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Job Quality and Economic Opportunity in Retail

Key Findings from a National Survey of the Retail Workforce



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Job Quality and Economic Opportunity in Retail:

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Fair Workweek Initiative, a collaborative effort anchored by CPD, is dedicated to restoring family-sustaining work hours for all working Americans. We partner with diverse stakeholders to advance an integrated set of strategies that include policy change, public education and industry advocacy.

Popular Democracy in Action and its affiliates know that everyday people have the power to change the world. We upend politics as usual to forge a representative, multiracial government and society where we all thrive, no exceptions.

ACKNOWLEDGEMENTS

This report was researched and written by Maggie Corser. It was edited by Rachel Deutsch, Carrie Gleason, and Lily Wang, Fair Workweek Initiative at the Center for Popular Democracy. This survey benefited from the input of an advisory group which included: Andrea Dehlendorf and Tyfani Faulkner, Organization United for Respect; Dr. Anna Haley-Lock, Rutgers University; Dr. Arne L. Kalleberg, University of North Carolina at Chapel Hill; and Dr. Susan Lambert, University of Chicago.

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Introduction

The growth of the service economy in the United States has profound implications for job quality and opportunity for working people today. With a workforce of nearly 16 million, the retail industry is now the largest employer of low-wage workers in the country.¹ In fact, retail now accounts for 10 percent of private sector employment.²

The retail industry is undergoing a period of deep disruption and rapid transformation which presents several new challenges. Emerging technologies, online retailing, and increasing corporate concentration are changing the retail landscape and impacting its workforce. Indeed, as a huge economic engine, retail is currently in flux: the rise of e-commerce is adding jobs in warehousing and logistics at an accelerated rate, while some brick-and-mortar stores shed jobs. Against this backdrop, many retailers are putting renewed value on quality customer service, personalized shopping, and specialized store based services.

In an effort to identify strategies to support the retail workforce in attaining economic stability and preparing for the work of the future, the Fair Workweek Initiative conducted a national survey of the retail workforce to better understand how people working in retail navigate their careers and adapt to the demands of market forces. In our survey of over 1,000 people working in retail, we found that, despite statewide minimum wage gains and some voluntary reforms by employers, many people struggle to achieve economic stability due to significant income volatility and wage stagnation.

Pathways to higher paying managerial roles remain elusive for millions in the retail workforce. As Walmart—both the largest employer in America and largest low-wage employer—invests over \$100 million in workforce development programs, our findings suggest that the practices affecting a low-wage, contingent workforce also create impediments to advancement.

Key Findings

Our findings point to a deep need to stabilize the retail workforce, by improving job quality and providing meaningful pathways for career advancement. With a stable workforce, the industry can best navigate this moment of disruption by preparing employees to meet the needs of the future.

Poor Job Quality is Widespread in Retail

Only 8 percent of frontline retail workers surveyed had jobs that met high standards of job quality including at least \$15 an hour, full-time work, health insurance through their employer, and at least one form of paid leave. Part-time workers, women, and people of color were more likely to report low wages, volatile hours and poor health. Wage stagnation contributes to low incomes - one in three frontline retail workers surveyed did not get a raise in the last 2 years. It is also not surprising then that over half (57 percent) of all frontline retail workers had physical symptoms associated with stress or anxiety in the past week.

Financial Instability and Reliance on the Social Safety Net

Forty-five percent of frontline retail workers had received at least one type of government benefit in the last 12 months. SNAP or food stamps, Medicaid, and the Earned Income Tax Credit were the most common forms of support. Despite having jobs, many frontline retail workers reported borrowing money (45 percent) or using a credit card (39 percent) in order to cover basic expenses in the past year.

Key Findings

The Shift Towards Part-Time Work is Suppressing Wages

Retailers increasingly rely on a large pool of part-time workers. While entry-level retail jobs historically included frontline full-time positions, the career pathway now typically begins with a part-time position. Among full-time frontline workers, 61 percent had previously worked part-time positions at their current employers. Our data shows that part-time workers make 68 cents for every dollar earned by their full-time counterparts, and experience higher rates of income volatility. For example, part-time workers reported hours fluctuating from 16 to 29 hours a week, resulting in an instability ratio of 56 percent.

Retail Career Pathways Exist, Yet Few Achieve Upward Mobility

Despite challenges with poor job quality, retail workers feel optimistic about advancement opportunities in retail. Three out of four people surveyed felt there were opportunities to advance to a better job in retail. The majority had access to training and clarity on the opportunities for a promotion. For frontline workers who received training, 59 percent reported they received a better position. Yet only 18.5 percent of people had advanced to managerial roles. Among those who had advanced, nearly two-thirds were white.

Cross-Training Leads to More Hours and Higher Wages

A large majority (81 percent) of retail workers reported receiving some form of cross-training to learn different roles in their workplace. Almost half of those workers received more hours as a result of this training. One third received higher wages and one fourth had gotten a new job title with more responsibility and/or more stable schedules.

Training Supports Mobility but Employers Must Ease Pressure for Open Availability

When asked what is required to get a retail job with higher pay and more responsibility, half of respondents identified training as a key component. An equal number of respondents, 51 percent, said open availability and the ability to work a variable schedule were also necessary to advance. Notably, 60 percent of women felt open availability was necessary to advance in their jobs, compared to 40 percent of men.

Although Workers Had Significant Tenure, Chronic Underemployment Remains a Barrier

Despite high turnover rates, two out of three retail workers surveyed had been in the retail industry for at least four years. Yet the average tenure of part-time frontline retail workers is 3 years – significantly less compared to their full-time counterparts, which is 5 years. Forty percent had been in the industry for at least 8 years. While working people are relying on retail jobs to provide for their families over longer periods of time, the seasonal nature of retail and volatility in hours (and therefore income) means that many workers face underemployment and unemployment. Yet only 32 percent of workers had received unemployment benefits in the past indicating an under-utilization of this important benefit.

National Survey on Working in Retail

This report highlights findings from a national survey of 1,100 retail workers employed across major employers and within key retail economies. The survey assessed opportunities and challenges faced by the frontline retail workforce in achieving economic security and advancement in the retail sector. By directly engaging frontline retail workers, the survey provides specific insights into how job quality intersects with career advancement as well as the key opportunities and barriers to career advancement for the retail workforce. This survey's sample size, along with its focus on the retail workforce, diversity of sub-sectors represented, and breadth of questions distinguish it from prior efforts. The survey also included responses from managers in the retail industry in order to understand pathways for career advancement and differences between frontline (non-managerial) and managerial workers' experiences.

