



## The Growing Movement for \$15

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## **About NELP**

For more than 45 years, the National Employment Law Project has worked to restore the promise of economic opportunity for working families across America. In partnership with grassroots and national allies, NELP promotes policies to create good jobs, enforce hard-won workplace rights, and help unemployed workers regain their economic footing. For more information, visit us at [www.nelp.org](http://www.nelp.org).

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# Executive Summary

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**D**uring 2012 and 2013, fast-food workers walked off their jobs, first in New York and then nationwide, in what was one of the first mass-scale labor actions in the United States in most adults' lifetimes. The workers' message was that they simply cannot survive on their meager paychecks. They called on the nation's fast-food chains to raise their pay to \$15 per hour, and to sit down with them as a union to work together to improve their jobs and industry.

In the intervening two years, the fight for \$15 has grown from a rallying cry to a diverse movement. Retail workers for Walmart and other chains, home care and child-care workers, convenience-store and dollar-store workers and others have joined strikes to demand a raise to \$15 per hour—just over \$31,000 for a full-time employee.

The call for a \$15 wage has also palpably shifted the national conversation around income inequality and created momentum for much more meaningful action to raise the minimum wage. Over the past two years, the levels of proposed minimum wage increases across the nation have jumped markedly—with major cities now approving up to \$15 per hour, and the [Democrats in Congress and leaders in many states raising their wage proposals to \\$12 or \\$13](#).

The \$15 movement is making great strides, as illustrated by recent public-opinion polling showing strong public support for \$12 and \$15 minimum wage rates; the wave of successful policy campaigns raising minimum wages at the state and local levels; the recent upsurge of wage-increase announcements by low-wage employers; the increase in the number of employers that have modified their business plans to include minimum pay of around \$15 per hour; and the spread of campaigns calling for \$15 wages.

Since November 2012, grassroots momentum generated by the \$15 movement has helped to push through dozens of state and local minimum wage policies, raising wages for millions of workers.<sup>1</sup> In addition, some of our nation's biggest low-wage employers, including

Walmart, McDonald's, T.J. Maxx and the Gap, recently announced pay increases for their lowest-paid workers. While these increases are modest, their public announcement demonstrates the effect of the \$15 movement in highlighting [soaring corporate profits on the one hand, stagnant worker wages on the other](#), and growing public demand for companies to increase pay.

As the movement for \$15 continues to gain momentum, the potential benefits for the U.S. workforce and economy are significant. This report provides comprehensive wage and demographic figures on the substantial swath of the U.S. workforce that today earns less than \$15 per hour, profiles notable recent victories in the \$15 movement, and offers action recommendations for federal, state, and local policymakers and private-sector leaders.

In **Part 1** of this report, we look at the portion of the U.S. workforce that currently earns less than \$15 per hour in the United States. Our findings include the following:

- **Forty-two (42) percent of U.S. workers make less than \$15 per hour.**
- **Women and people of color are overrepresented in jobs paying less than a \$15 wage.** Female workers account for 54.7 percent of those making less than \$15 per hour while making up less than half of the overall U.S. workforce (48.3 percent). African Americans make up about 12 percent of the total workforce, and they account for 15 percent of the sub-\$15-wage workforce. Similarly, Latinos constitute 16.5 percent of the workforce, but account for almost 23 percent of workers making less than \$15 per hour.
- **More than half of African-American workers and close to 60 percent of Latino workers make less than \$15.**
- **About half (46.4 percent) of workers making less than \$15 per hour are ages 35 and older.**
- **Two states—Arkansas and Mississippi—have median wages of less than \$15 per hour.** Four other states—Tennessee, Montana, Kentucky, and South Dakota—have \$15 median wages.
- **Food preparation and serving occupations have**

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- the greatest concentration of workers making less than a \$15 wage.** Other occupation groups in which such jobs are concentrated include farming, fishing, and forestry; personal care and service; building and grounds cleaning and maintenance; healthcare support; sales; and transportation and moving. In these occupations, more than 50 percent of workers make less than \$15 per hour.
- **Retail salespersons is the largest occupation with median wages of less than \$15 per hour, with at least three million people in the United States making less than a \$15 wage in that job.** The next-largest occupations in this category are cashiers, combined food preparation and serving workers, and office clerks.
  - **Six out of the ten largest occupations with median wages less \$15 also rank among the occupations projected to add the most jobs in coming years.** These are retail salespersons; combined food preparation and serving workers, including fast food; laborers and freight, stock, and material movers, hand; janitors and cleaners, except maids and house-keeping cleaners; nursing assistants; and personal care aides.
  - **The top industries for sub-\$15 work are food services and drinking places, private households, agriculture, personal and laundry services, (hotel/motel) accommodation, retail trade, and administrative and support services.** In these industries, more than 60 percent of workers make less than \$15 per hour.

In **Part 2**, we take a closer look at the largest front-line occupations in six industries—restaurants/bars, retail, child care, auto manufacturing, home care, and hotels—and find the following:

- Even after accounting for tips, more than four out of five (83.8 percent) front-line workers in all food service and drinking places make less than a \$15 wage.
  - **The overwhelming majority—96 percent—of fast-food workers make less than \$15 an hour.**
- Four out of five workers in both retail and hotel/motel accommodation front-line occupations make less than \$15 per hour.
  - Automotive manufacturing jobs have long been seen as well paid, but we find that **about half of front-line automotive manufacturing workers make below \$15.**
  - Almost 90 percent of people working in home care and child care make less than \$15 per hour.
  - **Front-line, low-wage jobs in these industries are predominately filled by women.** A majority of workers in these occupations—more than 70 percent of front-line workers in fast food, 74 percent in hotel/motel accommodation, and 53 percent in retail—are female.
  - **Although front-line retail jobs are often seen as jobs held by young people, almost half of workers in these occupations are age 35 or older.**
  - **Unionization rates are low—ranging from about 2 to 10 percent—for front-line workers in these industries, with the exception of auto manufacturing, in which more than one in four workers are union.**

In **Part 3**, we review recent economic research on wage floors, profile the experiences of localities and employers that are transitioning to \$15 wages, and give an overview of recent and current \$15 wage policy campaigns. We find the following:

- Both the most rigorous research and the actual on-the-ground experiences of localities and employers suggest that pay in the affected jobs can be upgraded to \$15 without any significant adverse effect on employment.
- Seattle, SeaTac, WA and San Francisco have all adopted \$15 minimum wages, and campaigns are underway in at least eight more cities – including Los Angeles, Washington, D.C., and New York City – and four more states – Oregon, Massachusetts, New York and Delaware – to increase minimum wages to at least \$15. Private sector employers, such as insurance

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giant Aetna, the university-affiliated hospital Johns Hopkins Medicine, and the University of Rochester, have also raised their base pay to approximately \$15 per hour.

Finally, in **Part 4**, we offer concrete recommendations for action by federal, state, and local policymakers, and private-sector leaders seeking to continue shifting our economy back toward better-paying jobs. Those recommendations include the following:

- **Phasing the minimum wage up to \$15**, as cities such as San Francisco and Seattle have done, with others such as Los Angeles poised to follow.
- **Adopting \$15 minimum wages for key low-wage industries** such as fast food, large retail, hotels, caregiving, property services, and airport workers, as several cities have done and states are now beginning to propose.
- **Issuing executive orders or wage laws raising the minimum wage to \$15 for businesses receiving taxpayer-funded contracts or subsidies.**
- **Raising wages for low-paid city, state, or federal employees to \$15**, as growing numbers of public bodies are doing.
- **Raising private-sector pay scales to \$15**, as employers from Aetna to the Johns Hopkins Hospital have done.

# 1 Who Makes Less Than \$15 per Hour in the United States?

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A \$15 hourly wage generates annual earnings of \$31,200 for a full-time, year-round worker. While this represents a relatively modest pay rate, our analysis shows that a sizeable portion of U.S. workers earn less than this amount. In this section of the report, we take a look at which U.S. workers make less than \$15 per hour and what kinds of jobs they have. We analyze data from the Current Population Survey (CPS) and the Occupational Employment Statistics survey (OES), two of the main government surveys providing information on wages, hours, and earnings for U.S. workers (see Technical Appendix for details on data and methods). Our analysis includes both workers who are paid on an hourly basis and those paid salaries. For non-hourly workers, we use an hourly wage variable that is calculated using reported hours and weeks worked. (In other words, a worker who is paid at an hourly rate of \$15 and a full-time year-round worker who earns an annual salary of \$31,200 are understood to have equivalent earnings.) Our findings include the following:

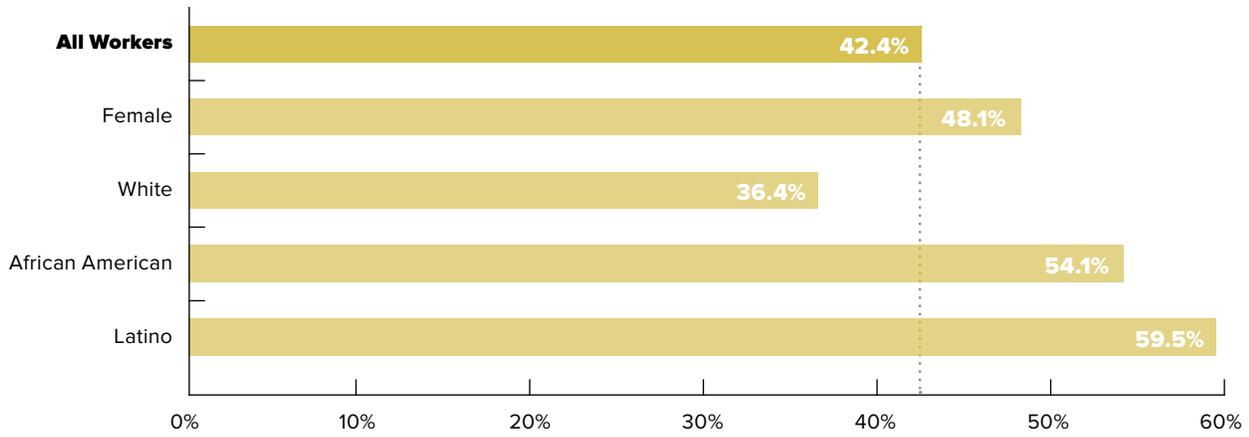
- **Forty-two (42) percent of U.S. workers make less than \$15 per hour.**
- **Women and people of color are overrepresented in jobs paying less than a \$15 wage.** Female workers account for 54.7 percent of those making less than \$15 per hour while making up less than half of the overall U.S. workforce (48.3 percent). African Americans make up about 12 percent of the total workforce, and they account for 15 percent of the sub-\$15-wage workforce. Similarly, Latinos constitute 16.5 percent of the workforce, but account for almost 23 percent of workers making less than \$15 per hour.
- **More than half of African-American workers and close to 60 percent of Latino workers make less than \$15.**
- **About half (46.4 percent) of workers making less than \$15 per hour are ages 35 and older.**
- **Two states—Arkansas and Mississippi—have median wages of less than \$15 per hour.** Four other states—Tennessee, Montana, Kentucky, and South Dakota—have \$15 median wages.

