



RESEARCH REPORT

Frontline Workers in the Retail Sector

A Profile of Characteristics for Advancement

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Executive Summary

The retail industry is large: it employs almost 16 million people in the US, or just over 10 percent of all US workers. Many workers begin their working years in retail jobs, with over 60 percent of all workers having held a frontline retail job early in their careers.¹ As such, the sector has the potential to provide workers with opportunities to advance their careers. Workers in frontline retail jobs can develop foundational skills and work experience that can help them advance in retail or in another sector.² Case studies have demonstrated that, for workers with the right skills and experience, a career in retail can “offer a pathway to a middle-class life.”³

Creating pathways and opportunities for frontline retail workers to advance is important, and many employers and their partners are exploring strategies to increase retention and advancement in the retail sector. These include comprehensive entry-level training programs, educational assistance programs for off-the-job training, English language classes at work, clear career advancement pathways and efforts to educate workers about them, career coaches and formal mentoring programs, policies and practices toward gender equity, and innovative scheduling systems allowing frontline workers greater scheduling autonomy.⁴

To support and expand the implementation of these types of employer approaches to retention and advancement, we profile frontline retail workers in this report, providing information on their characteristics, circumstances, and early career advancement. Our goal is to provide information about frontline retail workers that employers and their partners can use to better target interventions and practices, such as those listed above, that support worker advancement. The profile is based on data from two recent national surveys. As additional retail employers engage in advancement opportunities for frontline workers, the profile of retail workers will evolve.

Data

This study relies on data from two federally sponsored surveys: the Survey of Income and Program Participation (SIPP) and the National Longitudinal Survey of Youth (NLSY). Both surveys collect information including workers’ personal, family, and job characteristics. We use the SIPP to present a national profile of the characteristics of frontline retail workers. We use the NLSY, which is limited to younger workers, to understand factors associated with early career advancement in the retail sector. Both surveys include large, nationally representative samples allowing us to create a profile

representing all frontline retail workers across the country, not just those working in a specific region or for certain employers. These data complement studies on retail employment that are based on employer information or information gathered from employees at a specific retail location; such studies offer important perspectives, such as on work environment or the skills needed and pathways available for specific retail jobs. Our profile doesn't capture these aspects, but we include information about employees that is not necessarily available to employers, such as whether workers are in school, want to work more hours, or are primary earners for their households.

Defining Frontline Retail Workers

The retail industry does not formally define “frontline jobs.” In this study, we use the term to mean retail jobs that generally require minimal or no prior work experience and that could be called “entry level” — the first rung on a retail career ladder. Our definition includes various occupations that reflect the changing nature of retail work. We include traditional frontline retail jobs, such as cashiers and sales clerks, as well as jobs that reflect growth in ecommerce and home delivery, such as stock clerks, warehouse packers, and delivery drivers.

Approximately 12.6 million frontline retail workers ages 19 to 75 were employed in the US in 2015, the most recent year in the national data used in this study. To provide a more detailed picture of the frontline retail workforce, we present results for different subgroups representing workers in different career stages and circumstances. The four groups we examine are early-career workers (ages 19 to 24); full-time, midcareer workers (ages 25 to 54); part-time, midcareer workers (ages 25 to 54); and older, later-career workers (ages 55 to 75). Our key findings are as follows:

- **Frontline retail workers come from all age groups, with a median age of 40.** Roughly one-fifth of all frontline retail workers are early in their careers (ages 19 to 24). A similar share are older, later-career workers (ages 55 to 75).
- **Over one-quarter of frontline retail workers have earned a college certificate or degree.** Many frontline retail workers have completed education beyond high school— 14 percent had a college certificate or a two-year degree, and 14 percent had a bachelor's degree or higher.
- **Most frontline retail workers work full time and for large employers.** Nearly two-thirds (63 percent) of frontline retail workers work full time; the remaining one-third work part time. Three-quarters of frontline retail workers work for employers with 1,000 or more employees.

- Frontline retail workers have opportunities to advance by moving to different jobs within frontline retail because wages vary across retail occupations. The median wage for frontline retail workers overall is \$10.10 per hour, but that varies substantially depending on the type of job. The median wage for frontline retail occupations varies from \$24.04 an hour for sales representatives to \$8.25 an hour for cashiers. Four frontline retail occupations constitute about four-fifths of frontline retail workers: retail salespersons (25 percent) earning on average \$9.62 an hour; drivers and sales workers (24 percent), earning \$16.20; cashiers (20 percent), earning \$8.25; and stock clerks and order fillers (11 percent), earning \$10.45.

- Some frontline workers may be well-positioned to take advantage of opportunities for advancement.
 - » Women in the middle of their careers (ages 25 to 54) working full time in frontline retail jobs tend to have more education than midcareer full-time men, but they work in occupations where they tend to earn less. More than one in five of these women has a bachelor's degree or more,; only 15 percent of similar men do. Among all full-time midcareer frontline retail workers, women earn 71 percent as much as men. These women are more likely to work in occupations with lower average wages. For example, cashiers earn a median hourly wage of \$8.25 and 73 percent are women; drivers and sales workers earn a median hourly wage of \$16.20, and 6 percent are women. Creating opportunities for women to advance into supervisory roles or to move into traditionally male retail jobs could boost their earnings and reduce unequal gender distributions in managerial staff.

 - » **Early-career frontline retail workers (ages 19 to 24) are more highly educated than older frontline retail workers.** Compared with all retail workers, a higher share of this group has more than a high school degree or GED (44 percent versus 23 percent). However, nearly half (48 percent) of these early-career workers are in school, and two-thirds work part time. Increasing some of these early-career workers' understanding of advancement opportunities in retail may lead more to consider a career in the sector.

 - » Many full-time, midcareer frontline retail workers (ages 25 to 54) have long job tenure and are primary earners for their families. Men in this group have held their jobs on average 44 months; women in this group have held them an average of 35 months. Further, more than half of all these workers contribute the majority of income to their households. These figures suggest many of these workers have a

strong connection to the retail sector and might have strong incentives to take advantage of career advancement supports or opportunities.

- » Later-career frontline retail workers (ages 55 to 75) also have long tenure, suggesting both loyalty and experience that is valuable to employers. With a median tenure of 77 months, more than half (56 percent) of later-career retail workers have been in their current job for more than 5 years, and 38 percent have been in their current job for more than 10 years. Two-thirds of these older workers are working full time. Some long-tenure workers in this age group may be targets for additional employer training and promotion to managerial retail jobs.
- » One-third of frontline retail workers work part-time, but this varies by age. Two-thirds of early-career workers work part time compared with 28 percent of midcareer workers. Most frontline retail workers who work part time report they choose to work part time. Part-time work can allow flexibility for education, caretaking, or other activities. However, about one-third of midcareer frontline retail workers report they would like to work more hours or have a full-time job. A shift from part time to full time could boost hourly wages. Part-time midcareer retail workers earn a median \$8.25 an hour compared with \$14.13 an hour for full-time midcareer workers, although lower wages could reflect other worker or job factors than hours.

- **Some frontline workers may face challenges to participating in off-the-job training given their irregular work schedules.** About 1 in 10 frontline retail workers has a child under age 5, and about two-fifths work “nonstandard” hours, such as evenings, nights, or irregular shifts. Some workers appreciate the flexibility that can come with nonstandard schedules (e.g., evening or night shifts that allow them to attend school in the day or share child care with a partner who works a day shift). But some schedules, particularly irregular or rotating shifts, which one-fifth of frontline retail workers work, may make it more difficult for some workers to arrange child care or participate in educational opportunities outside of employer training during work hours.

How Frontline Retail Workers Advance

Understanding which frontline retail workers advance is important for thinking about future strategies to support advancement in retail. Using our definition of frontline retail jobs, we identified early-career

retail workers' first frontline retail job after age 18. This is approximately the same group as our "early-career frontline retail workers" referenced above. We then examined data for these workers' jobs five years later and, for those who remain in retail, compare the characteristics of those who advanced to those who did not. Advancement can be defined in many ways, but we focused on wage growth as the indicator. Increased wages may or may not be associated with changing jobs (within an employer) or changing employers. We use two different measures of wage growth : (1) annual wage growth - earning the equivalent of three-percent annual wage growth over five year and (2) target wage - earning a wage higher than a quarter of hourly workers.

We include all early career frontline workers in our analysis, even those working part-time, to get a complete picture of who is advancing in this early career period among frontline retail workers. Since on average part-time workers earn lower wages, a retail worker who moves from part-time to full-time frontline retail work is likely to be classified as having advanced. Many factors influence workers decisions about whether to remain in or leave the retail sector. We do not attempt to model or draw conclusions about this decision process across five years, but focus for the most part on those who remain in the retail sector.

Our key findings are as follows:

- Almost three-quarters of all workers starting in frontline retail jobs advanced with substantial wage growth (3percent or higher annually) over a five-year period. Whether staying in retail or moving onto other sectors, most early career workers starting in frontline retail jobs advanced. Of frontline workers who remained in the retail sector at five years, 78 percent advanced using our annual wage growth measure and 40 percent advanced using our target wage measure. Retail employers may want to highlight the wage advancement retail jobs can provide to attract and retain early-career workers.
- Early career frontline retail workers in one of the following categories are more likely to advance: with higher education, have received training on or off the job, don't have children, or are male. Retail employers may want to develop strategies that target women or workers with children. By supporting employee's efforts to attain additional education and by providing training as part of their career trajectory, employers may be able to increase loyalty among early-career workers and help them advance.

What Skills Frontline Retail Workers Need to Advance to Retail Supervisors

To provide information on skills frontline retail workers need to advance, we examined the skill gaps between frontline retail jobs and one “next-level” retail occupation, the direct supervisor of frontline retail sales workers.⁵ This occupation does not represent all retail supervisors, but does represent the skills required for a first-level supervisory position. The skill gaps we identify may help retailers and workers understand where to focus efforts to build skills for advancement. The skill requirements we use come from the US Department of Labor’s O*NET database, which ranks the importance of 120 skills across occupations. Training and advancement strategies for frontline workers in retail should focus on the skills that are most important for first-line retail supervisor jobs, where the gaps, relative to requirements for frontline retail jobs, are largest. Workers may acquire some of these skills on the job; others may require more structured employer-based or outside education and training.

