GALLUP^{*}



The American Upskilling Study Empowering Workers for the Jobs of Tomorrow

HOW ACCESS TO UPSKILLING IS BECOMING A SOUGHT-AFTER EMPLOYEE BENEFIT — AND A POWERFUL TALENT ATTRACTION TOOL

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Executive Summary

COVID-19 has impacted work in unprecedented ways, with 30 million American adults reporting having lost their jobs or businesses since the beginning of the pandemic. As the U.S. economy recovers from the impact of COVID-19, upskilling programs — defined as training or education that teaches new skills or advances or upgrades existing skills — present a compelling opportunity for workers and businesses. Upskilling can be an opportunity for displaced workers to move into other careers, and potentially for businesses to attract employees during the current hiring crunch. To better understand this opportunity and assess the impact of upskilling on workers' lives and careers, Amazon commissioned Gallup to conduct the most comprehensive study to date on upskilling — The American Upskilling Study: Empowering Workers for the Jobs of Tomorrow.

In June 2021, Gallup surveyed more than 15,000 U.S. adults who are either employed or in the labor force (i.e., not currently employed but have plans to return to work) and asked them about their interest in and experiences with upskilling. More than half of these workers (57%) say they are "extremely" or "very" interested in participating in an upskilling program, while modestly fewer (52%) report having participated in an upskilling program in the past 12 months. Of those interested in upskilling programs, 63% say that the motivation for doing so is to advance their careers.

Participation in upskilling is particularly high for Black workers, with 64% having done so in the past 12 months, followed by 63% of Hispanic workers. Asian workers (51%) are substantially less likely to have attended an upskilling program in the past year, while White workers are among the least likely to have done so, with about half (46%) saying they have.

The data reveal that U.S. workers and their employers receive clear benefits from upskilling programs, including an additional 8.6% in annual income (about \$8,000 on average) for workers, promotion opportunities, higher job satisfaction, greater retention and an increased standard of living. Workers say they have a very high interest in employer-provided upskilling, primarily to help advance their careers, but it is a demand their employers are only partially meeting.

As for the types of upskilling programs workers are most interested in, upskilling opportunities provided by their employer and held during work hours are most preferred, as they help workers overcome the two main barriers to upskilling that this survey revealed: workers' lack of time and money. These preferences are reflected in the types of programs participated in most by workers over the past 12 months — 36% of survey respondents participated

in employer-provided upskilling programs, compared to 21% who participated in a program they sought out on their own.

For employers, there are also clear benefits in providing upskilling opportunities related to attracting new employees. Sixty-five percent of workers say the opportunity to participate in an upskilling program is an "extremely" or "very" important factor in deciding whether to take a new job, and 61% cite it as "extremely" or "very" important when weighing the decision to remain at their current job.

Unfortunately, the research also revealed that upskilling opportunities are disproportionately offered to the highest-skilled workers. Many of those who want it most — those who express the greatest desire to learn skills for a new career and have the least confidence in their current skills — are the least likely to have participated in upskilling or to say their employer provides it. The challenge to employers is to expand upskilling opportunities to those in the lowest income earning groups and with the lowest current skill levels. Such an expansion would allow for more upskilling opportunities for those workers who may derive the most benefit from upgrading their skills. Participation in upskilling is particularly high for Black workers, with 64% having done so in the past 12 months, followed by 63% of Hispanic workers. Asian workers (51%) are substantially less **likely** to have attended an upskilling program in the past year, while White workers are among the least likely to have done so, with about half (46%) saying they had.

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Introduction

The COVID-19 pandemic impacted the U.S. economy and workers in an unprecedented manner, with lockdowns and other restrictions associated with the outbreak disrupting traditional patterns of work and hiring. Half of Americans say their lives were impacted "a lot" by COVID-19¹ and 13% of U.S. adults, roughly 30 million people, reported losing their jobs or businesses.² By May 2020, less than half of Americans (46.4%) rated their lives highly enough to be considered "thriving," equal to the lowest point in Gallup's trend since the Great Recession in 2008.³

As the U.S. economy has entered a recovery period, the challenge for businesses in attracting workers to fill vacancies has become more acute. This problem is not new for U.S. businesses. Since 2015, the number of monthly job vacancies has exceeded the number of monthly hires in the U.S. each month, except in May and June of 2020. With the economy continuing to reopen, labor demand is again surpassing labor supply, and the rate of job openings is the highest it has been since the Bureau of Labor Statistics Job Openings and Labor Turnover Survey began in 2000, with a ratio of roughly two positions filled for every three that are open.