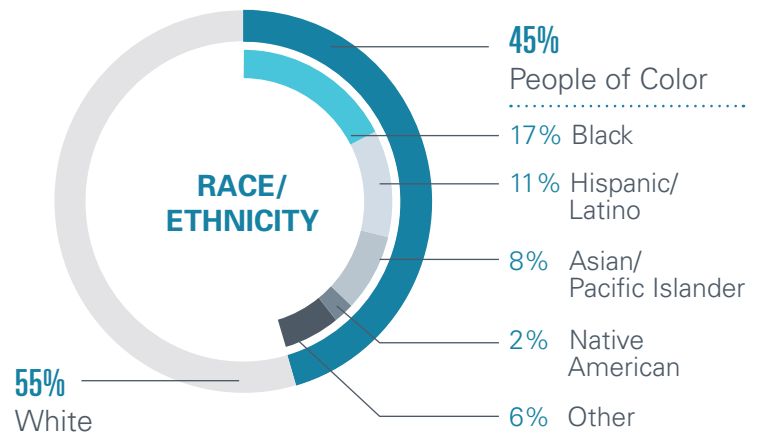
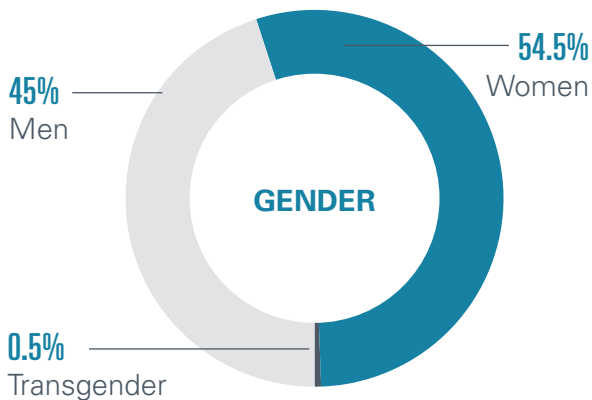
Who We Talked To: Survey Sample At-A-Glance

The survey sample is robust and broadly representative of the retail workforce in the United States. It mirrors both the demographics of the workforce as well as the retail sub-sectors that make up the industry. While the retail workforce overall is 65 percent white and 35 percent people of color, some sub-sectors like General Merchandise and Clothing are 45 percent people of color. We chose to oversample respondents of color in order to understand the experiences of workers in these sub-sectors as well as the workers most likely to face poor job quality and lower levels of career advancement.³ We worked to ensure a broadly representative cross-section among the 13 major sub-sectors (the appendix includes the percent breakdown of each subsector, by share of US employment). This survey sample represents a larger share of General Merchandise and Clothing retailers and smaller share of Grocery and Automotive retailers, relative to their share of US retail employment. The remaining nine sub-sectors are representative of their share of total US retail employment. We sought to ensure a balance of frontline retail workers and managerial positions to understand career pathways and barriers to upward mobility.



Survey Sample At-A-Glance

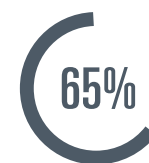
Survey Size:
1,100



RETAIL SUB-SECTORS



FRONTLINE VS. MANAGERIAL ROLES



Frontline retail workers



Managers of retail stores

FULL-TIME VS. PART-TIME

Among Frontline Retail Workers



Among Managers



Full-Time Part-Time

JOB TITLES

Managerial Job Titles

- 41% - Manager
- 17% - Store Manager
- 17% - Department Manager
- 18% - Supervisor
- 8% - Shift Manager
- 1% - Driver
- 8% - Other



Frontline Job Titles

- 40% - Sales Associate
- 19% - Cashier
- 12% - Store Associate
- 10% - Customer Service Representative
- 8% - Team Leader
- 6% - Stock Associate
- 4% - Key Holder
- 2% - Visual Merchandiser



EDUCATION AND HIGHEST DEGREE COMPLETED

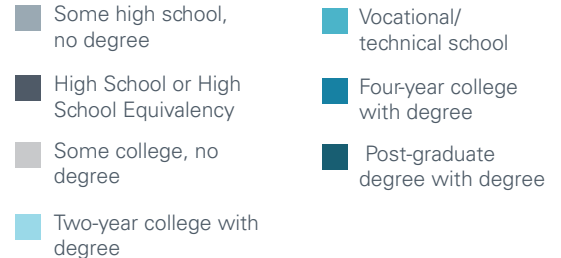
All Respondents *75% of workforce has some college



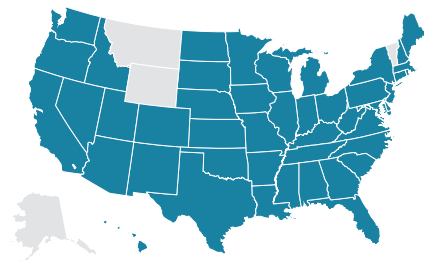
Frontline Retail Workers *68% of frontline retail workers had some college



Managers *83% of managers had some college



GEOGRAPHY



Survey Respondents Came From **46 US States**

US BORN VS. FOREIGN BORN

94%

were born in the US

6%

were foreign born

AGE

The respondents ranged in age from **18 to 78**

41
Average age of
frontline retail
workers

MAJOR RETAILERS REPRESENTED

While the survey sample spanned across 250 different retailers, the sample had higher concentrations among many major retail employers including:

■ **Walmart** Over **130 Walmart workers** took the survey

■ **20-30** workers from the following major retailers:

Walgreens

KOHL'S

JCPenney



Job Quality in the Retail Industry

The majority of frontline workers surveyed experience poor job quality. Based on key dimensions of job quality, including wages, raises, benefits, and fluctuations in hours, many retail workers face challenges of wage stagnation and income volatility. The workers most impacted by poor job quality included part-time workers, people of color, and women.

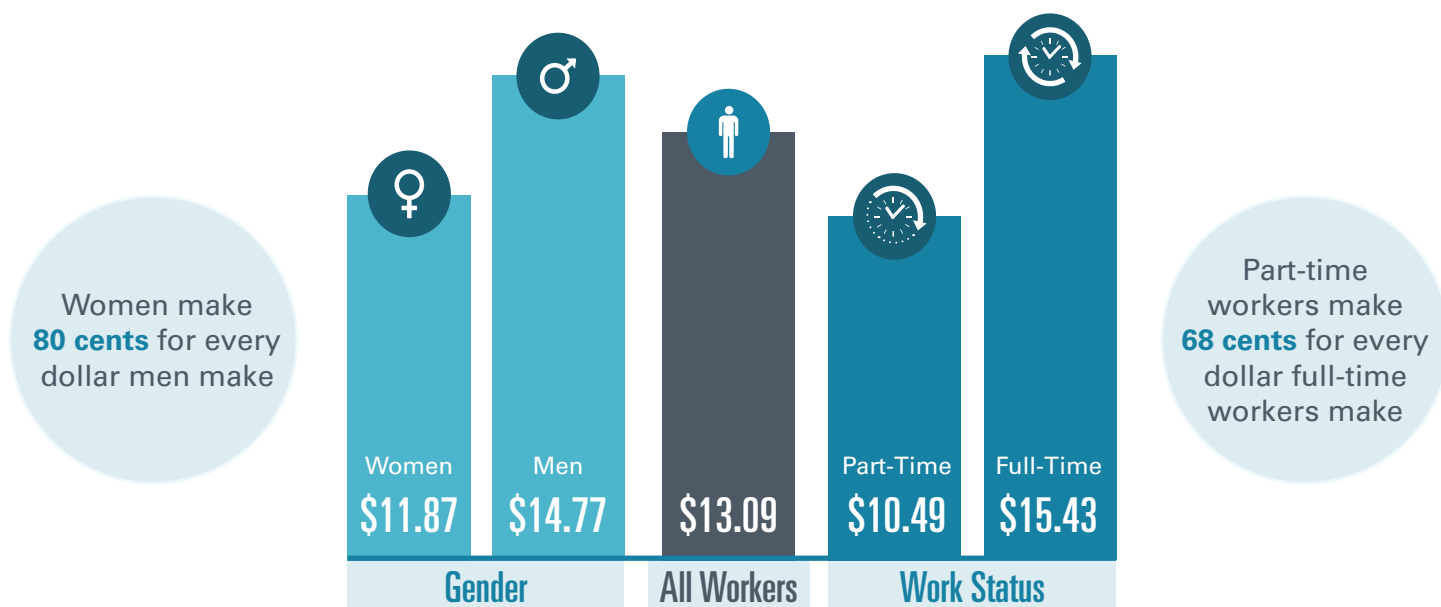


Lower Pay for Women and People Working Part-time

The survey results are consistent with national data on pay inequity—among frontline survey respondents, women made 80 cents to the dollar of what men made. The gender pay gap was **72 cents to the dollar** among managers. The survey also echoed findings on the part-time pay penalty with part-time frontline workers making, on average, **68 cents to the dollar** of what full-time workers make per hour.