- **Food preparation and serving occupations have the greatest concentration of workers making less than a \$15 wage.** Other occupation groups in which such jobs are concentrated include farming, fishing, and forestry; personal care and service; building and grounds cleaning and maintenance; healthcare support; sales; and transportation and moving. In these occupations, more than 50 percent of workers make less than \$15 per hour.
- **Retail salespersons is the largest occupation with median wages of less than \$15 per hour, with at least three million people in the United States making less than a \$15 wage in that job.** The next-largest occupations in this category are cashiers, combined food preparation and serving workers, and office clerks.
- **Six out of the ten largest occupations with median wages less \$15 also rank among the occupations projected to add the most jobs in coming years.** These are retail salespersons; combined food preparation and serving workers, including fast food; laborers and freight, stock, and material movers, hand; janitors and cleaners, except maids and house-keeping cleaners; nursing assistants; and personal care aides.
- **The top industries for sub-\$15 work are food services and drinking places, private households, agriculture, personal and laundry services, (hotel/motel) accommodation, retail trade, and administrative and support services.** In these industries, more than 60 percent of workers make less than \$15 per hour.

## Demographics

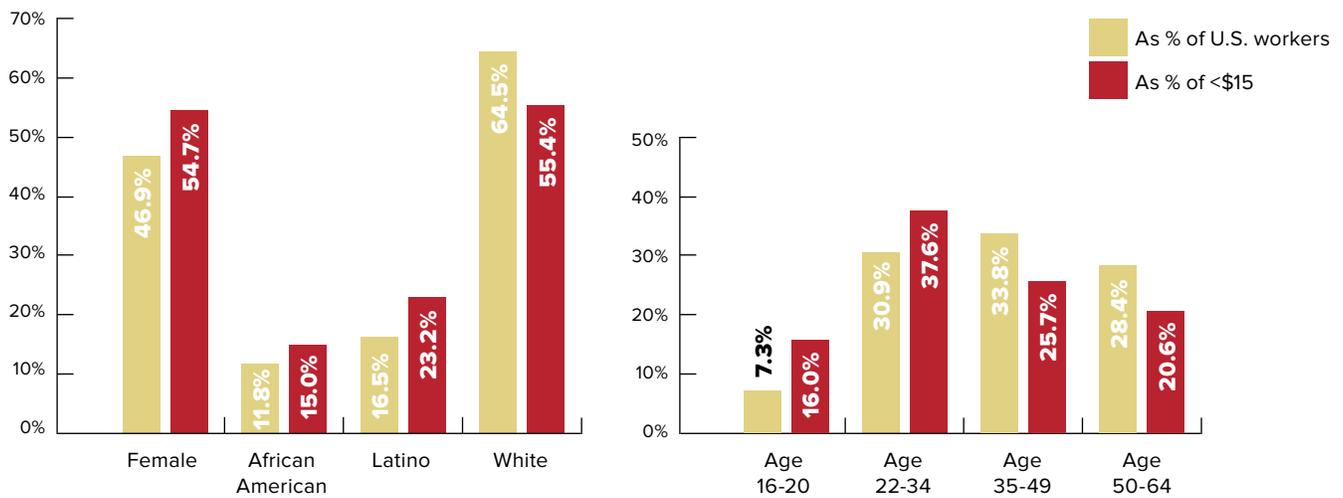
Almost half of U.S. workers (42.4 percent) make less than \$15 per hour. Workers within certain demographic groups are more likely to be working in this low-wage category than are workers in other groups. As Figure 1.1 shows, more than half of African-American workers and close to 60 percent of Latino workers make less than \$15.

**Figure 1.1. Ratio of workers making less than \$15 wage within each demographic group**



Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

**Figure 1.2. & 1.3. Share of workers in U.S. workforce and sub-\$15-wage workforce, by demographic group**



Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

Female workers are overrepresented in the sub-\$15-wage workforce, accounting for 55 percent of those making less than \$15 per hour while making up less than half of the overall U.S. workforce. African Americans also hold a disproportionate number of sub-\$15-wage jobs. While they make up about 12 percent of the total workforce, they account for 15 percent of the sub-\$15-wage workforce. Similarly, Latinos constitute 16.5 percent of the workforce, but account for almost 23.2 percent of workers making less than \$15 per hour.

White workers make up 65 percent of the workforce and 55 percent of workers making less than \$15 per hour.

The concentration of workers making less than \$15 differs across states. Table B.1 in Appendix B shows the share of workers in each state who make less than \$15 per hour. Arkansas and Mississippi had the largest shares of workers earning less than a \$15 wage, each with about half of all workers in this category.

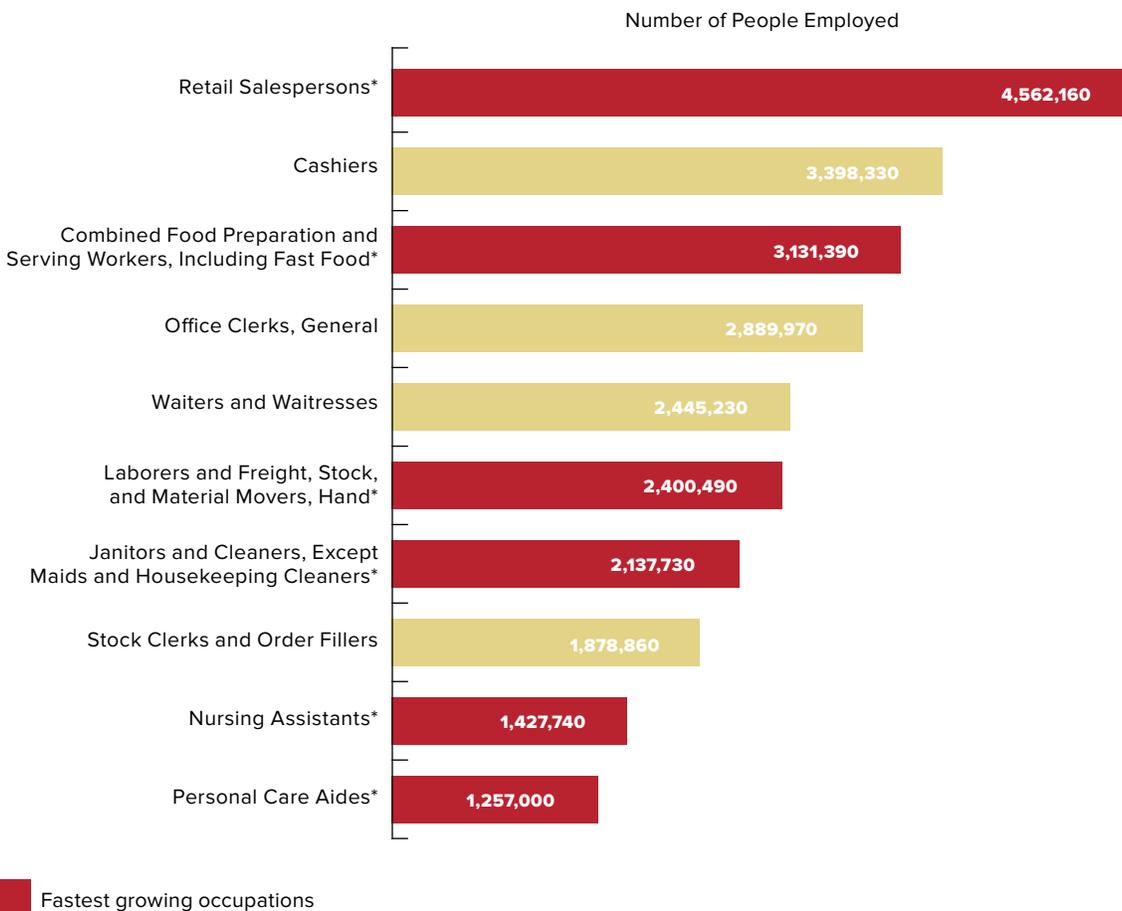
## The distribution of workers making less than \$15 per hour across occupation and industry

Certain occupations and industries have particularly high concentrations of sub-\$15-wage jobs. (An occupation refers to a specific task or set of tasks, while an industry refers to the type of firm for which a person works. A single occupation may be present in a range of industries. For example, the retail; food and drinking places; and arts, entertainment and recreation industries all employ cashiers.) While in general, people working in similar occupations earn similar wages,

this isn't always the case. Production occupations, for example, can vary widely in compensation depending on what is being manufactured.

In what follows, we first look at the distribution of jobs paying less than \$15 by individual occupations, then by occupation groups (as classified by the Census), then by industries. Figure 1.4 ranks individual detailed occupations with a median wage less than \$15 by the number of people employed in them, while Tables 1.1 and 1.2 show the share of sub-\$15-wage workers in occupation groups and industries, respectively.

**Figure 1.4. Largest occupations with median wages less than \$15 per hour**



Source: NELS calculations from May 2014 OES; 2012 BLS Employment Projections. OES wage measures include tips and commission but not overtime.

\* Asterisk denotes occupations in the top 30 of occupations projected to have the most net growth between 2012-2022.

