



2023 Career & Salary Survey Report

The state of the beverage alcohol industry

Presented by

PROVI



SevenFiftyDaily

The business and culture of drinks

Table of Contents

- 03 Letter from the Editor**
- 04 Introduction and Methodology**
- 05 Who Answered Our Survey?**
- 06 Breaking it Down by Industry Tier**

- 08 The Top Takeaways**
 - 09** 30% of those surveyed have not received a raise in the last two years
 - 10** Beverage professionals are fairly satisfied with their pay, but less optimistic about career growth
 - 11** More than a third of industry professionals surveyed have changed companies since 2020
 - 12** Seeking professional growth, beverage workers have shifted across industry tiers amidst the pandemic
 - 13** Industry members are prioritizing paid time off and healthcare benefits
 - 14** The rebound of on-premise: While workers are stressed and seeking safe workspaces, many are still optimistic
 - 15** The youngest generation of beverage professionals expects strong workplace benefits and is optimistic about future career opportunities
 - 16** Beverage professionals are still learning
 - 17** In the next year, professionals expect sustainable packaging and climate change to grow in importance
 - 18** The role of technology and ecommerce in the beverage industry will remain vital in 2024

- 19 Summary**
- 20 About Us**
- 21 References**

Letter from the Editor



WELCOME BACK TO OUR CAREER AND SALARY SURVEY REPORT. It's been four years since we last released a report on the state of beverage industry careers and pay—and what a tumultuous four years it has been. A global pandemic brought much of our industry to a halt, putting many out of work, adding the stress of being essential workers to others, creating persistent supply-chain challenges, and overall, completely upending the way we do business. Add to that a social justice movement and the accelerating climate crisis, and we're operating in a very different beverage industry than the one we surveyed in 2019.

We first launched this survey in 2018 to get a better understanding of the beverage alcohol industry and the opportunities that exist for workers within it. For two years, we had the opportunity to track average compensation, outlook for career growth, worker satisfaction, workplace benefits, diversity and inclusion, and more.

But after this four-year gap, we had some reconnaissance to do, particularly in the aftermath of such a tremendous upheaval. How did workers rethink their work lives? Have they shifted to different companies, or into alternative industry tiers? How have attitudes around workplace benefits and policies changed? And what is on their minds for 2024?

Though it will take further tracking to comprehensively assess these questions, determine what our transformed beverage workplace really looks like, and figure out how we can continue to attract workers to our industry, on behalf of Provi and *SevenFifty Daily*, we hope this report will begin to provide some answers. We'll see you back here next year for more.

Cheers,

A handwritten signature in black ink that reads "Courtney Schiessl Magrini". The signature is written in a cursive, flowing style.

COURTNEY SCHIESSL MAGRINI

EDITOR-IN-CHIEF

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Introduction

The Beverage Alcohol Career and Salary Survey returned in 2023 through a new partnership: Provi and *SevenFifty Daily*.

Our unified mission is to propel the industry forward, providing insights and tools that support and connect beverage professionals, and it's our hope that this report will do just that.

OUR METHODOLOGY

In June and July 2023, **Provi** and ***SevenFifty Daily*** conducted an online survey to better understand the state of the beverage alcohol industry—and its workers—today. Included in the survey pool are Provi customers, *SevenFifty Daily* newsletter subscribers, and Provi and *SevenFifty Daily* social media followers. Our online survey included questions about industry tier, current role, total compensation, recent job changes, career outlook and satisfaction, education, experience, and work-related stress level, among others.

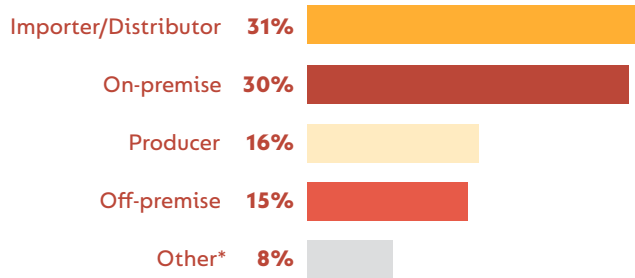
We sought to determine:

1. How salaries compare across each tier of the industry.
2. How satisfied industry professionals are with their careers, pay, and future growth opportunities.
3. How individuals have changed jobs and careers amidst the pandemic.
4. The most important workplace policies, industry issues, and learning resources.
5. And how the current state of the industry compares to our last assessment, four years ago.

Who Answered Our Survey?

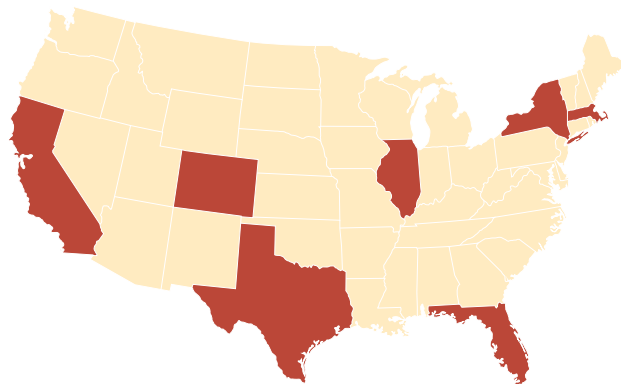
More than 1,800 trade professionals from across the beverage alcohol industry.

PARTICIPANTS BY TRADE TIER



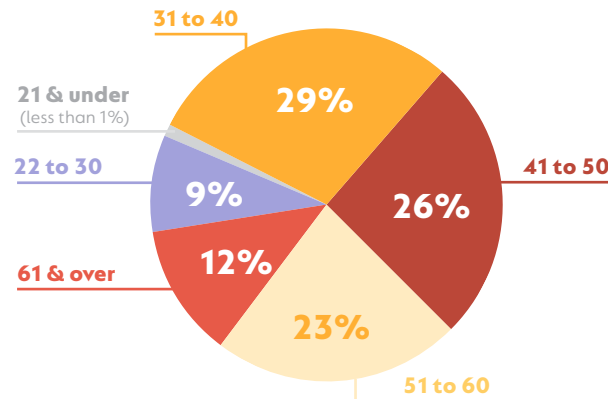
*Other company types may include consulting, education, marketing, and public relations.

