
DATA BRIEF:

RETAIL JOBS TODAY

January 2016



EXECUTIVE SUMMARY

“Retail salesperson” is now the most common occupation in the country.¹ One in ten workers – over 16 million people – are employed in retail, and the industry is projected to continue keeping pace with the economy as a whole for the next decade.² Understanding the challenges and opportunities for employment in the enormous retail sector requires a nuanced analysis of wages, hours and demographics across the industry’s occupations and subsectors. This data brief provides this critical analysis of retail employment, and then focuses on the relationship between wage levels and the race and gender demographics of common occupations in three of the largest subsectors of the retail industry: general merchandise, food and beverage, and home and garden.

Despite troubling trends of low wages, few benefits and unpredictable, part-time work schedules across the enormous retail sector as a whole, a closer analysis of different business types within the industry reveals pockets of higher-paying jobs with greater career opportunity. Yet across retail subsectors, gender and racial disparities are widespread: Women and people of color disproportionately staff the lowest paid jobs, while white men disproportionately staff the highest paid management positions.

KEY FINDINGS

LOW WAGES IN GENERAL MERCHANDISE: General merchandise retailers, which include big-box stores, department stores, and discount stores, are now some of the largest employers in the world. Yet wages across frontline general merchandise occupations remain low: over 90% of workers in these positions earn below \$15 per hour. And underemployment persists: 49% of part-time workers in general merchandise would like to work full-time. Opportunities are present if workers can advance in their stores—half of all first-line supervisors earn over \$17 per hour—but, people of color face barriers to equal access to advancement opportunities.

GENDER INEQUALITY BUT POSSIBLE CAREER PATHWAYS IN GROCERY: Although median wages for common positions such as packers and cashiers remain low in the food and beverage subsector, there are strong opportunities for earnings mobility within positions such as stock workers and first-line supervisors. However, though women make up 60% of first-line supervisors, they hold only 18% of higher store management positions.

HIGHER WAGES YET RACIAL AND GENDER DISPARITIES IN HOME AND GARDEN STORES: The home and garden subsector has the highest wages for retail salespersons and cashiers out of any store type (other than auto dealers), yet the subsector employs a lower share of people of color than other types of retail, with people of color holding less than a quarter of all positions. In addition, people of color are disproportionately employed as cashiers, holding 35% of those positions, and are underrepresented in higher-paying retail salesperson and management positions, holding only 20% of retail salesperson jobs and 18% of management jobs. Women also face tremendous barriers in the home and garden subsector: they are a third of the workforce, yet 74% of the cashiers and 12% of the management.

LOW WAGES AND OCCUPATIONAL SEGREGATION FOR CASHIERS: Across all subsectors, cashiers consistently have the lowest pay out of all major occupations within the retail industry, with 90% of all cashiers earning less than \$13.30 an hour. Women and people of color are disproportionately employed as cashiers; for example, women comprise four in five cashier jobs in general merchandise stores.

PROSPECTS IN THE SHIFT TO ONLINE RETAILING: While online-only retailers employ less than a quarter of a million people, the online retail workforce is expected to grow by almost 50% in the next decade. E-commerce sales were up more than 15% in November 2015 from one year prior, compared to only a 1% increase in all retail sales.³ The burgeoning online retail sector, set to affect the rest of the retail industry, has higher pay for entry-level positions such as retail salesperson, and over 10% of positions in online stores are management jobs. Thus, as the sector grows and exerts greater influence on the industry, it may help establish a better model for frontline worker pay. However, it is an imperative that online retailing does not repeat the low-wage models of other retail subsectors and instead continues its path of higher wages for workers.

CONCENTRATED OPPORTUNITIES FOR RETAIL SALES WORKERS: Retail salesperson positions receive higher pay in stores that sell higher-value items, such as cars, appliances, and home furnishings. For example, over half of retail salespersons in automotive stores earn over \$16 per hour. These employment opportunities may be obscured if the retail sector is only considered as a whole. But these same stores employ a greater proportion of white men, who hold higher-paid positions.

INCREASED DEMAND FOR CUSTOMER SERVICE REPRESENTATIVES: Customer service representatives (CSRs) will play a greater role throughout the retail industry with CSR jobs expected to increase by 11% in the retail industry (compared to 2% growth for cashiers, 5% for stock clerks, and 7% for retail salespersons).⁶ Though CSRs have one of the largest wage distributions in brick-and-mortar retail, CSRs employed at online-only outfits have a median wage of \$14.00, so as more retailers strive to compete with online stores, the share of higher-paying CSR positions will likely increase.

INVESTING IN THE RETAIL WORKFORCE

Given the industry's importance in the American economy, the retail sector must chart a new path away from its current, alarming patterns of poor job quality and racial and gender disparities. The retail industry can offer quality career paths toward sustaining, stable employment—and those better quality jobs should be accessible and available to women and people of color.

The brief recommends the following steps:

- ✓ **RAISE THE FLOOR** - Companies with consistently low wages across frontline positions must raise wages and improve scheduling practices and working conditions.
- ✓ **DIVERSIFY THE WORKFORCE** - Employers in higher-paying subsectors should make a concerted effort to expand hiring to reach more women and people of color for positions across the career ladder.
- ✓ **BUILD THE LADDER** - Employers should create internal career pathways and invest in their workforce by providing cross-training across job duties and responsibilities, and for specialized positions.

The retail industry employs millions of Americans and significantly contributes to social and economic inequality in the United States through stagnant wages, gender and racial disparities, and lack of opportunities for upward mobility. However, if the retail industry can change, it will change the lives of millions of working families and make a huge impact on the economy as a whole.

DATA BRIEF: RETAIL JOBS TODAY

INTRODUCTION

Driven by consumer spending, the retail sector plays a large and growing role in America's service-based economy. Retail jobs cannot be discounted in assessing opportunities for employment today. Already over 16 million workers—one in ten in the private sector—are employed in retail, and the industry is projected to increase jobs by 5% between 2014 and 2024, keeping pace with the economy as a whole.⁴ "Retail Salesperson" is now the most common occupation in the country.⁵ But deteriorating employment conditions in the retail sector have helped contribute to inequality nationwide.⁶ Too many retail jobs are low-wage, no-growth positions without benefits. Over three-quarters of hourly jobs in retail pay \$15 per hour or less.⁷ Yet over four million hourly retail jobs pay over \$15 per hour, enough for workers to provide for themselves and their families and save for the future.⁸ The presence of these higher-paid jobs demonstrates that business can be conducted with greater workforce investment in human capital and job quality within the retail sector.