Representing more than 4.6 million workers, the category of retail salespersons tops the list of largest occupations with a median wage less than \$15; at least three million people in the United States make less than a \$15 wage in that job (See Table 1.2). The next-largest occupations meeting this criterion are cashiers and combined food preparation and serving workers. Six out of the ten largest occupations with median wages less \$15 also rank among the occupations projected to add the most jobs by 2022. These are retail salespersons; combined food preparation and serving workers, including fast food; laborers and freight, stock, and material movers, hand; janitors and cleaners, except maids and housekeeping cleaners; stock clerks and order fillers; nursing assistants; and personal care aides.

In Table 1.2, we show groups of occupations ranked by the percentage of workers making less than \$15 per hour. Food preparation and serving-related occupations have the largest share (88.3 percent) of workers earning less than a \$15 wage. Workers making less than \$15 are also concentrated in farming, fishing, and forestry occupations (83.8 percent), personal care and service occupations (77.9 percent), building and grounds cleaning and maintenance occupations (75.2 percent), and healthcare support occupations (72 percent).

Table 1.3 shows the industries ranked by the percentage of workers making less than \$15 per hour. Food services and drinking places (85.2 percent), private households (80.6 percent), and agriculture (75.3 percent) rank the highest, followed by personal and laundry services (70.7 percent), hotel/motel accommodation (66.6 percent), and retail trade (64.1 percent).

**Table 1.1. Occupation groups with largest shares of workers earning less than \$15 per hour**

Occupation group	% Earning <\$15	Median wage
1. Food preparation and serving-related occupations	88.3%	\$9.00
2. Farming, fishing, and forestry occupations	83.8%	\$10.00
3. Personal care and service occupations	77.9%	\$10.35
4. Building and grounds cleaning and maintenance occupations	75.2%	\$10.80
5. Healthcare support occupations	72.0%	\$12.00
6. Sales and related occupations	58.1%	\$12.65
7. Transportation and material moving occupations	54.9%	\$14.00
8. Production occupations	49.6%	\$15.00
9. Office and administrative support occupations	49.2%	\$15.00

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

**Table 1.2. Industries with the largest shares of workers earning less than \$15 per hour**

Industry	% Earning <\$15	Median wage
1. Food services and drinking places	85.2%	\$9.00
2. Private households	80.6%	\$10.20
3. Agriculture	75.3%	\$10.20
4. Personal and laundry services	70.7%	\$11.38
5. Accommodation (Hotels, motels, etc.)	66.6%	\$11.52
6. Retail trade	64.1%	\$12.00
7. Administrative and support services	62.0%	\$12.42
8. Textile, apparel, and leather manufacturing	59.2%	\$13.00
9. Arts, entertainment, and recreation	59.0%	\$12.56
10. Social assistance	57.5%	\$13.26
11. Food manufacturing	55.5%	\$14.07
12. Rental and leasing services	50.3%	\$14.91

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Notes: All wages reported in 2014 dollars.

## 2 A Closer Look at Front-Line Occupations in Six Key Industries

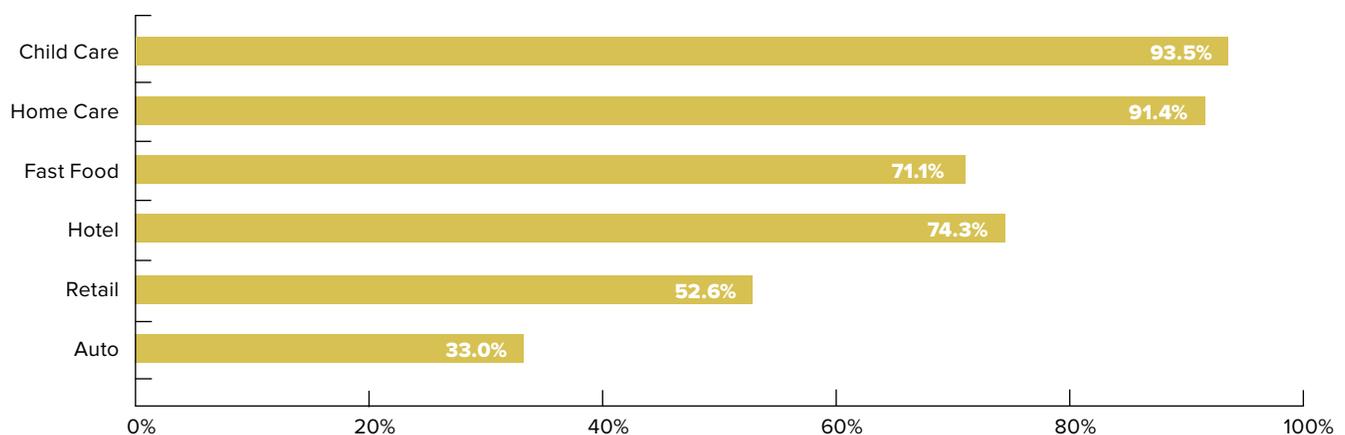
Our analysis to this point provides a broad overview of the distribution of the sub-\$15-wage workforce in the United States. But in order to gain a more precise understanding of wage levels for specific kinds of workers, we must take a closer look at groups of low-wage occupations within industries. In what follows, we focus on the following six industries: food services and drinking places (including fast food), retail, home care, automotive manufacturing, child care, and hotel/motel accommodation. We identify the largest, non-managerial occupations in these industries and define workers in these occupations as “front-line” workers in these industries.

In addition to wages, we look at unionization rates for front-line workers in these six industries, all of which have seen active union organizing campaigns in recent years. Union membership in the United States reached its peak in 1954, when 34.8 percent of all U.S. wage and salary workers belonged to unions.<sup>2</sup> As of 2014, however, only 11.1 percent of the workforce belonged to unions, down from 20.1 percent in 1983.<sup>3</sup>

For the largest front-line occupations in restaurants/bars, retail, child care, auto manufacturing, home care, and hotel/motel accommodation, our findings include the following:

- Even after accounting for tips, more than four out of five (83.8 percent) front-line workers in all food service and drinking places make less than a \$15 wage.
- **The overwhelming majority—96 percent—of fast-food workers make less than \$15 an hour.**
- Likewise, four out of five workers in both retail and hotel/motel accommodation front-line occupations make less than \$15 per hour.
- Automotive manufacturing jobs have long been seen as well paid, but we find that **about half of front-line automotive manufacturing workers make below \$15.**
- Almost 90 percent of people working in home care and child care make less than \$15 per hour.
- **Front-line, low-wage jobs in these industries are predominately filled by women.** A majority of workers in these occupations—more than 70 percent of front-line workers in fast food, 74 percent in hotel/motel accommodation, and 53 percent in retail—are female.
- **Although front-line retail jobs are often seen as jobs held by young people, almost half of workers in these occupations are age 35 or older.**
- **Unionization rates are low—ranging from about 2 to 10 percent—for front-line workers in all six industries, with the exception of auto manufacturing, in which more than one in four workers are union.**

Figure 2.1. Share of jobs in front-line occupations filled by women, by industry



Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

## Food services and drinking places

According to the Bureau of Labor Statistics, 10.6 million people in the United States worked in the food services and drinking places industry in 2014.<sup>4</sup> As we show above, this industry has the highest concentration of workers making less than \$15 per hour of any industry. The largest non-managerial occupations in food services and drinking places are the following: wait staff, cooks, cashiers, food preparation workers, other preparation and serving-related workers, bartenders, hosts, chefs, and dishwashers. Table 2.1 shows earnings figures for these occupations; cashiers are the lowest paid, followed by dishwashers and food preparation workers. Less than two percent of front-line workers in this industry are unionized.

Even when accounting for tips, more than four out of five front-line restaurant workers make less than a \$15 wage. (Available data on tips combine earnings from

tips, overtime, and commission. For restaurant workers, it is reasonable to assume that these figures primarily reflect earnings from tips.) Our findings show that while tips do provide some additional earnings—especially for wait staff and bartenders—hourly earnings are still low even for these workers. Seventy-eight percent of wait staff and 65 percent of bartenders make less than \$15 per hour including tips.

### Fast food

While wages are low throughout the restaurant industry, fast-food workers' wages rank the lowest. Table 2.2 reports earnings for the following fast-food-related occupations: cashiers, combined food preparation and serving workers, and counter attendants. The overwhelming majority—95 percent—make less than \$15 per hour. As a result, many workers rely on public assistance to make ends meet. A recent study showed that more than half of families of front-line fast-food

**Table 2.1 Hourly earnings and unionization rates for front-line workers in all food service and drinking places, by occupation**

	<\$15	<\$15 with tips	Median wage	Median wage with tips	Union
<b>All front-line occupations</b>	<b>91.6%</b>	<b>83.8%</b>	<b>\$8.53</b>	<b>\$9.31</b>	<b>1.7%</b>
Waiters and waitresses	92.5%	77.9%	\$8.00	\$10.00	
Cooks	91.2%	88.0%	\$9.26	\$9.56	
Cashiers	95.9%	93.7%	\$8.25	\$8.28	
Food preparation workers	94.1%	90.4%	\$9.00	\$9.18	
Other preparation and serving-related workers	94.8%	88.4%	\$8.28	\$8.80	
Bartenders	84.1%	64.7%	\$8.50	\$12.01	
Hosts and hostesses, restaurant, lounge, and coffee shop	66.1%	61.5%	\$12.24	\$12.94	
Chefs and head cooks	95.4%	89.8%	\$8.28	\$9.00	
Dishwashers	94.9%	92.5%	\$8.67	\$8.80	

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Notes: All wages reported in 2014 dollars. Available data on tips combine earnings from tips, overtime, and commission. The union column refers to the share of workers that are either members of a union or covered by a union contract.

workers are enrolled in public assistance programs; the cost of public assistance to families of workers in the fast-food industry is nearly \$7 billion a year.<sup>5</sup>

As Table 2.2 shows, female workers, workers of color, and young workers are highly concentrated in front-line occupations at food service and drinking places, and

even more so in fast-food jobs. Seventy-one percent of fast-food workers and 53 percent of all front-line workers at food service and drinking places are women. Twenty-one percent of fast-food workers and 12 percent of all front-line workers at food service and drinking places are African American.

**Table 2.2. Hourly earnings and unionization rates for workers in fast food**

	<\$15	Median wage	Union
<b>All front-line occupations</b>	<b>95.9%</b>	<b>\$8.25</b>	<b>1.7%</b>
Cashiers	95.6%	\$8.25	
Combined food preparation and serving workers	96.1%	\$8.15	
Counter attendants	96.9%	\$8.16	

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Note: All wages reported in 2014 dollars.