GEOGRAPHY

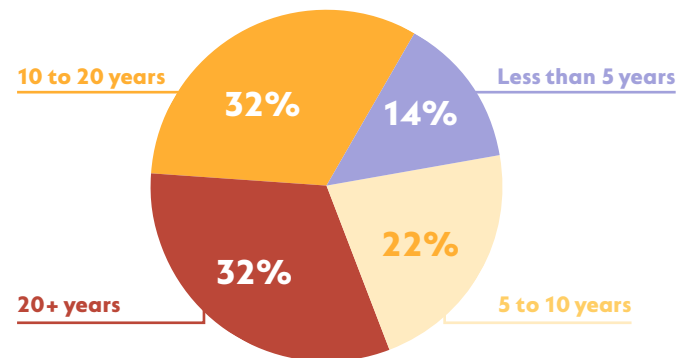


49 states plus Washington, D.C., responded, with the majority from New York, California, Texas, Illinois, Florida, Colorado, Georgia, and Massachusetts.

AGE OF RESPONDENTS



EXPERIENCE LEVELS



SALARY SNAPSHOT

\$76K

Median annual compensation across all survey respondents

\$100K+

33% earn three figures

40%

Receive raises once per year

12%

Receive income from tips

47%

Earn bonus or incentive pay, including commissions

A Closer Look by Industry Tier

Importers and Distributors

31%

OF OUR SURVEY POOL

47%

5+ YEARS IN CURRENT POSITION

MOST COMMON ROLES

43%

Sales representative

17%

Marketing or sales management

13%

Owner, CEO, or general manager, or senior management

12%

Regional or district manager

\$84K

Median annual compensation

Encompassing respondents who work for importers, distributors, and companies who both import and distribute beverages, the importer/distributor tier accounts for nearly a third of our survey pool. Though 43% of our respondents in this tier are sales reps, just a third of all importer/distributor respondents receive any kind of expense account or reimbursement for meals or gas.



Wine, Beer, and Spirits Producers

16%

OF OUR SURVEY POOL

35%

5+ YEARS IN CURRENT POSITION

MOST COMMON ROLES

26%

Marketing or sales management

24%

Owner, CEO, or general manager, or senior management

15%

Regional or district manager

13%

Production/operations

\$100K

Median annual compensation

Though only 14% of respondents within this tier report having less than five years of overall work experience in beverage, 65% of producer respondents have spent less than five years in their current role. At the same time, the producer sector has the highest median annual pay of all industry tiers in our survey, potentially because of the high proportion of respondents who hold marketing, sales management, senior management, or ownership positions; just 13% of respondents work in production or operations.



*Median annual compensation may include wages, bonuses, tips, commissions, expense reimbursements, and more. Survey respondent salaries may skew high due to seniority level or location, or due to a larger proportion of participants in ownership, executive, and senior management roles.

A Closer Look by Industry Tier (CONTINUED)

On-Premise: Workers at Restaurants and Bars

30%

OF OUR SURVEY POOL

42%

5+ YEARS IN CURRENT POSITION

MOST COMMON ROLES

40%

Owner, CEO, or general manager, or senior management

35%

Beverage / wine director, manager, or buyer

11%

Bar manager

5%

Sommelier

\$70K

Median annual compensation

Comprising 30% of respondents, the on-premise is tied with the importer/distributor tier for having the highest proportion of workers aged 22 to 30. Among our survey pool, 47% percent work at independent restaurants, while 16% each work for bars/clubs and chain restaurants. In total, 28% of respondents report receiving tips—though this number likely skews low due to the high proportion of owners/CEOs/senior managers and beverage directors that responded this year.



Off-Premise: Workers at Beer, Wine, and Liquor Stores

15%

OF OUR SURVEY POOL

58%

5+ YEARS IN CURRENT POSITION

MOST COMMON ROLES

33%

Beverage/wine director, manager, or buyer

30%

Owner, CEO, or general manager, or senior management

17%

Store manager assistant manager

15%

Sales staff or customer service

\$60K

Median annual compensation

The smallest percentage of our pool this year, the off-premise seems to be home to workers that stick around for the long haul. More than half of respondents are over the age of 50, and 58% have been in their current role for five or more years. More than two-thirds work for independent retail wine/beer/liquor stores, and half work at a company with 10 or fewer people. Though this sector has the lowest median annual pay—perhaps because part-time work is more common in retail—respondents also report the lowest stress levels.



*Median annual compensation may include wages, bonuses, tips, commissions, expense reimbursements, and more. Survey respondent salaries may skew high due to seniority level or location, or due to a larger proportion of participants in ownership, executive, and senior management roles.

The Top Ten Takeaways

- 1.** 30% of those surveyed have not received a raise in the last two years.
- 2.** Beverage professionals are fairly satisfied with their pay, but less optimistic about career growth.
- 3.** More than a third of industry professionals surveyed have changed companies since 2020.
- 4.** Seeking professional growth, beverage workers have shifted across industry tiers amidst the pandemic.
- 5.** Industry members are prioritizing paid time off and healthcare benefits.
- 6.** The rebound of on-premise: While stressed and seeking safe workspaces, many are still optimistic.
- 7.** The youngest generation of beverage professionals expects strong workplace benefits and is optimistic about future career opportunities.
- 8.** Beverage professionals are still learning and seeking professional qualifications.
- 9.** In the next year, professionals expect sustainable packaging and climate change to grow in importance.
- 10.** The role of technology and ecommerce in the beverage industry will remain vital in 2024.

30% of those surveyed have not received a raise in the last two years.