A closer analysis of the industry finds that these employment opportunities are often more concentrated within specific retail subsectors, such as home and garden stores, home furnishing stores, and car dealers. Conversely, certain subsectors, such as clothing stores and large supercenters, have a higher concentration of low-quality jobs, even as several successful companies in these sectors resist this downward trend. Based on this granular exploration of employment within the retail sector, this brief identifies areas of better job quality within the industry. It underscores the need to improve workforce development approaches to ensure equal access to quality job opportunities with stable, full-time employment. Rebuilding career ladders in retail that provide opportunities for workers to achieve economic stability requires sector-specific workforce development strategies along with tackling the challenge of raising job standards, raising wages, and improving benefits and work schedules.

OCCUPATIONAL AND SECTORAL DIFFERENCES IN THE RETAIL INDUSTRY

The retail industry ranges from grocery stores to car dealerships to supercenters to furniture stores that sell everything from discount goods to high-priced luxury items. This data brief begins with an exploration of the demographics and wage levels across the retail industry, identifying challenges for workforce development, such as occupational and sectoral segregation, as well as opportunities, including high-quality jobs with pathways to mobility. It finds that sectors and occupations with greater median wages and more stable work hours employ lower percentages of people of color and women. This brief then focuses on the relationship between wage levels and the race and gender demographics of common occupations in three of the largest types of retail stores: general merchandise, food and beverage, and home and garden.

This brief uses wage levels and occupations as indicators of opportunity across the retail sector. But there are several related dimensions of job quality that should be studied further to complement the analysis presented here, including access to benefits, job training, job tenure, and scheduling practices. These dimensions of job quality are profoundly intertwined and often determine income and career mobility in the retail sector. For example, workers within the retail sector often end up having to leave their jobs in order to seek more secure employment because they are unable to make ends meet with fluctuating work hours.

The retail industry can achieve its full potential as a source of quality, sustainable employment for millions of Americans. **To do so, retail employers and the industry at large must pursue four interconnected workforce development strategies:**

1 RAISE THE FLOOR Steps to ensure the economic security of the millions of workers employed in retail should include family-sustaining wages; affordable benefits, predictable, equitable schedules; and full-time work for those who want it. Across the retail industry, but especially in certain subsectors such as clothing retailers and supercenters with consistently low wages in frontline positions, employers must take these steps to improve job quality. State and city policymakers are also leading the way to raise workplace standards, pursuing policies to raise wages to \$15 per hour, secure improved work schedules, and guarantee earned sick time. This regulatory and public pressure, a tightening labor market, and the growing recognition that a more engaged workforce enhances profit-making and operational success have led several major employers to take steps to raise their wages and improve work schedules. Creating higher-paying, more secure retail jobs with greater opportunities for mobility will boost the economy, as the low-income retail workforce will likely use any additional earnings to cover basic expenses.

2 DIVERSIFY THE WORKFORCE Employers in subsectors that have a solid base of higher wages for frontline positions, such as home and garden supply stores or automobile dealers, should make a concerted effort to expand hiring and training to reach more women and people of color for positions across the career ladder, including entry-level positions. To accomplish this, employers should consider recruitment strategies and venues that reach into untapped communities, remove unnecessary barriers to employment for formerly incarcerated workers, establish family-friendly policies that support workers with care giving responsibilities and develop more robust training programs for entry-level and early-career workers. Throughout the retail industry, but especially in the grocery subsector, employers should ensure that women and people of color are equally represented in management positions. Retailers can also use their workforce management technologies to ensure that women and workers of color are not experiencing the brunt of unsustainable work schedules and are advancing within a company.

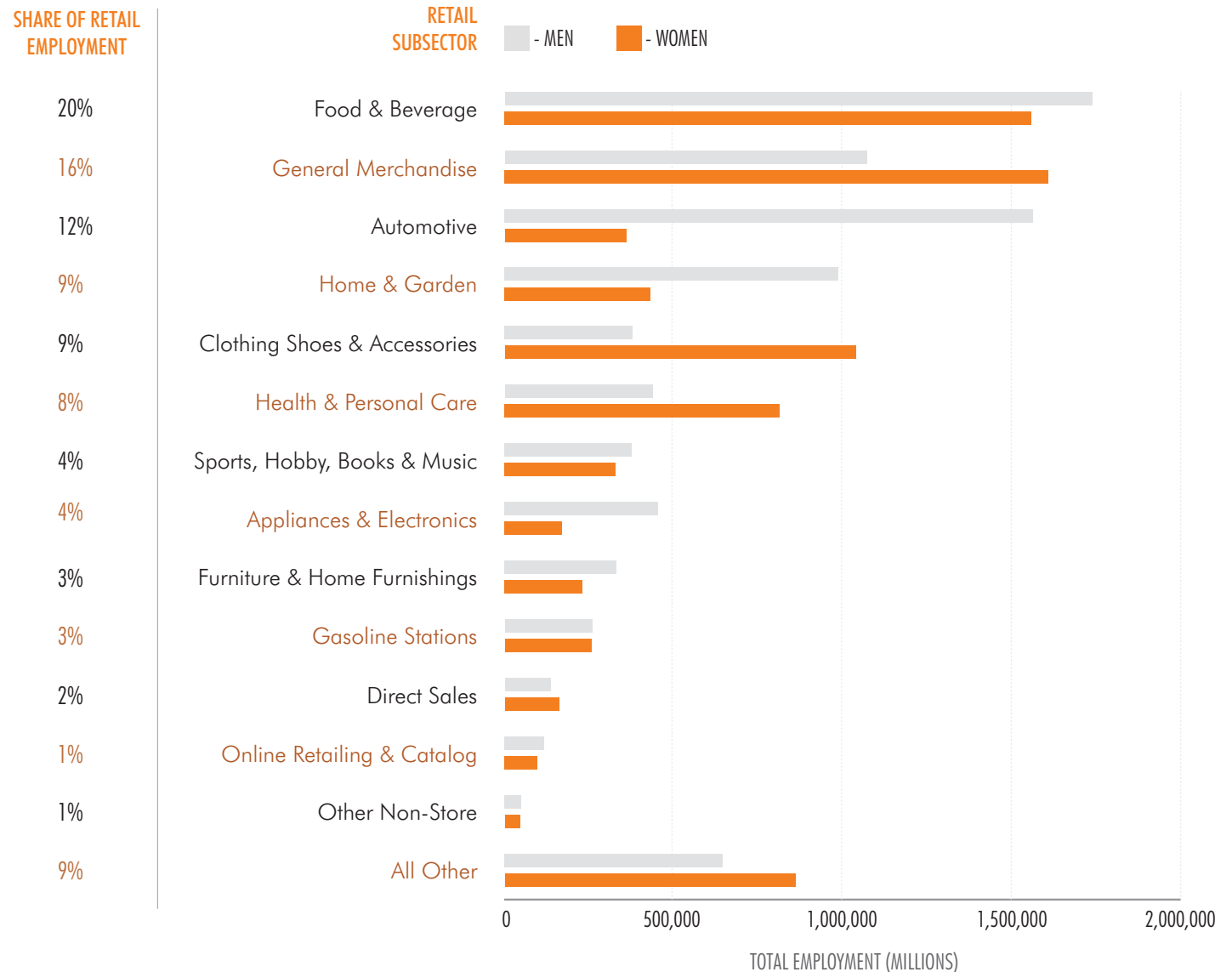
3 BUILD THE LADDER Employers should invest in building and opening up lifelong career opportunities within retail through greater on-the-job training. As conditions improve and turnover levels drop, employers should continue to invest in their workforce by ensuring that retail associates have access to upskilling and cross-training in order to advance to specialized positions in the company, where years of industry experience can be a strong driver of sales. Treating cashiers as a resource base to staff other positions will help build career pathways for workers, especially women, to stay in retail longer and to advance to management positions. With the Workforce Innovation and Opportunity Act (WIOA), there are new opportunities for greater investment in sector-specific skills training and industry partnerships that engage diverse stakeholders and integrate service provision. Employers should partner with workforce development programs to assess their labor needs and develop customized training that not only equips workers with high-demand skills but also could increase their prospects for employment and mobility in the industry and labor force more broadly.