**Table 2.3. Demographic characteristics of front-line workers in food service and drinking places**

	Female	African American	Latino	White	Age 16-21	Age 22-34	Age 35-49	Age 50-64
All food services and drinking places	53.3%	12.0%	27.3%	52.6%	32.2%	40.0%	18.5%	9.2%
Fast food	71.1%	21.4%	26.2%	44.7%	54.4%	29.5%	11.0%	5.1%

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

### Worker Profile: Dana Wittman, Subway, Kansas City, Missouri



Dana Wittman is a 38-year-old employee of Subway in Kansas City, Missouri. She has been working food preparation jobs for 20 years. Prior to working at Subway, she worked at Pizza Hut. At her current job at Subway, she makes an hourly wage of \$8.75, taking home about \$720 each month. As a “sandwich artist,” she is responsible for greeting customers, making sandwiches, ringing customers up, and keeping the store clean. In order to make ends meet, Dana skips meals and relies on payment plans for her rent and utility bills. Wittman says, “Winning \$15 and

a union would mean I could finally support myself. I would feel like I was actually living my life, not just surviving. My fridge would be fully stocked and I would never have to skip meals.” Wittman has been on strike three times since she joined the \$15 movement a year ago. “I got involved because she was tired of living paycheck to paycheck and not being able to pay my bills. I knew if I didn’t stand up and fight, no one was going to do it for me.”

“Winning \$15 and a union would mean I could support myself. I would feel like I was actually living my life, not just surviving.”

### Worker Profile: Albina Ardon, McDonald’s, Los Angeles, California



Albina Ardon has been working for McDonald’s in Los Angeles for nearly 10 years. As a cashier and a crew member, she makes \$9.05 per hour. Her husband also works at McDonald’s. They have two children, a five-year-old son and a seven-year-old daughter. Ardon describes the difficulty in covering her expenses with both bread-winners in their family working at McDonald’s: “My checks go toward rent, and [we try to cover] lights, phone, gas, transportation, and food on his checks, [but] it’s hard.” Like many other fast-food workers, they receive public assistance in the form of food stamps and Medicaid. Ardon highlights the shifts at her

workplace that have resulted from the \$15 movement: “Being part of this campaign has changed things at my store in a major way. Before the union, we rarely if ever received our 10 minute breaks or our checks on time. Since we have held actions and gone on strike, we have gotten our breaks and the owner has apologized publicly when our checks were late.” After being arrested for civil disobedience as part of the campaign, Ardon says she felt proud. “It made me hopeful for the future. My son and daughter could see that I can make a difference for their lives and speak up for them.”

“Since we have held actions and gone on strike, we have gotten our breaks and the owner has apologized publicly when our checks were late.”

## Retail

Employing more than 1 in 10 people in the U.S. workforce, the retail sector plays a vital role in the U.S. economy<sup>6</sup>; retail sales rates serve as a closely watched indicator of the country’s economic well-being. In 2014, more people in the U.S. worked as retail salespeople than in any other occupation, and the Bureau of Labor Statistics projects that the retail industry will be one of the leading producers of new jobs in the coming period.<sup>7</sup> Our study focuses on the four-largest non-managerial occupations in the retail trade; these include jobs typically associated with retailing, such as cashiers and salespersons, as well as back-of-the-house occupations such as stock clerks, laborers, and movers.

As Table 2.4 shows, almost 80 percent of these front-line workers make less than a \$15 wage, and only five percent are unionized. Table 2.5 shows that although front-line retail workers tend to be younger than the U.S. workforce overall, almost half are age 35 or older. As with many other low-wage occupations, women and people of color are disproportionately represented.

In early 2015, several large retailers such as Walmart, Target, and T.J. Maxx announced their decisions to raise wages for their workers, with the new base-wage levels ranging between \$9 and \$10. While these raises represent an improvement, the new hourly pay rates still only amount to about \$20,000 in annual earnings for full-time, year-round employees. Moreover, low wages in retail are compounded by less-than-full-time hours and unpredictable schedules; retail workers report higher rates of involuntary part-time than many other industries.<sup>8</sup> Although wages in this sector are low on average, there are notable examples of large and profitable retail companies, such as Costco, that pay higher rates. The starting wage at Costco is \$11.50 per hour, and the average wage is \$21 per hour; the retailer attributes its higher wages to lower employee turnover and higher customer satisfaction. Research has shown that Costco’s sales per employee are almost double those of Sam’s Club.<sup>9</sup>

**Table 2.4. Hourly earnings and unionization rates of front-line retail workers, by occupation**

	<\$15	Median wage	Union
<b>All front-line occupations</b>	<b>79.9%</b>	<b>\$9.94</b>	<b>5.0%</b>
Retail Salespersons	71.2%	\$10.35	
Cashiers	90.3%	\$9.00	
Stock clerks and order fillers	83.7%	\$10.10	
Laborers and freight, stock, and material movers, hand	80.2%	\$10.00	

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Note: All wages reported in 2014 dollars.

**Table 2.5. Demographic characteristics of front-line workers in retail**

Female	African American	Latino	White	Age 16-21	Age 22-34	Age 35-49	Age 50-64
52.6%	14.6%	17.9%	60.6%	23.8%	35.3%	20.7%	20.2%

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

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### Worker Profile: Fatmata Jabbie, Walmart, Northern Virginia



Fatmata Jabbie works as a cashier at a Walmart in Northern Virginia, earning \$8.40 per hour. Although she has asked her supervisors for full-time hours, her schedule remains inconsistent and often includes fewer hours than she needs. Some weeks she works 36 or 26 hours, while other weeks she works as few as 18 hours; her take-home pay is usually less than \$200 each week. Her unpredictable schedule also makes it difficult to arrange childcare for her four-year-old son and one-year-old daughter, or pursue an education for herself. Jabbie can't afford health care and pays out of pocket at the emergency room when necessary. She relies on food stamps, subsidized housing, and publicly subsidized childcare.

## Home care

The home care workforce encompasses workers in two main occupations: home health aides and personal care aides. Both assist older adults or people with disabilities at their homes with personal care (assistance with eating, dressing, bathing, and toileting) and household services (meal preparation, shopping, light cleaning, and transportation). The number of home care jobs in the United States is projected to grow five times faster than jobs in all other occupations. About two million people currently work in home care, and the country will need an additional one million new home care workers by 2022.<sup>10</sup>

Our analysis shows that almost 90 percent of home care workers make less than \$15 per hour. Slightly over 10 percent are unionized (See Table 2.6). The home care workforce is overwhelmingly female (91 percent); one in three workers is African American, and one in five is

Latino/a. Home care workers are slightly older than the U.S. workforce as a whole, with 35 percent of workers age 50 or older.

Low wages for home care workers have profound implications beyond the workers and their families, driving alarmingly high turnover and burnout, jeopardizing critical services, and straining the home care system just as more and more Americans come to rely on its services.<sup>11</sup> Several states and cities have recognized that raising wages for workers employed in such publicly funded programs also saves public funds by easing workers' reliance on public benefits and stemming the tremendous financial and human cost of recruiting and retraining what has been a constantly churning workforce. They have passed reforms such as New York's Wage Parity Act, which raised compensation for Medicaid-funded home care workers to \$14 per hour in wages and benefits.

**Table 2.6. Hourly earnings and unionization rates of front-line home care workers**

	<\$15	Median wage	Union
<b>Home care workers</b>	<b>88.6%</b>	<b>\$10.00</b>	<b>10.6%</b>

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Note: All wages reported in 2014 dollars.

**Table 2.7. Demographic characteristics of front-line workers in home care**

Female	African American	Latino	White	Age 16-21	Age 22-34	Age 35-49	Age 50-64
91.4%	33.5%	20.3%	38.9%	4.6%	30.5%	30.0%	35.0%

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

## Auto manufacturing

For much of the 20th century, motor-vehicle manufacturing jobs anchored the blue-collar middle-class in the United States, paying wages that were higher than those earned by most private-sector workers. In recent decades, however, real (inflation-adjusted) wages have declined in the automotive sector, with a sharp acceleration after the collapse of the U.S. economy in 2008. Since then, U.S. auto production has rebounded, from a low of 5.7 million vehicles in 2009 to 11.1 million vehicles in 2013.<sup>12</sup> Foreign and domestic companies have added 350,000 new jobs at their U.S. auto assembly and parts plants since 2009.<sup>13</sup> With expanded production, the industry has seen steady increase to capital returns; several major automotive parts suppliers recently each completed over \$1 billion in share repurchases.<sup>14</sup> However, average wages in the sector have continued

to decline. Between 2003 and 2013, the real wage for auto parts workers fell by 13.7 percent. As NELP’s past research has shown, during the recovery, many of the well-paying jobs that were lost during the crisis were replaced by lower-wage jobs, often non-union, outsourced, and/or staffed via employment agencies.<sup>15</sup>

Almost three-quarters of a million people worked in automobile parts and assembly manufacturing in 2014. Our analysis includes workers from the largest production occupation category, “miscellaneous assemblers and fabricators.” As Table 2.8 shows, almost half these workers make below \$15, and slightly more than one in four are unionized. Auto workers are largely white (58.3 percent) or African American (28.4 percent), and male (67 percent). A majority—about three in five—are age 35 or older.

**Table 2.8 Hourly earnings and unionization rates for front-line auto-manufacturing workers**

	<\$15	Median wage	Union
<b>Miscellaneous assemblers and fabricators</b>	<b>45.6%</b>	<b>\$15.30</b>	<b>28.7%</b>

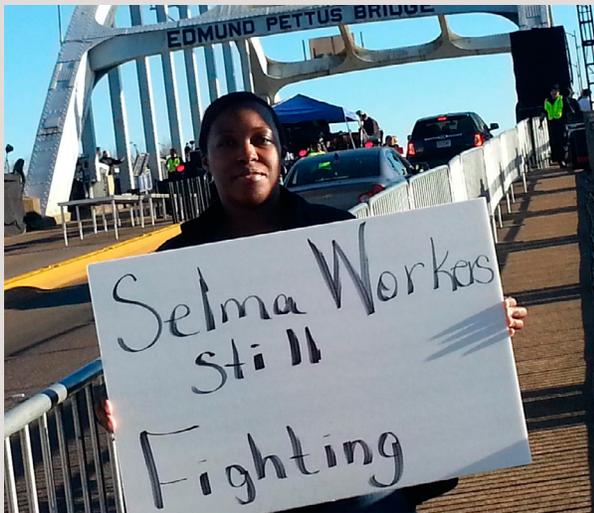
Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Note: All wages reported in 2014 dollars.