A 2021 World Economic Forum report noted that an effective upskilling effort in the U.S. could add \$800 billion to the country's GDP by 2030.⁴ However, little previous research has addressed the direct benefits of upskilling for workers. Research from this study shows that upskilling may offer benefits to workers, including financial gains and opportunities for career advancement. Businesses may also benefit from upskilling, as offering workers these opportunities may attract new employees and help fill vacancies.

The general impact of education on workers is well known. High levels of education tend to confer many benefits, including higher compensation, lower risk of unemployment and greater job quality. Most scholarly research on the subject has shown that securing these benefits via additional education has traditionally been seen as an individual responsibility.

Many businesses have found that the traditional emphasis on education alone has not resulted in a pool of applicants who possess the required skills. According to a recent survey of human resource management officers, 56% of these business leaders said their organizations were experiencing a moderate to severe skills gap.⁵ These

¹ https://news.gallup.com/poll/348716/covid-affected-people-lives-everywhere.aspx

² https://news.gallup.com/poll/348722/covid-put-billion-work.aspx

³ https://news.gallup.com/poll/310250/worry-stress-fuel-record-drop-life-satisfaction.aspx

⁴ http://www3.weforum.org/docs/WEF_Upskilling_for_Shared_Prosperity_2021.pdf

⁵ https://www.westmonroe.com/perspectives/signature-research/the-upskilling-crisis-effectively-enabling-and-retraining-employees-for-the-future

skills gaps impact business on several levels, including hobbling the ability to innovate, increasing costs associated with workers, affecting quality standards and customer experiences, restricting the ability to pursue market opportunities, and forcing the cancellation or delay of key strategic initiatives.⁶

Upskilling programs — defined as training or education that teaches new skills or advances or upgrades existing skills — offer the promise of helping to fill these skill gaps. These programs hold the potential to help businesses meet their needs while insulating workers from possible job loss due to advances in technology or competition, enhancing their engagement and boosting pay.

The current discussion on upskilling focuses on anecdotal stories, with limited research into its impact on workers' careers, leaving employers with little insight into the true value of these programs, which often require a significant financial investment. To address these current gaps in the research, Amazon commissioned Gallup to survey American workers on the issue. A total of 15,066 U.S. adults were interviewed via an online survey conducted June 8-17, 2021. The survey specifically addressed interest, participation and perceived benefits of upskilling, as well as details about the type of education or training respondents have received.

15,066 U.S. adults were interviewed

June 8-17, 2021

THE SURVEY SPECIFICALLY ADDRESSED

- interest
- participation
- perceived benefits of upskilling
- type of education or training respondents have received

⁶ https://www.shrm.org/hr-today/news/hr-magazine/summer2020/pages/upskilling-benefits-companies-and-employees.aspx

Skilling the Skilled: How Unequal Access to Upskilling Is Perpetuating Inequality in the Job Market

Gallup asked workforce members about their interest in participating in upskilling programs, as well as their reasons for doing so and potential obstacles to participation. Additionally, Gallup asked them if they have recently (within the last 12 months) participated in such programs and, if so, the details of that program.

57% of U.S. Workers Want to Update Their Skills

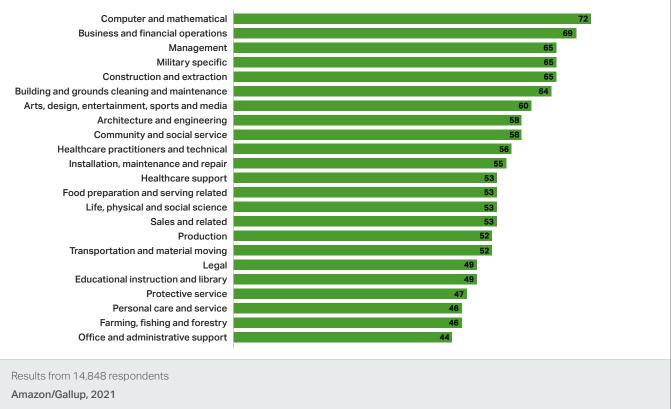
When asked if they are interested in participating in an upskilling program (i.e., learn new skills or upgrade their skills to advance their careers), more than half (57%) of survey respondents say they are "extremely" or "very" interested in doing so. Men (61%) are more likely than women (53%) to express interest. Among racial and ethnic groups, Hispanic workers are most likely to indicate interest in participating, with 69% indicating so, followed by Black workers at 63%, Asian workers at 56% and White workers at 53%.