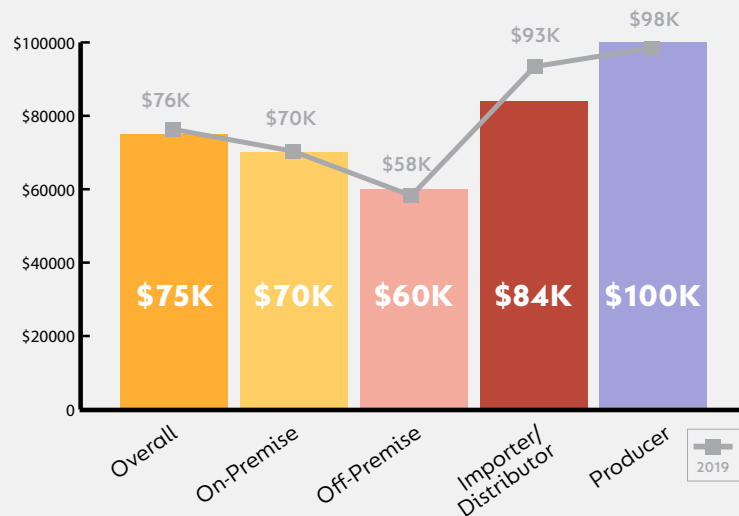
THE PAST FOUR YEARS HAVE NOT BEEN KIND TO BEVERAGE INDUSTRY COMPENSATION. Since we last surveyed the industry in 2019, the median compensation among total respondents has dropped 1.3% to \$75K. This decrease is even greater among those who work at import and distribution companies; their median compensation now sits at \$84K, a \$9K drop from 2019.

This isn't ubiquitous—the median on-premise compensation rate has remained steady at \$70K, and median on-premise and

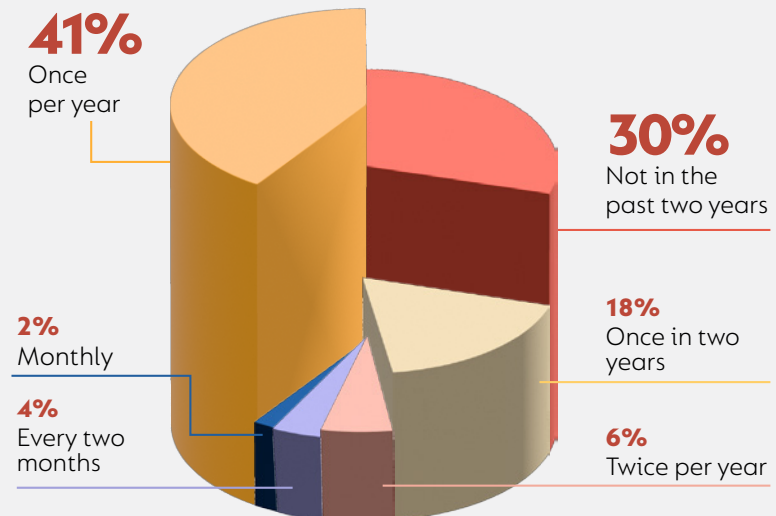
producer compensation rates have each increased by \$2,000. But considering the rate of U.S. inflation—peaking at 9.1%¹ in June 2022 and sitting at 3.7% in September 2023²—even these compensation increases trail inflation over the past four years.

This could be because a full 30% of respondents report that they have not received a raise in the past two years, precisely the same time period as this recent inflation surge. Less than half of respondents have received an annual raise in compensation, a figure that trails nationwide trends.³

Median Salary in 2023 vs. Average Salary in 2019



Frequency of Compensation Increase



*All compensation data in 2023 is calculated by median compensation, which is different from our 2019 report, when we calculated by mean compensation. While we feel that median compensation is most representative of our data set, we do acknowledge that comparing these two figures is not exact.

Beverage professionals are fairly satisfied with their pay, but less optimistic about career growth.

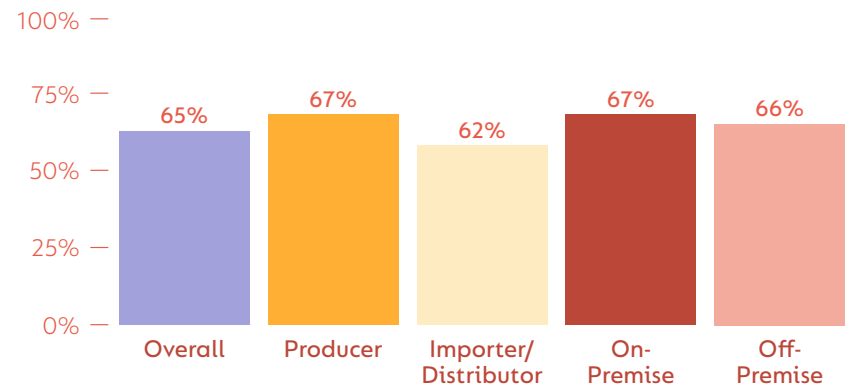
HOW HAS THE COMPENSATION LANDSCAPE IMPACTED CAREER SATISFACTION?

It's a bit complicated—and surprising. While the overall lack of strong compensation advancement in the past four years has dampened overall compensation satisfaction slightly, the majority of respondents are happy with their current pay. Among total respondents, within every trade tier, and even among those who make less than the median salary, the glass is half full.

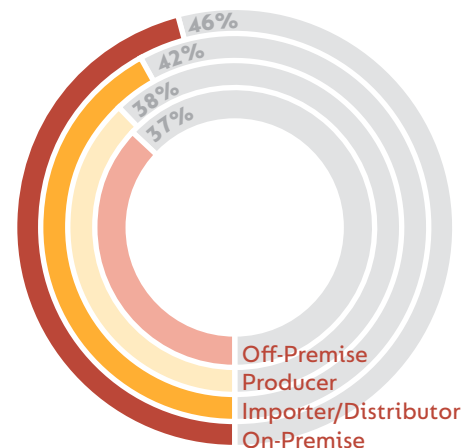
This could be a residual effect of the tumultuous employment landscape during the early days of the pandemic, or the feeling that in a difficult economic period, workers are grateful for a steady income. In a 2023 Pew Research Center study, 74% of employed adults in the U.S. were somewhat, very, or extremely satisfied with their pay.⁴

However, it does seem to have had an impact on respondents' sentiments about the forecast for overall career growth. When asked how respondents would rate their opportunities for professional growth in their tier of the trade, just 42% rated their outlook as “very good to excellent.” Within specific industry tiers, positive outlook for career growth almost universally dropped when compared to 2019—except for that of off-premise respondents, which remains low but did rise from 34% percent to 37% percent. Among total respondents, those aged 22 to 30 (52%) as well as those in owner/CEO/senior management roles (51%) were most optimistic about future career growth.

