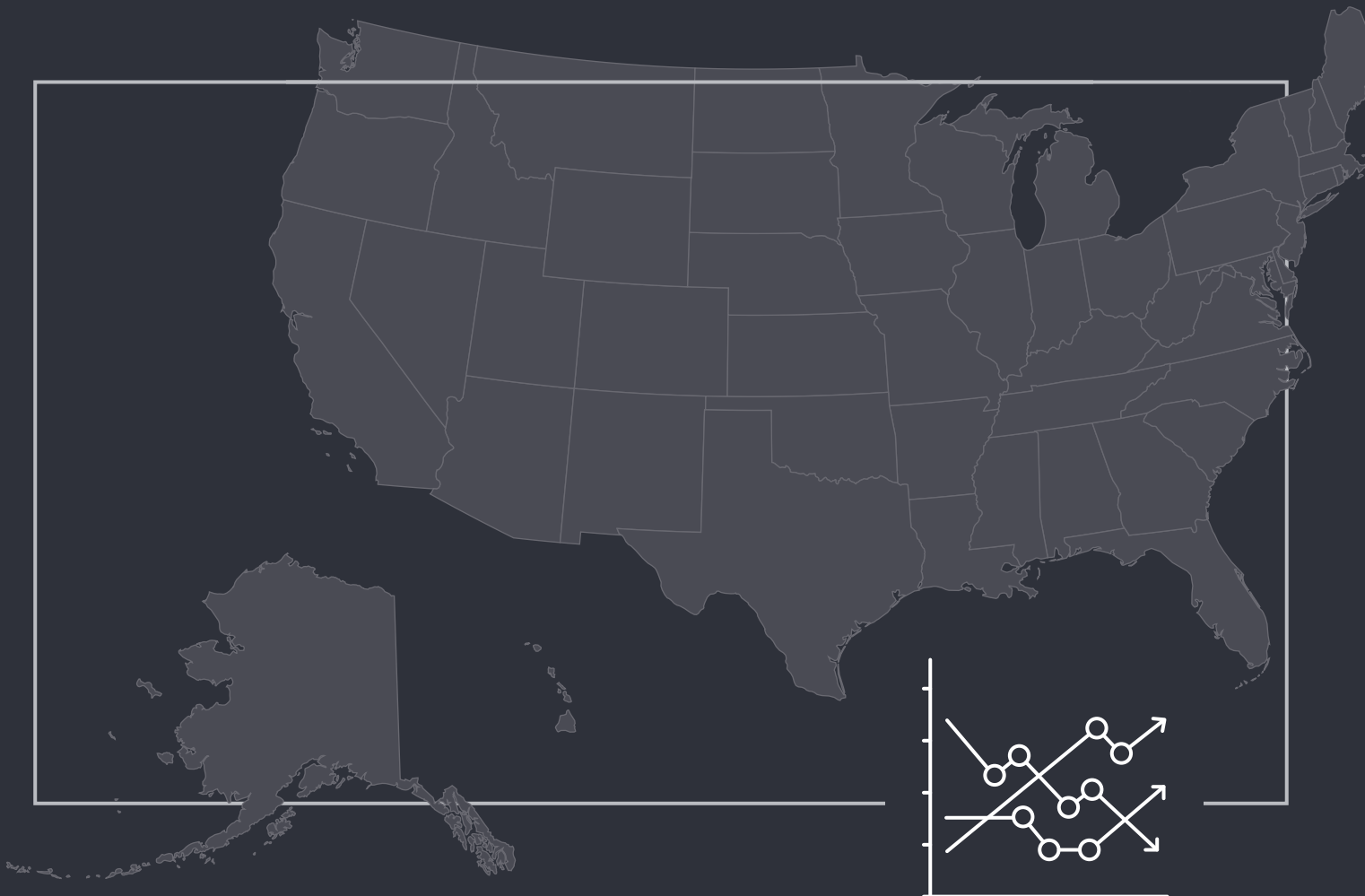


National Workforce Trends



The Restaurant Workforce is Missing Nearly 1 Million Workers from Before the Pandemic