THE RETAIL WORKFORCE: GENDER

One in five retail employees works in the food and beverage subsector, mostly in grocery stores, with a small number in liquor stores and specialty food stores. The next largest retail subsector is general merchandise stores, which includes department stores and supercenters (where groceries are included alongside a large variety of other items). The third largest subsector, motor vehicle and part dealers, covers 12% of all retail jobs (Fig. 1).

While women and men make up nearly equal shares of employment across the retail industry as a whole (48% and 52%, respectively), subsector analysis reveals a different picture. Grocery stores and other food/beverage retail, the industry's largest subsector, employs relatively even numbers of men and women. But 80% of workers in auto-related retail are men, while 73% of clothing and accessory jobs go to women. Department stores and supercenters have a 60% female workforce (Fig. 1). Overall, women are more likely to work in lower-paid retail jobs with few benefits and advancement opportunities, while men are more likely to have higher-paid retail careers.

FIG. 1 | GENDER GAPS IN THE RETAIL INDUSTRY



THE RETAIL WORKFORCE: RACE

People of color are also concentrated in the same types of stores that employ disproportionate numbers of women. While 35% of the retail workforce are people of color, they make up 45% of all workers in the apparel sector but only 24% of workers in the home and garden sector. White workers are overrepresented in automotive stores, furniture and home furnishing stores, and sports and hobby stores. Food and beverage stores, the largest source of employment within the sector, employ both people of color and women at the same rate they are employed in the retail industry overall (Fig. 2).

FIG. 2 | DEMOGRAPHICS OF THE RETAIL WORKFORCE

RETAIL SUBSECTOR	TOTAL	LATINO	BLACK	ASIAN	MIXED	WHITE	MEN	WOMEN
Food & Beverage	3.3m	18%	11%	7%	2%	62%	53%	47%
General Merchandise	2.7m	18%	18%	4%	3%	57%	40%	60%
Automotive	1.9m	16%	8%	3%	2%	70%	81%	19%
Home & Garden	1.4m	13%	7%	2%	3%	76%	69%	31%
Clothing, Shoes & Accessories	1.4m	23%	13%	6%	3%	55%	27%	73%
Health & Personal Care	1.3m	14%	10%	11%	3%	62%	35%	65%
Sports, Hobby, Books & Music	715,000	13%	7%	3%	3%	75%	53%	47%
Appliances & Electronics	635,000	18%	9%	8%	2%	63%	72%	28%
Furniture & Home Furnishings	570,000	15%	6%	4%	2%	73%	59%	41%
Gasoline Stations	527,000	13%	10%	12%	3%	62%	50%	50%
Direct Sales	310,000	13%	10%	1%	3%	73%	46%	54%
Online Retailing	225,000	14%	6%	12%	3%	64%	54%	46%
Non-Store incl. Catalog & Electronic Auction	105,000	9%	9%	8%	3%	71%	52%	48%
All Other	1.5m	16%	9%	5%	2%	68%	43%	57%
TOTAL	16.6m	17%	11%	5%	3%	65%	52%	48%

*Row totals may not sum to 100% due to rounding.

THE RETAIL WORKFORCE: OCCUPATIONS

The largest occupations both within the retail industry and the economy as a whole are sales-related positions, such as retail salesperson or cashier (Fig. 3). In grocery stores, the auto industry, and health stores, the most prevalent occupations also include food prep workers, repair mechanics, drivers, and pharmacists or pharmacy aids. Administrative workers such as stock room workers, customer service representatives, and shipping clerks make up a significant part of employment in the industry, with high rates of concentration in general merchandise stores as well as online retailing.