Satisfaction with Compensation



Positive Outlook for Professional Growth

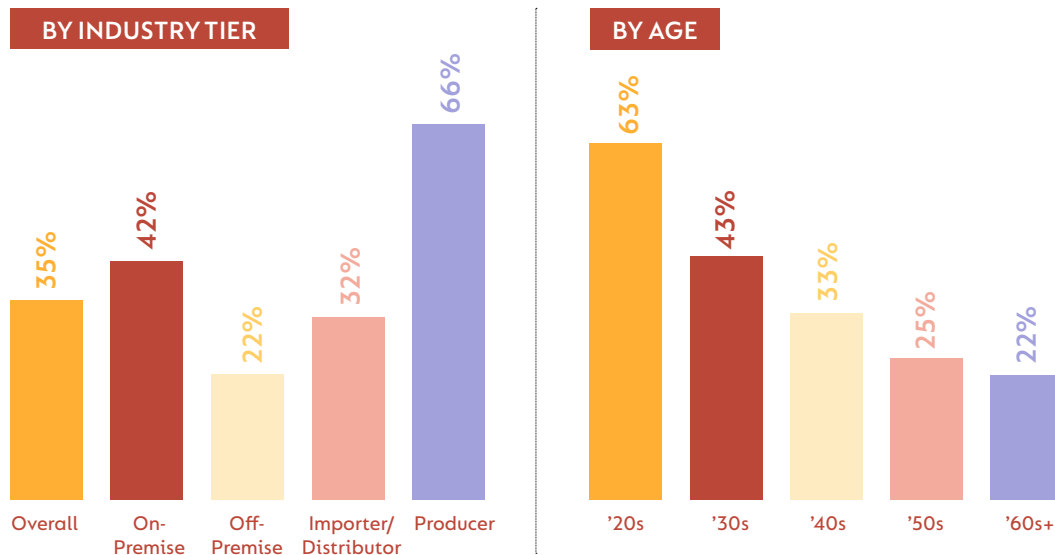


How would you rate your opportunities for professional growth in your tier of the trade?



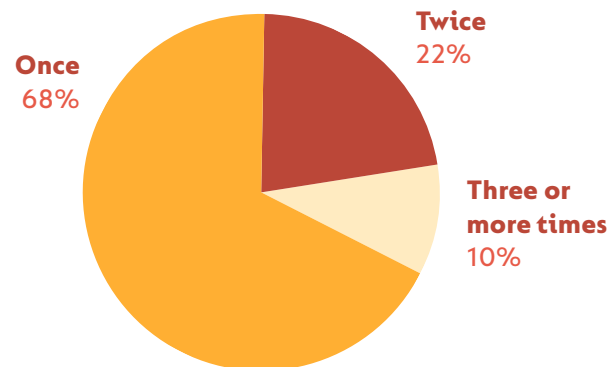
More than a third of industry professionals surveyed have changed companies since 2020.

Respondents Who Changed Companies Since 2020



Number of Company Changes Since 2020

(of those who have changed companies)



WHO HAS CHANGED COMPANIES IN THE TUMULT OF RECENT YEARS?

First, layoffs swept the industry, particularly in the on-premise, during the early days of pandemic lockdowns. Then, workers found themselves in high demand as employment rebounded and labor became hard to come by. Both events led to an uptick in workers seeking out job opportunities at new companies.

Among our respondents, 35% have changed companies at least once since 2020. This number is in line with nationwide trends; according to a September 2022 NPR/PBS Newshour/Marist poll, 38% of workers had changed jobs in the previous two years.⁵

The industry tier with the most shakeup was the on-premise; 42% of on-premise respondents have changed companies since 2020. This figure could skew low as well, as 40% of our respondents hold owner/CEO/senior management roles. The off-premise tier, on the other hand, has seen the most consistency, with just 22% of respondents changing companies since 2020. Younger professionals were also more likely to change companies; 63% of respondents aged 22 to 30 have changed companies over this time period.

Seeking professional growth, beverage workers have shifted across industry tiers amidst the pandemic.

THE COVID-19 PANDEMIC CAUSED MANY PROFESSIONALS TO REEXAMINE THEIR WORK LIVES.

While the Great Resignation—which was particularly acute in the hospitality industry—saw many workers leaving the workforce altogether, it also caused many beverage workers to shift industry tiers, largely in search of more professional growth⁶.

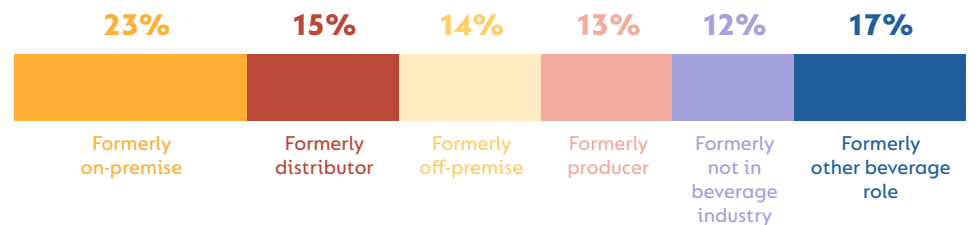
14% of all respondents have changed industry tiers since 2020, a figure that could skew low given the high proportion of owners, CEOs, and senior managers in our pool. This shift within the beverage industry was particularly prominent among younger workers; 33% of all respondents aged 22 to 30 have moved into a new industry tier between 2020 and 2023—more than the amount of those who changed companies but remained in their industry tier.

Among those who have shifted industry tiers, respondents were slightly more likely to have come from the on-premise sector; 23% report that they formerly worked in the on-premise. Those who changed industry tiers are most likely to work for an importer/distributor or producer now; 18% of all importer/distributor respondents and 16% of all producer respondents are new to the tier, versus 11% and 10% for on-premise and off-premise, respectively. The top reason for transitioning to a new industry tier? Professional growth.