GRAPH 1

American Workers' Interest in Upskilling, by Occupation

How interested are you in participating in training/education to upgrade your skills or learn new skills that could help you advance your career?

% Very/Extremely interested



Interest in upskilling is highest in more skill-intensive professional occupations, such as those in computer and mathematical-related fields, among whom 72% say they are interested in upskilling programs.

Additionally, workers who report that they have been laid off, lost their jobs permanently, had their hours cut or experienced a loss of income due to the COVID-19 pandemic are more likely to be interested in upskilling than those not impacted by the pandemic. Sixty-three percent of impacted workers say they are "extremely" or "very" interested in upskilling, while 42% of those not impacted by the pandemic say the same.

Workers Want to Upskill to Advance in Their Current Careers

As for what is motivating workers' interest in upskilling, 59% say career advancement is their primary motivation, followed by 17% who are most driven by wanting to find a new career with higher pay, 11% who want to find a more fulfilling job and 10% who seek a new job with greater growth potential.

Skilling the Skilled

More than half (52%) of American workers surveyed indicate they have participated in an upskilling program within the last 12 months. Thirty-six percent of those participated in a program provided by their employers and 21% participated in a program they paid for on their own. Men (57%) are more likely than women (47%) to say they have participated in an upskilling program, which they either paid for and pursued independently or their employer provided.

Black workers (64%) are the most likely racial or ethnic group to say they have participated in an upskilling program, whether provided by an employer (44%) or paid for independently (27%). Sixty-three percent of Hispanic workers say they attended an upskilling program, whether provided by an employer (44%) or paid for independently (24%). Asian workers (51%) are substantially less likely to report they attended upskilling, whether it was an employer-provided upskilling program (31%) or one they paid for independently (25%). White workers (46%) are the least likely to say they attended upskilling, whether it was an employer-provided program (33%) or one they paid for independently (18%).

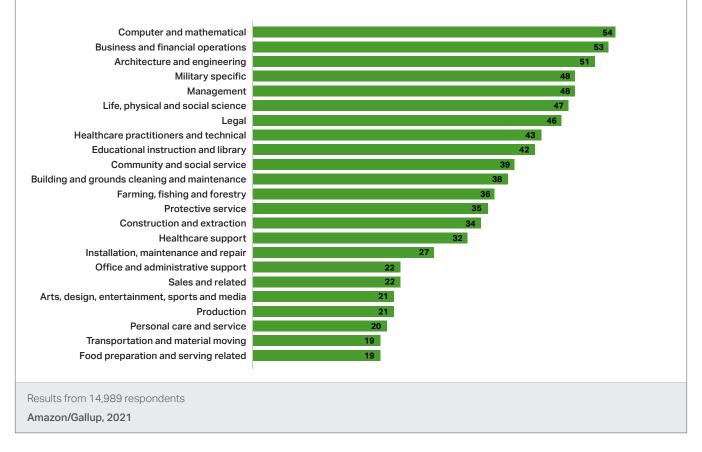
When examined by industry, those individuals in the most highly skilled occupations tend to be the most likely to have participated in an employer-provided upskilling program. For instance, 54% of those in computer and mathematical-related occupations say they did so, compared to 19% in transportation or moving services. This suggests those who are in the most privileged professional occupations are also those who have the most access to upskilling opportunities — in effect, upskilling programs are "skilling the skilled" rather than being offered to those who would benefit most from developing new skills and advancing their careers.

GRAPH 2

Workers Who Participated in Employer-Provided Upskilling in the Last 12 Months, by Occupation

In the past 12 months, have you participated in any training/education to upgrade your skills or learn new skills? Yes — I participated in training/education to upgrade or learn new skills provided by an employer

