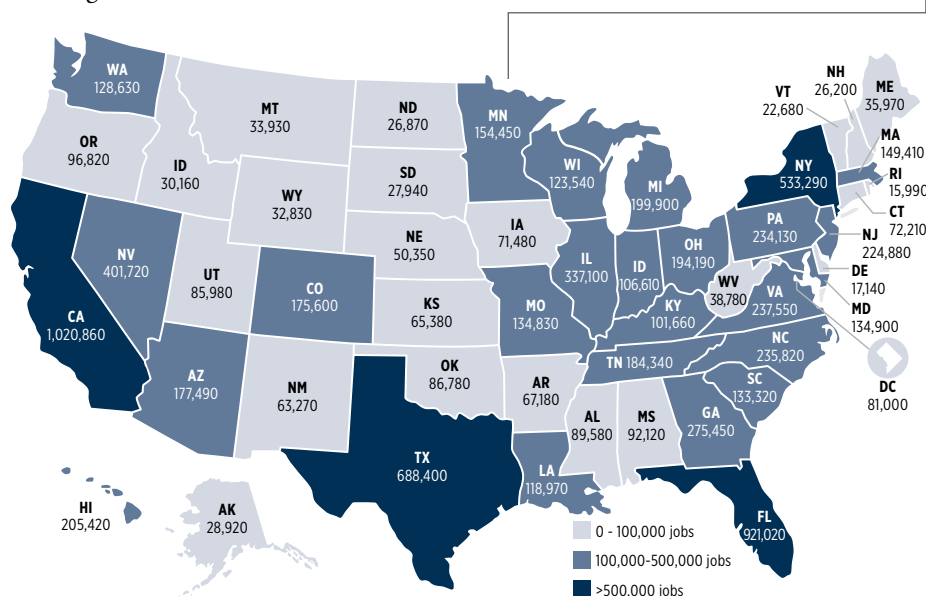
4.1 JOBS
Professional Services

4.4 JOBS
All Industries

In 2018, the travel industry generated **\$2.5 trillion for the U.S. economy, supporting 15.7 million American jobs.**⁴ One in 10 U.S. jobs directly and indirectly rely on the travel industry.⁵ As a labor-intensive industry, the power of travel to create jobs is much greater than other industries. On average, every \$1 million in travel goods and services directly supports 8.2 jobs, which is nearly double the 4.4 jobs supported by sales in all industries.⁶

At the national level, travel is America's seventh largest employer, directly employing 8.9 million Americans⁷ across transportation, entertainment and recreation, retail, lodging and restaurants in occupations such as hotel managers, chef, international marketing representatives, graphic designers, urban planners, public relations managers, budget analysts, and even mechanical engineers.

Travel is a top 10 employer in 49 states and Washington, D.C and employed more than 100,000 workers in 27 states in 2017.⁸ The travel industry employed 20,000 or more workers in nearly one-third (140) of U.S. congressional districts and more than 10,000 workers in 424 of the 435 U.S. congressional districts in 2017.⁹



Source: U.S. Travel Association and
U.S. Department of Commerce

Source: U.S. Travel Association

Travel jobs are expanding, propelling economic growth.

The travel industry is resilient and remains a strong and reliable source for job creation. Since the employment recovery began in 2010 following the Great Recession, travel industry employment has increased 22% or by 1.6 million jobs.¹⁰ This 22% increase in travel employment is measurably faster than the 17% increase in the rest of the private sector over the same time period.¹¹ **Adding jobs across the entire U.S. economy, the travel industry accounted for 8.4% of overall private sector job growth from 2010 to 2018.**¹² Travel employment grew faster than the overall private sector in 43 states and Washington, D.C. between 2010 and 2017.¹³

Travel is an export.

From flying on air carriers, to eating in restaurants, staying in hotels and purchasing souvenirs, international travelers are constantly buying goods and services that are made in the U.S. In other words, the U.S. is 'exporting' these goods and services. **Travel is America's second-largest industry export and a key job creator – accounting for 10% of all U.S. exports.**¹⁴ The spending from international travelers while visiting the U.S. directly supports 1.2 million American jobs.¹⁵ Not only that, the travel industry is more labor-intensive than other industries. As a result, every \$1 million spent by international visitors directly supports 7.6 American jobs – triple the 2.5 jobs supported by \$1 million in overall U.S. exports.¹⁶

However, like all industries, the travel industry is susceptible to shifting economic landscapes, fluctuations in the value of the U.S. dollar, changes in consumer patterns, traveler sentiment towards the United States and other geopolitical and global events. By recognizing and embracing the power of travel and instituting the right policies, the travel industry can continue to create and support good American jobs.

\$156 BILLION
in international spending
in the U.S. supports

1.2 MILLION
American jobs

For every
\$1 MILLION
spent by international
travelers,
7.6 JOBS
are supported.

— compared to —
2.5 JOBS SUPPORTED
by overall U.S. exports

Source: U.S. Travel Association and
U.S. Department of Commerce

What is a Travel Export?

International visitors are physically on U.S. soil, but economically part of their countries of origin. The goods and services they consume while in America are U.S. exports.



Travel jobs are a gateway to capturing the American dream

A job in the travel industry is a path toward capturing the American dream. Whether it's a first job waiting tables at a restaurant or managing a sales team at a world-class hotel, those who embody core American values—determination, a positive attitude, reliability and drive—can lead to a rewarding career and financial stability, regardless of age, ethnicity, education or background. (see Fig. 7, p.28)



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 creates a path towards financial security and economic prosperity. Travel jobs develop essential skills such as communication, customer service and problem solving through on-the-job training, regardless of educational attainment. American workers who start their careers in the travel industry can end up earning more than those who began their careers in most other industries.

Travel Offers Opportunity to
Ultimately Earn Higher Wages
(max average salary achieved)

\$82,400
per year



— compared to —

\$76,900
per year



\$61,200
per year



\$75,900
per year



Source: Oxford Economics Analysis based on BLS NLSY79

Young entry-level travel industry employees often work part time and earn an average of \$9,500 when they are 20 years old.¹⁷ Americans who began their career in travel went on to earn a maximum average salary of \$82,400 by the time they were 50 years old—higher than workers whose first jobs were in manufacturing, health care and most other industries.¹⁸

For those who started their careers in the travel industry and eventually obtain higher education, completing at least a four-year college degree, the benefits increase. Those whose first job was in travel eventually obtained a maximum salary of \$125,400, \$11,800 higher than the \$113,600 achieved for those who began their careers in other industries.¹⁹

Over the course of more than 30 years, Americans whose first job was in travel experienced a pay increase of \$72,900, 7% more than the gain of \$67,900 for individuals whose first job was in other industries.²⁰ This fact is particularly true for Hispanic Americans whose first job was in travel: this subgroup eventually achieved a maximum wage of \$74,400, \$9,700 higher than those whose first job was in other industries.²¹

Travel jobs provide and cultivate essential skills that lead to a successful and rewarding career.

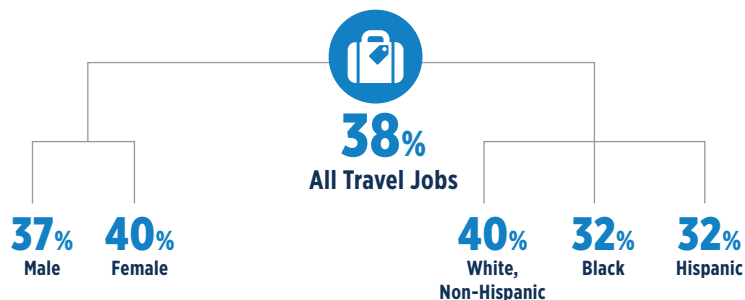
First jobs provide Americans with essential skills, confidence and experience that lead to successful and rewarding careers. The skills developed provide a foundation upon which more high-level skills are built.²² All businesses and companies are looking for employees they can count on, who have developed communications skills and who have the drive to deliver results. Practical skills such as strong communication, problem solving and the ability to deal with ambiguity continue to be in high demand and are crucial for the workforce of the future.

By far, the No. 1 industry for first jobs is travel.