- Predictably, **frontline retail jobs require lower levels of skill than retail supervisors**, as measured by the 25 most important skills for supervisors.
- Of the most important skills for supervisors, gaps are largest in education and training (which involves knowledge of training and instruction for individuals and groups), personnel and human resources, administration and management, sales and marketing, management of personnel resources, and customer and personal service.

These findings represent average skill requirements for current frontline retail and first-line supervisor jobs. However, the skills of frontline retail workers and the specific needs for first-line supervisory positions will vary by employer. As the nature of retail jobs evolves with increasing automation and other changes, future supervisory skill needs may also change.

Conclusions

Our findings show that the characteristics and circumstances of frontline retail workers allow many possible strategies to promote advancement and retention. Many early-career frontline retail workers, as well as midcareer women working full-time frontline retail jobs, are highly educated and could be targets for advancement. Some women could advance by making lateral career moves to other occupations within frontline retail. Some part-time workers want to work more hours, and later-career workers have long retail experience and loyalty to their employers. We also found that many early-

career frontline retail workers are advancing in retail. Those with higher education, who are receiving training on or off the job, who don't have children, and who are male are more likely to advance.

It's important for employers to create pathways and opportunities for frontline retail workers to advance. Many employers and their partners are already implementing strategies to increase retention and advancement in the retail sector. These findings can help these and other employers, and their partners, develop and target these strategies.

This report is the first in a two-part Urban Institute study examining frontline retail workers. The second phase will explore promising advancement strategies that some retail employers now use. This research will tell us more about targeted advancement strategies that build upon the strengths of current retail workers and highlight the opportunities for careers within retail.

Introduction and Background

The retail industry is large: it employs almost 16 million people, or about 10.7 percent of all US workers. Given the changing nature of retail, such as growth in e-commerce that might not be captured in official statistics, the number is likely higher.⁶ Many workers begin their working years in retail jobs, with over 60 percent of all workers having held a frontline retail job early in their careers.⁷ As such, the sector has the potential to provide workers with opportunities to advance in their careers through either increased earnings on the job or promotion to supervisory positions. Workers in frontline retail jobs develop foundational skills and work experience that can help them advance in retail or in another sector. Case studies have demonstrated that, for workers with the right skills and experience, a career in retail can “offer a pathway to a middle-class life.”⁸ Creating pathways and opportunities for frontline retail workers to advance is important but, some frontline retail workers may not view the sector as a place to build a career. Their reasons range from lack of knowledge about career pathways and opportunities for advancement to negative worker perceptions of retail work.⁹ Some retail employers are trying to change this narrative through strategies that promote worker retention and advancement. These include comprehensive entry-level training programs, educational assistance programs for off-the-job training, English classes at work, clear career advancement pathways and efforts to educate workers about them, career coaches and formal mentoring programs, policies and practices toward gender equity, and innovative scheduling systems allowing frontline workers greater scheduling autonomy.¹⁰

To support and expand the implementation of these types of employer approaches to retention and advancement, we profile frontline retail workers in this report, providing information on their characteristics, circumstances, and early career advancement. Our goal is to quantify the characteristics and circumstances of frontline retail workers to improve understanding of the sector and provide information that employers and their partners can use to better target interventions and practices that support worker advancement. We address the following questions in three sections:

- **A profile of frontline retail workers.** This section describes worker characteristics that potentially relate to the need for and uptake of advancement strategies and supports.
- **How early-career frontline retail workers advance.** This section presents data that track early-career frontline retail workers and describes who advances in retail versus who stays in retail and doesn't advance.

- **Skill gaps and advancement in retail.** This section describes the skill gap between frontline retail workers and those who hold “next-level” retail jobs as direct supervisors of frontline retail workers.

Before providing results on these topics, we briefly describe what we mean by frontline retail jobs and discuss the data and methods used in this report.

BOX 1

Career-Advancement Pathways in Retail

This report is the first in a two-part Urban Institute study examining frontline retail workers. The study aims to increase understanding of employer strategies to support frontline worker advancement in the retail industry. This first report provides a profile of frontline retail workers and their advancement in retail. The second report will describe promising advancement strategies that some retail employers now use.

Defining a Frontline Retail Job

The retail industry does not formally define “frontline jobs.” In this study, we use the term to mean retail jobs that generally require minimal or no prior work experience. These jobs can be described as “entry level” or “the first rung on a retail career ladder.” Our definition is not based on a worker’s wage or tenure (how long he or she has held the job); some workers in frontline retail jobs may have held their job for a long time or received wage increases.

Common frontline retail jobs include cashiers and sales clerks, but the gamut of frontline retail jobs varies greatly. Reflecting the changing nature of retail, such as growth in online shopping and home delivery, our definition of frontline retail jobs also includes stock clerks, warehouse packers, and delivery drivers. See table 1 for a complete list of the occupations included in our definition of frontline retail jobs and brief descriptions of each.¹¹ The number of frontline retail jobs in each of these occupations varies.

TABLE 1

Occupations Included in Frontline Retail Jobs

Occupation	Description
Cashiers	Receive and disburse money in establishments other than financial institutions. May use electronic scanners, cash registers, or related equipment. May process credit or debit card transactions and validate checks.
Counter and rental clerks	Receive orders, generally in person, for repairs, rentals, and services. May describe available options, compute costs, and accept payment.
Customer service representatives ^a	Interact with customers to provide information in response to inquiries about products and services and to handle and resolve complaints.
Door-to-door sales workers, street vendors	Sell goods or services door to door or on the street.
Driver/sales workers	Drive truck or other vehicle over established routes or within an established territory and sell or deliver goods, such as food products, including restaurant take-out items, or pick up or deliver items such as commercial laundry. May also take orders, collect payment, or stock merchandise at point of delivery. Includes newspaper delivery drivers.
Laborers and freight, stock, and material movers, hand ^a	Manually move freight, stock, or other materials or perform other general labor. Jobs within retail industry.
Order clerks ^a	Receive and process incoming orders for materials, merchandise, classified ads, or services such as repairs, installations, or rental of facilities. Generally receive orders via mail, phone, fax, or other electronic means. Jobs within retail industry.
Packers and packagers, by hand	Pack or package by hand a wide variety of products and materials. Jobs within retail industry.
Parts salespersons	Sell spare and replacement parts and equipment in repair shop or parts store.
Receptionists and information clerks ^a	Answer inquiries and provide information to the general public, customers, visitors, and other interested parties regarding activities conducted at establishment and location of departments, offices, and employees within the organization. Jobs within retail industry.
Retail salespersons	Sell merchandise, such as furniture, motor vehicles, appliances, or apparel to consumers.
Sales and related workers, other	All sales and related workers not listed in other categories.
Services sales representatives, other	All services sales representatives not listed in other categories.
Shipping, receiving, and traffic clerks ^a	Verify and maintain records on incoming and outgoing shipments. Prepare items for shipment. Jobs within retail industry.
Stock clerks and order fillers	Receive, store, and issue sales floor merchandise. Stock shelves, racks, cases, bins, and tables with merchandise and arrange merchandise displays to attract customers. May periodically take physical count of stock or check and mark merchandise.
Telemarketers ^a	Solicit donations or orders for goods or services over the telephone. Jobs within retail industry.

Source: US Department of Labor O*NET, <https://www.onetonline.org/>.

Note:

^a Only workers whose employer is in the retail industry are included for these occupations. For other occupations, all workers are included regardless of industry.

BOX 2

Data Used in This Report

This study relies on data from two large national surveys: the Survey of Income and Program Participation (SIPP) and the National Longitudinal Survey of Youth (NLSY). Both are large, federally funded surveys and collect information including personal, family, and job characteristics. The surveys are not limited to retail workers, but include large groups of retail workers for study. For both analyses we limited our sample to frontline workers who are older than 18 because our study focuses on advancement in retail; this cutoff excludes high school students who are in temporary summer or seasonal jobs. Although some youths at these younger ages have entered the labor market more permanently, most have not.

Our profile of frontline retail workers uses SIPP data on 2,903 workers ages 19 to 75 holding frontline retail jobs in January 2015 (the most recent year of data available). This sample provides a snapshot of all frontline retail workers.¹² We limit our study to frontline retail workers for whom their retail job is their only job or their primary job. (We define “primary job” as the job on which they usually work the greatest number of hours.) This restriction eliminates only 4.2 percent of workers holding frontline retail jobs. Our profile combines all frontline retail job occupations described in table 1. For most occupations, we do not have large enough samples to provide accurate information by occupation. The occupations are from classifications created by the Department of Labor’s Bureau of Labor Statistics.

We use the NLSY to track a group of early-career frontline retail workers to examine who advances and who does not. These data survey the same cohort of young people who were ages 14 to 19 in 1999 annually (or biannually in later years) through 2014 (the most recent year of available data.) Our base sample includes workers age 19 or over in their first frontline retail job. Because many people hold their first retail jobs early in their working years, the base year of their initial frontline retail jobs skews toward earlier calendar years of the data. The base year (first year the person held a frontline retail job) ranges from 1999 to 2010, with a median base year of 2002. The median age of workers on their first frontline retail job is 20. We then examine these same workers five years later to determine whether they advanced. Focusing on this period also reduces the impact of the Great Recession on our results.

A Profile of Frontline Retail Workers

The SIPP data show approximately 12.6 million frontline retail workers ages 19 to 75 in 2015. In this section, we discuss some of their characteristics and circumstances that could help employers and their partners better understand the workforce when considering different career advancement strategies. Before presenting our results, we provide a brief discussion of why we selected each factor.