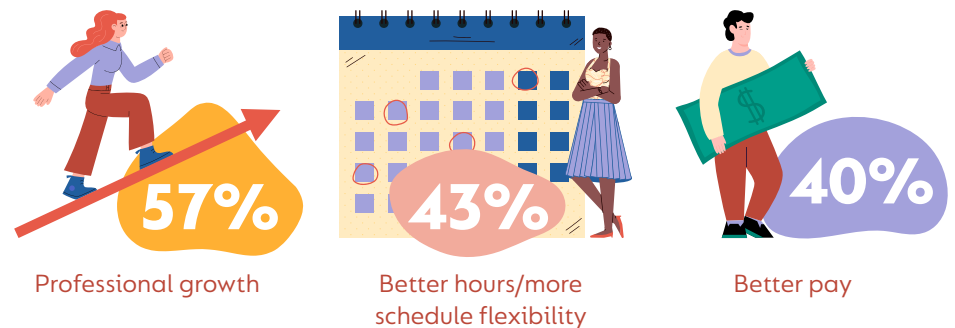


How Industry Tiers Have Shifted

(among those who have changed trade tiers)



Why professionals changed industry tiers



Industry members are prioritizing paid time off and healthcare benefits.

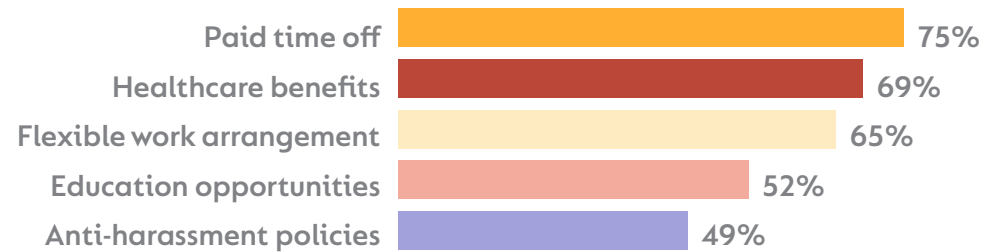
BEVERAGE PROFESSIONALS ARE SEEKING MORE BALANCE BETWEEN THEIR PERSONAL AND PROFESSIONAL LIVES. Our industry has historically not been one that is rife with benefits like paid sick leave, flexible hours, and healthcare access. But the pandemic underscored many of these gaps in workplace benefits, and emboldened workers to demand more.

Paid time off—including sick leave and vacation time—was cited as the most important workplace policy among respondents, with three-quarters of respondents noting that PTO is important to them. This has grown significantly since our last survey in 2019, when PTO was outranked by both healthcare benefits and flexible work arrangements.

Healthcare benefits, however, remain a priority among workers, with 69% of all respondents citing it as important. We have seen growing attention to healthcare access in the workplace in recent years, especially in the bar industry.⁷

Interestingly, those in owner/CEO/senior management roles under-indexed on both of these benefits, with just 64% saying that PTO is important and 62% citing healthcare benefits as important. With this gap between executives and employees, will beverage businesses be able to meet the workforce’s needs in order to retain talent?

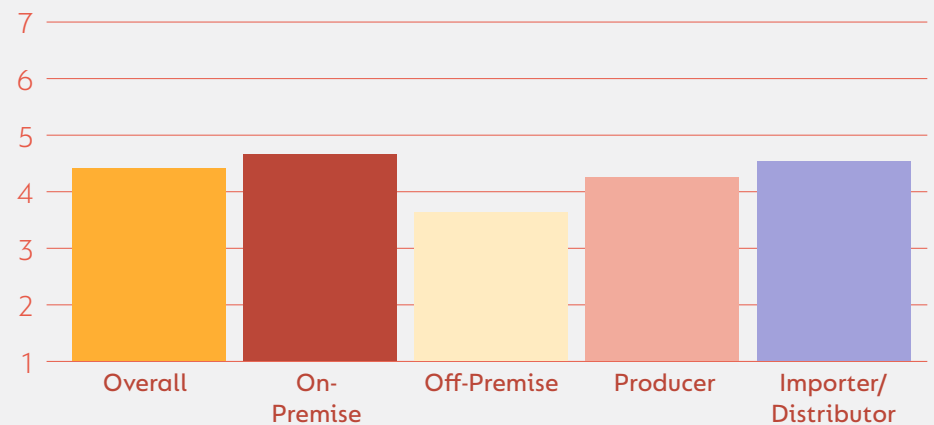
Which workplace policies matter most?



Work-Related Stress Levels

We asked respondents to rate their work-related stress levels from 7 (“way over-stressed”) to 1 (“not stressed at all”). While stress levels largely skew high, they have dropped since 2019.

7 = Way over-stressed 1 = Not stressed at all



The rebound of on-premise: While workers are stressed and seeking safe workspaces, many are still optimistic.

THE ON-PREMISE TODAY IS NOT THE SAME AS IT WAS FOUR YEARS AGO.

When one of the steadiest sources of employment laid off millions of workers all at once,⁸ on-premise professionals were shaken. And when they returned to work, they were forced to deal with upholding mask mandates, maintaining stringent health standards, and staying abreast of current operational regulations—all on top of running a restaurant.

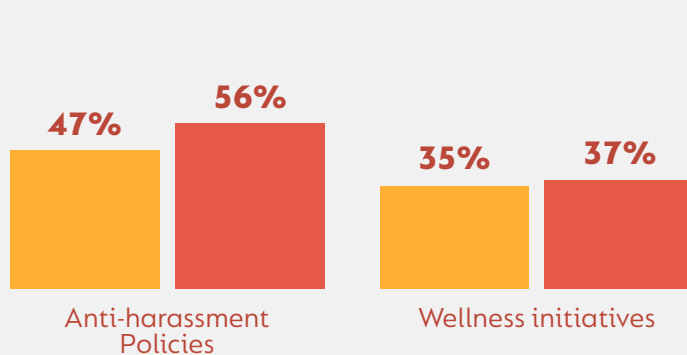
Despite a strong hospitality rebound, the lingering effects of this time persist: on-premise workers report the highest stress levels among sectors, and they are more likely to have changed

companies twice (25% of those who changed companies) or three or more times (14%). They are far more concerned with minimum wage increases (81%) and labor shortages (74%) in the coming year than the average respondent.