Nearly **four in 10 (38%)** individuals tracked by the Bureau of Labor Statistics National Longitudinal Survey of Youths (NLSY79) first job was in travel and tourism.²³

This fact spans across gender, race and ethnicity. (Fig.1) The next most common industry for first jobs was manufacturing at 17%.²⁴ (Fig.2) As the economy shifts to support more service sector jobs, the share of individuals with travel as their first job increased to 47% in the more recent survey (NLSY97) of individuals.²⁵

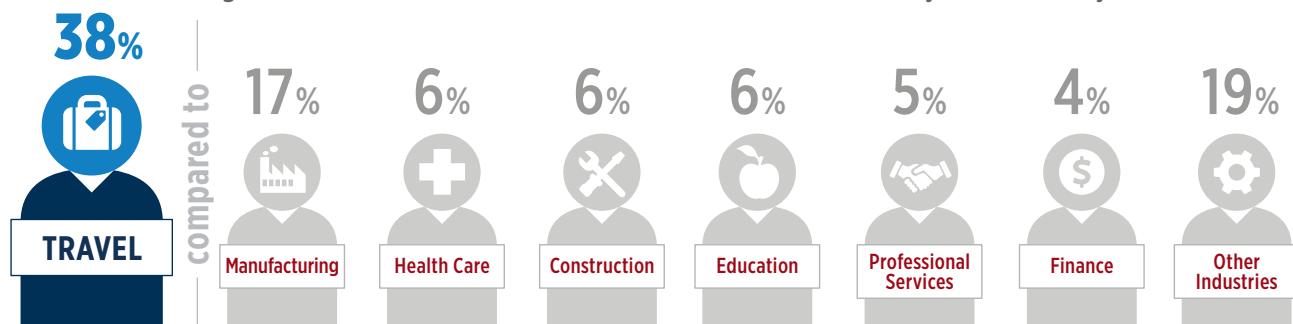
Fig.1 - Travel Industry Provides a First Foothold for All Americans



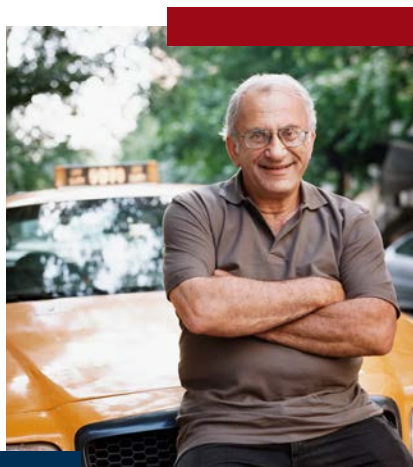
Source: Oxford Economics analysis based on BLS NLSY79



Fig.2 - Travel Provides the First Job for More Americans Than Any Other Industry



Source: Oxford Economics analysis based on BLS NLSY79



Travelers expect hospitality and superior customer service. Whether working on the front lines of a hotel, serving customers at a restaurant or clothing boutique or driving a taxi or ride-share vehicle, individuals employed in travel and tourism serve guests and need strong communication and customer service skills. Understanding and anticipating customer needs, providing prompt responses, establishing themselves as reliable and demonstrating empathy and sensitivity by dealing with travelers across the globe, travel industry employees are encouraged to develop the essential skills that employers seek—skills that transfer well to any workplace. Through direct experience and on-the-job training, travel provides a strong foundation for successful careers.

CAREER SPOTLIGHT



Luisa Mendoza,
Director Global Tourism
Development, BSE Global

A True American Dream Story

As an immigrant from Bogota, Colombia who moved to Florida at the age of four, Luisa watched her parents sacrifice and struggle to make ends meet. As a result, Luisa was motivated and determined to exceed academically, enter the workforce early to gain experience in a field she knew rewarded hard work and offered essential skills that would be a foundation for a successful career.

Introduced to the travel and tourism industry through a high school program, Luisa became the first high school intern at the Greater Fort Lauderdale (GFL) Broward County Convention Center. As a scholarship recipient, Luisa first received her associate degree from Johnson and Wales University and continued on to receive her Bachelor of Science Travel and Tourism Management degree from Florida International University.

Luisa continued to explore opportunities within the travel industry and upon graduation secured her first management role as Catering Sales Manager at the Fort Lauderdale Crowne Plaza before becoming a Corporate Sales Manager at the GFL Broward County Convention Center.

With a spirit to serve, strong work ethic, and a customer-first mentality, the travel industry offered Luisa management opportunities to excel as a tourism industry expert. As a result of the experience and confidence gained while employed in the travel industry in Florida, Luisa had the opportunity to move to New York—a lifelong dream—and raise her daughter. Securing a Sales Manager opportunity at Marriott International with the ability to work from home allowed her to bond with her child.



The official destination marketing organization for New York City, NYC & Company, hired Luisa as Director, Tourism Development to expand the quickly growing and lucrative Spain, Latin America and the U.S. Hispanic markets. With her travel industry experience, strong communication and negotiation skills, Luisa seized on this opportunity to help make NYC a top tourist destination for the markets she was overseeing.

CAREER SPOTLIGHT



Luisa Mendoza,
Director Global Tourism
Development, BSE Global

A True American Dream Story (CONTINUED)

Luisa attributes the problem solving, customer service and communication skills obtained through her experience in the travel industry as the fundamentals that allowed her to build rapport, cultivate and leverage personal and professional networks and to have the confidence to pursue her dreams and next challenge—as head of a brand-new tourism division at BSE Global.

As the only Hispanic female in a director role at BSE Global, Luisa has quickly become a leader in the sports and entertainment industry by increasing tourism groups revenue by over 50%. Luisa was recruited as the first Director, Global Tourism Development. Her knowledge

of the sports industry, destination management offices and travel trade has allowed her to generate awareness and cultivate strategic domestic and international partnerships. While BSE Global is a large corporation, the ability to lay the foundation for a new division has allowed Luisa to be more entrepreneurial, developing additional skills.

Not only has the travel industry provided Luisa the path to a successful and rewarding career, it also provided her the flexibility and stability to raise a family, the financial support to own a home in New York and gain independence while also fulfilling a lifelong promise to her parents to retire them comfortably.



“The travel industry has blessed me with the greatest mentors, colleagues and friends that I cherish like family. I have realized that if you are committed, passionate, personable and have grit you can accomplish anything you set your mind to... including achieving the American dream. This is an industry that has endless opportunities.”

CAREER SPOTLIGHT



Jo Ann Sanchez,
Director of Housekeeping,
Hilton Minneapolis

Ambition Opens Opportunities

When Jo Ann Sanchez walked into the Hilton Minneapolis/St. Paul Airport hotel in 1991, she wasn't looking for a job. A stay-at-home mom, she was accompanying a friend who was applying for a position. Even when the Executive Housekeeper asked Jo Ann whether she was also interested in a position, she politely declined. "Well, if you're ever looking for one, come see me," she remembers the Executive Housekeeper told her.

Jo Ann thought about it and a couple weeks later, she returned to the hotel—this time, looking for a job.

Jo Ann found success with the company almost immediately. She began as a Room Attendant and within three months she was promoted to Rooms Inspector. Not long after that, she was promoted again, to Laundry Supervisor.

In 1992, Jo Ann was given the chance to transfer to what was then the new Hilton Minneapolis, which had just been built. She was eager to learn more about the clerical and management side of running a hotel and was looking for opportunities to grow within the company. When the chance to move into the Housekeeping Office as a Clerk presented itself, she didn't hesitate. Jo Ann eventually served in many positions, from Office Coordinator to Housekeeping Manager to Assistant Director of Housekeeping. Today, she serves as the property's Director of Housekeeping.



CAREER SPOTLIGHT



Jo Ann Sanchez,
Director of Housekeeping,
Hilton Minneapolis

Ambition Opens Opportunities (CONTINUED)

Having been with the Hilton Minneapolis now for over 26 years, she credits her success in part to her ambition and her drive. But she also acknowledges that the travel and hospitality industry has given her ample opportunities to succeed. “Obviously, you need to have that ambition. You need to be able to learn and succeed in any position that you hold. But in the hospitality industry, there are so many openings, so many positions, and so many opportunities to be able to establish a career and move up.”

Jo Ann likes the fact that at Hilton no two days are ever the same. But given this variability, communication skills – and the ability to connect with colleagues and guests – are critical to success. “You’re interacting with your staff. You’re interacting with guests. You’re interacting with other team members,” Jo Ann said.

Over time, Jo Ann has refined her communications skills and it is her ability to communicate effectively and connect with others, she says, that has allowed her to manage teams and work collaboratively with other departments.