% Participated



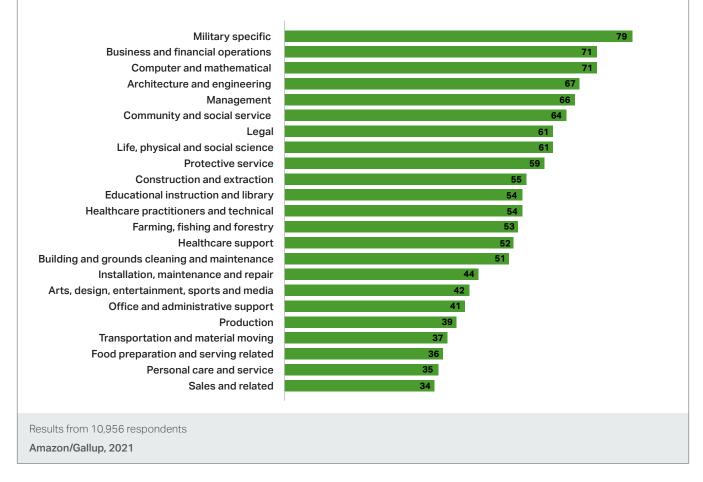
While those in the highest skilled occupations tend to be the most likely to participate in upskilling activities, they are not the most likely to report their employers offer the benefit. Nearly eight in ten (79%) workers in military-specific occupations say their employers offer the opportunity, followed by 71% in computer and mathematical industries and business and financial operations.

GRAPH 3

Workers Who Say Their Employer Provides Upskilling Opportunities, by Occupation

Does your current employer offer any training/education opportunities to upgrade your skills or learn new skills that you could participate in if you wanted to?

% Yes



Additionally, participation is higher for workers employed in occupations with higher numbers of vacancies per unemployed worker, which is an indication of how in-demand the field is. For instance, 54% of those employed in computer and mathematical-related occupations — a field where there are 10 vacancies for each unemployed worker — say they participated in an employer-provided upskilling program. Alternatively, 19% of those in food service and preparation occupations — a field where there is less than one vacancy for every unemployed worker — attended an employer-provided upskilling program. The current profusion of unfilled openings for lower skilled positions could prompt more employers to offer upskilling as an inducement to hiring, causing an overall increase of this trend in the future.

GRAPH 4 Participation in Employer-Provided Upskilling by Occupation, by U.S. Vacancies per **Unemployed Worker** % Received employer upskilling VACANCIES PER UNEMPLOYED WORKER Computer and mathematical 10.00 Healthcare practitioners and technical 6.46 Business and financial operations 3.90 Management 3.65 Life, physical and social science 2.85 Architecture and engineering 2.48 Office and administrative support 2.10 Transportation and material moving 1.99 Installation, maintenance and repair 1.92 Sales and related 1.85 Community and social service 1.62 Educational instruction and library 1.60 32 Healthcare support 1.26 Protective service 1.12 Legal 46 1.11 Arts, design, entertainment, sports and media 1.05 Personal care and service 1.03 Building and grounds cleaning and maintenance 0.93 Food preparation and serving related 0.88 Production 0.79 Construction and extraction 0.73 Farming, fishing and forestry 0.16 Military specific 0.08 Results from 10,956 respondents Vacancy data are from Burning Glass for 2020. National worker data are from the 2019 ACS. Unemployment rates by occupation are from The American Upskilling Study. Amazon/Gallup and U.S. Bureau of Labor Statistics, 2021

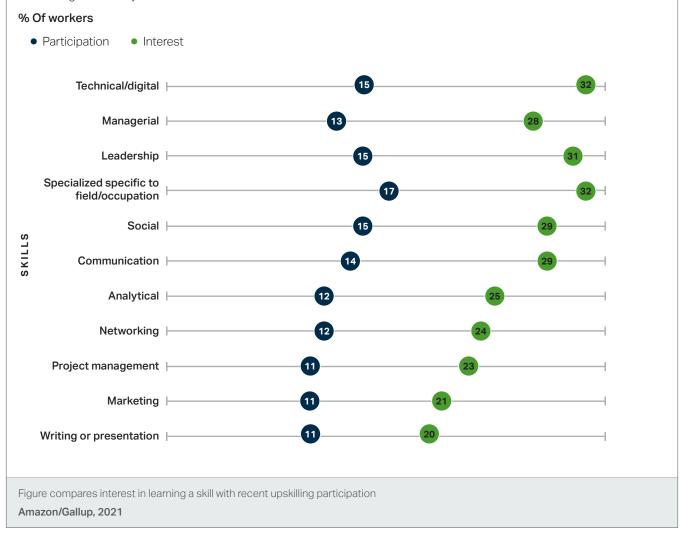
Does Interest Translate to Participation?

When comparing workers' interest in upskilling programs to their self-reported participation in these programs, there is a significant gap between workers' needs and their access or opportunity. This gap is prevalent across all types of skills trainings.

GRAPH 5

Workers' Participation in Upskilling for Specific Skills vs. Their Interest in Learning Those Skills

Which of the following skills were taught in the training/education that was provided by an employer? Thinking about the current job market, what skills do you think would be the most important for you to learn if you wanted to advance in your career or get a better job?