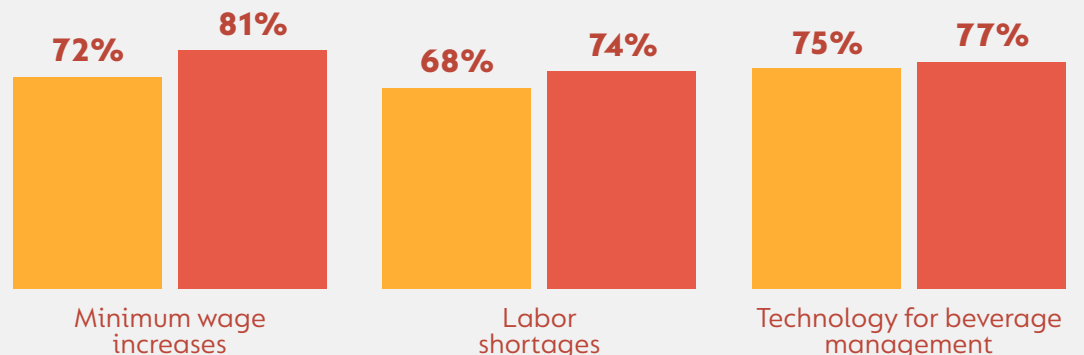
But at the same time, we also see resilience from the on-premise and its workers: They are the most optimistic about their opportunities for professional growth within their tier (46%), and they're prioritizing the workplace policies they need in order to feel safe, like anti-harassment policies and wellness initiatives.

Total Respondents: ■ On-Premise: ■

Workplace Policies That Matter



Industry Issues That Matter



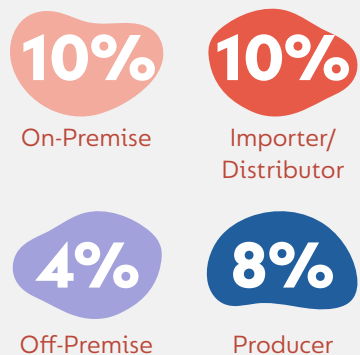
The youngest generation of beverage professionals expects strong workplace benefits and is optimistic about future career opportunities.

YOUNG, HUNGRY, AND OPTIMISTIC: This is what the rising generation of beverage professionals looks like today. Respondents aged 22 to 30—which includes young millennials and of-age Gen Z workers—accounted for just 9% of our survey pool, but their perspectives stood out throughout our data. For one thing, they're optimistic: While the majority of our survey segments, as well as our overall survey pool, did not have positive sentiments about prospects for career growth within their industry tiers, more than half of respondents aged 22 to 30 feel optimistic about their future prospects. What do younger beverage professionals care about? The

answer: A whole lot. Respondents aged 22 to 30 over-indexed on every single workplace policy listed in our survey when compared to the total industry base. They place far more importance on pay transparency (67% versus 47% overall), parental leave benefits (49% versus 34%), and diversity initiatives (49% versus 40%).

For those looking to hire these eager and optimistic young professionals, offering and emphasizing strong workplace policies across the board is crucial. And as we look at how the rising generation will transform the beverage workplace as they grow within it, the future looks bright.

Share of Respondents Aged 22 to 30

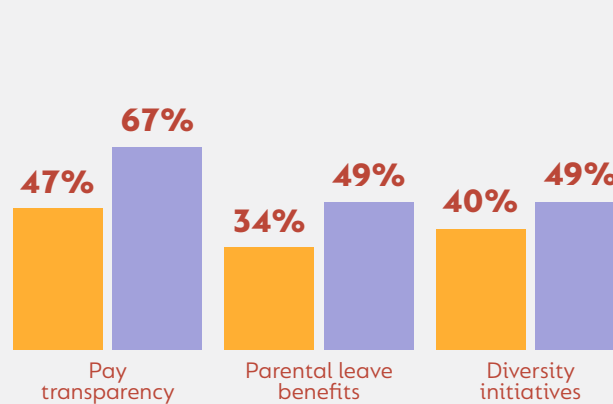


52%

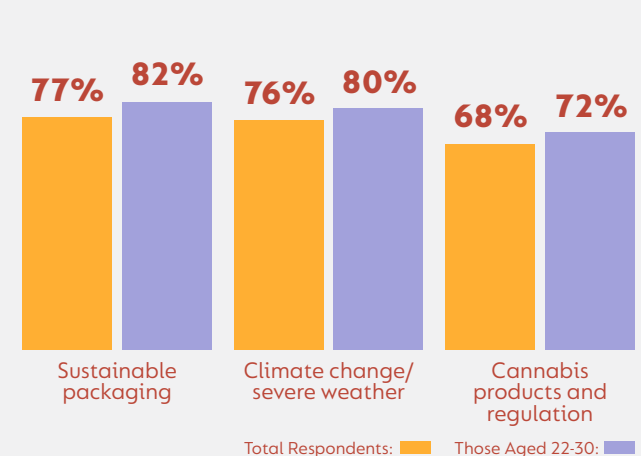
of those aged 22 to 30 have a positive outlook for professional growth.



Importance of Workplace Policies



Industry Issues That Matter



Beverage professionals are still learning and seeking professional qualifications.

BEVERAGE PROFESSIONALS LEARN IN A VARIETY OF WAYS.

There are numerous certification and study programs available to professionals in our industry, and in 2023, interest in study programs that don't include service exam components grew among respondents compared to 2019.

As they were four years ago, Wine & Spirits Education Trust (WSET) certifications were the most common among respondents and have seen significant growth over that time period: 36% of respondents have completed at least one WSET program, versus 25% in 2019. Likewise, growth was seen in the Society of Wine Educators' Certified Specialist of Wine (CSW) program (10% of respondents in 2023 versus 8% in 2019), and in the Cicerone program (7% in 2023 versus 6% in 2019).

Though certification through the Court of Master Sommeliers (CMS) was the second-most prevalent program among respondents, the number of those who have completed any CMS certification

dropped from 23% of those surveyed in 2019 to 17%. This could be attributed to the lower share of on-premise professionals in this year's survey, and to the high proportion of owners, CEOs, and senior managers among respondents, but even among on-premise respondents, WSET programs were more popular than CMS ones.