**Table 2.9. Demographic characteristics of front-line auto-manufacturing workers**

Female	African American	Latino	White	Age 16-21	Age 22-34	Age 35-49	Age 50-64
33.0%	28.4%	7.8%	58.3%	3.9%	36.1%	35.8%	24.0%

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

## Worker Profile: Letasha Irby, Lear Corporation, Selma, Alabama



*“A lot has happened this year in Selma, Alabama, where I’ve worked for nine years at a plant that manufactures foam seat cushions for Hyundai. Tens of thousands of people came to Selma to celebrate the 50th anniversary of Bloody Sunday and remember our town’s role in passing the Voting Rights Act, and millions more Americans learned the story by watching the award-winning movie Selma. When Oprah Winfrey came to town on Martin Luther King’s birthday, I listened to her speak from the steps of City Hall as she urged us to never forget how people had fought bravely 50 years ago to make a better life possible for so many today.*”

*“But the fact is, the struggles in Selma are not just a thing of the past.*”

*“Today, about 42 percent of people living in Selma are below the poverty line. The median income is half the average for Alabama as a whole—about \$22,500 a*

*“For our parents and grandparents, a good manufacturing job—especially in auto—was a ticket to the middle class. Why should my generation of workers be any different?”*”

*year. The vast majority of Selma residents—80 percent—are African American.*

*“I have two children—a 10-year-old boy and a four-year old little girl. I struggle to raise them on \$12.00 an hour—the same wage that most workers in my plant make. On \$12.00 an hour, we can’t afford our own house. My kids and I share my mother’s house. I can’t save for college on \$12.00 an hour. On \$12.00 an hour, all I can do is pay the bills.*”

*“When you make this little, the only way to earn enough money to provide for your family is to work all the overtime you can. At my plant, often you don’t have a choice. Lear operates six or sometimes even seven days a week, and it’s not unusual for a worker in the plant to work 60 or more hours a week. That’s a lot of time away from your kids. When I have to work those kinds of hours, it’s a constant juggling act. We shouldn’t have to choose between earning enough money to provide for our families, and having the time to actually be there for them.*”

*“When you make this little, the only way to earn enough money to provide for your family is to work all the overtime you can.”*

*“Even with all this, many people say a job at our plant is one of the best in town. But I know things can be better. I can appreciate what people went through many years ago when they fought for civil rights and voting rights. Now we’re fighting for workers’ rights. Since my co-workers and I started joining together to form our union, we’ve seen wages go up by almost \$1.00. That’s a start, but we have a long way left to go. For our parents and grandparents, a good manufacturing job—especially in auto—was a ticket to the middle class. Why should my generation of workers be any different?”*

## Child care

There are more than 800,000 child-care workers in the United States today, employed at child-care centers, pre-schools, family day cares, and in private households as “nannies.”<sup>16</sup> Child-care wages in the United States have historically been low, and have failed to increase even as public understanding of the importance of quality early-childhood care and education has deepened. Many child-care providers employed in private households are excluded from coverage of labor protections, including federal minimum wage and overtime law, occupational health and safety protections, and the right to organize unions. In order to make ends

meet, child-care providers often rely on various forms of public assistance such as Medicaid, food stamps, and the earned income tax credit. A recent estimate suggests that some 46 percent of child-care workers rely on some form of public assistance and that the annual public cost of that assistance-program participation is \$1.3 billion.<sup>17</sup>

As Table 2.10 shows, 85 percent of child-care workers make less than \$15 per hour. About six percent are union. The workforce is overwhelmingly female (93.5 percent). Fifty-nine percent are white, almost 15 percent are African American, and 21 percent are Latino/a.

**Table 2.10. Hourly earnings and unionization rates of front-line child-care workers**

	<\$15	Median wage	Union
<b>Child-care workers</b>	<b>85.1%</b>	<b>\$9.83</b>	<b>5.7%</b>

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Note: All wages reported in 2014 dollars.

**Table 2.11. Demographic characteristics of child-care workers**

Female	African American	Latino	White	Age 16-21	Age 22-34	Age 35-49	Age 50-64
93.5%	14.9%	21.4%	58.4%	26.0%	30.1%	23.2%	20.7%

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

## Worker Profile: Kendra Liddell, Seattle, Washington



Kendra Liddell lives in Seattle, Washington and currently earns \$11 per hour working at a child-care center caring for children ages one to five. She started at the center two years ago, first teaching in pre-K classrooms and now working in all of the classrooms with all age groups. Earning low wages has meant that Liddell struggles to take care of bills each month and to pay for basic necessities such as food and

toiletries for her family. She has a five-year-old son, for whom she can’t afford to pay for activities like going to a baseball game or trips to the zoo. Liddell believes that her supervisors at the child-care center are doing their best to support her and her co-workers, but she has joined with other workers to call for union representation because she believes a union would give them a greater voice to fight for more resources and support. According to Liddell, such resources would not only allow child-care workers to make ends meet, but also to improve the quality of the care they are able to provide.

### Hotel/motel accommodation

The hotel business in the United States is booming, with record profits in recent years and 2014 seeing the highest levels of rooms booked ever.<sup>18</sup> One industry analyst recently noted, “We have not seen...such strong and sustained profit growth in the 78 years [this firm] has been tracking the U.S. lodging industry.”<sup>19</sup> Although hotel profits are soaring and room occupancy rates are at all-time highs, wages for front-line staff remain low.

We look at hourly earnings for the four-largest non-managerial occupations: maids and housekeepers; hotel, motel and resort desk clerks; waiters and waitresses; and janitors and building cleaners. We find that more than 8 out of 10 workers in front-line occupations make less than \$15 per hour. Less than 1 in 10 are unionized. Three out of four workers are female. More than one in three workers is Latino/a, and about one in five is African American. More than half of front-line hotel/motel workers are over the age of 35.

#### 2.12. Hourly earnings and unionization rates for front-line hotel workers

	<\$15	Median wage	Union
<b>All front-line occupations</b>	<b>83.5%</b>	<b>\$10.00</b>	<b>9.5%</b>
Maids and housekeeping cleaners	86.8%	\$9.44	
Hotel, motel, and resort desk clerks	78.9%	\$10.14	
Waiters and waitresses	85.6%	\$9.18	
Janitors and building cleaners	72.9%	\$11.25	

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014. Note: All wages reported in 2014 dollars.

#### 2.13. Demographic characteristics of front-line hotel workers

Female	African American	Latino	White	Age 16-21	Age 22-34	Age 35-49	Age 50-64
74.3%	18.6%	36.4%	34.0%	8.1%	33.6%	33.2%	25.1%

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

# 3 \$15 Wage Policies: Economic Research and Case Studies

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Though just a few years old, the \$15 movement has already generated significant policy results. With workers, employers, and policymakers across the country joining in, this movement for significantly raising pay across the bottom of the U.S. economy has given rise to a growing number of policy changes, expanded the public debate on the minimum wage, and inspired a growing number of businesses to raise pay for their workforces. Workers across the country have won pay increases through a variety of methods: ballot initiatives, ordinances approved by local officials, collective bargaining, executive orders, and voluntary changes to employers' pay scales.

The most significant policy results have been the wave of action in major U.S. cities to adopt city minimum wages of up to \$15. This began in November 2013 in SeaTac, Washington, when voters approved a ballot initiative to increase the minimum wage to \$15 for workers in travel and tourism industry jobs associated with the SeaTac International Airport. The SeaTac action in turn sparked a campaign in neighboring Seattle for the nation's first citywide \$15 minimum wage, which its city council unanimously approved in June 2014. San Francisco became the third and largest city to approve a \$15 minimum wage in November 2014, when 77 percent of city voters backed a ballot measure raising pay for 23 percent of the city's workforce. Shortly after, Chicago under Mayor Rahm Emanuel won approval of a slightly lower \$13 minimum wage after a citywide campaign for a \$15 wage made that the moderate compromise position. Similar proposals are being debated today in Los Angeles, which is likely to phase up its wage close to \$15 in the coming years. And leaders in a range of other U.S. cities, from Sacramento to Minneapolis to New York, are championing similar proposals.

In other cities—especially those that may not currently have the authority to adopt citywide minimum wages—policy action has taken other forms. New York City Mayor Bill de Blasio issued an executive order raising pay and benefits to \$15 for employers operating at city-subsidized economic development projects. Portland, Oregon adopted a city living wage-type law raising

pay to \$15 for low-paid city employees and workers at companies performing contracts for the city.

A wider range of public bodies and institutions, from the Los Angeles Unified School District to Multnomah County, Oregon to Baltimore's Johns Hopkins Hospital have raised wages for low-paid public employees to \$15 through collective bargaining agreements. And in the private sector, major employers like Aetna have announced that they are raising their pay scales—a step that will boost wages for 5,700 at the insurance giant alone, where minimum pay will rise to \$16.

Low-wage workers in a number of localities around the country have won pay increases to approximately \$15 per hour (see Table 3.1). With the spread of the movement to other cities and states, the number of workers receiving wage increases could significantly increase. Table 3.2 lists campaigns underway in several cities and states, proposing minimum wage rates of around \$15.

The public strongly backs this trend toward more significant wage increases of up to \$15. A January 2015 poll by Hart Research Associates, commissioned by the National Employment Law Project, found that nearly two in three voters (63 percent) support raising the federal minimum wage to \$15 per hour by 2020<sup>20</sup>—including a solid majority of Independents (61 percent) and two in five Republicans (40 percent).<sup>21</sup> This support includes a majority (56 percent) of Americans living in states that voted for Mitt Romney in the 2012 elections, and strong margins in all regions of the country: 73 percent in the Northeast, 60 percent in the South, and 61 percent each in the Midwest and West.