We examine worker educational attainment and whether English is the worker's primary language. These indicate whether additional job training or education may be helpful to those workers.¹³ For instance, workers who have less than a GED might benefit from strategies that include basic skills education; workers without any postsecondary certificate or degree might benefit from advancement strategies that support or provide additional training and education; and workers with a college certificate or a two- or four-year degree could build on existing knowledge with additional retail-specific or management training. Whether English is a worker's primary language suggests whether English language classes might be beneficial.

Although much training to support advancement involves on-the-job options occurring during work hours, some strategies may involve options to pursue training outside of work hours. Some factors we examine indicate whether specific supports or considerations might help certain workers pursue these strategies. These factors include whether workers have a dependent child under age 5 or work night or irregular shifts. Providing child care, allowing appropriate scheduling, or assuring that work-based training options are available could be helpful for these workers.

Some factors we examine relate to workers' potential for pursuing advancement opportunities as well as the potential for employers to target advancement opportunities to certain workers. Workers with longer tenure or whose households have a greater reliance on their earnings (measured as the worker's earnings as a percentage of annual household income) may be targets for advancement opportunities. Those who earn lower wages, lack employer-provided health insurance, and work part-time but want more hours could also benefit from advancement opportunities.

Finally, we examine the gender, marital status, and race and ethnicity of workers as important factors for understanding the frontline retail workforce, especially considering discussions that focus on ways to increase diversity in retail management.¹⁴ We also report on the size of employers. Smaller employers may have different resources and internal organization structures that lead them to consider different strategies to provide advancement opportunities.

Characteristics of All Frontline Retail Workers

In this section, we provide an overview profile of all frontline retail workers. Although prior research has provided statistics on these workers, our discussion adds to this knowledge by including a broader, more current definition of frontline retail workers and by focusing on circumstances of these workers that are not commonly reported.

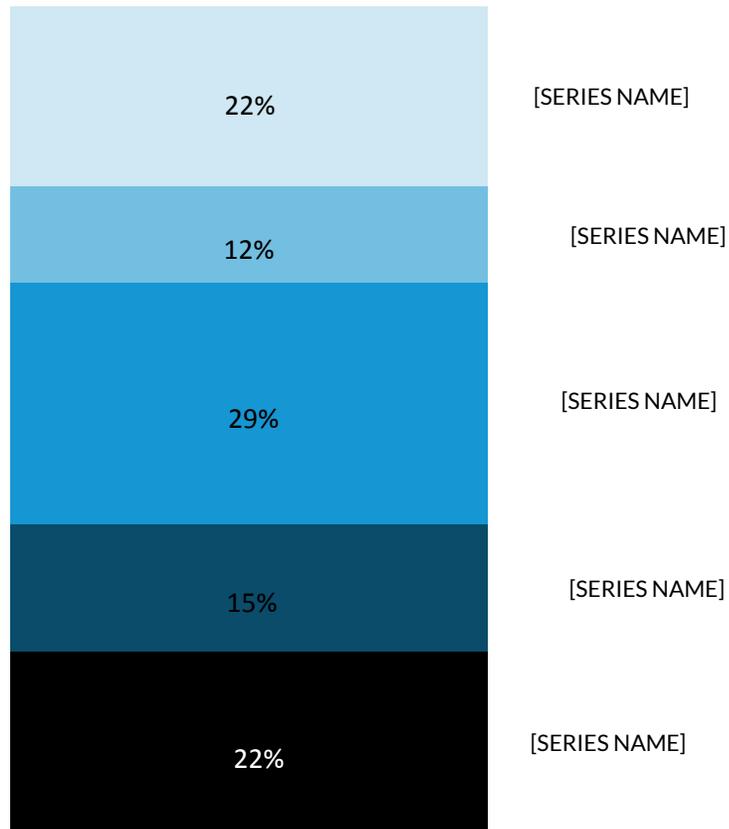
We divide the frontline retail workforce into major subgroups that represent workers in different career stages and discuss each group separately as well as the population as a whole. Each group has common characteristics and circumstances that could be potentially important factors when considering advancement strategies. Considering them separately provides a better picture of the frontline retail workforce. The four groups and their share of all frontline workers (figure 1) are:

- early-career workers (ages 19 to 24; 22 percent);
- full-time midcareer workers (ages 25 to 54; 12 percent women and 29 percent men);¹⁵
- part-time midcareer workers (ages 25 to 54; 15 percent); and
- later-career workers (ages 55 to 75; 22 percent).

In our discussion, we compare each of these profiles with its most relevant counterpart to highlight the notable differences observed between groups of retail workers, and we isolate those characteristics that may be important for targeting advancement strategies.¹⁶

FIGURE 1

Frontline Retail Workers, Ages 19 to 75



Source: Authors' calculations from the Survey of Income and Program Participation, 2015.

Occupations, Wages, and Gender

Frontline retail workers work in different occupations that pay varying median wages (table 2). Four occupations constitute about 79 percent of all frontline retail workers: retail salespersons (about 25 percent), drivers and sales workers (24 percent), cashiers (20 percent), and stock clerks and order fillers (11 percent). Differences in the structure and nature of these jobs could mean differences in the extent and type of managerial positions available. Advancement strategies also may vary across different occupations and work settings.

The median wage for all frontline retail workers is \$10.10 per hour, but wages vary substantially across occupations. Cashiers earn the lowest median wage and sales representatives the highest. Two-fifths of all frontline retail workers are women.¹⁷ Men and women work in different occupations within frontline retail, with a higher percentage of women in lower-paying occupations and a lower percentage in higher-paying occupations. For example, cashiers, with an average wage of \$8.25 are predominantly

women; drivers and sales workers, with an average wage of \$16.20, are predominantly male. These results suggest that one potential advancement strategy is to help workers move from one frontline retail occupation to another paying higher wages. Another strategy would be to help women move into frontline retail jobs traditionally held by men.

TABLE 2

Distribution of Frontline Retail Workers, Wages, and Percentage Female, by Occupation

Occupational code	Percentage of all frontline workers	Median hourly wage (\$)	Percentage female
Retail salespersons	24.9	\$9.62	52.8
Drivers/sales workers	23.8	\$16.20	5.6
Cashiers	20.0	\$8.25	73.2
Stock clerks and order fillers	10.5	\$10.45	38.9
Sales representatives, services, all other	4.2	\$24.04	28.5
Customer service representatives*	4.0	\$10.00	62.8
Laborers and freight, stock, and material movers, hand*	3.5	\$11.00	27.0
Packers and packagers, hand	2.5	\$9.00	54.2
Sales and related workers, all other	1.9	\$12.50	46.6
Shipping, receiving, and traffic clerks*	1.6	\$10.50	31.2
Door-to-door sales, news and street vendors, and related workers	1.2	\$13.40	40.2
Parts salespersons	0.6	\$12.00	4.0
Counter and rental clerks	0.5	\$9.50	45.8
Receptionists and information clerks*	0.4	\$10.00	100.0
Telemarketers*	0.2	\$13.50	35.1
Order clerks*	0.2	\$9.00	87.2
All frontline retail workers	100.0	\$10.10	42.0

Source: Authors' calculations from Survey of Income and Program Participation, 2015.

Note: Workers were ages 19 to 75.

* Only individuals working in jobs classified as in the retail industry within these occupations were included in this category.

Education and Training

Some frontline workers have completed higher levels of education: 14 percent report having a bachelor's degree or higher, and the same percentage report having a college certificate or a two-year degree (figure 2). Twenty-three percent have some college education but no degree or certificate, while 49 percent report having a high school degree or GED. These "mid-education" groups, who have not already earned a degree or certificate but have earned a high school diploma or GED, may benefit from certificate courses or training that would better prepare them for advancement.¹⁸ About 1 in 10 retail workers does not have a high school degree or GED.

About 16 percent report that English is not their primary language, suggesting that some workers might benefit from English language classes or from employer training that accounts for language ability

and needs.¹⁹ Relatively few (13 percent) frontline retail workers are currently enrolled in school (nearly three-quarters of those who are enrolled are seeking an undergraduate degree).

Children and Work Schedule

About 1 in 10 frontline workers has a child under age 5, suggesting workers may benefit from child care supports or from scheduling considerations to pursue additional training away from work. Although more than half of frontline retail workers (58 percent) work a regular daytime shift, the rest work evenings, nights, or irregular shifts. These schedules, particularly irregular or rotating shifts, may make it more difficult for some workers to access educational opportunities outside of work. About 20 percent are working irregular shifts, 15 percent are working regular evening or night shifts, and 6 percent are working rotating shifts. The overwhelming majority (85 percent) follow their shift schedule because their job requires it.

Tenure, Hours, Household Reliance on Retail Earnings, and Benefits

Frontline retail workers have a median job tenure of 25 months, or just over two years. This shows that although turnover in some retail jobs is high, more than half of frontline retail workers have been on the job for several years.²⁰ One-third of frontline retail workers have a job tenure longer than five years. Some of these long-tenure workers may have received wage increases (as suggested by higher average wages earned by those with longer tenure). Long-tenure frontline retail workers may be good candidates for training that will move them into supervisory positions.

Almost two-thirds (63 percent) of frontline workers work full time, and more than half (55 percent) are the primary earner in their household (i.e., their annual earnings contribute more than half of their household's annual income). This indicates that many frontline retail workers' families are relying on their income, so these workers may be willing to undertake additional training necessary to advance if it can be combined with work. Because these workers rely on their jobs for a high percentage of their household income, they may be less likely to quit than those less reliant on this income and are therefore a good target for investment.