Of course, formal certification isn't required for success, and it certainly isn't the only way to learn about the industry. When asked which learning resources they rely on most for professional development, respondents cited online publications as their preferred resource by a strong margin—73% overall. Trade tasting events and seminars were dubbed important by 60% of respondents; this number jumped to 74% within the off-premise tier, making it the most important off-premise resource cited. Visits to wine, beer, and spirits producers rounded out the top three with 58% of respondents calling it important to their learning.

BEVERAGE INDUSTRY EDUCATION

36%

Wine & Spirit Education Trust, all levels

17%

Court of Master Sommeliers, all levels

10%

Certified Specialist of Wine

7%

Cicerone

1.19%

Master Sommelier

1.14%

Master of Wine

TOP 5 LEARNING RESOURCES ACROSS INDUSTRY

73%

Online Publications

60%

Trade Tasting Events and Seminars

58%

Visits to Producers

45%

Books

39%

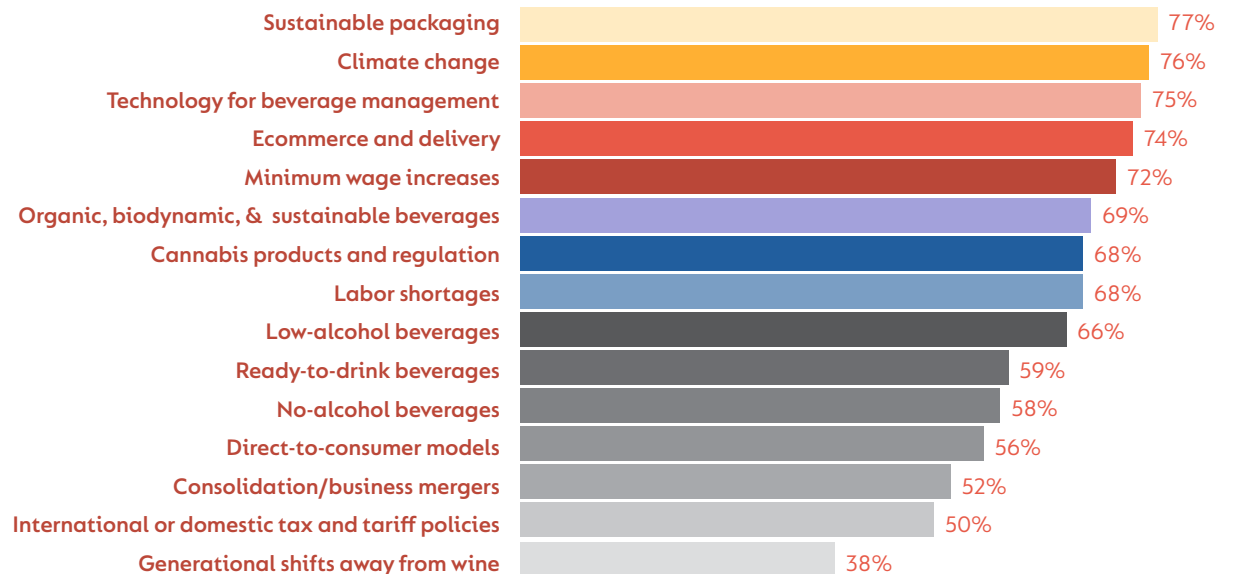
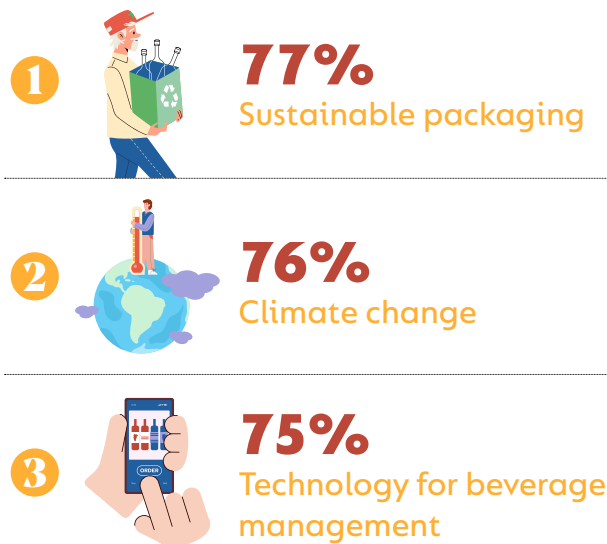
Print Publications

In the next year, professionals expect sustainable packaging and climate change to grow in importance.

WHICH INDUSTRY ISSUES ARE MOST PRESSING? Eco-consciousness ranks high, as rising temperatures and extreme weather events underscore the fact that we cannot ignore the beverage industry’s impact on the environment any longer. According to 77% of respondents, sustainable packaging will grow in importance in 2024 as producers find ways to cut down on the carbon footprint of their product vessels, from innovative new materials to more sustainable traditional ones.⁹

Similarly, 76% of respondents think climate change will grow in importance over the next year. Though they ranked further down the list, low-alcohol (66% versus 56% in 2019) and no-alcohol beverages (58% versus 44% in 2019) both made strong gains in overall industry importance as conscious alcohol consumption has become more prevalent. And while it was the top-ranked industry issue in 2019 at 86%, only 68% of professionals now think this will grow in importance in the next year.

Which industry issues or trends will grow in importance over the next year?