## **Economic research and on-the-ground experiences demonstrate the feasibility of \$15 wage floors**

Both the most rigorous research and the actual experiences of cities that have adopted significantly higher minimum wages show that low-paying jobs can be manageably transitioned up to \$15 wages.

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The bulk of rigorous research over the past two decades shows that raising the minimum wage has little adverse effect on employment levels. This is best illustrated by “meta-studies” that survey and aggregate the findings of scores of studies of the impacts of higher minimum wages. The two leading meta-studies—by economists Hristos Doucouliagos and T.D. Stanley (2009) and Dale Belman and Paul Wolfson (2014)—show that the vast majority of recent studies find minimum wage increases have little to no effect on employment levels or job growth.<sup>22</sup>

Similarly, state-of-the-art recent studies of cities and counties with higher minimum wages have found no evidence that the higher wages cost jobs to any significant degree. For example, in what is probably the most sophisticated and widely praised recent study, “Minimum Wage Effects across State Borders,” economists Arindrajit Dube, T. William Lester and Michael Reich (2010) compared employment trends in every pair of neighboring counties in the United States that had differing minimum wage levels at any time between 1990 and 2006. They found that higher minimum wages did not lead businesses in affected counties to reduce their hiring or shift their hiring to neighboring counties with lower minimum wage rates.<sup>23</sup>

Now that cities have begun to phase up their minimum wages to the \$15 level, economists have gone further and begun to model how the costs of such substantially higher wages can be manageably absorbed. For example, economists Robert Pollin and Jeannette Wicks-Lim recently analyzed how fast-food employers—one of the major low-paying industries—would adjust to a \$15 wage.<sup>24</sup> They found that the costs of transitioning to this higher pay scale could be covered without any reduction in fast-food employment, through a combination of four types of offsets: substantial savings from reduced employee turnover; moderate price adjustments; allocating a slightly larger share of projected industry sales growth (which averages 2.5 percent per year) to labor costs rather than profits; and redistributing a higher portion of overall revenues within firms to cover labor costs.<sup>25</sup>

And as the Los Angeles City Council considers proposals to raise the citywide minimum wage to \$13.24 by 2017 and to \$15.25 by 2019, two separate studies found that these higher wage rates would have substantially positive effects on the local economy and workers’ earnings. A City Council–commissioned study by the Institute for Research on Labor and Employment at the University of California, Berkeley estimated that these proposals would boost workers’ spending by \$1.36 billion by 2017 and \$2.38 billion by 2019, with little impact on total employment; there would be a net gain of more than 5,200 jobs county-wide, and business operating costs would rise by just 0.9 percent by 2019.<sup>26</sup>

In a separate study on the impact of Los Angeles’s \$15.25 minimum wage proposal, researchers at the UCLA Labor Center projected even stronger economic benefits—that 723,000 workers would see increased earnings totaling \$5.9 billion in 2019, resulting in a boost of consumer spending that would translate to 46,000 new jobs.<sup>27</sup>

Finally, the on-the-ground experiences of cities that have adopted significantly higher minimum wages in recent years has shown that higher wages have been manageable for businesses and have not led to lay-offs or slowed job growth. For example, in both San Jose and San Francisco, jobs in the restaurant industry grew faster after the minimum wage was increased, than they did in surrounding cities and counties that did not raise wages. In San Jose, The Wall Street Journal reported, “Fast-food hiring in the region accelerated once the higher wage was in place. By early [2014], the pace of employment gains in the San Jose area beat the improvement in the entire state of California.”<sup>28</sup> Similarly, University of California researchers found that restaurant employment grew 17.7 percent in San Francisco, faster than in the other Bay Area counties.<sup>29</sup>

The story has been similar in SeaTac, Washington—the first city in the United States to transition to a \$15 minimum wage. Some local businesses had predicted lay-offs and expansion-plan cancellations, as the proposed wage increase would represent a 63 percent boost in the

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minimum wage and would not be phased in (although the new \$15 minimum wage was originally meant to cover all hospitality and transportation workers, a lawsuit by Alaska Airlines and the Washington Restaurant Association has delayed coverage to airport workers. The state’s Supreme Court may rule on this case relatively soon). However, as the Puget Sound Business Journal reported a year later, the “[o]nce controversial \$15-an-hour minimum wage [is] now a shoulder shrug in SeaTac.”<sup>30</sup>

SeaTac hotelier Scott Ostrander, owner of Cedarbrook Lodge, for example, had testified in front of the SeaTac City Council in July 2013, stating, “I am shaking here tonight because I am going to be forced to lay people off...I’m going to take away their livelihood...And what I’m going to have to do on January 1 [2014] is to eliminate jobs, reduce hours.”<sup>31</sup> Rather than distributing pink slips, Mr. Ostrander went ahead with a \$16 million expansion, adding 63 rooms and a spa, and creating jobs.<sup>32</sup> Another business, MasterPark, similarly opposed to the wage increase, warned it would be forced to replace some workers with automation. Instead, it implemented a surcharge of less than a dollar for its services, did not cut jobs, and highlighted the \$15 wage as an employee recruiting incentive. After the wage increase took effect, its manager stated that laying off workers would be “foolish,” that good service is key to the company’s business model, and that this type of service includes customers’ ability to interact with human beings.<sup>33</sup>

These real-world experiences illustrate that businesses are reluctant to cut jobs when faced with a substantially higher minimum wage. And that many—including the businesses highlighted in this report—instead actively incorporate the benefits of paying higher wages into their staffing strategies.

### **Case Study: Johns Hopkins**

In many small- and medium-sized cities with a significant higher education presence, universities and their affiliated institutions—in particular medical centers—are often the most powerful drivers of the local economy.

Johns Hopkins University and the affiliated Johns Hopkins Medicine (JHM) in Baltimore is one such example. Collectively, Johns Hopkins–affiliated institutions employ more than 33,000 people in the city and account for nearly \$4 billion in economic activity.<sup>34</sup> Johns Hopkins Medicine itself is the largest single employer in the City of Baltimore and one of the State of Maryland’s largest private employers.<sup>35</sup>

So when 2,000 housekeepers, food service workers, nurses assistants, and other caregivers at JHM’s Johns Hopkins Hospital—inspired by fast-food workers—went on strike for a \$15 wage in the spring of 2014, it was significant news not only in Baltimore but around the nation. The workers, members of SEIU 1199 United Healthcare Workers East, earned as little as \$10.71 per hour<sup>36</sup> working for an institution that opened a \$1 billion medical complex in 2012 and provided its CEO over \$15 million in compensation in 2013.<sup>37</sup>

Hospital employee Melvinna Alford, who cleans rooms, assists nurses, and transports patients,<sup>38</sup> told the Baltimore Sun, “We just want to be able to take care of our families.”<sup>39</sup>

After a three-day strike in April, a Mother’s Day march and rally attended by 3,500 Hopkins employees and supporters (including the actor Danny Glover),<sup>40</sup> the threat of another strike in late June, and the intervention of Maryland Governor Martin O’Malley,<sup>42</sup> the hospital workers won a significant victory. The contract they signed in July 2014 will give every worker with 15 years’ experience a \$15 wage by 2017, and ensure that all workers employed in the unit will earn a least \$13 per hour by 2018.<sup>43</sup>

Given Johns Hopkins’ massive presence and clout in the City of Baltimore, observers have predicted that the increase will not only impact wages at other local medical facilities but also effectively raise wages in the city as a whole.<sup>44</sup>

The Hopkins victory—in the relatively small, post-industrial city of Baltimore—represents a major

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advance for a \$15 movement whose biggest wins thus far have been confined to big cities and the West Coast.

### **Case Study: Aetna**

The growing \$15 movement has not only made significant progress through policy campaigns and collective bargaining—it has also inspired some large companies to re-think their pay scales.

In January, Mark Bertolini, CEO of insurance giant Aetna, announced plans to boost the company’s minimum pay to \$16 per hour, giving 5,700 employees a pay increase of up to 33 percent.<sup>45</sup> Asked why he made the move, Bertolini echoed the demands of fast-food, retail, and other workers who have protested low pay.

“Here we are a Fortune 50 company and we’re about to put these people into poverty, and I just didn’t think it was fair,” he told CNBC.<sup>46</sup> In the interview, Bertolini indicated that many of Aetna’s workers are single mothers who have had to rely on food stamps and Medicaid because they could not afford Aetna’s health-care plans on their low wages.<sup>47</sup>

Bertolini also cited the benefits to Aetna’s business. Employees impacted by the increase include those in customer service, claims administration, and billing—people who are “the face of the company to customers every day,” according to the company’s press release.<sup>48</sup>

“We’ve sort of destroyed business after business in this country by looking at spreadsheets with numbers we call truth,” Bertolini said. “Instead, let’s look at the potential benefits we could derive, hard and soft, as a result of this investment.”

Aetna’s unilateral pay increase—no other company in the insurance industry has made the same move—is evidence both that big business can absorb such increases and that there is a significant benefit to business that comes from paying higher wages. It remains to be seen whether Bertolini’s fellow Fortune 500 CEOs will get the message.

### **Case Study: Seattle Minimum Wage**

More U.S. cities than ever before are fighting poverty locally by raising the minimum wage. With eleven acting in 2014 alone, today more than 20 cities and counties have adopted higher local minimum wages.<sup>49</sup> And buoyed by the \$15 movement, more major cities are adopting higher minimum wages than ever before—demonstrating that it is feasible to transition local economies to significantly higher wages of up to \$15.

Seattle is at the forefront of that movement as the first major city to adopt a \$15 minimum wage. The effort actually began in SeaTac, a Seattle suburb that is home to the city’s airport. Like many airports across the country, workers at the Sea-Tac International Airport had seen their formerly well-paying jobs turn into low-wage ones, as airline companies increasingly contracted out their work. Alex Hoopes, an airport worker with 20 years of experience who earned \$21 per hour in 2005 as a baggage handler for Alaska Airlines, told the Seattle Post-Intelligencer that his pay fell to \$9.50 per hour working for a contractor.<sup>50</sup>

A broad coalition, including SEIU 775, a local SEIU health care union, led a ballot initiative campaign to establish a \$15 wage floor for airport and airport-related jobs. The organizing to pass the ballot initiative was deep and sustained. In a town with just 12,000 registered voters, volunteers knocked on doors 40,000 times.<sup>51</sup> By a narrow margin, the initiative passed—raising pay for nearly 6,000 airport, hotel, car rental, and other workers.