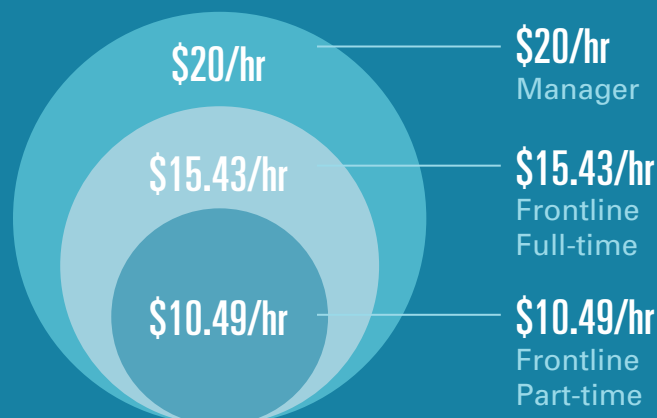
Consistent with national trends, women are over-represented in part-time work. 54 percent of survey respondents were women but they made up 67 percent of the part-time workforce. Black and Latino workers were also more likely to be part-time workers relative to their share of the survey sample at 24 percent and 13 percent, respectively. This is consistent with national federal data on the makeup of the part-time workforce.⁶

Among frontline retail workers, the average hourly wage particularly varied depending on full and part-time status and gender



RAISING THE FLOOR

Only 17 percent of frontline retail workers made \$15 or more an hour. Among the frontline retail workers earning \$15 or more per hour, 85 percent were full-time workers. About 40 percent of these people had experienced mobility having previously worked part-time at their current employer. **The average hourly wage for managers was \$20.**



Low Raises Contribute to Wage Stagnation

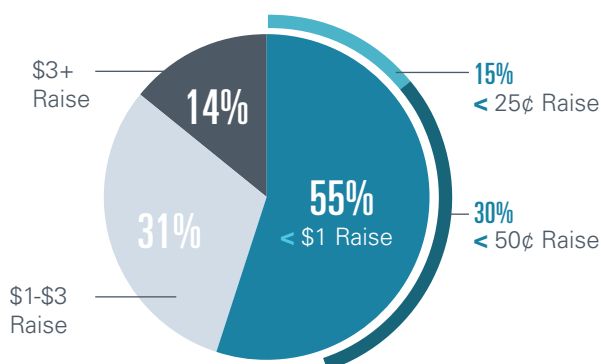
While many workers (64 percent) had received a raise in the last two years, the average total raise was \$1 per hour.



Significantly, our data reveals that one in three frontline retail workers have not received a raise in the last 2 years.

Though the national median hourly wage for a retail salesperson is \$10.90,⁷ the hourly wage for those surveyed is \$11.23.

Of those who received a raise, more than half (55 percent) were given less than \$1 more per hour.



The survey found widespread wage stagnation, consistent with national data that spans the last 30 years.⁸ Middle and low-income workers' wages have not risen proportionate to their share of productivity gains. In fact, economists have projected the federal minimum wage would be \$18 per hour today if it had kept pace with productivity gains since the 1960's.⁹ The raises reported among survey respondents, at 15 cents or \$1 more per hour, are unlikely to help meet rising costs of housing and childcare for many families.





Unstable Hours and Volatile Income is Widespread for Part-time Workers and People of Color

Part-time frontline workers saw the highest fluctuations in weekly hours. Changes in average hours can be converted into an instability ratio which measures fluctuations in hours compared to usual work hours. The higher the number, the greater amount of income and hour instability. Part-time workers had high rates of instability and wider fluctuations in hours. Across all jobs, people of color had higher rates of instability. While white workers had an instability ratio of 36 percent, Black, Latino, and Asian workers had a ratio of 41 percent.

Instability Ratio

Frontline Work Status	Greatest Hours	Fewest Hours	Hour Range	Usual Hours	Instability Ratio*
Part-Time Workers	29	16	13	23	56%
Full-Time Workers	42	31	11	38	29%

*Greatest Hours - Fewest Hours/Usual Hours = Instability Ratio¹⁰



This translates into significant fluctuations in weekly earnings. Based on the reported average part-time hourly wage of \$10.49, a worker might earn \$300 one week and almost half as much the following week based on these hours:

Part-Time Worker Earning \$10.49/Hour*	Hours	Weekly Earnings
Greatest Hours in a Week	29	\$304
Fewest Hours in a Week	16	\$167

*\$10.49 was the average hourly wage reported by part-time workers

Temporary, seasonal, and sub-contracted jobs can further contribute to income volatility and fluctuation in hours. As mentioned above, half of workers surveyed had worked a temporary, seasonal, or sub-contracted job. Workers of color, in particular Black workers, were more likely to be temporary, seasonal, and/or sub-contracted. They were also almost twice as likely to use a temp agency to find another job.

Retail Workers with Poor Job Quality Face High Rates of Financial Instability

A large number of frontline survey respondents reported borrowing money (45 percent) or using a credit card (39 percent) in order to cover basic expenses in the last year. Despite having jobs, many frontline retail workers reported using the following strategies to cover basic expenses in the past 12 months:

45% 

Borrowed money from friends or family

39% 

Used a credit card to pay bills

25% 

Purchased a money order

17% 

Used a prepaid card to pay the bills

12% 

Used a payday loan

6% 

Used rent-to-own service at a store to get furniture or appliances

5% 

Took out a car title loan to borrow money for a short period of time

4% 

Took out a tax refund anticipation loan to get their refund sooner than the IRS would send it

***The large majority (85 percent) of the survey respondents who selected at least one of these responses earned less than \$15 per hour.**

People of color working in retail were more likely to use certain types of financial strategies to cover monthly expenses. For instance, among Black survey respondents (despite being 17 percent of the

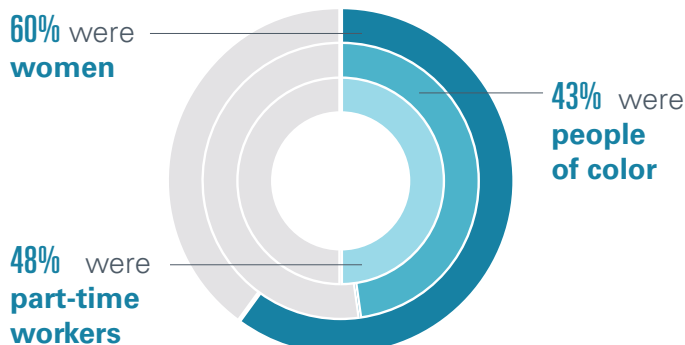
survey sample), 27 percent had used a payday loan, 28 percent had purchased a money order, and 25 percent had used a pre-paid card to pay bills. When people rely on these types of financial strategies to make ends meet, they often become vulnerable to predatory lending practices, high interest rates, and debt cycles which can, in turn, undermine long-term financial stability.¹¹

Poor job quality and income instability can be especially challenging for people taking care of families.