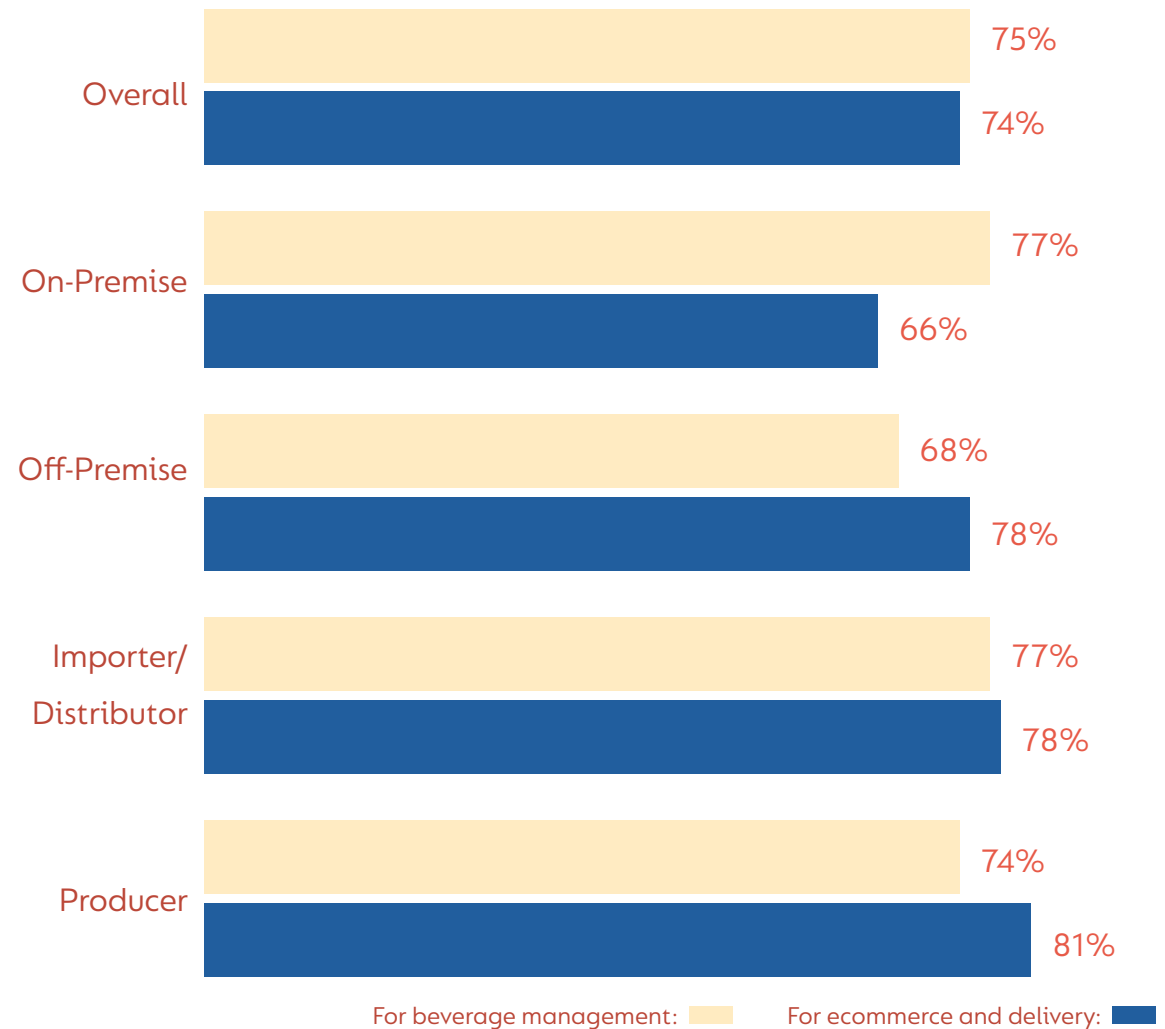
The role of technology and ecommerce in the beverage industry will remain vital in 2024.

BEVERAGE TECH IS HERE TO STAY.

The pandemic didn't introduce technology to the beverage industry, but it certainly accelerated its momentum as both work lives and social lives went remote. Though daily life has regained a sense of pre-pandemic normalcy, the beverage trade isn't throwing away its adoption of digital tools over the past three years. Rather, beverage tech is becoming part of our new normal as well.

Overall, 75% of respondents said that technology for beverage management would grow in 2024, and 74% of respondents said that ecommerce and delivery would grow in the coming year as well. On-premise professionals and those who work for importers and distributors point to particularly high importance for beverage management technology, with 77% of each industry tier predicting it will grow in importance. Off-premise workers (75%), those who work for importers and distributors (78%), and those who work for producers (81%) place high value in ecommerce and delivery, while on-premise professionals under-index on this matter.

The Growing Importance of Technology in 2024



Summary

TODAY'S BEVERAGE PROFESSIONAL WANTS TO WORK FOR AN INDUSTRY, A TRADE TIER, AND AN EMPLOYER THAT VALUES THEM.

The upending of our industry in 2020 shook our foundation, and now that beverage professionals are back to work, they're realizing that they can demand more. After all, the unemployment rate hit a 54-year low in 2023;¹⁰ workers have options.

While being paid fairly is important, and can impact professionals' optimism about future opportunities in the industry as a whole, being valued doesn't just pertain to monetary compensation. Workplace policies and benefits are extremely important to talent acquisition and retention, particularly in the on-premise, which has realized what

little safety net existed in terms of benefits like healthcare and paid time off amidst the pandemic.¹¹ This is only going to become more acute as young millennials and Gen Z workers—who expect and demand more of their employers—comprise more of the workforce.

If we want to continue attracting workers who will not just do a stint, but build a career in the beverage industry, we need to compensate them appropriately, provide them with more secure workspaces, and help them see pathways to future growth. Our industry is rapidly changing, and it's up to us to stay on the pulse of that change going forward.

About Us

PROVI

Provi is the largest online marketplace that simplifies the complex process of ordering wholesale alcohol by connecting buyers, distributors, and suppliers. Active in all markets throughout the U.S., Provi's robust, online marketplace improves communication and efficiency for on- and off-premise buyers, distributors, and suppliers. Founded in 2016 and headquartered in Chicago, Provi received Built In Chicago's Best Places to Work recognition in 2022. In 2022, Provi joined forces with SevenFifty, which included the Beverage Media properties with industry legacy dating back to the repeal of prohibition, along with *SevenFifty Daily*, an award-winning industry publication discussing the beverage alcohol business and culture.

SevenFiftyDaily

The business and culture of drinks

SevenFifty Daily is an award-winning online magazine about the business and culture of the beverage alcohol industry. We analyze the issues people are talking about, uncover new insights and innovations, and explore the people, places, and traditions beyond the bottle. Covering the three tiers of the alcohol industry, we connect a global community of drinks professionals, creating a space that fosters conversation and a platform for showcasing the people and ideas moving the industry forward.

Questions about the insights in this year's survey report?
Contact editor@sevenfifty.com.

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