What Workers Want: Upskilling as an Employee Benefit

American workers want employers to fund their skills training. When asked a series of questions about the types of potential upskilling programs they want, they most commonly say they want educational opportunities where workers receive pay while attending, with 71% of the workforce indicating they are interested in this type of program. More specifically, workers want upskilling paid for by employers and provided during normal working hours, with 65% of workers indicating they prefer training delivered this way.



When asked about employer-provided upskilling, interest jumps considerably for workers in less skill-intensive occupations, including those in personal care and service occupations, as well as those in production occupations.

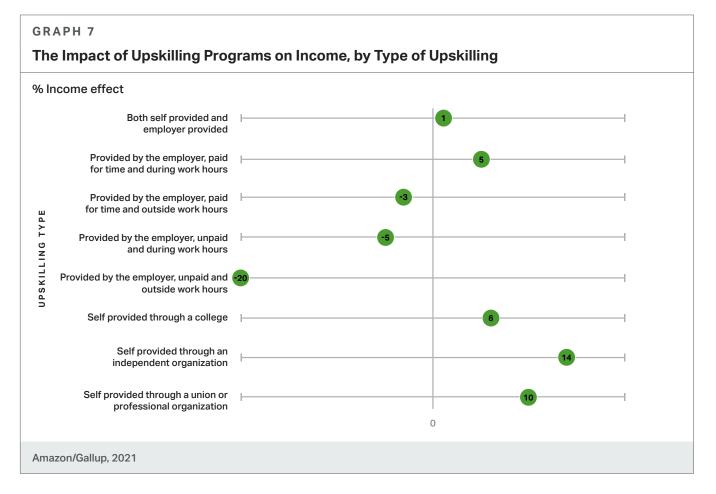
Workers want upskilling paid for by employers and provided during normal working hours, with 65% of workers indicating they prefer training delivered this way.

Upskilling Supports and Empowers Workers

Overall, upskilling has a positive impact on workers across a variety of measures, including income, career advancement and quality of life. Additionally, there are positive impacts on the 11 elements of what constitutes a good job, as measured by Gallup. A complete list of these elements can be found on **page 16**.

Upskilled Workers Make an Average of \$8,000 More Annually

American workers who recently participated in an upskilling program have, on average, annual incomes \$8,000 higher than those who did not — the equivalent of an 8.6% salary increase. This effect is similar to average U.S. per-course training benefits found in economics literature (6.1% increase) and the effect found here controls for education, age, gender, remote worker status, interest in upskilling, college enrollment status, tenure, state, industry and occupation.⁷ It suggests that if workers who have not received upskilling in the last 12 months participated, the aggregate gains to the economy would be \$661 billion each year. The estimated income benefits — with no consideration of costs to workers — are larger for self-funded upskilling (15.3%) compared to employer-provided (5.2%). And 64% of workers who have recently completed upskilling agree that it had a positive impact on their standard of living.⁸



⁷ Haelermans, Carla, and Lex Borghans. "Wage effects of on-the-job training: A meta-analysis." British Journal of Industrial Relations 50, no. 3 (2012): 502-528.

⁸ For additional discussion of the calculation of this benefit, please see the appendix.

Additionally, clear majorities of those who participated in upskilling programs report improvement in three areas of their lives. More than seven in 10 (71%) report greater satisfaction with their jobs. Nearly as many (69%) say their quality of life has improved and 65% report their standard of living has increased.



Three in Four Upskilled Workers Report Career Advancement

Among workers who have participated in an upskilling program, the vast majority (75%) report some type of advancement in their careers. The most common form of career advancement was at their current employer, with 39% having experienced this. Obtaining another, better paying job was the next most common effect of participating in an upskilling program, with 30% of workers saying they were able to move into a new, higher paying job after upskilling.



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Upskilled Workers Are More Likely to Have a Good Job

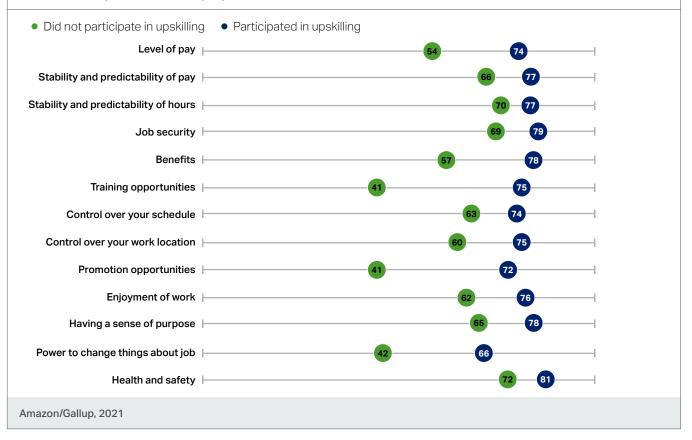
Gallup has identified 11 dimensions of job quality that were included in the upskilling survey. They are:

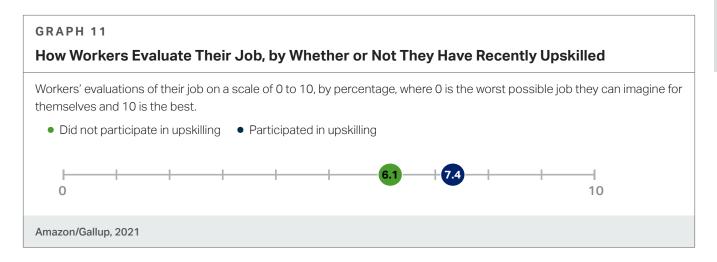


Workers who recently participated in an employer-provided upskilling program are 22 percentage points more likely to be in a good job — defined as a high score across all 11 dimensions of job quality measured by Gallup — than those who didn't.

GRAPH 10

Percent of Workers Who Are Satisfied With Their Job, Along 13 Dimensions of a Good Job, by Whether They Have Recently Upskilled





Additionally, 71% of workers who recently completed upskilling agree it had a positive impact on job satisfaction. Nearly eight in 10 (78%) agree if the training was employer-provided during work hours, much higher than the 50% of workers who agree if the training was employer-sponsored but unpaid and outside of work. This emphasizes the potential importance of providing upskilling as a benefit to workers.



Upskilling Is the New Benefits: How Access to Free Training Can Help Employers Attract Talent Amidst a Worker Shortage

As the COVID-19 pandemic has waned, the large numbers of workers seeking new employment — or the "Great Resignation" — have resulted in an increasing number of unfilled vacancies at businesses around the country. While many business leaders grapple with the costs associated with these shifts, upskilling may play a useful role in attracting — though not necessarily retaining — workers.⁹

For Young Workers, Upskilling Is More Important Than Paid Vacation

Nearly two-thirds of workers believe employer-provided upskilling is very important to evaluating a job, whether it is a potential new job (65%) or their current job (61%). For young adults aged 18 to 24 who are just entering the workforce, upskilling is deemed the third most important benefit when evaluating a new job, behind only health insurance and disability and ahead of retirement, life insurance, sick leave, parental leave and vacation. However, even 53% of workers above the age of 55 report that upskilling is "very" or "extremely" important.

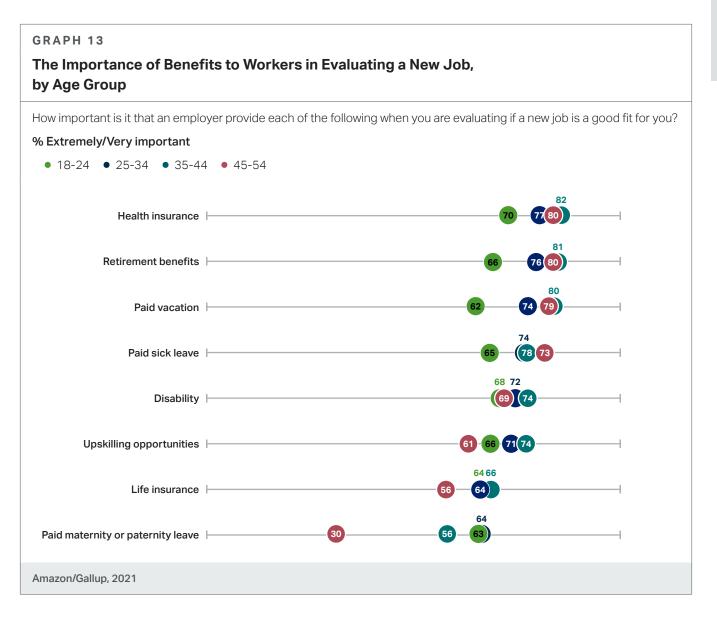
Among workers whose work has been impacted by the COVID-19 pandemic in some way, 68% say employerprovided upskilling is "very" or "extremely" important to evaluating a new job and 65% report it is "very" or "extremely" important to staying at their current job. For those not impacted by COVID-19, 57% cite upskilling as an important factor in evaluating a new job, while 49% say it is an important factor in staying at their current job.