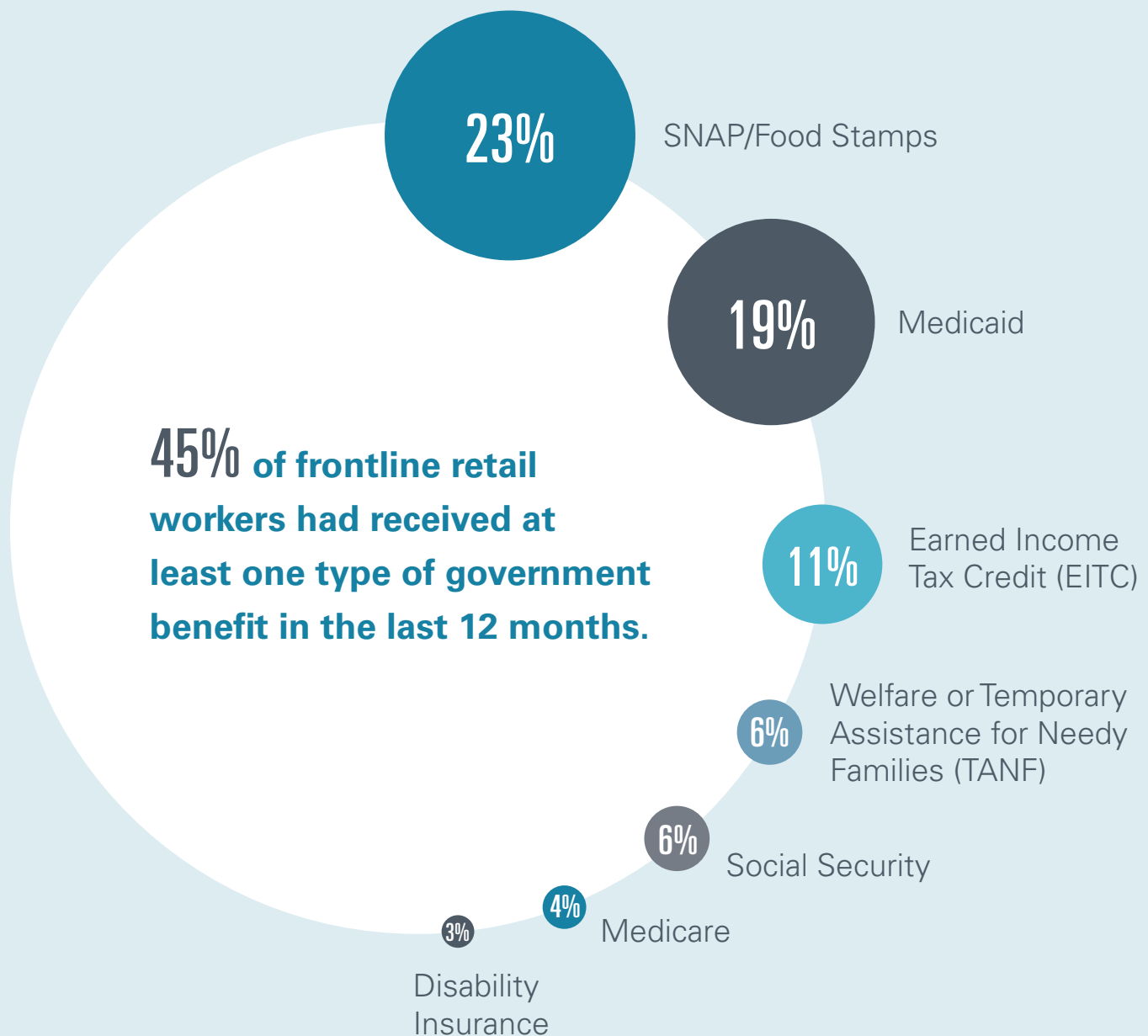
Among Survey Respondants:

- **47 percent** of frontline retail workers had caregiving responsibilities at home for children or relatives.
- The average age of the youngest child at home was **six years old**.

Among those with caregiving responsibilities:



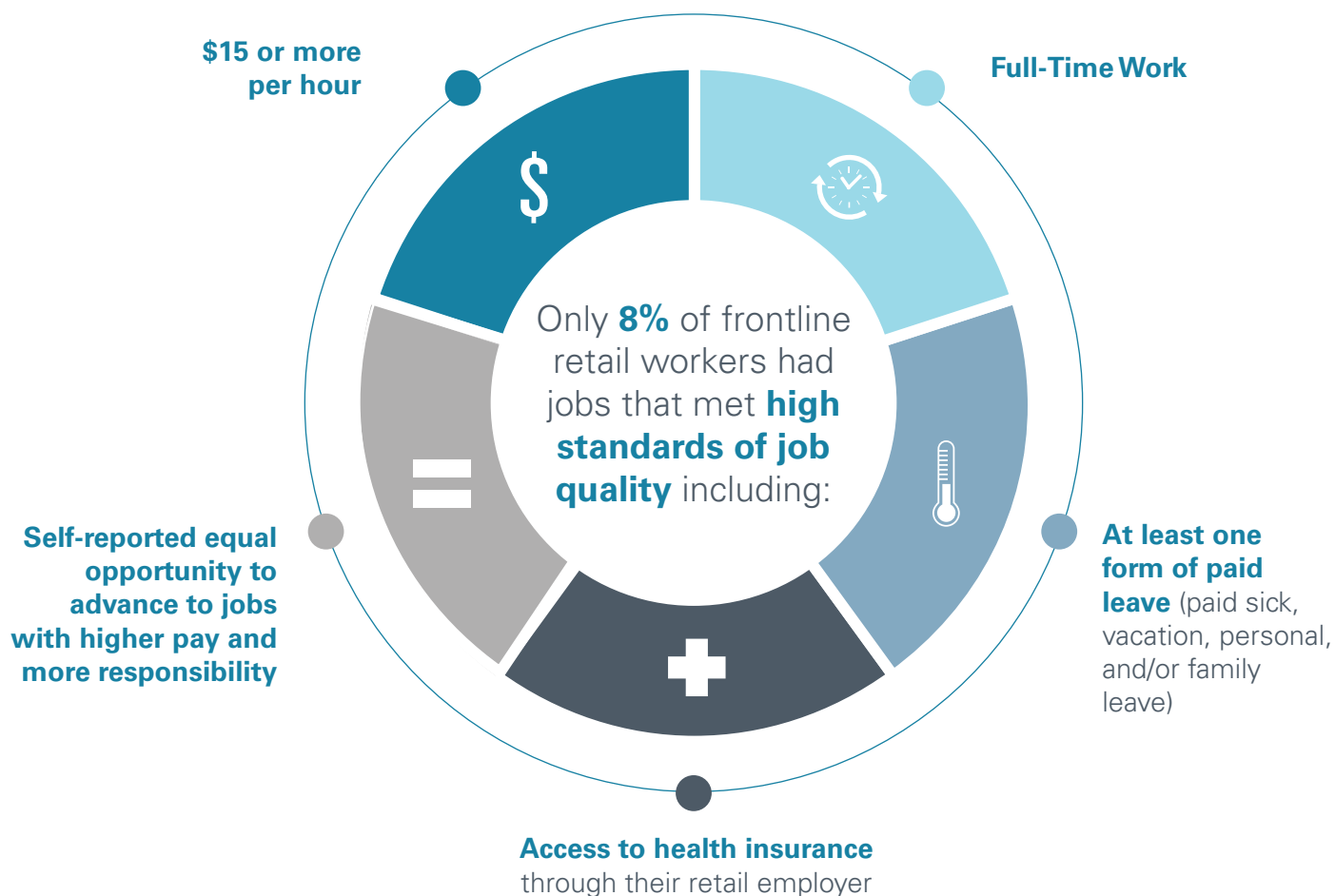
Nearly Half of Retail Workers Used the Social Safety Net in the Last Year