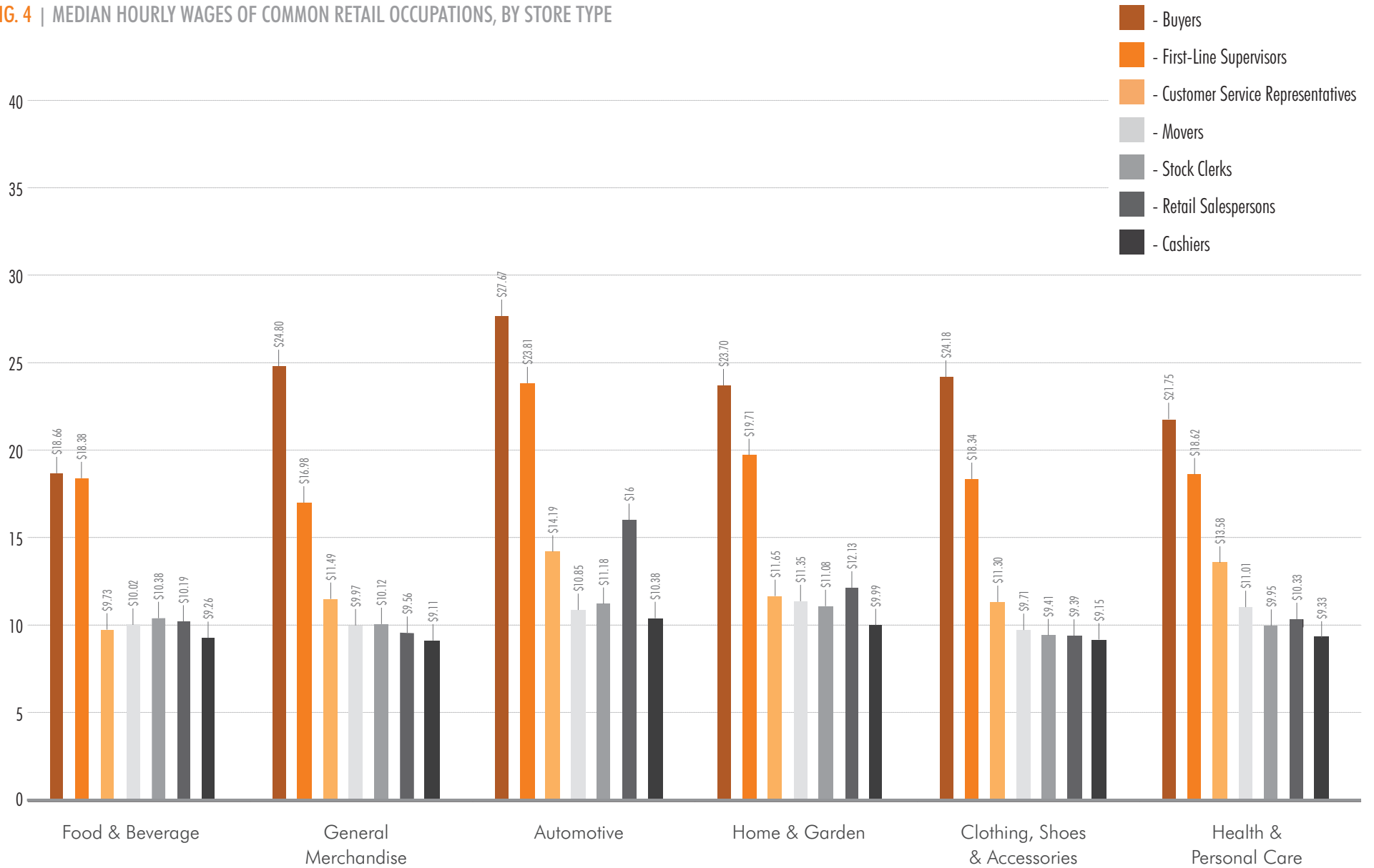
FIG. 3 | OCCUPATIONAL TYPE AS SHARE OF EMPLOYMENT

RETAIL SUBSECTOR	TOTAL EMPLOYMENT	MANAGEMENT	SALES	ADMINISTRATIVE (e.g. Stock/Shipping)	TRANSPORTATION (e.g. Packers/Movers)	OTHER (e.g. Health Practitioners/ Repairs/Janitorial/Arts & Design)
Food & Beverage	3.3m	2%	49%	17%	11%	21%
General Merchandise	2.7m	2%	55%	25%	6%	12%
Automotive	1.9m	6%	42%	12%	13%	27%
Home & Garden	1.4m	4%	53%	18%	11%	13%
Clothing, Shoes & Accessories	1.4m	3%	72%	13%	2%	11%
Health & Personal Care	1.3m	3%	42%	8%	2%	45%
Sports, Hobby, Books & Music	715,000	5%	64%	15%	2%	14%
Other	660,000	4%	58%	12%	8%	19%
Appliances & Electronics	635,000	6%	58%	12%	3%	21%
Furniture & Home Furnishings	570,000	5%	55%	13%	8%	19%
Gasoline Stations	527,000	3%	66%	8%	11%	12%
Online Retailing	225,000	10%	34%	25%	6%	25%

*Row totals may not sum to 100% due to rounding.