Age and Race/Ethnicity

Although many people begin their working years in a retail job, the median age of frontline retail workers is 40. The distribution of the retail workforce by race or ethnicity is 62 percent non-Hispanic

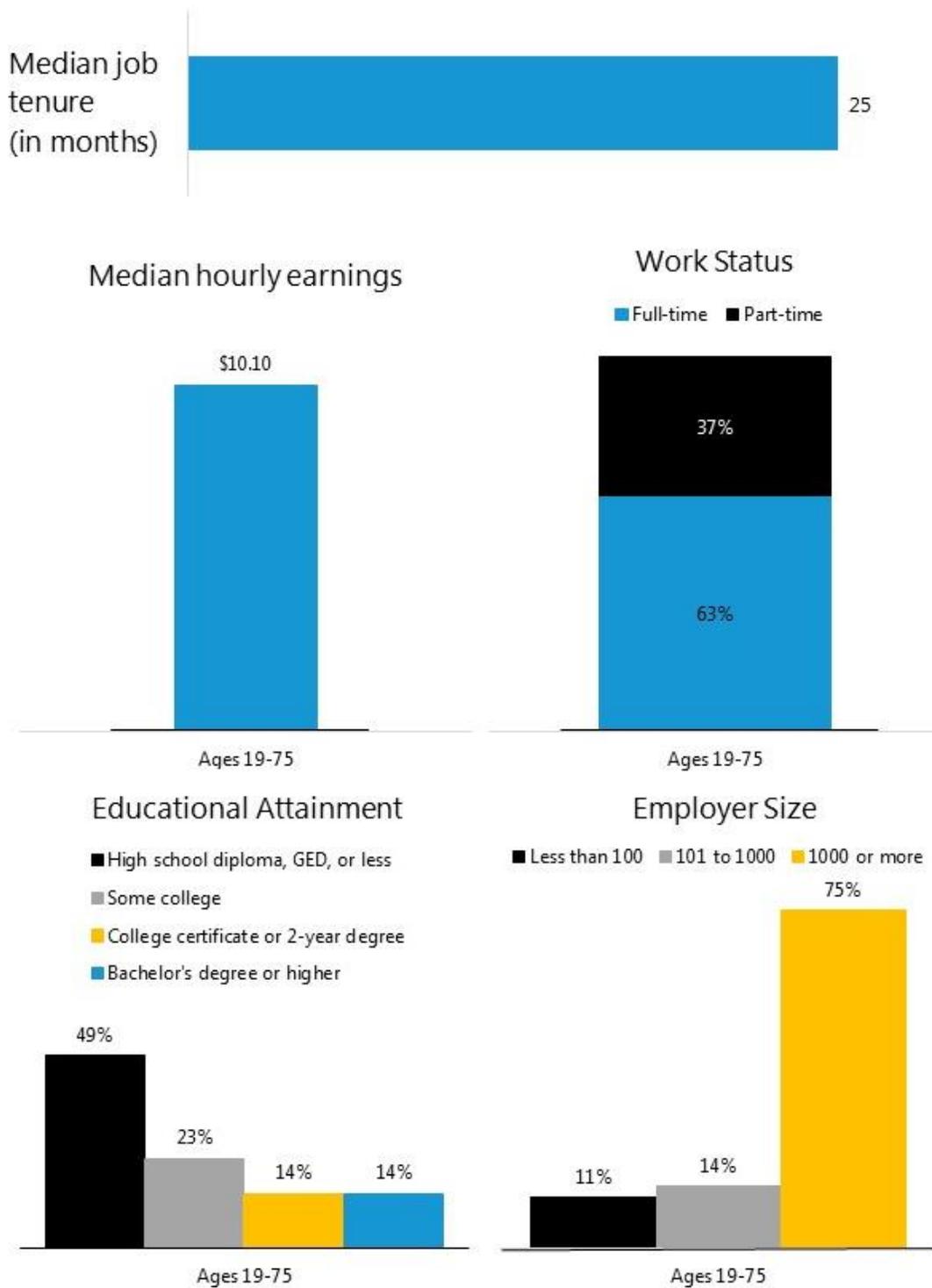
white, 17 percent Hispanic, 13 percent African American, and 5 percent Asian; this is nearly identical to the distribution for all US workers.²¹

Employer Size

Large employers, who are more likely to have the resources to invest in workers in ways that promote advancement (and who are perhaps more likely to have more higher-level job openings), employ the vast majority of frontline retail workers: 75 percent work for an employer with 1,000 or more employees, and only 11 percent work for employers with 100 or fewer employees (figure 2).²² The distribution of employer size is fairly similar across the different groups of frontline workers we discuss later.

How these characteristics and circumstances combine is important for understanding the profile of frontline workers. To aid in this understanding, the following sections provide information on subgroups of frontline retail workers with similar characteristics.

FIGURE 2
Characteristics of All Frontline Retail Workers, Ages 19 to 75



Source: Authors' calculations from the Survey of Income and Program Participation, 2015.

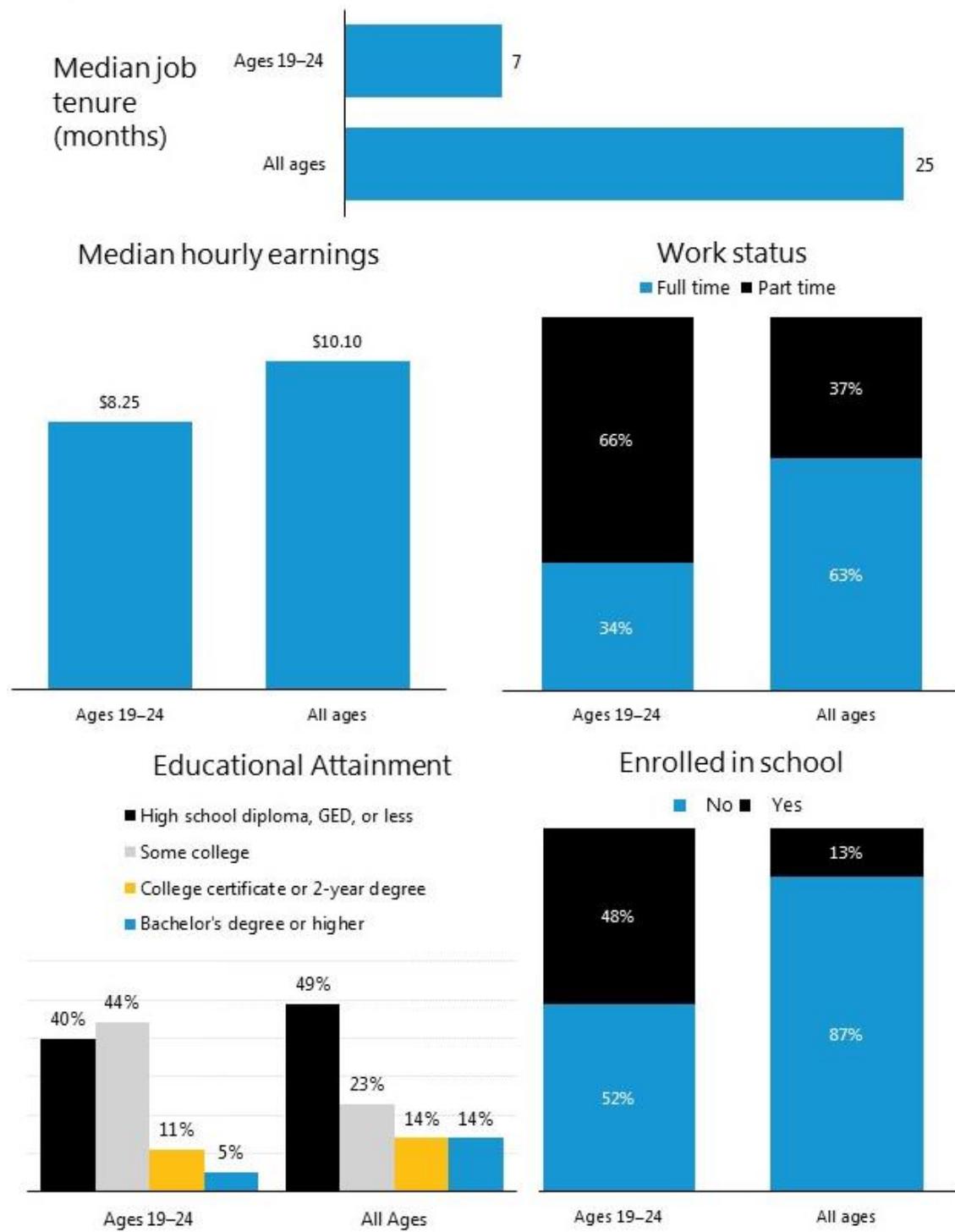
Early-Career Workers

Early-career workers are workers ages 19 to 24 who are just beginning their careers. This retail job may be their first job. Approximately 22 percent of retail workers are in this stage. To put their characteristics and circumstances in context, we compare these young workers to retail workers of all ages.

Early-career frontline retail workers differ from retail workers overall in several ways that might influence a strategy to promote their advancement (figure 3). One difference is that early-career workers are more likely to be combining work and school; nearly half are currently enrolled. Two-thirds of those enrolled are pursuing a four-year degree. Further, many more of these early-career workers are working part time than retail workers overall (66 percent versus 37 percent). Employers may not view workers who are already pursuing education toward a nonretail career or who are working part time as targets for additional training. But compared with all retail workers, a relatively high share of this group has more than a high school degree or GED (44 percent versus 23 percent). To encourage early-career workers to consider retail careers, employers should pursue strategies that provide and make early-career workers aware of advancement opportunities and show what a career in retail can offer. (In the next section, we discuss the characteristics and circumstances of early-career retail workers who remain and advance in retail.)

Another characteristic of early-career workers is a shorter median job tenure, which likely explains their lower median hourly wages. Early-career workers' median tenure is seven months, and their median wages are \$8.25 an hour (figure 3). Most (93 percent) do not have dependent children under age 5.

FIGURE 3
Early-Career Frontline Retail Workers, Ages 19 to 24



Source: Authors' calculations from the Survey of Income and Program Participation, 2015.