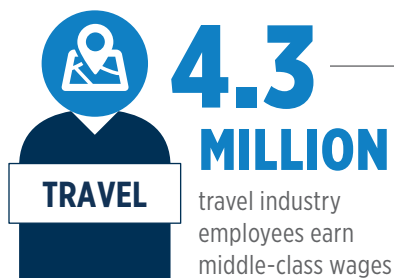
Jo Ann’s career in travel and tourism hasn’t just brought her personal success – it has also allowed her to serve as a role model for her five children. “They’ve seen how I’ve progressed in my career through Hilton,” she said. She hopes her success will give her children the confidence to pursue their own professional goals, no matter what career they choose.

Most of all, Jo Ann enjoys working with people from such diverse backgrounds. “Learning the different cultures, learning the different aspects of all the team members. That’s what gets you up in the morning to come to work the next day,” Jo Ann said. “I can honestly say in the 20 some years in this business I have never regretted getting up and coming to work.”

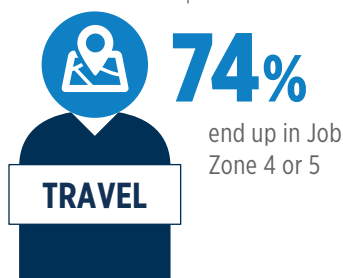


“I can honestly say
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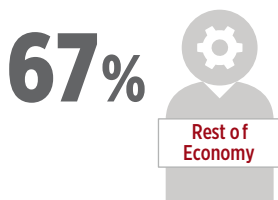
Travel jobs lead to rewarding, competitive careers.



Source: U.S. Travel Association based on BLS



— compared to —



Source: Oxford Economics analysis based on BLS NLSY79

The travel industry is one of the top 10 largest employers of middle-class wage earners in the U.S.—more than real estate, information and other industries.

Half of all travel industry employees—a total of more than 4.3 million—earn middle-class wages.²⁶

Despite the fact that many travel industry employees are considered entry level, data shows that those who start in travel ultimately go on to have highly successful careers—whether within or outside the travel industry. Bureau of Labor Statistics job zone classifications are used to help define the level of education, experience and training needed to perform a certain job, ranging from “little or no” to “extensive” preparation. (Fig.3) Of the respondents tracked for more than 35 years by the Bureau of Labor Statistics longitudinal survey, **nearly three quarters (74%) of individuals who started in travel ultimately ended up in a job zone requiring at least a bachelor’s degree and extensive skills, knowledge and experience (job zone 4 or 5)** such as economists, executives, managers, lawyers and salespeople.²⁷ This is compared to 58% of those working in manufacturing, 67% for construction, 70% for health care and 67% for the rest of the economy reaching a job zone four or five by the time they are 50 years old.²⁸ While entry level travel jobs tend to have low occupational scores (requiring little education or previous experience), over the course of their careers, those who started out in travel achieve desirable occupations requiring extensive preparation.

Fig.3 - Description of Job Zones

Job Zone 1 - Little or No Preparation Needed	
Education	High school or GED
Experience	Little or no previous work-related skill or experience needed
Examples	Dishwashers, bus boys, amusement attendant
Job Zone 2 - Some Preparation Needed	
Education	High school
Experience	Some previous work-related skill, knowledge or experience needed
Examples	Restaurant manager, customer service representative, carpenters, cashiers, bartenders
Job Zone 3 - Medium Preparation Needed	
Education	Vocational school, associate degree
Experience	Previous work-related skill, knowledge or experience is required as well as on-the-job experience or training
Examples	Travel guides, medical assistants, librarian, dental hygienists
Job Zone 4 - Considerable Preparation Needed	
Education	College degree
Experience	Considerable amount of work-related skill, knowledge or experience is required and several years of work experience
Examples	Accountants, sales manager, graphic designers, teacher, computer programmer
Job Zone 5 - Extensive Preparation Needed	
Education	Graduate degree
Experience	Extensive skill, knowledge and experience
Examples	Lawyers, surgeons, veterinarians, astronomers

Source: Bureau of Labor Statistics

CAREER SPOTLIGHT



Bob Agra,
President of Mercury and
Chief Financial Officer,
Chicago's First Lady

Empowering America's Future

For Bob Agra of Chicago, Illinois, working in the travel industry runs in the family. It all started in the 1930s when his grandfather, an immigrant from Portugal, and his grandmother launched a business giving speed boat rides to locals trying to beat the summer heat on the Chicago lakefront—a role his father eventually took over.

After his father passed away in the 1970s, Bob, only 18 years old at the time, took responsibility for managing the business and overseeing its day-to-day operations. It wasn't long until he met his wife, Holly, who has served as his business partner ever since.



Over the years, the couple has turned Bob's small family business into two successful cruise excursions, Mercury Chicago's Skyline Cruiseline and Chicago's First Lady, which have come to be known as the city's most popular architecture and historic tours. What started as just one little speed boat and a handful of employees has grown to 8 vessels and 150 staffers.

Today, Bob serves as President of Mercury and Chief Financial Officer of Chicago's First Lady. As the head of a tourism company, he has worn many hats in his role, from accountant to mechanical engineer to boat pilot. And, over the years, he's had the opportunity to help many young people get a start in the travel industry. He believes no other industry does a better job of equipping young workers with a broad range of practical skills they will need throughout their careers, wherever their path takes them.

"A deck hand is several jobs in one," Bob said, describing the entry level role in his travel and tourism business. "It's customer service. It's multi-tasking under pressure—handling lines and tying up the boat. It's learning to navigate personalities and work with other employees. It's communications skills."



CAREER SPOTLIGHT



Bob Agra,
President of Mercury and
Chief Financial Officer,
Chicago's First Lady

Empowering America's Future (CONTINUED)

Bob has seen firsthand how his business and others like it in the industry support families, enabling them to earn a comfortable living and raise a family. "It's always great when one of our people that have worked up through the ranks buys their first home. And that has happened several times over the last few years."

One particular point of pride for Bob: the companies' ability to support a variety of career paths. "We've helped to put quite a few people through college, some through medical school, some through law school." He also points to his business' ability to support non-traditional career paths.

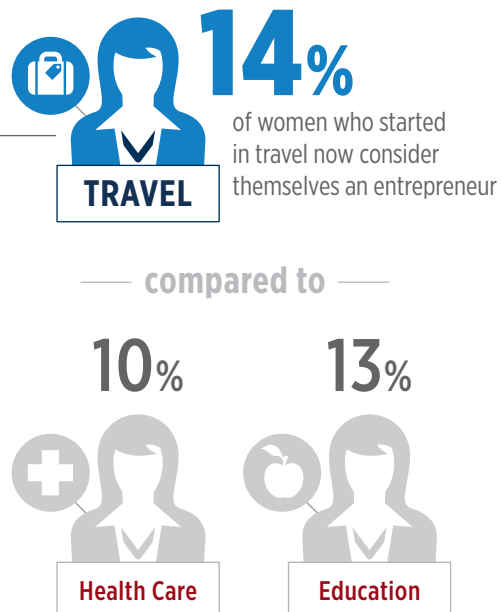
While there is plenty of work to be done aboard during the spring and summer months, there is also a lot of maintenance that takes place during the winter: perfect for young people.

"It gives a career path to people that don't have a college degree, don't have a graduate degree. It helps them make a nice life for themselves."

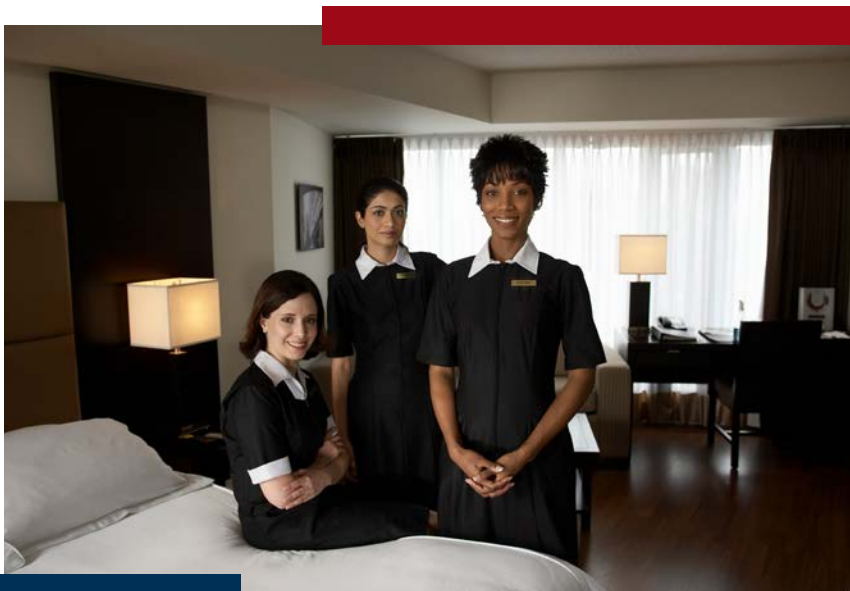
Experience in travel fosters entrepreneurs.