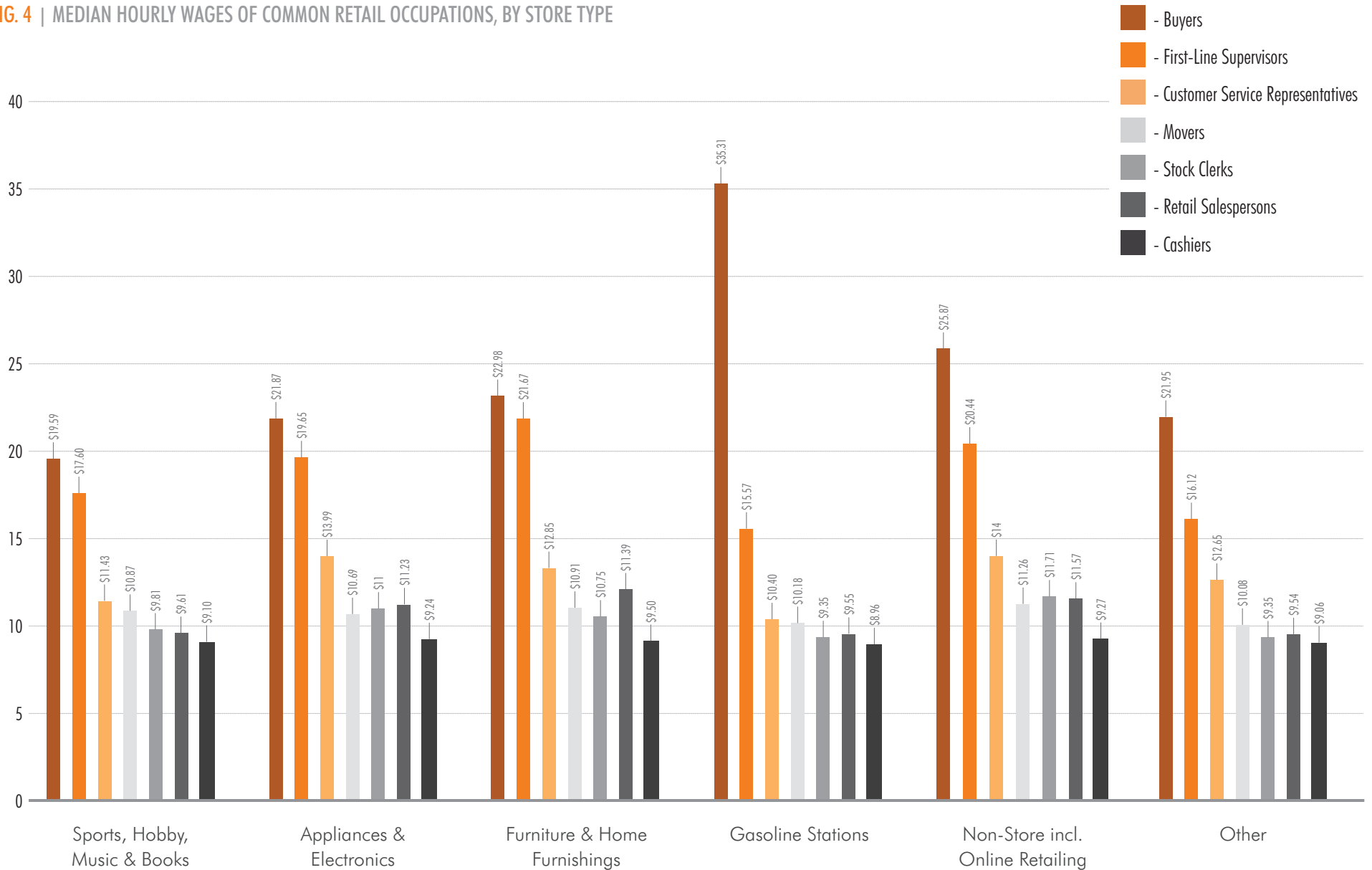
THE RETAIL WORKFORCE: WAGES ACROSS SUBSECTORS AND OCCUPATIONS

FIG. 4 | MEDIAN HOURLY WAGES OF COMMON RETAIL OCCUPATIONS, BY STORE TYPE



THE RETAIL WORKFORCE: WAGES ACROSS SUBSECTORS AND OCCUPATIONS

FIG. 4 | MEDIAN HOURLY WAGES OF COMMON RETAIL OCCUPATIONS, BY STORE TYPE



THE RETAIL WORKFORCE: WAGES ACROSS THE INDUSTRY

CHALLENGE

LOW WAGES FOR CASHIERS: Across the retail sector, cashiers consistently have the lowest pay out of all major occupations within the industry (Fig. 4). Women and people of color are disproportionately employed as cashiers, even in subsectors that are otherwise dominated by white and male workers. With its integral customer-facing role, and the potential to make or break customer shopping experiences, companies must do more to ensure that cashiers are paid higher wages. In addition, reducing turnover and encouraging longevity in the job by coupling higher wages with cross-training can increase customer satisfaction at the check-out line, as more experienced employees can help make the purchasing experience run more smoothly.

OPPORTUNITY

CONCENTRATED OPPORTUNITIES FOR RETAIL SALES WORKERS: Retail salesperson positions receive higher pay in stores that sell higher-value items, such as cars, appliances, and home furnishings. For example, over half of retail salespersons in automotive stores earn over \$16 per hour. These employment opportunities may be obscured if the retail sector is only considered as a whole. But these same stores employ a greater proportion of white men, who hold higher-paid positions. Increasing diversity and focusing job placement activities on sectors that already pay high wages should be a key component of workforce development investments, and can help workforce retention.

OPPORTUNITY

PROSPECTS IN THE SHIFT TO ONLINE RETAILING: While online-only retailers employ less than a quarter of a million people, the online retail workforce is expected to grow by almost 50% in the next decade. Furthermore, all types of retail stores are moving to complement their brick-and-mortar operations with online sales. Online sales were up more than 15% in November 2015 from one year prior, compared to only a 1% increase in all retail sales.⁹ At present, online-only stores employ fewer Black and Latino workers than the industry overall (20% compared to 28%) but twice the share of Asians (12% compared to 5%). Wages for frontline positions in online retailing are higher than for corresponding positions in big-box retail and department stores, grocery stores, or clothing and accessories stores, but as of now, these higher-paying jobs remain relatively few in number.

OPPORTUNITY

INCREASED DEMAND FOR CUSTOMER SERVICE REPRESENTATIVES: Customer service representatives (CSRs) will play a greater role throughout the retail industry, with CSR jobs expected to increase by 11% in the retail industry (compared to 2% growth for cashiers, 5% for stock clerks, and 7% for retail salespersons).¹⁰ CSRs have one of the largest wage distributions in retail, earning more than other frontline positions in comparatively low-wage subsectors such as general merchandise stores or clothing stores, but less than other frontline positions in subsectors like home and garden stores and grocery stores, which employ a sizable number of CSRs. And CSRs employed at online-only outfits have a median wage of \$14.00, so as more retailers strive to compete with online stores, the share of higher-paying CSR positions will likely increase.



THE RETAIL WORKFORCE SPOTLIGHT ON GENERAL MERCHANDISE STORES | TOTAL EMPLOYMENT: 2.7 MILLION

General merchandise retailers, which include big-box stores, department stores, and discount stores, are now some of the largest employers in the world, demonstrating significant industry consolidation. Yet wages across frontline general merchandise occupations remain low: over 90% of workers in the largest occupations earn below \$15 per hour.

Opportunities are present if workers can advance in their stores — half of all first-line supervisors of retail workers earn over \$17 per hour. But general merchandise stores have high levels of occupational segregation both by race and gender. People of color make up 50% of cashiers and 43% of retail sales workers, but only 34% of first-line supervisors. Employers must invest in training programs to diversify these advanced positions.