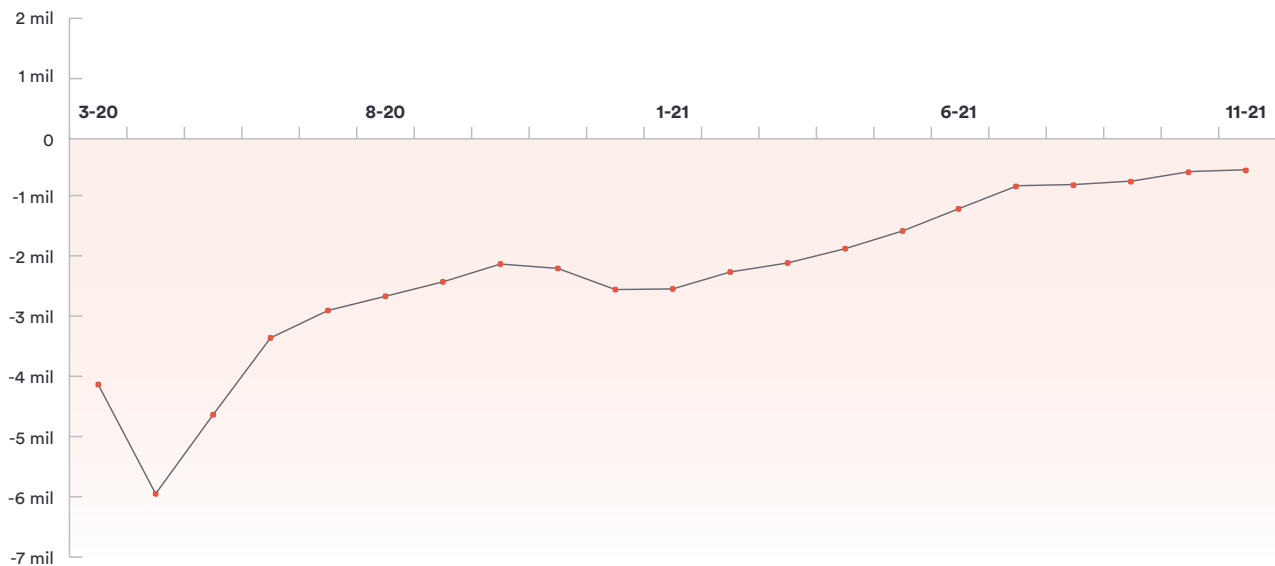
In April 2020, the restaurant worker job deficit reached a peak of 6.3 million.

The deficit has steadily closed since then, but there are still more than 900k fewer workers than pre-pandemic.

There was a surge of new jobs added from March-July 2021, but momentum stalled in August and hasn't bounced back.



Net Jobs Lost Since February 2020, Food Service & Accommodations



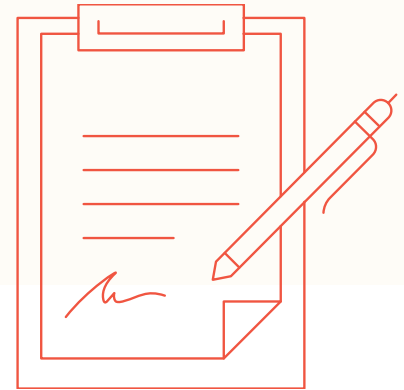
Source: U.S. Bureau of Labor Statistics, "Job Openings and Labor Turnover Survey," January 2022.

Job Growth Has Slowed Due to Record-High Levels of Restaurant Workers Quitting

Although “quits” were rising in March-July 2021, hires were rising faster, leading to an average gap of 461k per month.

In August, hires returned to pre-April levels, but “quits” continued rising to record highs, decreasing the average gap to 225k per month.

Federal unemployment benefits expired on September 6, but this failed to slow what’s [been called](#) “The Great Resignation.”



Hires and Quits by Month, Food Service & Accommodations

Month	Hires	Quits
Dec 20	698,000	616,000
Jan 21	808,000	577,000
Feb 21	1,059,000	574,000
Mar 21	1,015,000	650,000
Apr 21	1,150,000	695,000
May 21	1,160,000	703,000
Jun 21	1,212,000	706,000
Jul 21	1,258,000	735,000
Aug 21	1,080,000	867,000
Sep 21	1,050,000	838,000
Oct 21	1,075,000	761,000
Nov 21	1,079,000	920,000

Source: U.S. Bureau of Labor Statistics, “Job Openings and Labor Turnover Survey.” January 2022.

To Bring Workers Back, Restaurants Have Substantially Increased Wages

Between January and October 2021, restaurant wages increased by 14%. Before that, the largest percent growth on record was 4% in 2018.

In a span of eight months (February-October 2021), restaurant wages grew more than in the previous four years **combined**.

Inflation has played a role in this, but restaurant workers were one of just two groups with wage growth that [outpaced inflation](#) (hotel workers were the other).



Average Hourly Earnings, All Employees, Food Service & Accommodations

Year	January	December*	Total Increase	Percent Increase
2011	\$12.40	\$12.52	\$0.12	1.0%
2012	\$12.48	\$12.67	\$0.19	1.5%
2013	\$12.62	\$12.95	\$0.33	2.6%
2014	\$12.90	\$13.35	\$0.45	3.5%
2015	\$13.34	\$13.74	\$0.40	3.0%
2016	\$13.80	\$14.33	\$0.53	3.8%
2017	\$14.37	\$14.89	\$0.52	3.6%
2018	\$14.89	\$15.50	\$0.61	4.1%
2019	\$15.44	\$16.00	\$0.56	3.6%
2020	\$15.99	\$16.16	\$0.17	1.1%
2021	\$16.23	\$18.48	\$2.25	13.9%

*2021 data only available through October

Source: U.S. Bureau of Labor Statistics, "Current Employment Statistics." December 2021.