The experience, transferable skills and knowledge gained from a first job in travel opens doors for individuals to own their own business and become entrepreneurs. **Seventeen percent of Americans whose first job was in travel now own their own business and 19% consider themselves entrepreneurs—higher than the finance, manufacturing and health care industries.**²⁹

The skills gained through travel industry employment inspires entrepreneurship, particularly for women. **Of women who started their career in the travel industry, 14% now consider themselves an entrepreneur.**³⁰ **Only 10% of women who started out in health care and 13% of those whose first job was in education consider themselves an entrepreneur.**³¹ While only four out of every 10 businesses in the U.S. are women owned, in the past decade, the number of women-owned businesses has grown 58% compared to the overall growth rate of 21% for all businesses.³² Women-owned businesses in travel-related accommodation and food services were one of the top five fastest growing industries between 2007 and 2018.³³



Source: Oxford Economics analysis based on BLS NLSY79



Entrepreneurship Drives Competitiveness

In sync with the **White House's Women's Global Development and Prosperity Initiative, (or W-GDP)**, announced in early 2019, the travel industry provides opportunities for females to own a business or succeed as an entrepreneur. Entrepreneurship is a key driver of prosperity and competitiveness in the U.S. It is essential to continue to support and encourage all entrepreneurs. A thriving travel economy is vital to small business, entrepreneurship and job growth for men and women alike.



CAREER SPOTLIGHT



Rachel Frampton,
Senior Tour Guide/Owner,
Bindlestiff Tours

Developing the Drive to Go Solo

Traveling the country while providing tourists personalized memorable experiences, Rachel was a natural tour guide. What started as a summer tour guide gig while she was obtaining her business degree in tourism quickly sparked a passion for adventure travel. She rose through the ranks to become lead tour guide at a specialist, small tour group company for nearly 10 years. Gone for months at a time, with no permanent address, Rachel felt most at home on the road while guiding tourists and sharing the natural beauty and unique cultural and historical assets the United States has to offer. Before long, she was motivated to establish her own tour company in Las Vegas.

Requiring technical skills to build and manage a website, strong communication, customer service and sales skills, and an understanding of transportation regulations to manage a fleet of 20 buses, with true entrepreneurial spirit, and core values such as determination and drive, Rachel established Bindlestiff Tours from the ground up in 2010. Providing a unique tailored experience for clients at a reasonable cost, Bindlestiff received national recognition including Trip Advisor's Hall of Fame, Tour Radar's Travelers Choice and Best North America Tour, and was able to expand quickly. Eight years later, the company now employs 15 full-time tour guides and recently launched into Canada, making Bindlestiff Tours an international travel company.

Rachel says that "you never know what situation will get thrown at you as a guide on a tour. You are on duty 24/7. Your job doesn't just cover one base, you need to have the capacity to handle multiple situations. Besides being a walking encyclopedia, you will fill the role of counselor, medical provider, safety supervisor, fun instigator, master chef and bus driver to name but a few."

Being a tour guide has taught me not to worry about the things that may or may not happen. Regardless of the outcome, I will find a way to work through it and I apply the same mentality to the way I run my business.



CAREER SPOTLIGHT



Rachel Frampton,
Senior Tour Guide/Owner,
Bindlestiff Tours

Travel grows small business

Small business is critical to a strong U.S. economy. According to the Small Business Administration, companies that employ under 500 workers employ nearly half of the private-sector workforce (48%). In addition, small businesses are the primary force for job creation: from 2000 to 2017, small businesses generated 66% of all new jobs in the United States.³⁴

The No. 1 small-business employer in the United States is the travel-dependent leisure and hospitality sector. In 2016, leisure and hospitality small businesses employed 9.7 million workers, accounting for 16% of small-business employment in the country—more than any other industry.³⁵

This reality extends across America: leisure and hospitality is the top small-business employer in 30 states, and number two in the remaining 20 states.³⁶ The leisure and hospitality sector is also more small-business oriented than the overall private sector. **Small businesses employ 61% of the leisure and hospitality workforce, compared to 45% in the rest of the private sector.**³⁷

Developing the Drive to Go Solo (CONTINUED)

“As a small company we are able to create a unique experience for clients, really tailoring each trip to different group dynamics. We are able to keep client costs to a minimum and continue to provide unparalleled value for money. We love what we do and every day is a new adventure!”

Not only does Bindlestiff Tours employ tour guides and office staff, it also has positive downstream impacts on the local economy and community. Owning a bus fleet requires maintenance, inspections and glass window repair—all of which is sourced locally. A local supermarket provides food essentials and boxed lunches for the tour and local restaurants, bars, gas stations and other attractions benefit from additional business on multi-day tours.

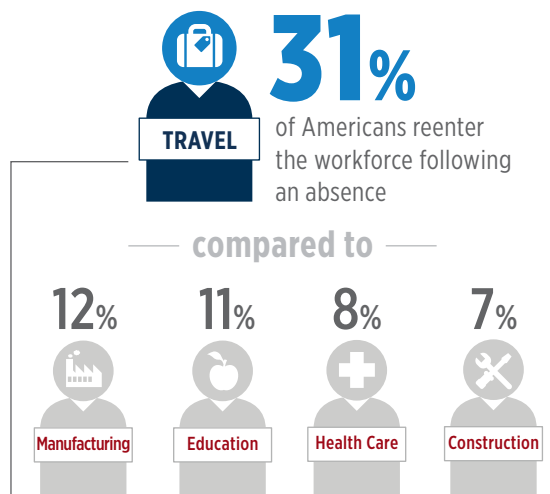
On a wider scale, Rachel also supports U.S. companies by purchasing camping equipment, trailers, buses and more. In the spirit of giving back, Bindlestiff Tours is involved with multiple local outreach programs in Las Vegas including tour donations for Toys for Tots and providing camping equipment donations for Las Vegas Rescue Mission every two years when their camping equipment is replaced. Her core values were rewarded: determination, strong will, confidence and drive have been paramount to her success.



Travel jobs help return Americans to the workforce

Americans leave the workforce for many reasons such as furthering their education, raising a family or retirement. Others may be out of the workforce after being “downsized” and are unable to find a new job before receiving temporary government assistance. **Whether out of the labor force voluntarily or involuntarily, a supportive bridge for Americans looking to reenter the workforce is essential in a dynamic economy.**

Due to its flexibility, number of entry level positions, welcoming culture, acceptance of all backgrounds, diversity of work available and sheer size, over the past three decades, the travel industry has been the No. 1 industry for returning Americans to the workforce. **Travel has been the gateway for more than three in 10 Americans to reenter the workforce after taking time off, whether for school, to raise a family, early retirement or simply down on their luck.**³⁸ This is compared to 12% in manufacturing, 11% in education, 8% in health care and 7% in construction.³⁹



Source: Oxford Economics analysis based on BLS NLSY79

Getting Americans back on their feet.

More than any other sector of the U.S. economy, the travel industry has a proven track record of providing Americans the opportunity to reenter the workforce after spending time on the sidelines. **Over the past three decades, the travel industry was the reentry point for nearly three in 10 (29%) of Americans receiving temporary government assistance to transition back to the workforce—more than any other industry—a fact that is true across all demographics.**⁴⁰ (Fig.4)

Fig.4 - The Travel Industry Helps Americans Reenter the Workforce

	All	White, Non-Hispanic	Hispanics	Black
Travel	29%	30%	23%	29%
Other industries	22%	21%	29%	21%
Manufacturing	16%	17%	15%	13%
Construction	9%	11%	8%	5%
Professional services	8%	7%	8%	12%
Health care	8%	6%	7%	12%
Education	5%	5%	6%	7%
Finance	3%	3%	3%	2%

Source: Oxford Economics analysis based on BLS NLSY79

The travel industry is the leading avenue providing opportunities for those receiving temporary government assistance with a high school degree or less. More than any other industry, a thriving and growing travel industry plays a central role in providing the experience, on-the-job training and confidence needed for Americans to become productive, independent citizens.