Midcareer Women and Men Working Full Time

Midcareer workers (ages 25 to 54) who are working full time may be a prime target group for advancement strategies because their reasonably long average tenure suggests commitment to the retail sector. We show results separately for men and women because, as noted, they work in different occupations within frontline retail and differ on some key characteristics. Fewer midcareer full-time women work frontline retail jobs than men (12 percent versus 29 percent). If employer advancement strategies target midcareer full-time workers, employers should encourage women to pursue upper-level positions, which would also alleviate unequal gender distribution in managerial staff.²³

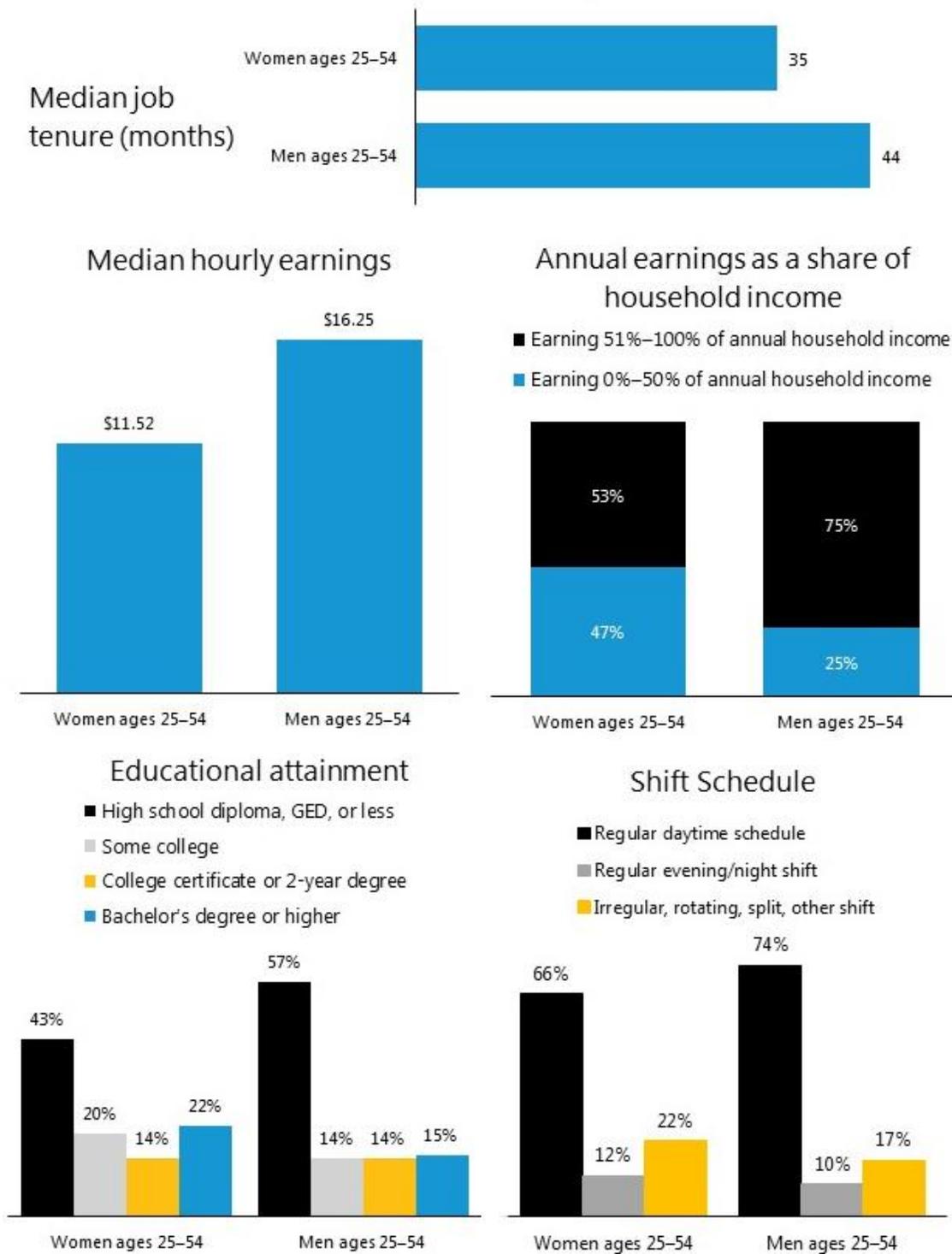
Midcareer full-time workers earn higher wages on average than their younger counterparts, partly because of their longer tenure. By several metrics, however, midcareer full-time women are in a weaker economic position than their male counterparts. They have somewhat shorter job tenure (35 months versus 44 months) and substantially lower hourly wages (figure 4). Midcareer women working full time earned a median \$11.52 an hour compared with \$16.25 an hour for men, with some of the wage gap explained by the different retail occupations that women and men hold. This is despite the higher educational attainment of women in this group. Over half (57 percent) of men working full time in retail jobs have no more than a high school degree or GED, compared with 43 percent of women. More than one in five women has a bachelor's degree or more; only 15 percent of men do. Three-quarters of men (75 percent) in this group contribute the majority of their household's income; slightly more than half (53 percent) of women do so for their household.

Relatively few of these workers have young children, but a larger percentage work nonstandard schedules (not a regular daytime shift). Sixteen percent of men and 12 percent of women have children under age 5. However, one-third (34 percent) of full-time women and one-quarter (27 percent) of full-time men work a nonstandard schedule. About 1 in 5 women (22 percent) and somewhat fewer men (17 percent) work an irregular, rotating, or split shift, and smaller percentages (12 percent of women and 10 percent of men) work a regular evening or night shift. The overwhelming majority (94 percent of men and 85 percent of women) report working these schedules because the job requires it. Only 4 percent of women and 1 percent of men who work full time in retail report that they choose their shifts to accommodate child care.

As mentioned, among all frontline retail workers, men and women hold different jobs, and this is true for midcareer full-time workers as well. Almost one-quarter of full-time women are cashiers compared with 5 percent of men. Almost half (47 percent) of full-time men are drivers or sales workers compared with only 5 percent of women. As shown in table 2, cashiers make less hourly on average than drivers or sales workers.

FIGURE 4

Mid-Career Women and Men Working Full Time in Frontline Retail, Ages 25 to 54



Source: Authors' calculations from the Survey of Income and Program Participation, 2015.

Note: Percentages may not sum to 100 because of rounding.

Part-Time, Midcareer Workers

Some characteristics of midcareer frontline retail workers who are working part time (less than 35 hours a week) suggest they may be interested in pursuing advancement opportunities and could be a target for employer strategies. Part-time midcareer workers constitute 15 percent of all frontline retail workers.²⁴

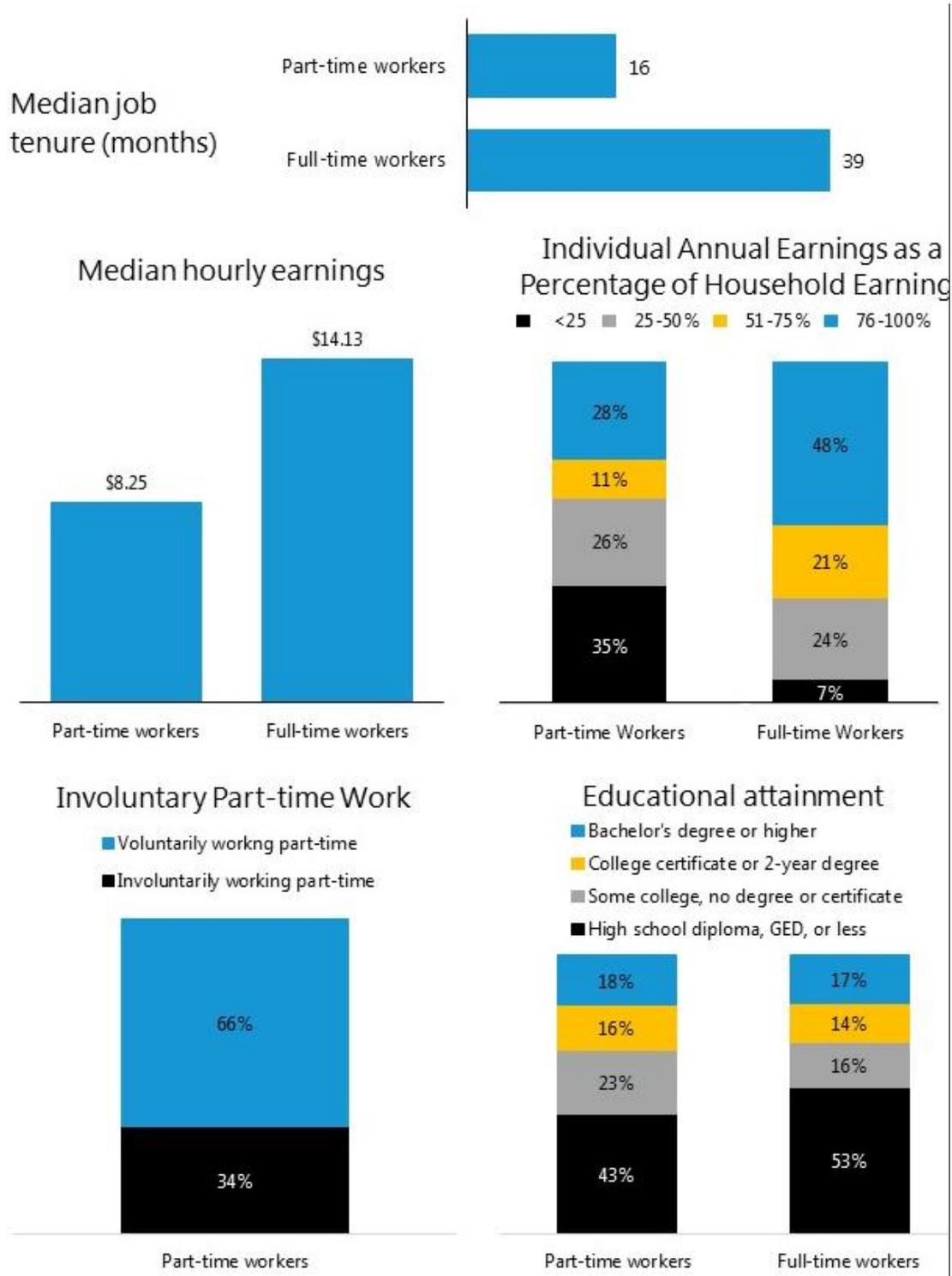
One-third (34 percent) of these workers are involuntarily working part time, meaning they are interested in working additional hours (figure 5).²⁵ These workers are nearly as likely as full-time workers to have a dependent child under age (14 percent versus 15 percent, respectively). Part-time midcareer retail workers have somewhat higher levels of education than full-time workers. Similar percentages of part- and full-time workers have (a) a college certificate or two-year degree or (b) a four-year or higher degree. More part-time workers than full-time workers have some college education (23 percent versus 16 percent). This could reflect the higher percentage of part-time midcareer workers in school (12 percent) compared with full-time workers (3 percent).