Signs Suggest the Wage Hikes Are Making a Positive Impact on Restaurant Hiring

As of November 2021, Food Service & Accommodations still has the highest job openings rate* of any industry.

However, the gap is shrinking. Since July, only one industry has seen a larger improvement in job openings rate.

The largest improvement occurred in November, the last month for which we have data, which suggests continued wage hikes are making an impact.



Job Openings Rate by Industry

Industry	Jul '21	Aug '21	Sep '21	Oct '21	Nov '21	Change Since July
Food Service & Accommodations	11.3%	10.0%	9.3%	10.5%	8.9%	2.4%
Health Care and Social Assistance	8.1%	7.4%	8.2%	8.5%	8.2%	-0.1%
Professional and Business Services	8.1%	8.2%	7.8%	8.1%	7.8%	0.3%
Arts, Entertainment, and Recreation	10.2%	9.5%	7.8%	7.4%	7.2%	3.0%
Other Services	7.4%	7.8%	6.6%	7.5%	7.2%	0.2%
Trade, Transportation, and Utilities	6.5%	6.9%	6.8%	6.6%	6.6%	-0.1%
Manufacturing	6.8%	6.5%	7.1%	7.1%	6.4%	0.4%
Finance and Insurance	5.0%	4.2%	4.7%	4.7%	5.8%	-0.8%
Information	5.5%	6.1%	5.3%	5.8%	5.5%	0.0%
Mining and Logging	6.0%	5.6%	5.4%	5.2%	5.3%	0.7%
Real Estate and Rental and Leasing	7.5%	7.5%	4.7%	5.1%	5.3%	2.2%
Federal Government	4.0%	4.5%	4.5%	4.6%	5.3%	-1.3%
State and Local Government: Non-Education	5.5%	4.5%	6.2%	5.0%	5.1%	0.4%
Construction	4.5%	4.6%	4.5%	5.7%	4.4%	0.1%
Educational Services	5.2%	4.8%	3.6%	4.6%	4.4%	0.8%
State and Local Government: Education	3.9%	2.8%	2.5%	2.9%	3.1%	0.8%
Total	7.0%	6.7%	6.7%	7.0%	6.6%	0.4%

*The job openings rate is the number of job openings as a percent of total employment plus job openings.

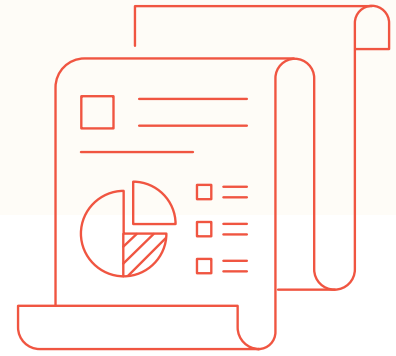
Source: U.S. Bureau of Labor Statistics, "Job Openings and Labor Turnover Survey." January 2022.

Despite Gains in Wages, Benefits Access Still Lags Far Behind Other Industries

Compared to other industries, Food Service & Accommodations ranks last in worker access to every core benefit listed.

In most cases, the percent of Food Service & Accommodations workers with access to a benefit is **less than half** the all-worker average.

This gap may have closed (the most recent data available comes from March 2021), but it still represents a major hurdle to restaurant recruitment.



Percent of Workers With Access to Benefits by Industry

	Benefit Type	All Workers	Food Service & Accommodations	Food Service Industry Rank*
Insurance	Healthcare	71%	31%	#11 out of 11
	Medical Care	70%	31%	#11 out of 11
	Dental Care	40%	10%	#11 out of 11
	Vision Care	26%	8%	#11 out of 11
	Prescription Drug	69%	31%	#11 out of 11
	Life	56%	16%	#11 out of 11
	Short-Term Disability	42%	17%	#11 out of 11
	Long-Term Disability	35%	3%	#11 out of 11
Leave	Paid Holidays	81%	41%	#11 out of 11
	Paid Sick	77%	49%	#11 out of 11
	Paid Vacation	79%	43%	#11 out of 11
	Paid Personal	46%	7%	#11 out of 11
	Paid Funeral	52%	10%	#11 out of 11
	Paid Jury Duty	52%	12%	#11 out of 11
	Paid Military	27%	4%	#11 out of 11
	Paid Family	23%	9%	#11 out of 11
	Unpaid Family	89%	78%	#11 out of 11

*Included Industries: Construction; Manufacturing; Trade, Transportation and Utilities; Information; Finance and Insurance; Real Estate and Rental and Leasing; Professional and Business Services; Education Services; Health Care and Social Assistance; Accommodations and Food Service; Other Services

Source: U.S. Bureau of Labor Statistics, "Employee Benefits in the United States." March 2021.