Furthermore, to create real opportunity within big-box stores and department stores, employers should commit to elevating job standards. Several major employers have announced that they will raise starting wages for entry-level positions. This is a step in the right direction. Simultaneously, as more shipping-related positions are created within the sector, employers should take advantage of this industry change to try new strategies to diversify the workforce and create advancement opportunities.

29.5 AVERAGE NUMBER OF HOURS WORKED WEEKLY

16% OF HOURLY WORKERS IN THIS SUBSECTOR ARE INVOLUNTARILY PART-TIME

31% OF HOURLY WORKERS ARE PART-TIME

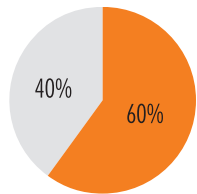
26% OF MEN ARE PART-TIME

35% OF WOMEN ARE PART-TIME

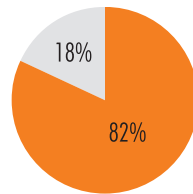
49% OF HOURLY PART-TIME WORKERS IN THIS SECTOR WOULD PREFER TO WORK FULL-TIME

GENDER DEMOGRAPHICS OF GENERAL MERCHANDISE OCCUPATIONS

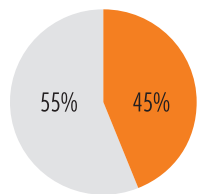
■ - MEN ■ - WOMEN



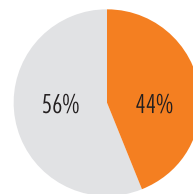
ALL GENERAL MERCHANDISE JOBS - Across all occupations, women outnumber men three to two in department stores and supercenters. Yet lower-paying positions have an even greater concentration of women than this store-wide rate.



CASHIER - Women are employed in four out of five cashier jobs, the lowest paid position in general merchandise stores. A quarter of all women employed in general merchandise stores work as cashiers. 90% of all cashiers earn less than \$13.30 an hour, implying there is very little mobility in this job.



MANAGER - Up the ladder, women are under represented as general and operating managers in department stores and big-box retail. These positions would be a strong opportunity for women to build a retail career, since 50% of general managers earn over \$35 per hour.



STOCK CLERK - Stock clerk is the most common occupation for men in the general merchandise sector. While median pay for stock worker jobs is still low, it is over 11% higher than median wage for cashiers and nearly 6% higher than wages for retail sales workers. 10% of stock workers make over \$15 per hour. But fewer stock jobs go to women, making it difficult for them to access these higher-paying jobs.

By 2024, this sector is projected to add a net 263,000 more jobs, an increase of over 8%. Jobs related to online retailing, such as packers, are projected to grow the fastest, by up to 30%.¹¹



THE RETAIL WORKFORCE SPOTLIGHT ON GENERAL MERCHANDISE STORES | TOTAL EMPLOYMENT: 2.7 MILLION

OCCUPATION:	CASHIER	RETAIL SALESPERSON	MOVER	STOCK CLERK
WAGE DISTRIBUTION BY OCCUPATION: 	<p>Hourly Wage</p> <p>10th 25th 50th 75th 90th</p> <p>Percentile</p> <p>\$7.95</p> <p>\$13.30</p>	<p>10th 25th 50th 75th 90th</p> <p>\$8.07</p> <p>\$14.45</p>	<p>10th 25th 50th 75th 90th</p> <p>\$8.14</p> <p>\$14.84</p>	<p>10th 25th 50th 75th 90th</p> <p>\$8.13</p> <p>\$15.05</p>
TOTAL # OF EMPLOYEES:	630,000	960,000	130,000	510,000
RACIAL DEMOGRAPHICS BY OCCUPATION: <ul style="list-style-type: none"> - Latino - White - Black - Asian - Mixed - Native American/ Pacific Islander 	<p>50%</p>	<p>57%</p>	<p>56%</p>	<p>53%</p>



THE RETAIL WORKFORCE SPOTLIGHT ON GENERAL MERCHANDISE STORES | TOTAL EMPLOYMENT: 2.7 MILLION

OCCUPATION:	CUSTOMER SERVICE REPRESENTATIVE	MERCHANDISE DISPLAYER	FIRST-LINE SUPERVISOR	GENERAL/OPERATIONS MANAGER
WAGE DISTRIBUTION BY OCCUPATION: 				
TOTAL # OF EMPLOYEES:	50,000	14,000	233,000	28,000
RACIAL DEMOGRAPHICS BY OCCUPATION: <ul style="list-style-type: none"> - Latino - White - Black - Asian - Mixed - Native American/ Pacific Islander 		<p style="text-align: center; background-color: #f0f0f0; padding: 20px;">RACE DATA NOT AVAILABLE</p>		<p style="text-align: center; background-color: #f0f0f0; padding: 20px;">RACE DATA NOT AVAILABLE</p>

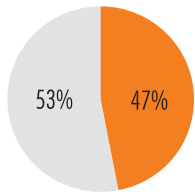


THE RETAIL WORKFORCE SPOTLIGHT ON **FOOD & BEVERAGE STORES** | TOTAL EMPLOYMENT: 3.3 MILLION

Food and beverage retailers, mostly grocery stores along with specialty food stores and wine and liquor stores, employ more workers than any other type of retail store. Food expenditures remain a significant part of consumer spending, making up 15% of all retail sales in the first 11 months of 2015.¹² Given this steady demand, placing workers in food retail makes sense for long-term job stability. Although median wages for common positions such as packers and cashiers remain low and need to be elevated, there are strong opportunities for earnings mobility within positions such as stock workers and first-line supervisors. Overall, food and beverage stores employ more people of color in higher-paying positions, such as general managers or first-line supervisors, than many other subsectors, but employers should do more to bolster these avenues for advancement.

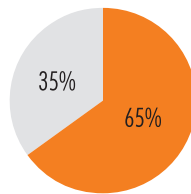
In addition to millions of traditional sales-related positions, the food and beverage subsector employs many workers in food-related positions, including food prep workers and butchers and meat cutters. Women hold three-quarters of food prep positions, which are generally low-paying, with a median wage of below \$9.00. In contrast, men hold over 90% of over 150,000 butcher positions nationwide, where 25% of workers earn over \$17 per hour. Specialized training programs could help women advance to more higher-skilled positions within the food and beverage sector, which remains the single most important part of the retail sector.