Many part-time workers' households rely on their earnings. As expected, part-time workers contribute less to their household's overall income than full-time workers, but more than one-third of part-time workers contribute the majority of their household's annual income, and 28 percent contribute more than three-quarters of their household's annual income. These workers' median hourly wages are relatively low at \$8.25, or 58 percent of full-time workers' median wage. These characteristics suggest part-time midcareer workers may be interested in training or advancement opportunities within retail that could increase their hourly wages.

Part-time workers are less likely than full-timers to work a regular daytime shift (53 percent versus 68 percent). This means almost half of these workers are working such arrangements as irregular schedules (24 percent), regular evening or night shifts (12 percent), or split or rotating shifts (8 percent). Further, part-time workers have shorter median job tenure than full-time workers (16 months versus 39 months). These schedules, particularly irregular or rotating shifts, could make it more difficult for some workers to access educational opportunities outside of their employer.

FIGURE 5

Mid-career Part-Time and Full-Time Frontline Retail Workers, Ages 25 to 54



Source: Authors' calculations from the Survey of Income and Program Participation, 2015.

Later-Career Workers

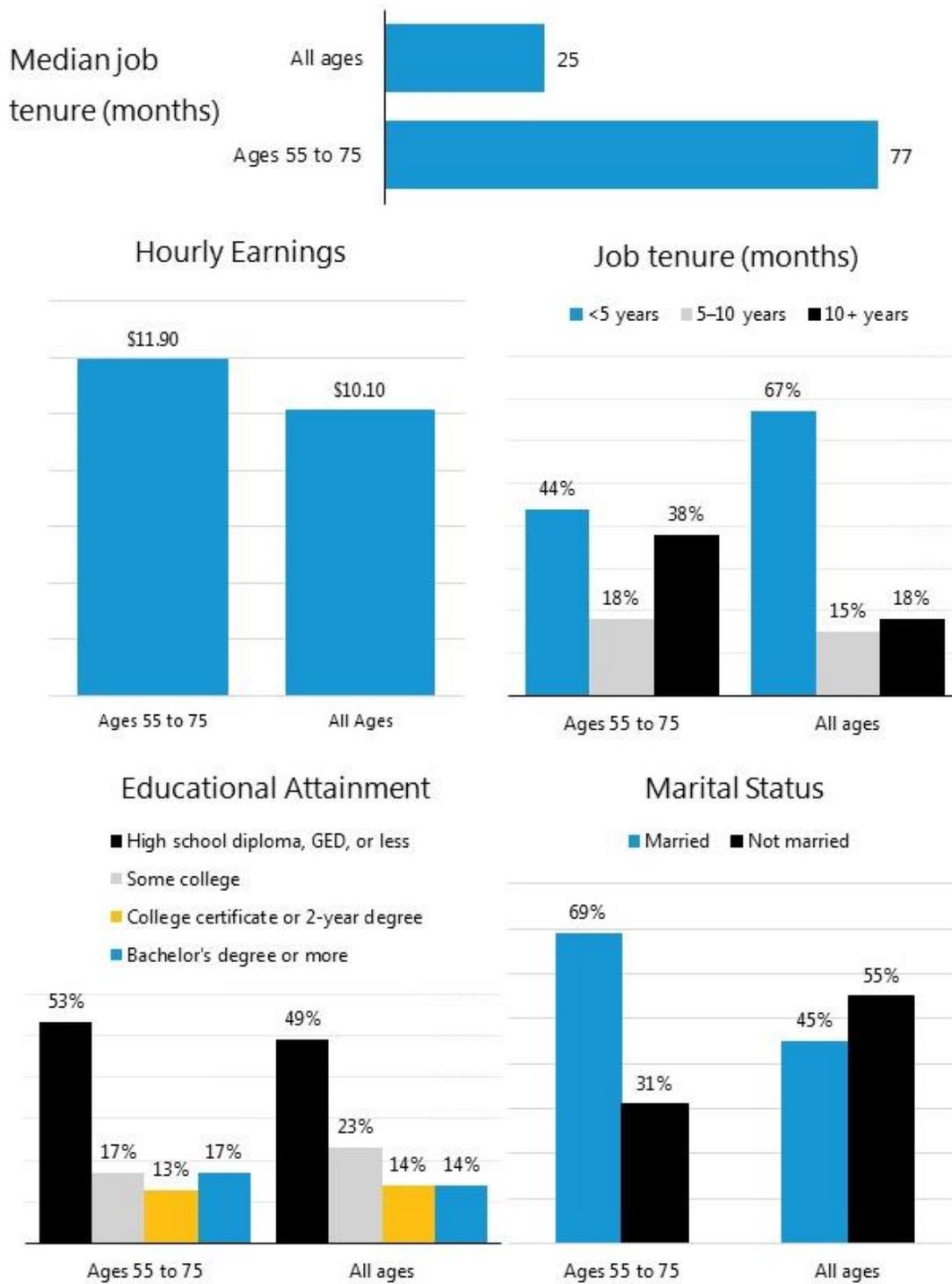
About one-fifth (22 percent) of all frontline retail workers are ages 55 to 75, or “later-career” workers. Their median age is 61. In some ways, later-career retail workers resemble all retail workers: 65 percent work full-time (compared with 63 percent of all workers), and 59 percent are men and 41 percent are women (the same shares as the retail workforce overall).

But many later-career frontline retail workers have had long careers in their current frontline retail job. Their median tenure is 77 months compared with 25 months for all workers (figure 6). Because this tenure is for the current job, they may have been in the retail sector even longer. Given their long tenure and experience, these older workers for the most part are likely not taking on these jobs in retirement. More than half (56 percent) of later-career retail workers have been in their current job for more than 5 years, and 38 percent have been in their current job for more than 10 years. This length of tenure is much less common among all retail workers: one-third (33 percent) have been in their current job for more than 5 years and 18 percent for more than 10 years.

Later-career frontline retail workers earn higher wages than other frontline retail workers. They earn a median hourly wage of \$11.90 compared with \$10.10 for all frontline retail workers, which could be related to their longer tenure. But this average masks substantial wage differences at the low and high ends. About one in five later-career workers earns less than \$7.25 an hour, and a similar percentage earns more than \$20.99 an hour.

These workers’ long tenure suggests commitment to their jobs and to the retail sector; they therefore may be targets for advancement. A recent study found that 44 percent of older, low-income workers have no plans to retire, and another 9 percent do not know when they will retire (Mikelson, Kuehn, and Martin-Caughey 2017).²⁶ The higher average tenure and wages shown in figure 5 suggest that some of these later-career workers are likely to have received raises over time. However, they have not moved into supervisory or managerial jobs (at least not as reflected in their occupational titles). Employers thus may consider whether some of their long-term later-career employees may be appropriate for these positions.

FIGURE 6
Later-Career Frontline Retail Workers, Ages 55 to 75



Source: Authors' calculations from the Survey of Income and Program Participation, 2015.

How Early-Career Frontline Retail Workers Advance

Understanding which frontline retail workers advance and which do not sheds light on how employers can target their strategies and supports to broaden advancement pathways in retail. In this section, we use data that tracks early-career frontline retail workers' employment over time to describe what characteristics and circumstances are associated with advancement in retail. The data we use are limited to young workers. But understanding and improving advancement for this early-career group is important for encouraging workers to remain in the retail sector.

Using our definition of frontline retail jobs, we identified early-career retail workers' first frontline retail job after age 18. This is approximately the same group as our "early-career frontline retail workers" profile.²⁷ We examined these workers' jobs five years later and tried to discern who advances within the retail sector.

Advancement can be defined in many ways, but we used wage growth as our primary indicator. Increased wages are an accepted indicator of career progression and, unlike changes in job titles or occupations, are a consistent cross-sector metric.²⁸ Government data sources (the basis for our analysis) categorize people's jobs by occupation. In some cases, career pathways in retail involve changing occupations, such as from a retail salesperson to a first-line supervisor of retail sales. But workers can also advance to greater responsibilities and wages within a given retail occupation, such as a cashier becoming a head cashier or a warehouse stocker becoming a team leader. Increased wages may or may not be associated with changing jobs (within an employer) or changing employers.

To measure the percentage of workers in their first frontline retail job (base year) who had advanced five years later (target year), we need to define advancement. We use two different methods:

- **Personal wage growth:** A worker's wage increases by a certain amount in five years. For this definition, we use the metric "more than 3 percent annual growth," meaning a person experienced an average 3 percent annual wage growth or more over the five years since the base year. Three percent was the average annual growth rate of wages for all workers in the economy between 2000 and 2015, the approximate years this study covers.²⁹ Advancement under this definition means workers experienced greater than average wage growth.
- **Achieving a target wage:** A worker's wage is higher than a specific target wage five years after starting in retail, regardless of their initial wage. For this definition, we used the metric "greater

than 25th-percentile wages,” meaning a person is earning a wage higher than 25 percent of the hourly labor force in the target year. We chose 25 percent because in the base year, the average hourly wage of frontline retail workers was approximately at the 25th percentile of all workers’ hourly wages. Advancement under this definition means individuals’ actual earnings in the target year are higher than 25 percent of other hourly workers’ earnings in that same year.