CAREER SPOTLIGHT



Lester Johnson,
Mama J's Restaurant

Giving Qualified Workers a Second Chance

Velma Johnson never intended to open a restaurant, much less become one revered for her hiring practices. She was just looking for a permanent space to manage her small catering business. Even when her son, Lester Johnson, found a commercial kitchen in Richmond, Virginia's Jackson Ward neighborhood that was tied to an existing restaurant, the pair thought she could continue to focus on the catering business while managing the restaurant on the side. Fortunately for Velma and Lester, it didn't quite turn out that way. When its doors opened in 2009, customers came, business boomed—and Mama J's restaurant has become a southern soul food institution and a must-try for visitors.

But it's not just the food that makes Mama J's stand out. It's also the service. In fact, the restaurant was nominated this year by the James Beard Foundation as a semi-finalist for Outstanding Service.

As a minority-owned business, the restaurant's location in Jackson Ward is significant. For much of the 20th Century, the neighborhood was the commercial and cultural heartbeat of the African American community in Richmond and also home to the famous Hippodrome Theater which has hosted some of the country's most notable black entertainers and acts throughout its history.

Given Velma and Lester's connection to the neighborhood, it's no wonder Mama J's is committed to giving back to the community—starting with its hiring practices. A believer in second chances, Lester makes a point to hire employees who have made mistakes, including those who have previously been incarcerated.

Lester was introduced to one employee who had spent almost three decades in prison through a reentry program. "I could genuinely tell that whatever, whoever he was 30 years ago was not who he was now," Lester said. "And I hired him originally as a dishwasher. And he's turned out to probably be one of my best employees."

CAREER SPOTLIGHT



Lester Johnson,
Mama J's Restaurant

Giving Qualified Workers a Second Chance (CONTINUED)

Velma and Lester's hiring practices and commitment to its workers prompted Food & Wine to recently name Mama J's one of the "19 Great Restaurants to Work For." When it comes to hiring, Lester isn't looking for employees with years of experience. He looks for people who are reliable, driven and eager to learn new skills. "I'm not looking for people that really necessarily have a background in the hospitality-restaurant business. What I'm looking for is people that, in my opinion, understand that they have to put forth effort," he said.

Is there a secret to employee success in the travel and hospitality industry? For Lester, it's not a secret: "You can teach people pretty much how to do anything," he says.

"It's about cultivating their internal drive, it's about their mindset, it's about what they're trying to accomplish. There is no limit to how high a person can rise at the restaurant – so long as they are willing to learn."



Working mothers in the travel industry.

Largely as a result of higher educational attainment for women, the American labor force has changed considerably over the past 50 years. In 1970, women accounted for 38% of the workforce. By 2018, women's share rose to 47%.⁴¹

Three-quarters of women in their prime working years (25-54) were in the workforce in 2018. Women's growing presence in the workforce also includes mothers. In 1975, less than half (47%) of mothers were in the labor force.⁴² By 2016, 71% of mothers were employed, with three-quarters of mothers working full time and a quarter employed part time.⁴³ While a sizable share of mothers with children under three years of age are not in the labor force (37%), three-quarters of mothers are employed once their children reach school-age.⁴⁴

And it is not just mothers. Now that women are increasingly investing in their education and spending more time working outside the home developing their careers, men also take time away from the workforce to assist in raising their families. Travel provides the pathway for both men and women to return to the workforce after raising children.

In fact, over the past three decades, **30% of Americans—and 31% of women**—who took time off to raise their children reenter the workforce through the travel industry.⁴⁵



Importance of the Economic Empowerment of Women

According to the Women's Global Development and Prosperity (W-GDP) Initiative, there is evidence that when women are empowered, they stimulate economic growth and help create stable societies.

Through improved access to quality education, skills training and supporting entrepreneurship, women are empowered to advance their participation in the economy.

With women now comprising nearly half of the workforce and more than seven in 10 mothers employed, it is increasingly important to provide welcoming, rewarding, stimulating and flexible career options for women to continually contribute to the overall economy. **Travel's flexibility, emphasis on practical skills and availability of entry-level jobs provide women unique opportunities to launch and build a rewarding career, whether starting out or reentering the workforce after taking time off to raise children.**

Expanding workforce opportunities for women has the potential to boost global economic output by an additional \$12 trillion by 2025. The economic empowerment of women shouldn't be viewed as a "women's issue." Smart development assistance benefits families, communities and nations.

Whitehouse.gov, "Empower Women to Foster Freedom", February 7, 2019. <https://www.whitehouse.gov/briefings-statements/ivanka-trump-empower-women-to-foster-freedom/>

CAREER SPOTLIGHT



Jen Sweeney,
Management Assistant,
Enterprise Holdings, Inc.

Newfound Confidence and Career

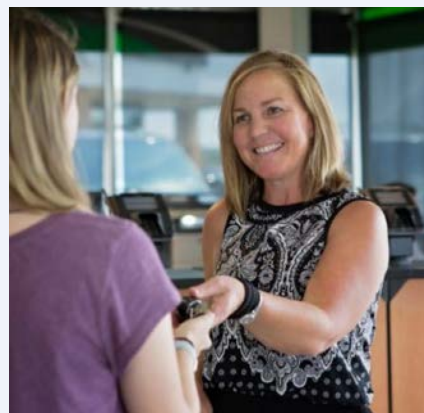
For Jennifer Sweeney, a job in the travel industry was never on her radar. After graduating from college with a degree in education, she took her first job as a teacher in Chicago, but later left the workforce to raise her two sons. As her boys got older, however, she was eager to find a long-term career but wasn't sure where to start.

"I was trying to find something that was a career, not just a job," Jennifer recalled. It wasn't long until she stumbled upon the Management Training program with Enterprise Holdings, the world's largest rental car provider, and that's when things started to click. The program, which is designed to train and cultivate a pipeline of talent within the company, offered her an opportunity to build a meaningful career. She jumped at it.

Since joining the company in December 2017, Jennifer has risen from Management Trainee (MT) to Management Assistant. She credits her quick assent to the program's focus on building practical skills that she can apply every day in her job. "You're not just renting cars to people," Jennifer explained. "When you're in the branch, you're learning how to run a business."

Day-to-day, the program teaches MTs everything they need to know about running an Enterprise branch, from learning the intricacies of the company's fleet and finances to managing employees and dealing with customer situations. "It worked out perfectly for me because I felt like I could learn a business from the ground up," Jennifer said.

Jennifer acknowledges the similarities between her role as an educator and her job at Enterprise. "When I was a teacher, preparation was key. You get to school before the kids do so you can prepare for your day, and Enterprise is very much the same," she said.



CAREER SPOTLIGHT



Jen Sweeney,
Management Assistant,
Enterprise Holdings, Inc.

Newfound Confidence and Career (CONTINUED)

But her new role has also pushed her to become a better problem solver – a necessary skill when it comes to building trust with customers. Case in point: recently, Jennifer took a call from a family on vacation that had been left stranded after their tire blew out. Not missing a beat, she contacted a tow truck company who gave the family a lift to a nearby Enterprise branch so they could get back on the road and back to enjoying their vacation. “Things happen,” she said. “But the most important thing is how you react to it.”

As a working mother, her two sons are never far from her mind. Enterprise makes it possible for Jennifer to balance both her personal and professional obligations. She mentioned, for example, a company practice that allows employees to schedule appointments and tend to other personal matters. “I’m always going to be a mom,” she said, “Enterprise is supportive of that.”

Today, Jennifer thinks a lot about the future. Long-term, she hopes to manage her own Enterprise branch and one day move into other senior management positions within the company. But perhaps most importantly, she recognizes the travel industry for instilling in her the confidence to achieve her goals. “I’m accomplishing something that I never thought possible,” Jennifer said.

“I never thought I’d have the confidence to do what I’m doing today and here I am doing it and that’s really because of the support and training that we receive here at Enterprise.”