GENDER DEMOGRAPHICS OF FOOD & BEVERAGE OCCUPATIONS

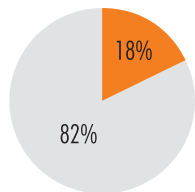


ALL FOOD & BEVERAGE JOBS - Overall in the grocery sector, employment is split more evenly by gender than in almost any other type of store.

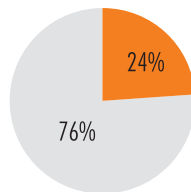
■ - MEN ■ - WOMEN



CASHIER - Though cashier remains a low-paid position in this sector, there is more opportunity for wage growth than in big-box stores, with 10% of workers earning over \$14.65 per hour.



MANAGER - 8 out of 10 general manager positions are held by men, even though they make up less than half of the workforce in food and beverage stores. But women make up over 60% of first-line supervisors, so employers should capitalize on that strong representation to ensure that more women can build careers within their stores.



STOCK CLERK - Stock clerks are often more highly paid than other frontline retail workers in grocery stores, earning as much as \$17 per hour. Men hold the vast majority of these positions.

28.1 AVERAGE NUMBER OF HOURS WORKED WEEKLY

13% OF HOURLY WORKERS IN THIS SUBSECTOR ARE INVOLUNTARILY PART-TIME

41% OF HOURLY WORKERS ARE PART-TIME

37% OF MEN ARE PART-TIME

45% OF WOMEN ARE PART-TIME

40% OF HOURLY PART-TIME WORKERS IN THIS SECTOR WOULD PREFER TO WORK FULL-TIME

By 2024, this sector is projected to add a net 95,000 more jobs, an increase of just 3%. Jobs related to food preparation, such as cooks, are projected to grow the fastest, by up to 45%, as more customers purchase ready-made food in grocery stores.¹³



THE RETAIL WORKFORCE SPOTLIGHT ON FOOD & BEVERAGE STORES | TOTAL EMPLOYMENT: 3.3 MILLION

OCCUPATION:	FOOD PREP WORKER	CASHIER	RETAIL SALESPERSON	CUSTOMER SERVICE REPRESENTATIVE
WAGE DISTRIBUTION BY OCCUPATION: 	10 th : \$8.04 25 th : ~\$8.50 50 th : ~\$9.50 75 th : ~\$11.50 90 th : \$14.09	10 th : \$8.04 25 th : ~\$8.50 50 th : ~\$9.50 75 th : ~\$11.50 90 th : \$14.61	10 th : \$8.27 25 th : ~\$9.00 50 th : ~\$10.00 75 th : ~\$12.50 90 th : \$16.48	10 th : \$8.02 25 th : ~\$8.50 50 th : ~\$9.50 75 th : ~\$11.50 90 th : \$14.90
TOTAL # OF EMPLOYEES:	148,000	958,000	126,000	85,000
RACIAL DEMOGRAPHICS BY OCCUPATION: <ul style="list-style-type: none"> - Latino - White - Black - Asian - Mixed - Native American/ Pacific Islander 		<div style="background-color: #f0f0f0; padding: 20px; text-align: center;"> <p>RACE DATA NOT AVAILABLE</p> </div>		



THE RETAIL WORKFORCE SPOTLIGHT ON FOOD & BEVERAGE STORES | TOTAL EMPLOYMENT: 3.3 MILLION

OCCUPATION:	STOCK CLERK	BUTCHER	FIRST-LINE SUPERVISOR	GENERAL/ OPERATIONS MANAGER
WAGE DISTRIBUTION BY OCCUPATION: 				
TOTAL # OF EMPLOYEES:	502,000	113,000	164,000	40,000
RACIAL DEMOGRAPHICS BY OCCUPATION: <ul style="list-style-type: none"> - Latino - White - Black - Asian - Mixed - Native American/ Pacific Islander 		<p>*Includes other meat/fish processing workers</p>		

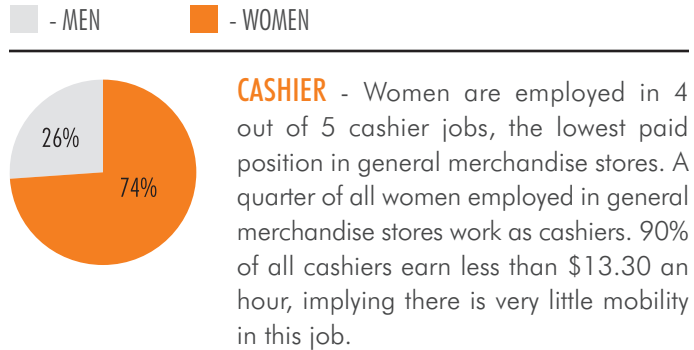


THE RETAIL WORKFORCE SPOTLIGHT ON HOME & GARDEN STORES | TOTAL EMPLOYMENT: 1.4 MILLION

Home and garden retailers contain a larger number of higher-paying and more stable jobs, even for frontline store employees. But the vast majority of jobs in the sector, nearly 70%, are held by men. Thus this sector is faced with the challenge of high levels of sectoral and occupational segregation, as well as an opportunity: home and garden stores present a concentration of good quality jobs that can be sources of stability for all workers entering the retail industry, and an accelerated path to security for women and people of color, if employers commit to diversifying their workforce.

Home and garden stores employ a lower share of people of color compared to any other type of retail. They also have the highest wages for retail salespersons and cashiers out of any store type (other than auto dealers). This makes it a significant locus of better jobs within the retail industry. However, people of color are extremely underrepresented in the sector, holding less than a quarter of all positions. While people of color are disproportionately employed as cashiers, holding 35% of those positions, they are underrepresented in the higher-paying retail salesperson position, holding only 20% of these better jobs. In addition to increasing the diversity of the workforce as a whole, employers should invest in training and developing industry expertise of the women and people of color they employ as cashiers so that they can access more of these higher-paying positions.