Lifted by the success of this initiative, the coalition proposed a \$15 wage for Seattle and helped make the proposal a centerpiece in the city’s 2014 mayoral race. The “\$15 question” was raised in almost every major candidate forum and event, prompting then-candidate Ed Murray to endorse the idea. The fast-food worker movement, which had elevated the debate on wages nationally and in Seattle, prompted a race to the top—with candidates eager to support the movement and the idea of a \$15 minimum wage. Once elected, Mayor Murray appointed a business-labor

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taskforce to figure out how the city could get to \$15 per hour. Appointing both David Rolf, the president of SEIU 775, and business leader Howard Wright, the founder of the Seattle Hospitality Group, Mayor Murray gave the taskforce four months to hammer out a proposal.<sup>52</sup> The taskforce settled on a compromise proposal that would phase in a \$15 minimum wage more slowly for smaller businesses than for larger ones, and would allow employers to count some portion of tips and health-care benefits in calculating the minimum wage—but only temporarily. With community groups and significant segments of the business community supporting the proposal, in June 2014, Seattle’s city council unanimously approve the taskforce proposal.

As the first city to adopt a plan to transition to a \$15 wage, Seattle is leading the way for the nation’s other major cities. Shortly after Seattle, in November 2014 San Francisco voters approved raising that city’s minimum wage to \$15 by 2018. In December 2014, Chicago under Mayor Rahm Emanuel approved a \$13 minimum wage after the \$15 movement created significant local pressure for strong wage action. Currently, Los Angeles is debating minimum wage proposals ranging from \$13.25 to \$15.25, with final action expected this year. And cities from Sacramento and Olympia to Minneapolis and New York are considering \$15 proposals.

### **Case Study: Portland Public Workers**

Cities have long been ground zero for the living wage movement, the site of numerous campaigns over the past two decades focused on ensuring that taxpayer dollars – which pay the salaries of city employees and subcontracted workers – fund decent jobs.

But even with all the successes of this, the recent approval of a \$15 wage for public workers in two separate jurisdictions in Oregon (Multnomah County and the city of Portland) is momentous.

Multnomah County was first. In November, 2014, AFSCME Local 88 reached agreement with the county on a new contract that will lift the minimum wage for covered employees to \$15 by mid-2016.<sup>53</sup> Not content to stop there, AFSCME suggested that the county extend the \$15 minimum to all county workers, not just unionized ones – and in early December the county Board of Commissioners voted to do just that. The decision will impact nearly 400 city employees, in addition to the 150 unionized employees who will see their wages rise to \$15, and makes Multnomah the first county and largest public employer in Oregon to adopt a \$15 wage.<sup>54</sup>

In the city of Portland, the increase to \$15 came via a 5-0 vote by the city council to raise its minimum wage for full-time city workers and contracted workers.

The vote was the result of pressure by \$15 Now Portland, which has ties to activists in Seattle who orchestrated that city’s campaign for a \$15 minimum wage, and the local Jobs with Justice chapter, which spearheaded the original version of the city’s “Fair Wage Policy.” The city’s labor unions have also pushed the increase.

Most of the workers who will be affected are janitors, parking attendants, and security officers employed by contractors covered by the Fair Wage Policy. Left out are 1,800 seasonal and part-time Parks Bureau employees, but the Council has agreed to commission a study on extending the increase to these workers.

Inspired by and following on the heels of the victory in Seattle, the Multnomah and Portland measures have solidified the Pacific Northwest’s role as the vanguard of the Fight for \$15. And more wins may be coming: a bill for a statewide \$15 minimum wage is now before the Oregon state legislature.

**Table 3.1. Summary table of \$15 wage policies**

State	Jurisdiction or Employer	Wage	Year	Type of Policy
California	San Francisco	\$15.00	2018	Citywide Minimum Wage Law
	LA (hotel workers)	\$15.37	2015	City Industry Minimum Wage Law
	LA Unified School District	\$15.00	2016	Collective bargaining
Florida	First Green Bank	\$14.40 (\$30K/yr)	2014	Company policy
	C1 Bank	\$14.00	2014	Company policy
Maryland	John Hopkins Hospital	\$15.00	2017	Collective bargaining
Massachusetts	Lynn Community Health Center	\$15.00	2016	Collective bargaining
Michigan	Moo Cluck Moo	\$15.00	2014	Company policy
New York	University of Rochester (service workers)	\$15.00	2017	Collective bargaining
	New York City economic development project workers	\$15.22	2019	Executive order
Oregon	Portland (housing authority workers)	\$15.00	2014	Collective bargaining
	Portland (seasonal park rangers)	\$15.83	2014	Collective Bargaining
	Multnomah County	\$15.00	2016	Collective bargaining
	Portland (full-time city, contract workers)	\$15.00	2015	City Living Wage Law
Washington State	SeaTac	\$15.00	2014	City Industry Minimum Wage Law
	Seattle	\$15.00	2017	Citywide Minimum Wage Law
	Seattle Central Co-Op Grocery Store	\$15.36	2015	Collective bargaining
	King County (county, contract workers)	\$15.00	2017	Ordinance
Various	Aetna	\$16.00	2015	Company policy

**Table 3.2. Current policy campaigns for \$15 base wages**

State	Jurisdiction or Employer	Wage	Type of Policy	Number of Workers Affected
California	Davis	\$15	Citywide Minimum Wage Law	Not Available
	Los Angeles	\$13.25 to \$15.25	Citywide Minimum Wage Law	609,000 <sup>55</sup>
	Sacramento	\$15	Citywide Minimum Wage Law	Not Available
Delaware	Delaware (fast food & property services)	\$15	State Industry Minimum Wage Law	Not Available
District of Columbia	Washington	\$15	Citywide Minimum Wage Law	Not Available
Illinois	Chicago (public school employees)	\$15	Policy	Not Available
Maine	Portland	\$15	Citywide Minimum Wage Law	Not Available
Massachusetts	Massachusetts (fast food & larger retail)	\$15	State Industry Minimum Wage Law	Not Available
New York	New York	\$11.50 to \$15	State Minimum Wage Law for Certain Cities	1.0 to 1.25 million <sup>56</sup>
Oregon	Oregon	\$15	Statewide Minimum Wage Law	703,000 workers <sup>57</sup>
Washington State	Olympia	\$15	Citywide Minimum Wage Law	Not Available
	Tacoma	\$15	Citywide Minimum Wage Law	Not Available

# 4 Action Recommendations

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As cataloged in this report, the growing momentum and early achievements of the \$15 movement are giving rise to a diverse array of policy initiatives. Federal, state, and local policymakers and private-sector leaders, recognizing the benefits of shifting our economy back toward better-paying jobs, can contribute to this change through steps such as the following:

- 1. Phasing up the minimum wage to \$15.** San Francisco and Seattle led the way with the first citywide \$15 wages. This momentum led Chicago to raise its wage significantly to \$13. And Los Angeles and other major cities are now poised to follow. Mayors and other city leaders, especially in high-cost regions, can join and build this movement by championing increases to phase up their minimum wages to \$15 to over several years. And in states like Oregon, coalitions are campaigning for statewide \$15 minimum wages—proposals that, even if they do not fully prevail, can shift the debate and create momentum for higher statewide wages like the \$12-13 proposals that many states and the Democrats in Congress are now calling for.
- 2. \$15 minimum wages for key low-wage industries such as fast food, large retail, hotels, caregiving, property services, and airport workers.** Growth in major low-paying industries has been driving our economy's tilt toward low-paying jobs. By paying so little, employers in these sectors are forcing taxpayers to pick up the cost of supporting their workforces; they can afford to pay better. Airports such as SeaTac, LAX, SFO, San Jose, Oakland, and St. Louis have already shown that it is feasible to raise pay and benefits to \$15 or more. Los Angeles has raised wages for hotel workers to \$15.37. Washington, D.C. raised pay and benefits for security guards in large office buildings to \$16.71. New York raised wages and benefits for Medicaid-funded home care workers to \$14.09. States and cities can join this movement by raising the minimum wage for key low-wage industries to \$15 or more, as Massachusetts is proposing for fast-food and large retail employers.
- 3. Executive orders or wage laws raising the minimum wage to \$15 for businesses receiving public contracts or subsidies.** Many cities, some states, and the federal government already make it a practice, under living wage or prevailing wage laws, to require employers receiving government contracts or economic development subsidies to pay higher minimum wages. Many of these city and state wage laws already require pay of \$15 or more, but others still do not and may set standards as low as \$10 per hour. Mayors, governors, and the federal government should adopt executive orders or wage laws to raise pay for employers benefiting from taxpayer-funded contracts or subsidies to at least \$15 plus benefits.
- 4. Raising wages for low-paid city, state, or federal employees to \$15.** Many state or city employees, such as school aides, human services workers, property service workers, and food service workers, perform vital public functions yet earn well under \$15 per hour. Through either executive action, or as part of negotiating collective bargaining agreements with public workers, mayors and governors can tackle this problem by raising pay for public workers to at least \$15, as the Los Angeles Unified School District and the City of Portland have done.
- 5. Raising private-sector pay scales to \$15.** Employers such as Aetna and the Johns Hopkins Hospital are leading the way for the private sector by acting to raise their minimum company pay scales to \$15 or more. They are finding that raising pay at the bottom helps retain a stable and motivated workforce, with significant productivity benefits for the company and the nation's economy. Other private companies and major institutions should follow their example, creating momentum to raise standards in their industries and make a broader shift toward investing in better jobs.

# Appendix A: Technical Notes

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## **Estimating the share of workers making less than \$15 per hour**

The bulk of our analysis in this study uses data from the Current Population Survey (CPS), the primary government survey containing information on wages, hours, and unionization rates. The CPS is a monthly national survey of approximately 60,000 households that is representative of the U.S. non-institutional population aged 16 and older. We used the Current Population Survey Merged Outgoing Rotation Groups (CPS ORG) files made publicly available by the Center for Economic and Policy Research. In order to have a sample sufficiently large to analyze specific occupations and industries, our analysis combines data from the last three consecutive years available (2012-2014). We use wage variables in which all values have been converted to 2014 dollars.