A significant share of frontline retail workers must rely on some form of the social safety net.

Volatile incomes and insecure employment means that millions working in retail jobs struggle to cover basic expenses. Among the survey respondents who had **not** received any government benefit in the last year, two-thirds (66 percent) worked full-time and earned, on average, \$15 per hour. In contrast, among survey respondents who had qualified for at least one government benefit, 84 percent earned less than \$15 per hour.

High Quality Retail Jobs Exist But Are Difficult to Attain



A disproportionate number of these high quality jobs were held by white people and men:



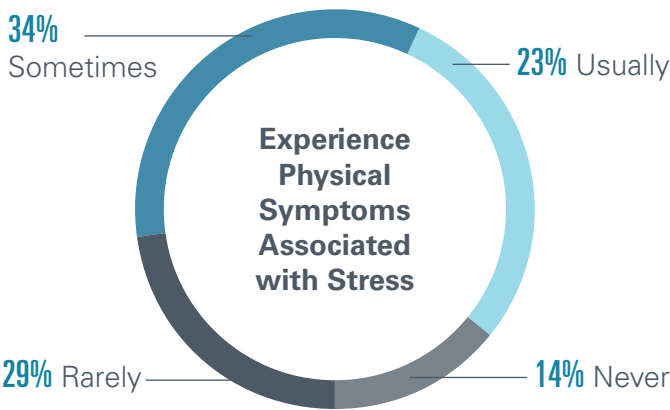
Among people with high quality jobs, nearly two-thirds were white respondents in management roles. **Fifty eight percent of these respondents were men.**



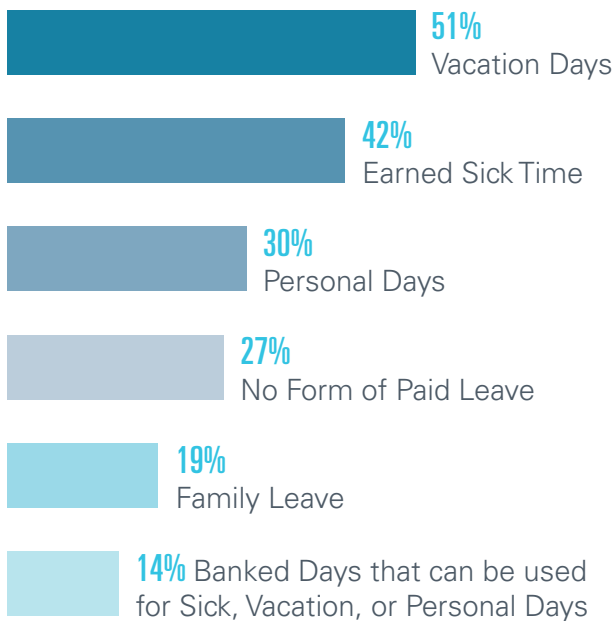
Among frontline and managerial Walmart workers, who made up 12 percent of the survey sample, **only 18 percent had jobs that met these criteria for high quality.**


Retail Workers Reported High Levels of Stress and Anxiety

Over half (**57 percent**) of all frontline retail workers had physical symptoms associated with stress or anxiety in the past week. These symptoms included headaches, backaches, stomach aches, muscle pain, or feeling tired. **One in four** usually felt symptoms associated with stress.



Types of Paid Leave Among Frontline Retail Workers



 **1 in 4 retail workers surveyed do not receive any form of paid leave.**

Gender Dimension to Reported Health and Wellness

The survey data reveals a gender divide, with women much more likely than men to experience these symptoms. **Seventy percent of women** experience physical symptoms associated with stress and anxiety on a regular basis. On the other hand, **68 percent of men** report not having experienced any physical symptoms associated with stress.



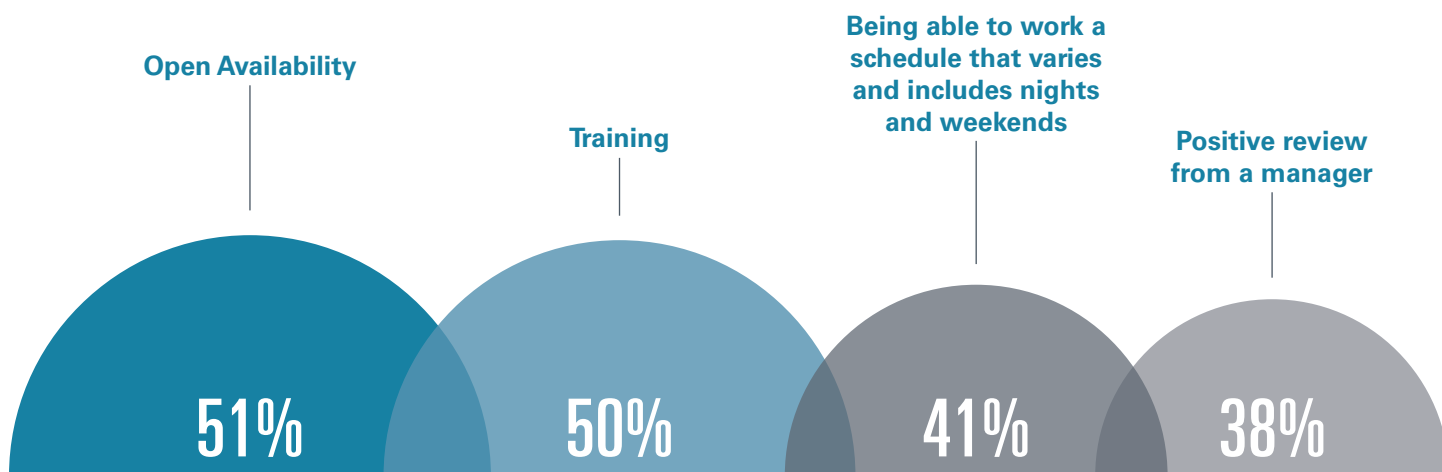
Career Advancement in the Retail Industry

Traditional workforce development programs emphasize training, skills development and job placements. By this view, training people on both hard and soft skills will eventually enable them to access better positions with more responsibility and opportunity. Our survey found that while training is a key component, it may not be sufficient for workers seeking to advance. Retail workers reported that maintaining open availability (the ability to work on any day, at any time, with little notice) and being willing to work a variable schedule were equally important precursors to advancement. While open availability policies by employers are well-documented, this survey offers insight into what role it plays in worker advancement.