> For young adults aged 18 to 24 who are just entering the workforce, upskilling is deemed the third most important benefit when evaluating a new job, behind only health insurance and disability and ahead of retirement, life insurance, sick leave, parental leave and vacation.

⁹ https://www.cnbc.com/2021/07/13/employers-dont-think-many-workers-will-quit-great-resignation.html

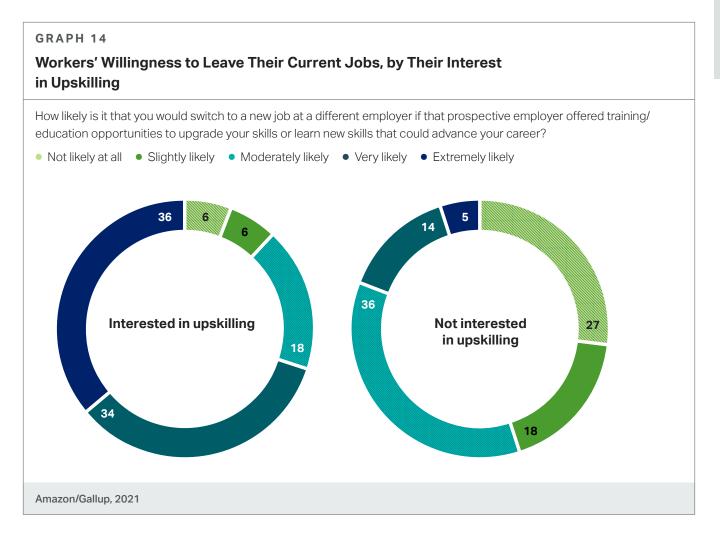
GRAPH 12	
Workers' Rankings of the Importance of Benefits to Staying in Their Current Jobs	
How important are each of the following to you when weighing the decision to remain at a job?	
% Extremely/Very important	
1 Health insurance	76
2 Retirement benefits	74
3 Paid vacation	73
Paid sick leave	71
5 Disability	68
6 Upskilling opportunities	61
7 Life insurance	59
8 Paid maternity or paternity leave	45
Amazon/Gallup, 2021	



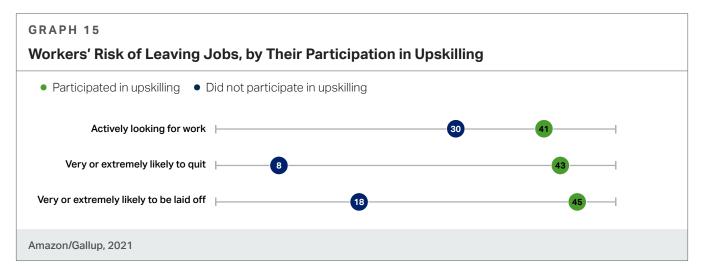


48% of American Workers Would Switch Jobs for Upskilling Opportunity

When workers were asked if they would switch to a new job if that new employer offered upskilling opportunities, 48% indicated they are "extremely" or "very" likely to do so. Among those who specifically report being interested in upskilling programs, 69% are "very" or "extremely" likely to leave their job for upskilling opportunities provided by another employer. For workers impacted by COVID-19, 56% say they are likely to switch jobs for an upskilling opportunity, compared with 26% of those not impacted by the pandemic.



Workers who are likely to switch jobs, which includes those actively looking for work, those "very" or "extremely" likely to quit their current job, those "very" or "extremely" likely to be laid off, and those who have participated in an upskilling program recently, are generally more likely to leave than those who haven't upskilled. Large percentages — but not majorities — of all three groups would be more likely to depart their current jobs after upskilling.



Higher Earners Are More Likely to Say Upskilling Opportunities Are Important to Staying in Jobs

When workers were asked how important the opportunity to participate in an upskilling program was to their decision to remain at a job, 61% indicated it was an "extremely" or "very" important factor. The impact of the opportunity to upskill is even more substantial among the highest wage earners making \$120,000 a year or more, with 73% of this group indicating it is an important factor to them. Additionally, among those workers with a bachelor's degree or higher, 67% note the opportunity to participate in training or education is an important factor in their decision to stay in a position.

The impact of the opportunity to upskill is even more substantial among the highest wage earners making

\$120,000 a year or more,

with 73% of this group indicating it is an important factor to them.