GENDER DEMOGRAPHICS OF HOME & GARDEN OCCUPATIONS



31.8 AVERAGE NUMBER OF HOURS WORKED WEEKLY

8% OF HOURLY WORKERS IN THIS SUBSECTOR ARE INVOLUNTARILY PART-TIME

27% OF HOURLY WORKERS ARE PART-TIME

24% OF MEN ARE PART-TIME

33% OF WOMEN ARE PART-TIME

38% OF HOURLY PART-TIME WORKERS IN THIS SECTOR WOULD PREFER TO WORK FULL-TIME

By 2024, this sector is projected to add a net 58,000 more jobs, an increase of 5%. While home and garden stores will be investing in employees related to their online presence, such as web developers, retail salesperson positions within brick-and-mortar home and garden stores will also increase by an estimated 9%.¹⁴



THE RETAIL WORKFORCE SPOTLIGHT ON HOME & GARDEN STORES | TOTAL EMPLOYMENT: 1.4 MILLION

OCCUPATION:	CASHIER	MOVER	STOCK CLERK	CUSTOMER SERVICE REPRESENTATIVE
WAGE DISTRIBUTION BY OCCUPATION: 	<p>Hourly Wage</p> <p>Percentile</p> <p>10th 25th 50th 75th 90th</p> <p>\$8.12 \$14.27</p>	<p>Hourly Wage</p> <p>Percentile</p> <p>10th 25th 50th 75th 90th</p> <p>\$8.52 \$16.80</p>	<p>Hourly Wage</p> <p>Percentile</p> <p>10th 25th 50th 75th 90th</p> <p>\$8.29 \$16.86</p>	<p>Hourly Wage</p> <p>Percentile</p> <p>10th 25th 50th 75th 90th</p> <p>\$9.18 \$16.90</p>
TOTAL # OF EMPLOYEES:	139,000	65,000	64,000	33,000
RACIAL DEMOGRAPHICS BY OCCUPATION: <ul style="list-style-type: none"> - Latino - White - Black - Asian - Mixed - Native American/ Pacific Islander 	<p>64%</p>	<p>69%</p>	<p>56%</p>	<p>71%</p>



THE RETAIL WORKFORCE SPOTLIGHT ON HOME & GARDEN STORES | TOTAL EMPLOYMENT: 1.4 MILLION

OCCUPATION:	DELIVERY DRIVER	RETAIL SALESPERSON	FIRST-LINE SUPERVISOR	GENERAL/OPERATIONS MANAGER
WAGE DISTRIBUTION BY OCCUPATION: 				
TOTAL # OF EMPLOYEES:	30,000	465,000	111,000	25,000
RACIAL DEMOGRAPHICS BY OCCUPATION: <ul style="list-style-type: none"> - Latino - White - Black - Asian - Mixed - Native American/ Pacific Islander 				

CONCLUSION

Consumer spending drives the American economy and positions the retail sector as a pivotal force in employment. The industry will add three-quarters of a million jobs by 2024. But low wages, a lack of benefits, schedule instability and a lack of training in the majority of frontline retail positions push workers into greater economic insecurity instead of providing them with a steady source of income and a start on a long-term career trajectory. As a result, retail workers stay in their jobs an average of 39 months, compared to a job tenure rate of 55 months for the overall workforce.¹⁵

In light of such conditions, workforce development practitioners, policy makers and employers must work together to ensure that job placement and job training services are data-driven and targeted in terms of where investment is concentrated. This brief seeks to identify areas of opportunity within the retail sector to help inform that practice.

Despite troubling trends across the enormous retail sector as a whole, a closer analysis of different business types within the industry reveals where there are higher-paying jobs with greater career opportunity, often clustered within specific retail subsectors such as car dealers, home furnishing stores, and home and garden stores. Correspondingly, there are also clusters of low-quality jobs within other subsectors, such as clothing stores and big-box retail, even though there are employers across all subsectors of the industry that pursue a good-jobs strategy. Yet the sector's occupations with greater median wages and more stable work hours employ lower percentages of people of color and women. Even within the higher-paying subsectors of the retail industry, lower-paid occupations, such as cashier, have a greater concentration of women and people of color. The burgeoning online retail sector, set to transform the retail industry, has higher pay for entry-level positions such as customer service representative, and over 10% of jobs in online stores are management level. Thus there may be emerging opportunities for quality employment in some occupations within the online retail sector.

To transform the retail sector into a source of quality, sustainable employment for the entire American workforce, regardless of race or gender, retail companies and policy makers should pursue a series of three interconnected workforce development strategies:

- ✓ **Elevate the quality of jobs across occupations and subsectors in the form of higher wages, improved work schedules and access to a range of benefits**
- ✓ **Address occupational and sectoral segregation that excludes women and people of color from higher paid subsectors and occupations**
- ✓ **Foster career pathways by training workers across varied job duties and occupations, and also by creating new opportunities for women and people of color to develop specialized industry knowledge.**

Addressing inequality in America cannot be achieved without a retail sector strategy that ensures that the millions of people employed in retail can support their families and pursue a career pathway for a thriving future.

NOTES

All demographic information (race, gender) is based on analysis of the Current Population Survey's Basic Monthly Data 12-month averages for 2014, utilizing Dataferrett. All total employment figures at the subsectoral level across all occupations (Figures 2 and 3, or the "total employment" figures on pp. 11 - 19) are also from this data source.

Wage distributions and data on the number of employees by occupation on pp. 11 - 19 are from the U.S. Bureau of Labor Statistics, Division of Occupational Employment Statistics, May 2014 National Industry-Specific Occupational Employment and Wage Estimates, Sectors 44 and 45, Retail Trade.

The term "subsector" used in this brief generally refers to the 12 three-digit NAICS industries within the Retail Trade sector, with the exception of electronic stores, which corresponds to the four-digit NAICS code 4541, and falls under the "Nonstore Retailer" subsector. Electronic stores have been isolated for analysis in this way because of the pertinence of online retailing to the retail sector as a whole.

SOURCES

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2. Employment Projections program, U.S. Department of Labor, U.S. Bureau of Labor Statistics, "Employment by industry, occupation, and percent distribution, 2014 and projected 2024, 44-450 Retail Trade."
3. U.S. Census Bureau, "Quarterly Retail E-commerce Sales, 3rd Quarter 2015."
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15. U.S. Department of Labor, U.S. Bureau of Labor Statistics, "Employee Tenure in 2014," 9.