Employers Should Continue to Invest in Training But Must Ease the Pressure on Workers to Have Open Availability

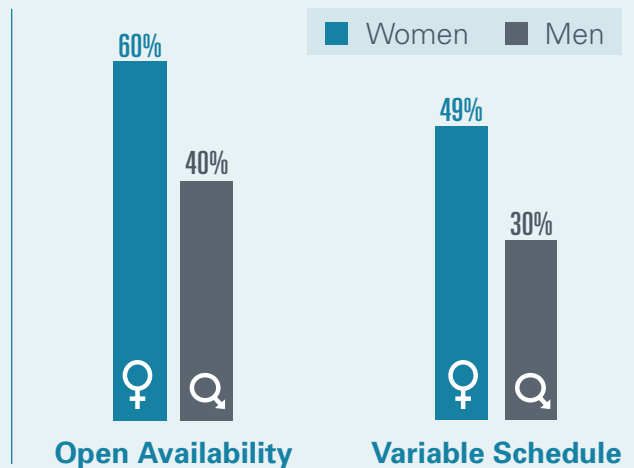
- Frontline retail workers felt training and open availability were the two most important requirements in order to access jobs with **higher pay** and **more responsibility**.
- **Fifty-one percent** of frontline workers indicated open availability and **41 percent** indicated being able to work a variable schedule was a key factor to advancing.

What do you need in order to access jobs with higher pay and more responsibility in your current company?



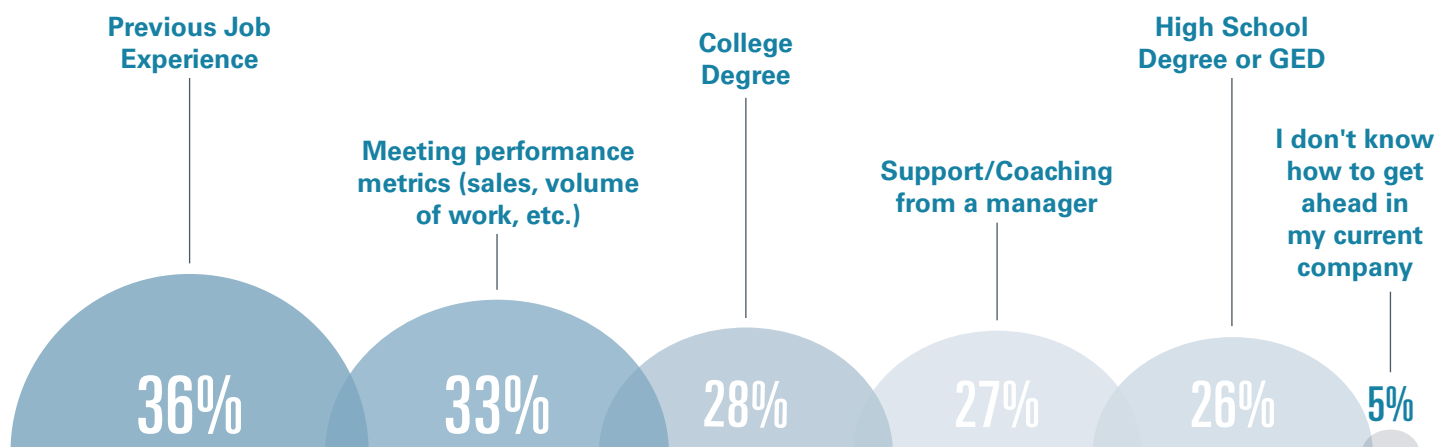
Women were most impacted by employer requirements of open availability and variable schedules.

- Nearly **60 percent of women** identified open availability as a key criteria for advancement, compared to **40 percent of men**.
- **Forty-nine percent of women** said variable schedule, compared to **30 percent of men**.



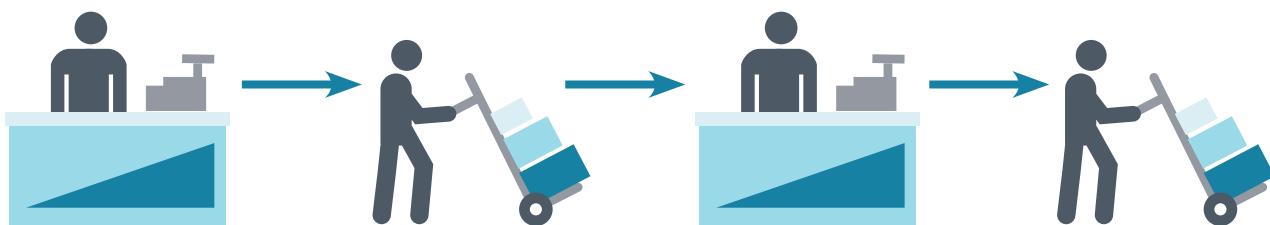
Open availability is difficult for many working people who have family, school, or other scheduling considerations, in particular for caregivers. While anecdotal evidence has indicated that retail workers face significant pressure to maintain open availability, **this is the first quantitative measure that illustrates the scope and impact of retail employers' demand for open availability across roles and sub-sectors.** This common industry practice undermines efforts to promote equal opportunity and address the pervasive occupational segregation experienced by women working in retail.⁴

What do you need in order to access jobs with higher pay and more responsibility in your current company? (Continued)

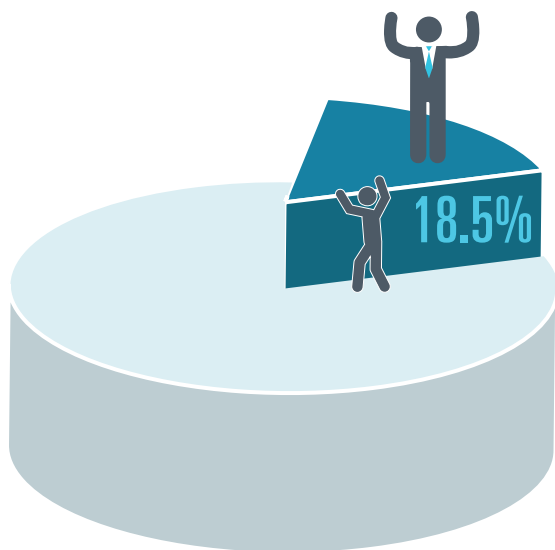


While Retail Career Pathways Exists, Few Achieve Upward Mobility

Half of people surveyed had previously worked at another role in their current employer, but most of this occupational mobility was lateral:



Only **18.5%** of people who changed positions moved up from frontline positions to managerial roles.