Each of these measures has limitations. Under the first measure, people whose first job pays a relatively higher wage would have to get a higher absolute wage increase than someone starting in a lower-paying job to be counted as advancing. This is because our measure is in percentage growth. Under the second measure, individuals who start out at a low wage and experience considerable wage growth will not be counted as advancing if they do not reach the target wage. Using both measures provides two different perspectives. Selecting different annual wage growth or target wages would change these results.

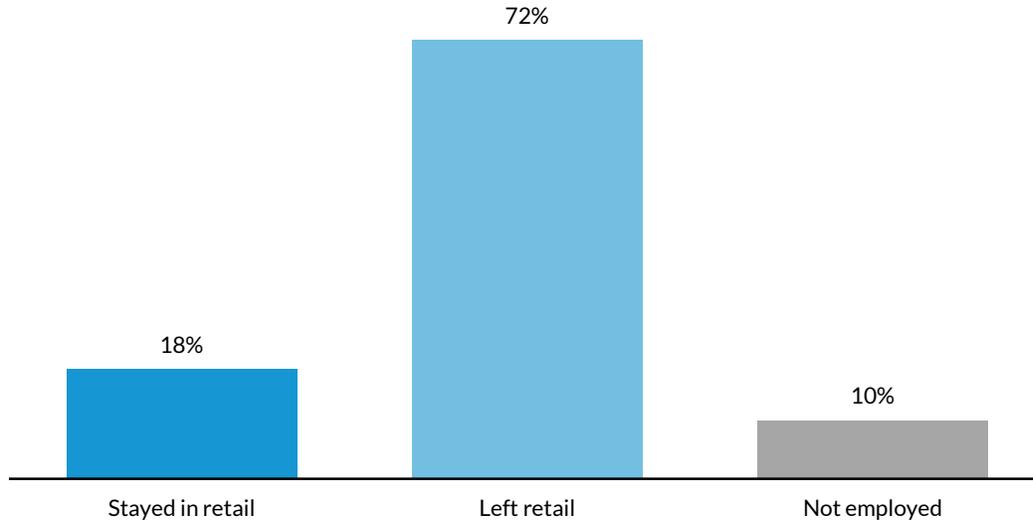
For this analysis, we include all frontline retail jobs held by our target group regardless of whether they are part-time. This allows us to track advancement of all frontline workers, because part-time workers may also advance over the period.

Before addressing who advances in retail, we note some important facts about early-career advancement of frontline retail workers. First, 72 percent of frontline retail workers no longer work in retail five years after they start their first retail job (figure 7). Because only about 10 percent of all US employment is in the retail sector, this reflects that there are many more jobs outside of retail than within it and, therefore, there are likely to be many opportunities for advancement outside as well.³⁰ More study is needed to understand other reasons workers leave the retail sector. For early-career workers, retail may have been temporary job until they completed school. Our earlier results (figure 3) show that almost half of early-career retail workers are enrolled in school. One study that conducted focus groups with retail workers suggested other reasons, including low wages and not knowing about opportunities for careers in retail (FHI 360 2016). Further, about 10 percent of those who start a frontline retail job are no longer working at all five years later.

FIGURE 7

Most Frontline Retail Workers No Longer Work in the Retail Sector Five Years Later

Employment status five years after starting a frontline retail job

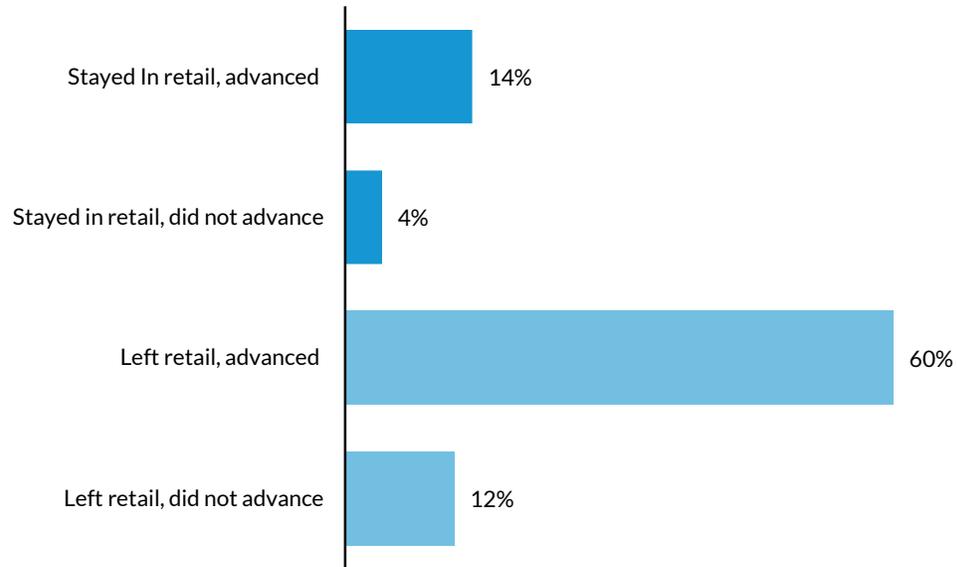


Source: Authors' calculations from the National Longitudinal Survey of Youth.

Most of those starting a frontline retail job had advanced five years later, using either of our measures of advancement (figures 8 and 9). But this advancement mostly occurred after leaving retail, which is consistent with the large share of workers who left retail.

FIGURE 8

Percentage of Frontline Retail Workers Who Advanced, Measured by Annual Wage Growth Exceeding 3 Percent

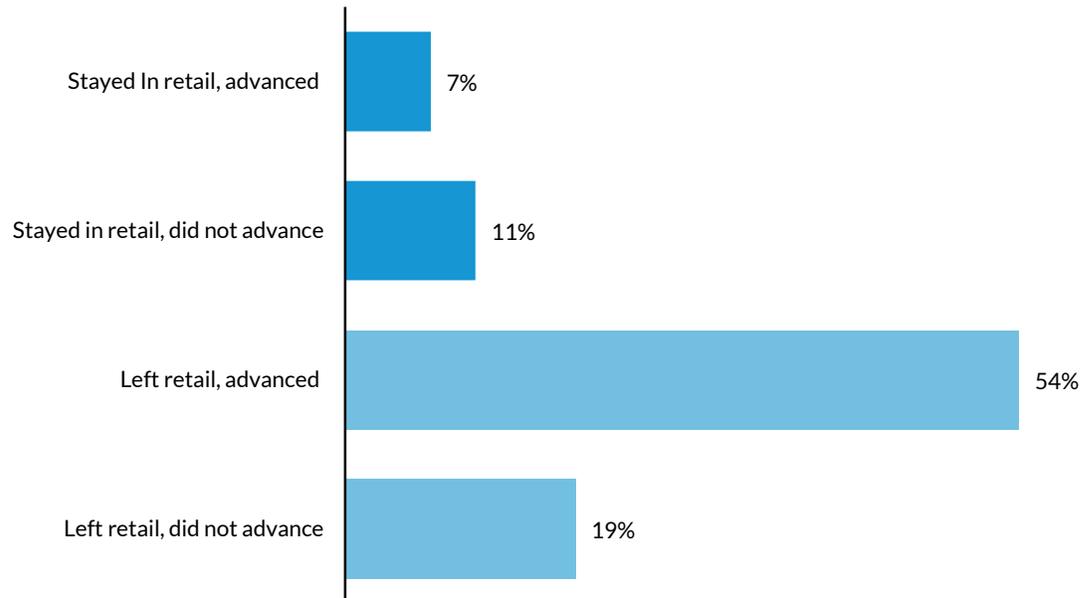


Source: Authors' calculations from the National Longitudinal Survey of Youth.

Note: 10 percent of workers are no longer working for pay, not shown.

FIGURE 9

Percentage of Frontline Retail Workers Who Advanced, Measured by Wage Growth Exceeding the 25th Percentile wages



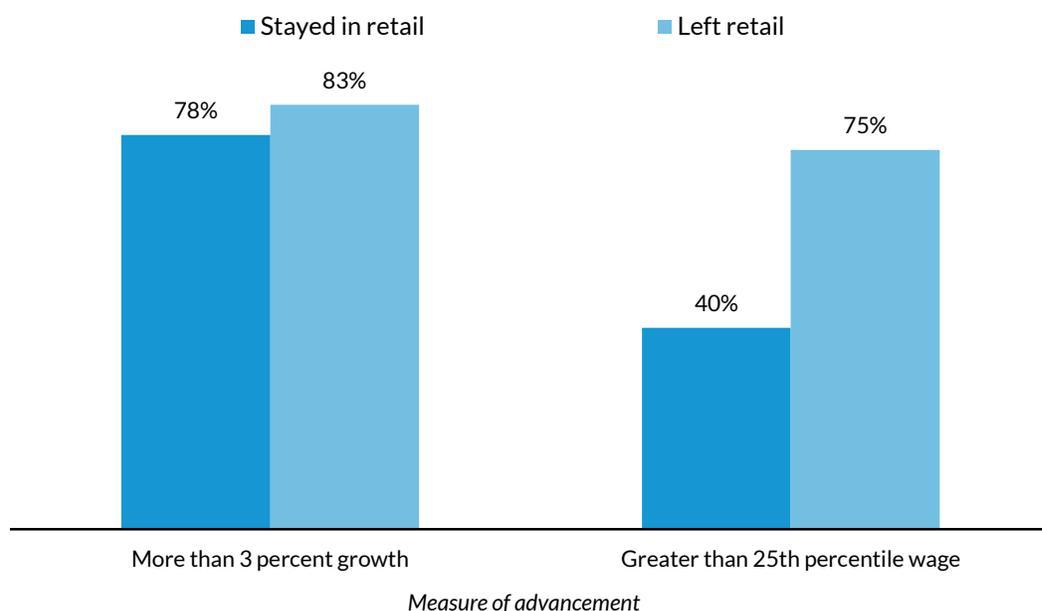
Source: Authors' calculations from the National Longitudinal Survey of Youth.