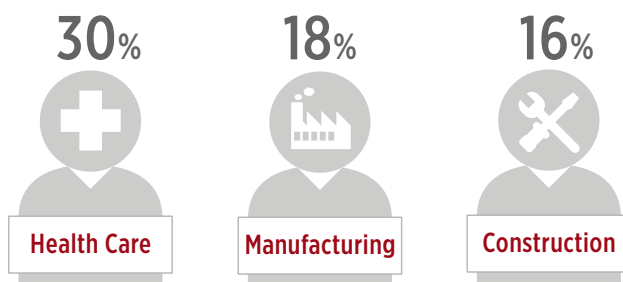
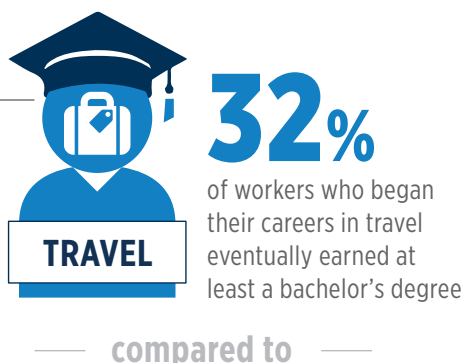
Travel industry jobs and attaining higher education

One of the key benefits of the travel industry to American workers is that the travel industry offers the flexibility to gain additional knowledge, skills and training through educational programs and higher education opportunities.

Of the 6.1 million Americans working part-time while pursuing higher education in 2018, more than half, or 3.6 million, were employed in travel-related industries.⁴⁶

Nearly one-fifth (18%) of travel industry employees currently attend school, more than double the 8% of workers in other sectors of the economy.⁴⁷

Over the past three decades, travel has achieved an impressive record of helping workers attain their educational goals. Among workers who began their careers in the travel industry, nearly one-third (32%) eventually earned at least a bachelor's degree, compared to 30% in health care, 18% in manufacturing and 16% in construction.⁴⁸










Source: Oxford Economics analysis based on BLS NLSY79

Not only that, for youths surveyed through the more recent Bureau of Labor Statistics Longitudinal Survey (NLSY97), travel was the top reentry point from school to work for more than half (52%) of individuals who took time off to further their education, followed by education at 9%.⁴⁹ (Fig.5)

The flexibility the travel industry offers Americans to pursue higher education contribute to a productive future workforce. Higher education, knowledge and skills are in growing demand in today's labor market. The travel industry puts Americans on a path to further their education, ultimately leading to a rewarding career and achieving financial success.

Fig.5 - Top Industry Reentry Point From School to Work

Rank	Industry	Percentage
1	 TRAVEL	52%
2	 Education	9%
3	 Professional Services	8%
4	 Health Care	7%
5	 Construction	4%
5	 Manufacturing	4%
6	 Finance	3%

Source: Oxford Economics analysis based on BLS NLSY97

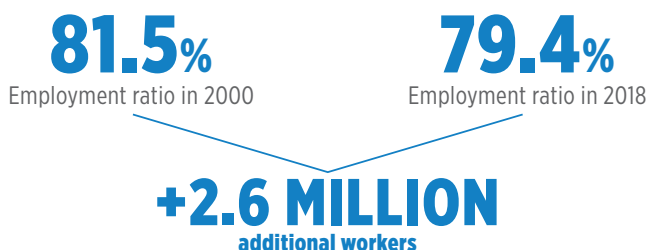
Travel jobs are accessible to all Americans



The U.S. economy continued to expand and remain strong in 2018. Real GDP grew 2.9%, wages increased 3.0%, 2.5 million jobs were created and the unemployment rate fell to 3.9%, a 50-year low.⁵⁰

However sanguine these top-line numbers are, this does not tell the full story and many Americans still remain on the economic sidelines. Of those in their prime working years (ages 25 to 54) the 79.4% employed in 2018 remains below the record employment population ratio of 81.5% set in 2000.⁵¹ Returning Americans in their prime working years to the workforce would employ an additional 2.6 million individuals.⁵²

For Americans in Prime Working Years, Employment Levels Remain Low



Source: Bureau of Labor Statistics

Despite low unemployment and a strong economy, there were more than 6.7 million job openings in the private sector at the end of 2018—an increase of 16% over 2017.⁵³

Leisure and hospitality represented 15% of the total openings in 2018 with nearly one million jobs.⁵⁴

Leisure and Hospitality
accounted for
15% of total job
openings
(nearly 1 million jobs)

Source: Bureau of Labor Statistics

As of April 2019, the official unemployment rate was 3.6%, but when accounting for all persons marginally attached to the labor force and those employed part-time for economic reasons, the unemployment rate rises to 7.3%.⁵⁵ Although unemployment is at record lows and the labor market is strong, there are nearly 6 million unemployed Americans.⁵⁶

Younger and less educated Americans tend to have the most difficulty finding employment. These two groups accounted for 61% of unemployed Americans in 2018.⁵⁷ One in five unemployed Americans were between the ages of 16 and 24. Of those unemployed over the age of 25, 45% had a high school degree or less.⁵⁸

The World Travel and Tourism Council recently cited research that shows individuals experiencing unemployment in their youth tend to have lower lifetime earnings, higher unemployment later in life and fewer career opportunities.⁵⁹



Shifting demographics can impact the workforce.

America's demographics are changing. Millennials (born between 1981 and 1996) are now the largest generation in the U.S. labor force—making up 35% of the total population.⁶⁰ The Millennial population is expected to continue growing until 2036.⁶¹ While Baby Boomers made up the majority of the workforce in the 1980s, they made up just 25% of the total workforce in 2017.⁶² By 2030, all Baby Boomers will be older than 65—or one in five Americans will be of retirement age.⁶³



While the workforce is becoming increasingly younger, the United States as a whole is becoming more diverse. As of 2016, the Hispanic population reached nearly 60 million, constituting 18% of the total U.S. population—and this population is expected to grow 2.7% annually between 2016 and 2026.⁶⁴ This group is overwhelmingly younger: more than six in 10 Hispanic Americans were under the age of 35 in 2016 and their median age was 28.⁶⁵ The Asian population is also expected to grow at a faster rate (2.5%) than overall average annual growth rate (0.6%) between 2016 and 2026.⁶⁶ (Fig. 6)



Fig.6 - The U.S. Population is Becoming More Diverse

Demographics	2016	Projected 2030	Projected 2060	% Chg 2016-2060
Total Population (million)	323,128	354,840	403,697	25%
White	77%	74%	68%	11%
Black or African American	13%	14%	15%	41%
Asian	6%	7%	9%	101%
Multiple races	3%	4%	6%	197%
Non-Hispanic White	61%	56%	44%	-10%
Hispanic	18%	21%	28%	93%

Source: U.S. Census Bureau





The travel industry delivers for all Americans.

The travel industry is much more reflective of demographic shifts than the rest of the economy, employing a younger and more diverse workforce than many other sectors.

It is well positioned to provide underserved youth and less educated Americans with employment opportunities and a path to independence. Individuals employed in the travel industry are younger: 27% are between the ages of 16 and 24 compared to 9% of the rest of the economy.⁶⁷ The average age of those employed in travel is 37.5 years compared to 43.2 years of those employed in other industries.⁶⁸ (Fig.7)

Corresponding with the fact that travel employees are younger, nearly half (46%) of travel industry employees have a high school degree or less, compared to 30% of employees in the rest of the economy.⁶⁹ While only 3% of Americans employed in industries outside of travel are under the age of 25 and have a high school degree or less, 14% of travel industry employment consists of younger and less educated Americans who are often unemployed.⁷⁰

The travel industry is more diverse. Travel employs a greater share of Hispanics, African Americans and multi-ethnic individuals than the rest of the economy. One in five of travel employees are Hispanic compared to 16% of the rest of the economy. Caucasians made up three-quarters non-travel industry employment compared to 71% of travel-related employment.⁷¹ (Fig.7)

With the evolving demographics of America, the travel industry is best positioned to meet the needs of the future American workforce. Travel jobs provide a ladder to economic success, equipping Americans in practically all ranks and stations in life with the skills and experiences that can translate into a rewarding career.

Fig.7 - Travel Industry Delivers for All Americans

Demographics	Travel	Rest of Economy
Age		
16-24	27%	9%
25-44	40%	44%
45-64	28%	41%
65+	5%	6%
Average	37.5	43.2
Education		
High school or less	46%	30%
Some college	37%	30%
Bachelors degree or more	18%	40%
Currently attending school	18%	8%
Race/Ethnicity		
White	71%	75%
Black	13%	11%
Asian	7%	7%
Multi, other	9%	7%
Non-hispanic	80%	84%
Hispanic	20%	16%

Source: U.S. Census Bureau, American Community Survey, 2017

The travel industry helps fill a growing skills gap.