Among those who had experienced upward mobility, the majority:



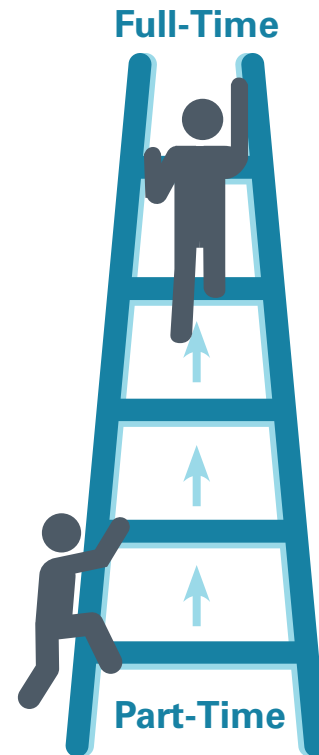
The Shift to Part-Time Work is Eroding the Retail Career Ladder

Since the Great Recession, full-time employment has become harder to secure for low-wage workers.⁵ Many service industries, including retail, have shifted towards a staffing model that relies on a large pool of part-time workers. This shift in employer practice has eroded the retail ladder – a pathway that used to start with a full-time position is now often starting with an entry-level part-time position.

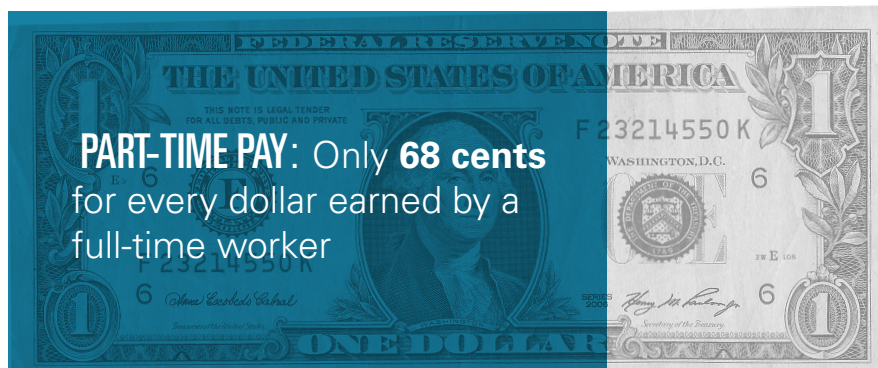


Securing full-time work is increasingly seen as a promotion, and workers must start from a lower rung for the chance to eventually secure a better job.

The survey data echoed this shift towards part-time staffing. **Among full-time frontline workers, 61 percent had previously worked part-time positions at their current employer.** The most common move within retail was from part-time to full-time work. For those able to secure full-time work, this led to improved job quality.



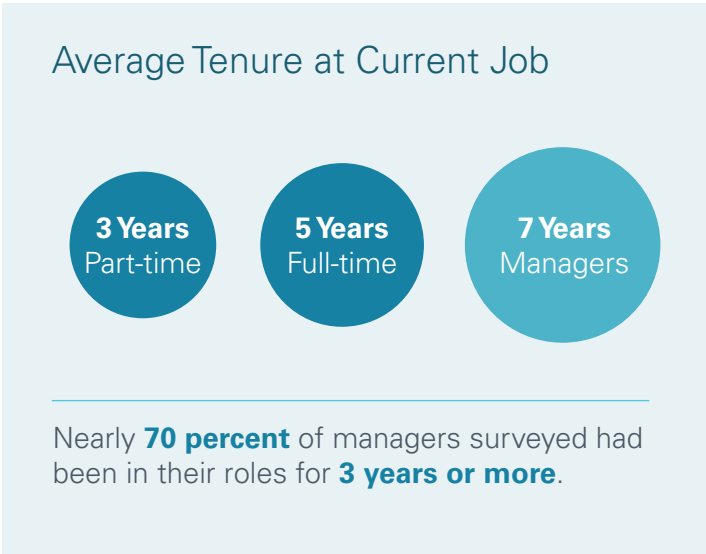
Our data also showed that part-time workers made 68 cents for every dollar earned by their full-time counterparts, and experienced the highest rates of income instability among all surveyed retail workers.



Although Workers Had Significant Tenure, Chronic Underemployment Remains a Barrier

High turnover rates among the retail workforce makes moving up the career ladder challenging. Our data confirmed prior studies showing that part-time workers are less likely to stay at jobs for long periods of time.

- **Nearly 30 percent** of frontline retail workers surveyed have been in their current positions for **less than one year**.
- **60 percent** of frontline retail workers have been in their positions for **less than 3 years**. Of those workers, **56 percent are part-time**.
- Among frontline retail workers, **full-time workers had longer tenure** at their current employers than part-time.



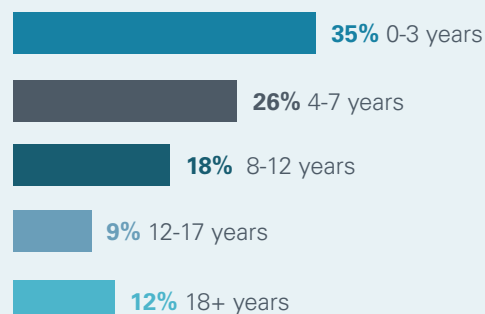
Tenure at Current Employer	Frontline Workers	Managers
Under 1 year	28%	10%
1-3 years	33%	22%
3-5 years	17%	19%
5-8 years	10%	25%
9-15 years	10%	17%
More than 15 years	3%	8%

Tenure in the Retail Industry

While workers often have low tenure with one particular employer, many work in retail long-term, perhaps cycling between employers in search of better wages, hours or working conditions. **Two out of three retail workers surveyed had worked in the industry for at least four years. Forty percent had been in the industry for at least 8 years.**

Working people are increasingly relying on retail jobs to provide for their families and to develop careers over longer periods of time. The average age of a frontline retail worker among our sample was 41 years old. **Half of the frontline workers in our survey are the primary caregiver of their children or relatives.**

Total Years Worked in the Retail Industry



Temporary Employment in a Seasonal Industry

The retail industry has seasonal peaks and lows. Retailers often hire a large influx of temporary workers during the holidays who later face layoffs. Nearly half of the workers we surveyed had worked a temporary, seasonal, or sub-contracted job. People of color, in particular Black workers, were more likely to be temporary, seasonal, and/or sub-contracted.

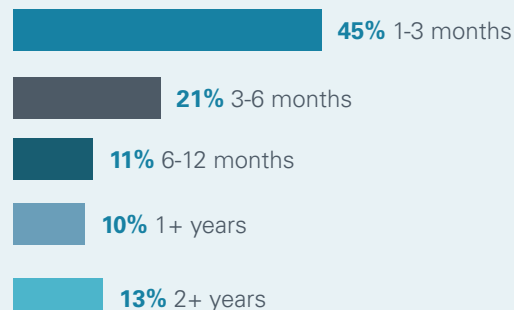
Nearly Half of Retail Workers Had a Temporary or Seasonal Job in the Past



Cycles of Unemployment in Retail

In light of seasonal fluctuations and poor job quality, many workers face periods of unemployment and underemployment. For those without a job after they left their last one, two-thirds were unemployed 6 months or less.

Time Spent Looking for Work When Unemployed



Unemployment Insurance: Among those workers who had faced unemployment in the past, only **32 percent** had received unemployment benefits.

Cross-Training Leads to More Hours and Higher Wages

Retail employers often train staff for different jobs in their workplace. For instance, a store associate may learn how to run a cash register, conduct sales, and restock shelves. A large majority (81 percent) of retail workers reported receiving some form of cross-training. The data underscores that employer investment in skills training for workers can often translate into better outcomes for workers. Almost half of the workers who reported cross-training were able to work more hours as a result. One third received higher wages and one fourth had received a new job title with more responsibility and/or more stable schedules.