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Conclusion

The COVID-19 pandemic disrupted work in the U.S. in unprecedented ways, leaving many workers seeking new positions in more resilient industries. The latest Gallup research indicates that nearly half (48%) of U.S. workers are actively looking for new jobs or watching for opportunities.¹⁰ This leaves many businesses scrambling to fill vacancies — and offering upskilling as a benefit may prove an incentive to those new job seekers.

Obtaining new, necessary skills has traditionally been viewed as a personal responsibility on the part of workers, and that approach has not adequately addressed the gap in required skills or what workers need to thrive and advance in their careers, especially as the pandemic turned entire industries upside down overnight. A clear majority of U.S. workers is interested in upgrading their skills and has access to upskilling programs through their employers. However, 48% have not participated in either an employer-provided program or one they have sought out on their own in the last 12 months.

Additionally, there are clearly differences in both interest and participation in upskilling among racial and ethnic groups. Hispanic workers are most likely to indicate interest in participating, with 69% indicating so, followed by Black workers at 63%, Asian workers at 56%, and White workers at 53%. However, Black workers are most likely to have participated in upskilling programs, with 64% having done so, followed by 63% of Hispanic workers. Asian workers (51%) are substantially less likely to report they attended an upskilling program and White workers are among the least likely, with roughly half (46%) saying they had.

For workers, upskilling offers the possibility of success through both higher wages and career advancement, as well as higher levels of satisfaction. For businesses, upskilling offers a potent benefit to encourage workers to fill vacancies or remain in their current jobs. Businesses that provide upskilling as a benefit for workers may attract new hires and ensure their workers have the skills that they as an organization require. This is particularly true for younger workers, who are disproportionately interested in upskilling.

Currently, workers earning the highest levels of compensation are offered a disproportionate opportunity to engage in upskilling. For companies and the larger national economy to feel the full benefits of upskilling, employers should expand access to these programs to all workers. This expansion would allow more opportunity for lower earning employees to advance within their current employment and likely assist in bridging the skills gap.

¹⁰ https://www.gallup.com/workplace/351545/great-resignation-really-great-discontent.aspx

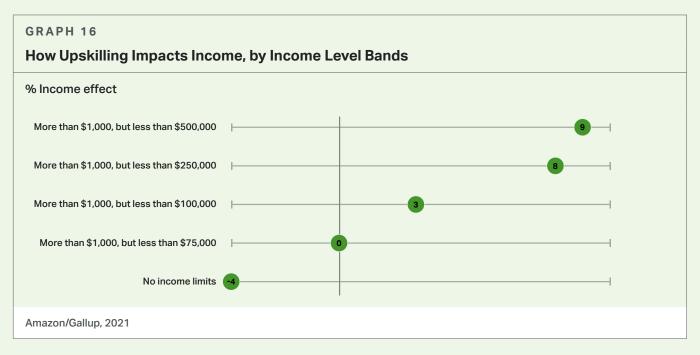
Methodology

Results from The American Upskilling Study: Empowering Workers for the Jobs of Tomorrow are based on a self-administered web survey conducted June 8-17, 2021, of 15,066 U.S. adults from Dynata's opt-in panel. The sample included adults aged 18-65 who are currently in the workforce (i.e., employed or unemployed but seeking work or planning to return to work). The survey was conducted in English only.

The sample was weighted to correct for nonresponse. Data were weighted by age, gender, education, race/ ethnicity and census region to produce national and state-level weights. Weighting targets were created using the Census Bureau's American Community Survey.

Appendix

The data is self-reported, with outlying responses that have been excluded from the current analysis in the interest of providing an accurate estimate.



About Amazon and Gallup



ABOUT AMAZON

Amazon is investing more than \$1.2 billion by 2025 to provide education and skills training benefits to more than 300,000 of its U.S. employees to help them move into higher paying, in-demand roles at Amazon and beyond. Since the launch of Upskilling 2025 in 2019, more than 70,000 Amazon employees have participated in one of Amazon's nine upskilling programs. Through its popular Career Choice program, the company will now fund full college tuition, as well as high school diplomas, GEDs, and English as a Second Language (ESL) proficiency certifications for its front-line employees. In addition to offering employees opportunities to advance their careers, all Amazon employees in the U.S. make a starting wage of at least \$15/hour - twice the federal minimum wage. All regular full-time Amazon employees also have access to comprehensive benefits, including mental health benefits, up to 20 weeks of paid parental leave and more from their first day on the job. To learn more about Amazon's commitment to upskilling, visit aboutamazon.com/upskilling2025.

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