Our sample includes private- and public-sector, hourly and salaried workers between the ages of 16 and 64. We exclude non-incorporated, self-employed workers. For non-hourly workers, hourly wages are calculated using reported hours worked. Unless otherwise noted, the figures we report are calculated from hourly earnings that do not include tips, overtime, and commission. Note that there is a tendency for workers to report hourly earnings in round numbers, which causes percentiles of the distribution to “clump” at whole-dollar values. Our analysis does not “smooth” wages to correct for this source of measurement error. For calculations involving wages, we only include respondents for whom wage data are available. For calculations involving occupations and industries, we only include respondents for whom occupation and industry data are available.

## **Demographic estimates**

Racial/ethnic categories used in this analysis are mutually exclusive. “Latino” in our demographic tables refers to individuals who report that they belong to Spanish, Hispanic, or Latino categories. These respondents may also select more than one race. As such, the three racial/ethnic categories we report are white, non-Latino; African American, non-Latino; and Latino, any race.

Percentages reported with regard to demographic and wage variables are calculated using CPS-provided population weights.

## **Employment level estimates**

We supplement our CPS analysis with analysis of data from the Occupational Employment Statistics survey, which is a Bureau of Labor Statistics establishment survey that provides more reliable estimates of employment levels than the CPS. The OES only reports wage levels at the following percentiles: 10th, 25th, 50th, 75th, and 90th. In order to estimate the minimum number of workers in each occupation, we identified the first reported percentile at which wages were below \$15 per hour. Note that the wage measure in the OES survey includes tips and commission but excludes overtime.

## **Estimating unionization rates**

The CPS asks whether respondents are union members or covered by a union or employee association contract because it is possible to be represented by a labor union and to be covered by a collective bargaining agreement, but not be a member of that union. We define union workers as respondents who answer affirmatively to being a member of, or being represented by, a union at their current job.

## **Defining front-line occupations**

Food service and drinking places includes workers classified in the Census two-digit detailed industry recode as “food service and drinking places” (46), and in the occupations listed in the Table 2.1 (Occupation codes 4110, 4000, 4020, 4030, 4040, 4050, 4130, 4140, 4150, 4720).

For simplicity, we combined the occupation categories “food prep and serving related, all other” (4050) and “combined food prep and serving” (4130) into a category we labeled “other preparation and serving-related workers.” We report on “combined food prep and serving” separately in the Table 2.12, which reports figures on front-line fast-food workers.

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For fast-food restaurants, we likewise include workers classified in the two-digit detailed industry recode as “food service and drinking places” (46). Following previous studies, we used the following occupations as a proxy for fast-food workers as a whole: “combined food preparation and serving workers, including fast food” (4050), “counter attendants, cafeteria, food concession, and coffee shop” (4060) and “cashiers” (4720).

For retail, we included the largest occupations (4720, 4760, 5620, 9620) in the category “retail trade” (two-digit industry code 22).

For home care, we included workers classified in the “home health services” four-digit industry code (8170), who reported working in one of the following two occupations: “nursing, psychiatric, and home health aides” (3600) and “personal care aides” (4610).

For automobile manufacturing, we included workers classified in the category “motor vehicles and motor

vehicle equipment manufacturing” (four-digit industry code 3570) as “miscellaneous assemblers and fabricators” (7750).

For child care, we included all workers in all industries who reported that their occupation was “child care worker” (4600).

For hotels, we included all workers in the category “accommodation” (four-digit industry code 8660), and the following largest non-managerial occupations: (4220) janitors and building cleaners; (4110) waiters and waitresses; (4230) maids and housekeeping; and (5300) hotel motel and resort desk clerks.

## Appendix B: Tables

Table B.1. Estimates of workers making less than \$15 per hour, by state		
State	<\$15	Median Wage
Arkansas	51.0%	\$14.71
Mississippi	50.5%	\$14.79
Tennessee	49.8%	\$15.00
Montana	49.8%	\$15.00
Kentucky	49.5%	\$15.00
South Dakota	49.0%	\$15.00
Idaho	48.4%	\$15.19
South Carolina	47.8%	\$15.30
Louisiana	47.7%	\$15.30
North Carolina	47.5%	\$15.42
Nevada	47.3%	\$15.30
Texas	47.0%	\$15.52
Alabama	46.7%	\$15.52
New Mexico	46.7%	\$15.52
Oklahoma	46.5%	\$15.42
Nebraska	46.2%	\$15.52
West Virginia	46.1%	\$15.81
Arizona	45.3%	\$15.92
Georgia	45.3%	\$16.00
Iowa	45.0%	\$15.91
Florida	45.0%	\$16.00
Kansas	45.0%	\$15.99
Utah	45.0%	\$16.00
Indiana	44.9%	\$15.71
Ohio	44.8%	\$15.87
Maine	44.4%	\$16.00
Michigan	44.1%	\$16.32
Missouri	43.6%	\$16.32
Wisconsin	41.8%	\$16.83
California	40.9%	\$17.35

**Table B.1. Estimates of workers making less than \$15 per hour, by state (continued)**

State	<\$15	Median Wage
Oregon	40.8%	\$17.02
Illinois	40.8%	\$17.34
Pennsylvania	40.6%	\$17.10
Hawaii	40.4%	\$17.16
North Dakota	39.8%	\$16.92
Delaware	39.8%	\$17.59
Rhode Island	39.4%	\$17.83
Vermont	39.1%	\$17.16
Wyoming	38.4%	\$17.50
New York	38.4%	\$18.25
Virginia	36.9%	\$18.95
Colorado	36.4%	\$18.48
Minnesota	36.1%	\$18.54
New Hampshire	36.0%	\$18.46
Washington State	35.9%	\$18.75
New Jersey	35.8%	\$19.61
Maryland	33.8%	\$19.90
Massachusetts	33.6%	\$20.09
Alaska	33.5%	\$19.02
Connecticut	33.4%	\$20.40
Washington DC	25.8%	\$24.73

Source: NELP calculations from Current Population Survey Merged Outgoing Rotation Group files 2012-2014.

**Table B.2. Largest occupations with median wages less than \$15 per hour**

	Employment	Minimum # workers <\$15	Median wage	Median annual earnings
1. Retail Salespersons*	4,562,160	3,421,620	\$10.29	\$21,390
2. Cashiers	3,398,330	3,058,497	\$9.16	\$19,060
3. Combined Food Preparation and Serving Workers, Including Fast Food*	3,131,390	2,818,251	\$8.85	\$18,410
4. Office Clerks, General	2,889,970	1,444,985	\$13.78	\$28,670
5. Waiters and Waitresses	2,445,230	2,200,707	\$9.01	\$18,730
6. Laborers and Freight, Stock, and Material Movers, Hand*	2,400,490	1,200,245	\$11.74	\$24,430
7. Janitors and Cleaners, Except Maids and Housekeeping Cleaners*	2,137,730	1,603,298	\$10.98	\$22,840
8. Stock Clerks and Order Fillers	1,878,860	1,409,145	\$10.99	\$22,850
9. Nursing Assistants*	1,427,740	1,070,805	\$12.07	\$25,100
10. Personal Care Aides*	1,257,000	1,131,300	\$9.83	\$20,440
11. Team Assemblers	1,125,160	1,012,644	\$13.64	\$28,370
12. Cooks, Restaurant*	1,104,790	828,593	\$10.81	\$22,490
13. Security Guards	1,077,520	538,760	\$11.74	\$24,410
14. Receptionists and Information Clerks*	981,150	490,575	\$12.87	\$26,760
15. Maids and Housekeeping Cleaners*	929,540	836,586	\$9.67	\$20,120
16. Landscaping and Groundskeeping Workers*	868,770	651,578	\$11.68	\$24,290
17. First-Line Supervisors of Food Preparation and Serving Workers	867,340	433,670	\$14.21	\$29,560
18. Construction Laborers*	852,870	426,435	\$14.95	\$31,090
19. Food Preparation Workers	850,220	765,198	\$9.40	\$19,560
20. Home Health Aides*	799,080	719,172	\$10.28	\$21,380
21. Light Truck or Delivery Services Drivers	797,010	398,505	\$14.21	\$29,570
22. Packers and Packagers, Hand	693,170	519,878	\$9.77	\$20,330
23. Shipping, Receiving, and Traffic Clerks	661,530	330,765	\$14.39	\$29,930
24. Substitute Teachers	622,600	311,300	\$12.60	\$26,200

**Table B.2. Largest occupations with median wages less than \$15 per hour (continued)**

	Employment	Minimum # workers <\$15	Median wage	Median annual earnings
25. Medical Assistants	584,970	292,485	\$14.41	\$29,960
26. Childcare Workers*	582,970	524,673	\$9.48	\$19,730
27. Bartenders	579,700	434,775	\$9.16	\$19,050
28. Cooks, Fast Food	519,910	467,919	\$8.91	\$18,540
29. Tellers	514,520	385,890	\$12.38	\$25,760
30. Dishwashers	502,280	452,052	\$9.03	\$18,780
31. Bus Drivers, School or Special Client	499,440	249,720	\$13.87	\$28,850
32. Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	476,470	428,823	\$9.01	\$18,740
33. Counter and Rental Clerks	437,610	218,805	\$11.47	\$23,860
34. Helpers—Production Workers	420,520	315,390	\$11.35	\$23,610
35. Dining Room and Cafeteria Attendants and Bartender Helpers	410,460	369,414	\$9.02	\$18,760
36. Driver/Sales Workers	405,810	202,905	\$10.70	\$22,250
37. Cooks, Institution and Cafeteria	402,800	302,100	\$11.27	\$23,440
38. Packaging and Filling Machine Operators and Tenders	381,760	190,880	\$12.70	\$26,410
39. Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	372,670	335,403	\$9.00	\$18,720
40. Pharmacy Technicians	368,760	184,380	\$14.33	\$29,810

Source: NELS calculations from May 2014 OES; 2012 BLS Employment Projections. Note: All dollar values in 2014 dollars. OES wage measures include tips and commission but not overtime. Asterisk denotes occupations in the top 30 of occupations projected to have the most net growth between 2012-2022.

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