81% of frontline retail workers received some form of cross-training.

According to workers, this cross-training resulted in:

More hours

48%

More Work During Shifts

38%

Higher Wages

36%

New job title with greater responsibility

26%

More stable schedule

26%

No changes

15%

Yet our survey suggests that the opportunities that can flow from cross-training are inequitably distributed. Women were more likely to report receiving additional work during their shift (60 percent for women compared to 39 percent for men) and less likely to get higher wages as a result of the cross-training. **Employers must ensure that additional training and execution of more varied tasks yields benefits to workers, such as higher wages or a new job title, rather than increasing the employee's responsibilities and work-related stress without compensation.**





Despite the Barriers, a Majority of Retail Workers Felt Advancement Opportunities Existed at their Employer

While the survey underscored both barriers to advancement and the extent of poor job quality in retail, it also demonstrated high levels of optimism among the retail workforce. Among the survey respondents, three out of four people felt there were opportunities for growth at their current employer. Two out of three frontline retail workers felt their employers gave clear information on how to advance to jobs with higher pay and more responsibility.

Interestingly, reported levels of optimism among workers stood in contrast to their reported experiences of current job quality. Many of the workers who felt there were opportunities to advance did not currently have jobs that met high standards of job quality (for instance earning \$15 or more an hour, receiving paid time off and benefits), however they did believe opportunities existed in their current place of employment. Among the 59 percent who had reported receiving a better position, half were currently sales associates or cashiers who still faced some measure of income volatility based on their hourly wage and average weekly hours. Many had moved from part-time positions to full-time positions at their current employer which were characterized by higher wages and less variation in weekly hours compared to part-time jobs.

76% of respondents reported that their employers offered training to help advance within the company.

Our data shows that when employers define a career ladder and offer training, employees are more likely to advance to better jobs. Among the survey respondents who had taken advantage of the training:



of managers said training enabled them to get a better position.



of frontline retail workers said the training enabled them to get a better position.

Conclusion

Highlighting findings from a nationally representative survey of 1,100 retail workers, this report sheds light on key dimensions of opportunities for upward mobility and job quality in retail employment. Our data underscores the importance of investing in training—half of all retail workers consider training to be key to moving up in their jobs. For frontline workers who received training, 59 percent reported they received a better position. Cross-training has also resulted in concrete gains for workers, including more hours and higher wages. However, our findings indicate that training alone is not enough. The demands on workers to maintain open availability, and to work a variable schedule, in fact overshadow the importance of upskilling to the retail workforce, and disproportionately burden working people with caregiving responsibilities.

Our findings also indicate that, while career mobility appears to exist, much of the movement is lateral. At the same time, gender and racial disparities are widespread. Women and people of color disproportionately staff the lowest paid jobs, while white men are more likely to work in the higher paying subsectors and management positions. Women working in retail are also significantly more likely than men to experience physical symptoms of stress.

Of the retail workers we surveyed who have experienced any upward mobility, 80 percent had previously worked part-time. Sixty percent of full-time frontline workers had previously worked part-time. This suggests the rise of part-timing has fundamentally changed the career pathway in retail, and entry-level part-time jobs are increasingly becoming the first rung on the ladder. In addition, part-time retail workers take home 32 percent less for every hour they work than their full-time counterparts. As a result of this underemployment, low wages and wage stagnation, the retail workforce has high rates of financial instability and must rely on the social safety net at high numbers.

The retail industry is undergoing a period of deep structural disruption. The industry must simultaneously grapple with a tightening labor market and increased competition. By improving job quality and reinvesting in its workforce, the retail industry can become an economic force that ensures stability and opportunity for millions of working families.

Appendix

Methods and Survey Sample

The survey results featured in this report were the result of a comprehensive 60-question online survey conducted on the Qualtrics platform. The survey sample included 1,110 retail workers (4 invalid responses were ultimately filtered out of final results bringing the response total to 1,096). The survey ran from September 1st to September 25th, 2017.

The survey included sub-sector*, race, and gender quotas to ensure the survey sample was broadly representative of the US retail industry.

For the purpose of this report, frontline retail workers included any respondent who indicated their current job title was: Sales Associate, Cashier, Store Associate, Customer Service Representative, Stock Associate, Team Leader, Key Holder, and Visual Merchandiser. Managers included any respondent who listed the following job titles: Manager, Store Manager, Department Manager, Supervisor, or Shift Manager.

*Share of national retail employment by retail sub-sector.¹²

- 20% Food & Beverage
- 16% General Merchandise
- 12% Automotive
- 9% Home & Garden
- 9% Clothing Shoes & Accessories
- 8% Health & Personal Care
- 4% Sports, Hobby, Books & Music
- 4% Appliances & Electronics
- 3% Furniture & Home Furnishings
- 3% Gasoline Stations
- 2% Direct Sales
- 1% Online Retailing & Catalog
- 1% Other Non-Store
- 9% All Other

Endnotes

- 1 Françoise Carré and Chris Tilly, "America's biggest low wage industry: Continuity and change in retail jobs." Center for Social Policy Publications. December 2008, http://scholarworks.umb.edu/csp_pubs/22/, 22.
- 2 U.S. Bureau of Labor Statistics, Current Population Survey, "Table 2.1 Employment by major industry sector, 2006, 2016, and projected 2026," https://www.bls.gov/emp/ep_table_201.htm.
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- 5 Lonnie Golden "Still falling short on hours and pay: Part-time work becoming new normal" Economic Policy Institute, December 5, 2016, <http://www.epi.org/press/6-4-million-americans-are-working-involuntarily-part-time-employers-are-shifting-toward-part-time-work-as-a-new-normal/>
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- 8 Lawrence Mishel, Elise Gould, and Josh Bivens, "Wage Stagnation in Nine Charts," Economic Policy Institute, January 6, 2015, <http://www.epi.org/publication/charting-wage-stagnation/>.
- 9 Lawrence Mishel, Elise Gould, and Josh Bivens, "Wage Stagnation in Nine Charts," Economic Policy Institute, January 6, 2015, <http://www.epi.org/publication/charting-wage-stagnation/>.
- 10 Note: an instability ratio measures fluctuations in hours compared to usual work hours. This approach was published by Dr. Susan Lambert, Dr. Julia R. Henly, and Doctoral Student Peter J. Fugiel, University of Chicago, in the 2014 "Precarious Work Schedules among Early-Career Employees in the US: A National Snapshot" https://ssascholars.uchicago.edu/sites/default/files/work-scheduling-study/files/lambert.fugiel.henly_precarious_work_schedules_august2014_0.pdf; The ratio is calculated by dividing the hour range by the reported usual hours. The higher the number the greater amount of instability.
- 11 Susanna Montezemolo "Payday Lending Abuses And Predatory Practices: The State of Lending in America & its Impact on U.S. Households," Center for Responsible Lending, September 2013, <http://www.responsiblelending.org/state-of-lending/reports/10-Payday-Loans.pdf>.
- 12 Center for Popular Democracy "Retail Jobs Today," January 2016, <https://populardemocracy.org/sites/default/files/RetailJobsToday1.pdf>.