The United States is also facing a growing skills gap that threatens the nation's long-term economic prosperity. Seven million jobs were available in December 2018, but only 6.3 million unemployed people were looking for work.⁷² In a recent Society of Human Resources Management (SHRM) survey, more than eight in 10 (83%) human resource (HR) professionals had trouble recruiting suitable candidates in the past year, primarily due to skills shortages.⁷³ Three in 10 HR professionals cited candidates lacking the right workplace soft skills, such as communication, as a primary reason why organizations are struggling to hire suitable candidates.⁷⁴ On-the-job training and firsthand experience are some of the most effective ways for individuals to develop these highly valued skills. As the country nears full employment, businesses face an even greater talent shortage that will have a stifling impact on the economy and global innovation.

Recognizing the growing need to fill vacant positions with qualified workers, the travel industry has spearheaded multiple workforce development initiatives to increase awareness and promote opportunities within the travel industry. Through training, education, certification programs and firsthand experience, the industry is providing resources and opportunities for everyone from high school to college students, minorities, women and individuals with barriers to employment.



Workforce Development Initiatives Within the Travel Industry

In support of the Trump administration's National Council for the American Worker, a number of U.S. Travel member companies signed on to a White House workforce development pledge. *The Pledge to America's Workers* ensures all Americans can benefit from the nation's historic economic boom and low unemployment rates. The pledge was an important discussion topic when U.S. Travel President and CEO Roger Dow and U.S. Travel corporate leaders met with President Donald Trump, Director of the National Economic Council Larry Kudlow and Senior Advisor Ivanka Trump in the fall of 2018. The industry has pledged to create opportunities for American workers by expanding and establishing programs that educate, train and reskill Americans for meaningful jobs and careers.

Travel and Tourism Advisory Board (TTAB) Recommendations and Best Practices on Workforce Development as it Relates to Travel and Tourism:

As part of their work to bolster the U.S. economy and workforce, the U.S. Travel and Tourism Advisory Board—comprised of travel industry leaders—submitted a series of recommendations to the U.S. Department of Commerce, with workforce development a top priority. The pledge was based on best practices in the industry, in partnership with educational institutions, foundations and nonprofit organizations.



InterContinental Hotels Group (IHG) Frontline program leverages technology to reach thousands of customer-facing colleagues globally and provide training, hospitality service skills and resources to promote upward mobility and opportunity. The IHG Frontline program provides valuable online, self-paced training to teach frontline colleagues about the hotel, brand, standards and ways of working to enhance knowledge and performance. The video-based technology equips colleagues with the knowledge and confidence needed to deliver their roles with skill and pride. It is also a cost-effective way to provide consistent training to colleagues all over the nation.

Educational institutions help by focusing their certificate and degree programs on developing skills that travel and tourism companies need. **Industry foundations** also enable collaboration to build talent more quickly.

Las Vegas Convention and Visitors Authority initiated an effort to catalog the extensive web of organizations that support the local travel and tourism industry. Developing relationships with local universities and hospitality schools combine classroom and work experience to deliver skilled students to entry-level positions in the hospitality industry.



Workforce Development Initiatives Within the Travel Industry (continued)

There are over 500 schools with hospitality degree programs currently in the U.S. Many of these schools partner with the **American Hotel & Lodging Educational Institute (AHLEI)** to source industry-vetted curricula, training programs, and certifications for their students. One of the best examples of schools and industry working together can be seen through the Certification in Hotel Industry Analytics (CHIA). Adopted by more than 250 post-secondary schools, the CHIA was developed by STR and AHLEI with leading industry experts. It is the only hotel-related certification for industry professionals focused on analytics—one of the most in-demand skillsets for lodging industry employees.



The **National Restaurant Association Educational Foundation** offers a two-year food service curriculum for high school students, college-level programs on restaurant or hospitality management, professional development opportunities and scholarships for students, educators and industry professionals. American Hotel and Lodging Educational Foundation (AHLEF) recruit out-of-school and unemployed young people for permanent careers in hospitality, offer a management apprenticeship program and a cost-free college program.

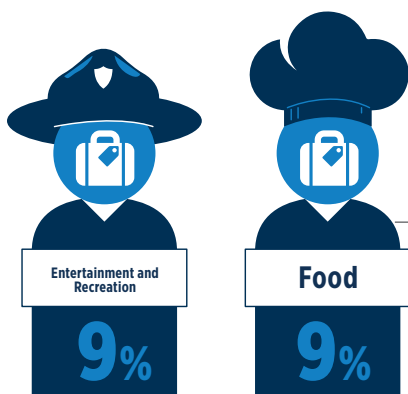


Nonprofit organizations help lower-educated workers upgrade their skills and connect with prospective employers. For example, **Café Reconcile** is a nonprofit daytime restaurant serving Southern staples cooked by at-risk youth who receive job training in New Orleans. **Emma's Torch** is a nonprofit restaurant that provides culinary training for refugees and helps them assimilate into society. **Goodwill Industries** in D.C. partnered with the AHLEF to offer a hospitality training academy and was responsible for training one-third of the Marriott Marquis DC staff when the hotel opened.



The future of jobs in travel: we're hiring

Fastest growing **travel employment sectors**
from 2017-2027



Source: Bureau of Labor Statistics

Not only do the travel-dependent leisure and hospitality industries provide ample opportunity for career advancement, but they are also one of the top industries hiring Americans. **Leisure and hospitality hired 1.1 million Americans in 2018, 20% of total job hires and nearly three times more than the manufacturing sector.**⁷⁵

Travel employment is expected to grow 5% in the next decade—on par with the economy overall.⁷⁶ **Entertainment and recreation and food services are projected to be the fastest growing travel employment sectors.**⁷⁷ While eight of the top 20 fastest growing industries over the next decade are in the health care sector, museum and historical site employment is one of the top 20 industries growing most rapidly with employment levels expected to increase 26% by 2026.⁷⁸ Conversely, 14 of the top 20 industries declining the fastest are in the manufacturing sector.⁷⁹

As the goods sector of the U.S. economy becomes increasingly automated, the service sector is projected to drive employment growth in the next decade. Nine out of 10 new jobs added between 2016 and 2026 will be in the service sector.⁸⁰

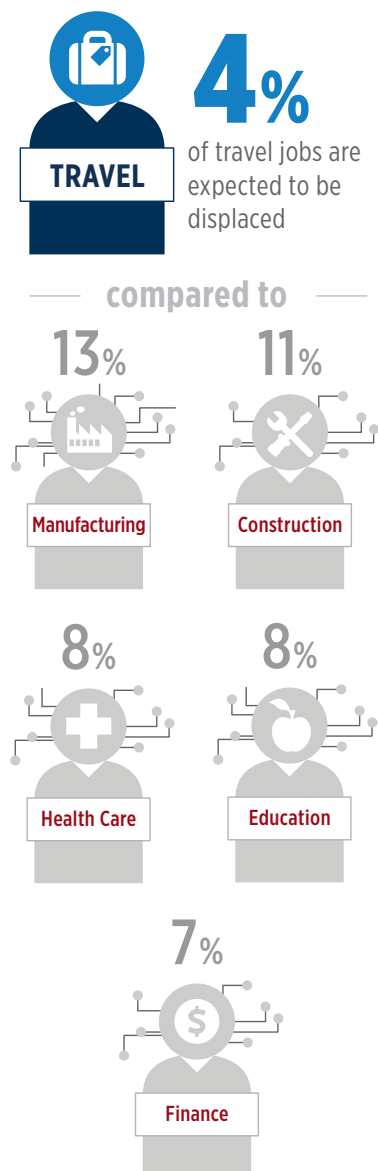


Technology's impact on the workforce of the future.

Contrary to popular belief, technology often changes the nature of work rather than eliminating the number of jobs. More often than not, technological innovations improve productivity and change the demands of the workforce, generating additional demand which creates new and different jobs.⁸¹

According to Oxford Economics, technology will increasingly take over the most repetitive and regimented tasks including administration functions such as documenting information and other back-office functions.⁸² Interpersonal communication, creative thinking and customer skills are highly valuable and are only expected to become more important. While technology will make communication more efficient, it will not replace highly personalized service and customer interactions.

Percentage of jobs expected to be displaced by 2027



Source: Oxford Economics, The AI Paradox

Even as technology becomes more powerful and capable, demand for strong “human skills” are increasingly critical. Oxford Economics forecasts that human skills such as coordination, instruction, negotiation and persuasion are crucial to the future labor force. Nearly one-third (32%) of the total skills gap facing the U.S. economy by 2027 is due to a dearth of “human skills”.⁸³ Developing highly effective soft skills will define the future success of the U.S. labor market to ensure the workforce is making the best use of technological advancements. The problem solving, communication and negotiation skills developed through firsthand experience in the travel industry will prove essential to the workplace of the future.

Due to the service nature of travel jobs and the high level of personal service expected, travel jobs are less likely to be displaced as a result of technology and automation. According to Oxford Economics, less than 4% of travel employment is expected to be ‘displaced’ as a result of automation and artificial intelligence (AI), compared to 10% of the rest of the economy by 2027.⁸⁴ In comparison, 13% of manufacturing, 11% of construction, 8% of health care and education and 7% of finance are expected to be displaced as a result of automation and artificial intelligence.⁸⁵

The travel industry is unique: travel is more labor-intensive and trade-dependent than the rest of the economy. **At the same time, travel is less susceptible to job outsourcing or the adverse effects of automation than the rest of the economy.**





The health of the travel industry impacts American jobs.

A strong domestic economy, with low unemployment, rising wages, solid consumer spending as well as low inflation, has propelled domestic travel in recent years. Domestic travelers took 2.3 trillion trips in 2018—an increase of 1.9% from 2017.⁸⁶ At the same time, spending by domestic travelers increased 5.8% to \$933 billion.⁸⁷

A healthy and growing travel industry depends on not just a robust domestic travel economy but also capitalizing on the lucrative global travel market.

Internationally, global tourism is booming. As China, Brazil, India and other nations prosper and develop, there continues to be growing demand for international travel. The United Nation's World Tourism Organization reported that global travel increased 6% to 1.4 billion in 2018.⁸⁸ The United States estimates having welcomed 80 million international visitors in 2018.⁸⁹ These visitors spent \$156 billion while traveling in the U.S., representing a 49% increase from 2008.⁹⁰

However, these numbers could be even greater. Since 2015, the U.S. has been losing its share of global long-haul travel, dropping from 13.7% in 2015 to 11.7% in 2018.⁹¹ In 2018, the resulting loss of inbound visitors has cost the U.S. 120,000 American jobs.⁹² By reclaiming the 2015 share of global long-haul travel by 2024, the U.S. stands to gain 164,000 American jobs.⁹³



How we can ensure future growth.

While the travel industry is poised to continue to grow, the pace is anticipated to decelerate as a result of increased global competition for long-haul travelers, rising trade tensions and potential economic slowdowns.

By joining together with the travel industry, leaders in both the government and the private sector can help advance policies that will continue the travel industry's progress to expand economic opportunity for millions of American workers. U.S. government leaders should prioritize pro-travel policies that will undoubtedly create good American jobs including:

1

Affirming a National Strategy to Welcome Inbound Visitors. America has an opportunity: Global long-haul travel has increased over the past three years since 2015 but our share has been in decline. We must increase our share of this lucrative market to continue to grow the U.S. economy and create American jobs.

2

Renewing Brand USA. At no cost to federal taxpayers, Brand USA successfully operates as a public-private partnership to promote travel to America from around the world. Brand USA is the only organization that encourages more travel to the United States to a global audience.

From the tens of thousands of jobs it creates, to its significant, positive impact on our economy, Brand USA is an important program that works—and must be maintained for years to come.

3

Renaming and Expanding the Visa Waiver Program. Considered the gold standard of security programs, the Visa Waiver Program allows for expedited travel of pre-vetted visitors from 38 of our closest allies.

Renaming this program to the Secure Travel Partnership as introduced through House bill H.R. 1996 in March 2019 to better reflect its stringent security requirements and then expanding the program to qualified countries will help increase inbound travel.

4 Modernizing Transportation Infrastructure. Modern travel infrastructure strengthens America's economy and improves the travel experience. From our highways to our airports, the poor condition of our nation's infrastructure slows travel and restricts economic growth.

Establishing a Travel Mobility Program, targeting federal grants toward projects that improve mobility and increasing federal investment in all modes of transportation infrastructure, will help ensure we can keep travelers moving to and within the United States.

5 Investing in our National Parks. While America's national parks are welcoming record numbers of domestic and international visitors year after year, the National Park Service is facing an \$11.9 billion deferred maintenance backlog that could threaten visitor's experience, or worse, access. Addressing the deferred maintenance backlog, which are capital maintenance and infrastructure projects that have been delayed a year or more due to a lack of funding, financing and resources, is paramount to ensuring National Parks remain an attractive destination.

By investing in infrastructure and preservation projects, we can create and support more than 110,000 American jobs.

6 Preserving Open Skies. For decades, Open Skies agreements, which have been the cornerstone of American aviation policy, have increased connectivity. The U.S. has more than 100 agreements with countries around the world, which eliminate government involvement in airline decision-making about routes, capacity and pricing, and have led to lower fares for consumers, greater competition among airlines and higher passenger growth.

Increasing connectivity to the U.S. brings more international visitors to our shores, whose spending boosts our economy, creates American jobs and helps reduce our trade deficit.

Travel has provided a ladder of opportunity to millions of Americans. And, with smart, forward-looking policies for the 21st century, the travel industry can continue to expand its role in developing the workforce of the future.



Methodology

This report primarily relies on data from the Bureau of Labor Statistics National Longitudinal Surveys of Youth (NLSY) 1979 and 1997 to explore the career path of individuals whose first job was in the travel industry. The NLSY is a longitudinal survey, meaning that the same set of individuals are interviewed repeatedly over a period of decades, making it possible to construct their entire work history.

“First job” is defined for these purposes as the first job (based on start date) that each individual works starting in the calendar year in which they turn 20, even if the job started before that year. This is used for the purposes of assigning each individual to a first industry, as well as for assigning them a first occupation and associated job zone code and a first wage.

The travel industry was defined in this report as follows:

CORE TRAVEL		EXPANDED TRAVEL	
NAICS code	Description	NAICS code	Description
481111	Scheduled Passenger Air Transportation	4411	Automobile Dealers
481211	Nonscheduled Chartered Passenger Air Transportation	4412	Other Motor Vehicle Dealers
487	Scenic and Sightseeing Transportation	4413	Automotive Parts, Accessories, and Tire Stores
532111	Passenger Car Rental	443	Electronics and Appliance Stores
5615	Travel Arrangement and Reservation Services	444	Building Material and Garden Equipment and Supplies Dealers
711	Performing Arts, Spectator Sports, and Related Industries	445	Food and Beverage Stores
712	Museums, Historical Sites, and Similar Institutions	446	Health and Personal Care Stores
713	Amusement, Gambling, and Recreation Industries	447	Gasoline Stations
7211	Traveler Accommodation	448	Clothing and Clothing Accessories Stores
7212	RV (Recreational Vehicle) Parks and Recreational Camps	451	Sporting Goods, Hobby, Musical Instrument, and Book Stores
7224	Drinking Places (Alcoholic Beverages)	452	General Merchandise Stores
7225	Restaurants and Other Eating Places	453	Miscellaneous Store Retailers
		4821	Rail Transportation
		483112	Deep Sea Passenger Transportation
		483114	Coastal and Great Lakes Passenger Transportation
		483212	Inland Water Passenger Transportation
		4852	Interurban and Rural Bus Transportation
		4853	Taxi and Limousine Service
		48551	Charter Bus Industry
		4881	Support Activities for Air Transportation
		8111	Automotive Repair and Maintenance

In addition to the NLSY, three additional sources were analyzed:

1. The current (2017) demographic makeup of the travel industry was profiled using data from U.S. Census Bureau’s American Community Survey.
2. Projections for growth of total employment in the travel industry, as compared to growth in other industries, were constructed based on industry growth rates in the Bureau of Labor Statistics employment projections.
3. Estimates of the share of employment by industry that is susceptible to automation through artificial intelligence were estimated using occupation-specific susceptibility to automation shares calculated by Oxford Economics, “The A.I. Paradox”. This work used data on the extent of routine job tasks by occupation from BLS’s O*NET to estimate these occupation-specific shares.

Endnotes

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