Note: 10 percent of workers no longer working for pay, not shown.

Five years after starting a frontline retail job, many workers have advanced, although those who remained in the retail sector were less likely to have advanced than those who had left (figure 10). The vast majority of those starting as frontline retail workers had higher than 3 percent annual growth rate over five years, regardless of whether they stayed in retail or left. But a somewhat greater percentage of those who left retail (83 percent versus 78 percent) advanced by this metric. Fewer of those remaining in retail advanced based on the metric of earning more than the 25th percentile of workers: only 40 percent of those staying in retail advanced by this definition compared with 75 percent of those who left retail. This could reflect a greater number of part-time workers in the retail sector than in other sectors, because part-time workers usually earn lower wages than full-time workers. One study of the retail sector showed that controlling for worker experience, skills, and hours worked, retail jobs pay as well as nonretail jobs and provide long-term earnings growth.³¹

FIGURE 10

Workers Who Stayed in Frontline Retail or Moved to Other Sectors Advance



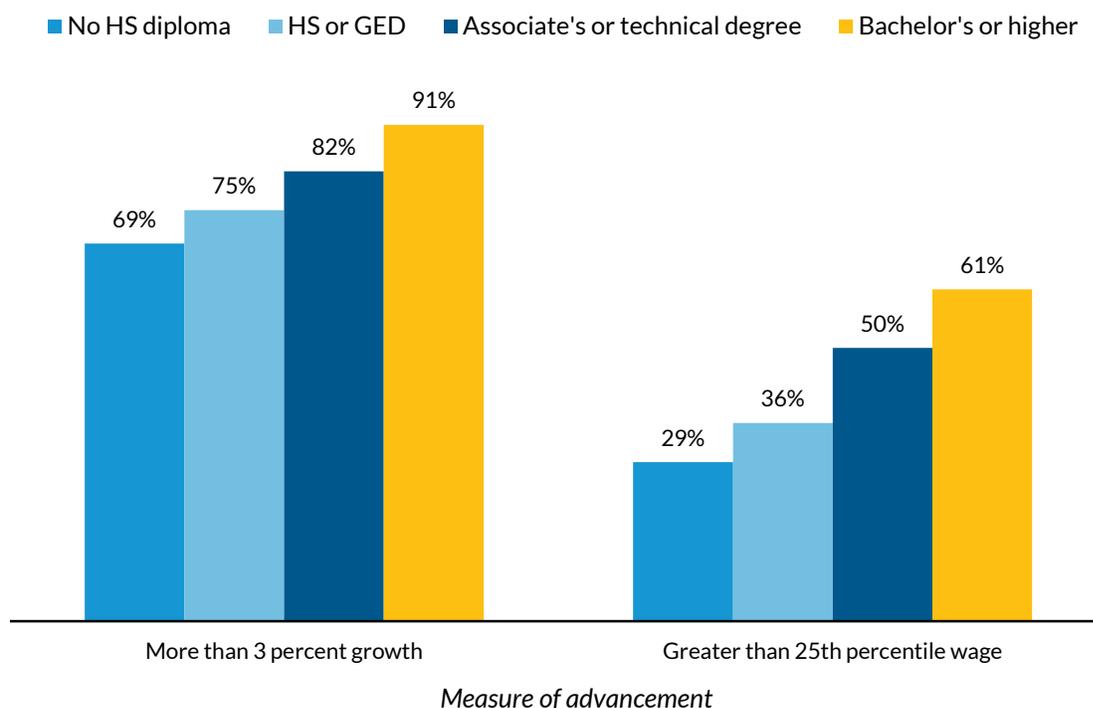
Source: Authors' calculations from the National Longitudinal Survey of Youth.

Focusing on those who remain in retail, we examine the characteristics associated with a greater likelihood of advancing, specifically those that could inform employers' advancement strategies.

For those who remain in retail five years after starting a frontline retail job, education is strongly connected to the likelihood of advancement. Among those who achieve higher levels of education (measured at the fifth year after starting in retail), the share that advances is larger (figure 11). This is

true for both of our measures of advancement. Although it may not be surprising that those with a bachelor's degree are more likely to advance than those with no high school diploma, the percentage advancing is also higher for those with a high school diploma or GED than for those without these qualifications. Some of these people were working in retail while in school.

FIGURE 11
Of Frontline Retail Workers Remaining in Retail, Those with Higher Education Were More Likely to Have Advanced

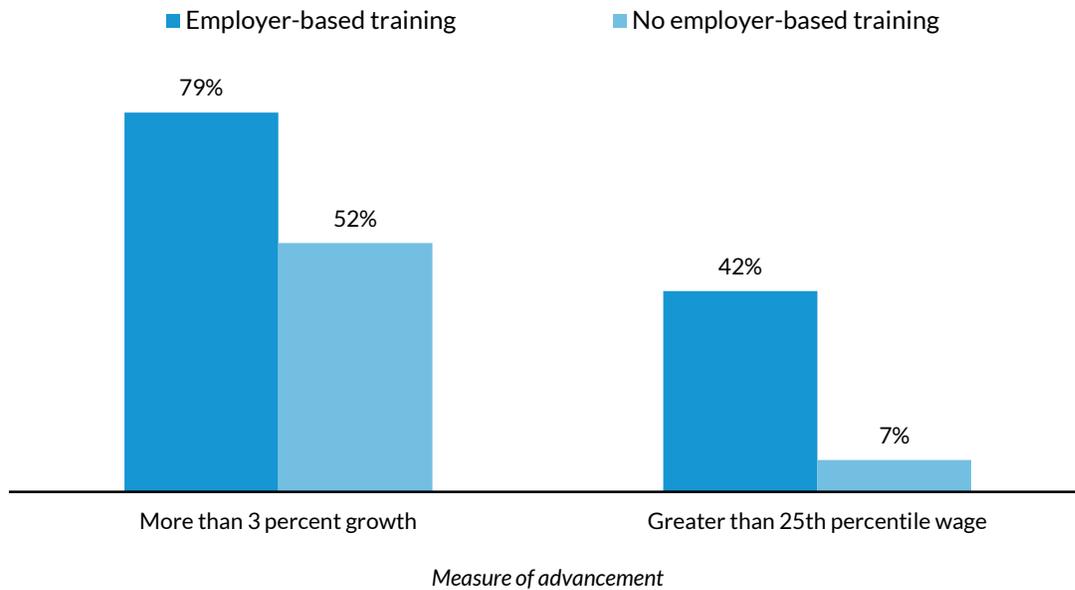


Source: Authors' calculations from the National Longitudinal Survey of Youth.

In addition to formal schooling, receiving employer-based training during the five years after starting a frontline retail job was also found to be associated with higher rates of advancement (figure 12). The difference in shares advancing is large for both measures of advancement, suggesting that employer-based training is an avenue to advancement. It also could signal that jobs not offering employer-based training also do not offer advancement opportunities, but such jobs are fairly uncommon. Almost all frontline retail workers who remain in retail (95 percent) received employer-based training over the five years we tracked advancement.

FIGURE 12

Of Frontline Retail Workers Remaining in Retail, Those Who Received Employer-Based Training Were More Likely to Have Advanced

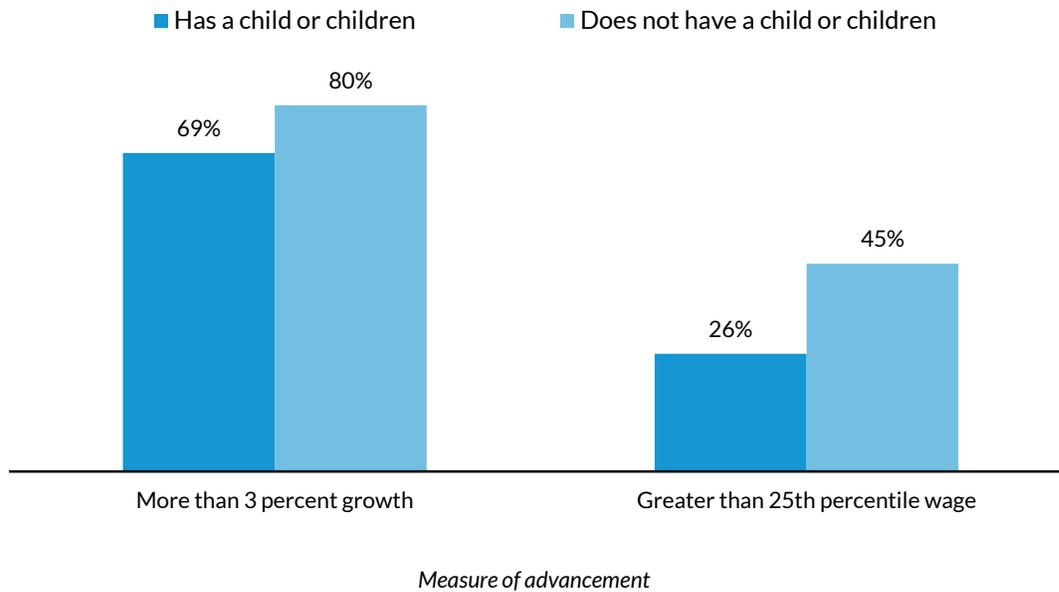


Source: Authors' calculations from the National Longitudinal Survey of Youth.

Whether a frontline retail worker has children also influences his or her likelihood of advancement. Frontline retail workers who remain in retail are more likely to advance if they do not have children (figure 13).³² For example, 80 percent of those without children who stayed in the retail sector experienced greater than 3 percent annual wage growth compared with only 69 percent of those with children. This could reflect the difficulty workers with children face balancing family and work duties that would lead to advancement, or it could reflect that workers with children hold retail jobs less likely to lead to advancement. Only a minority of these early-career workers have children (16 percent), but these results suggest that those who do may be targets for employer-provided support to foster advancement.

FIGURE 13

Of Frontline Retail Workers Remaining in Retail, Those Who Did Not Have Children Were More Likely to Have Advanced

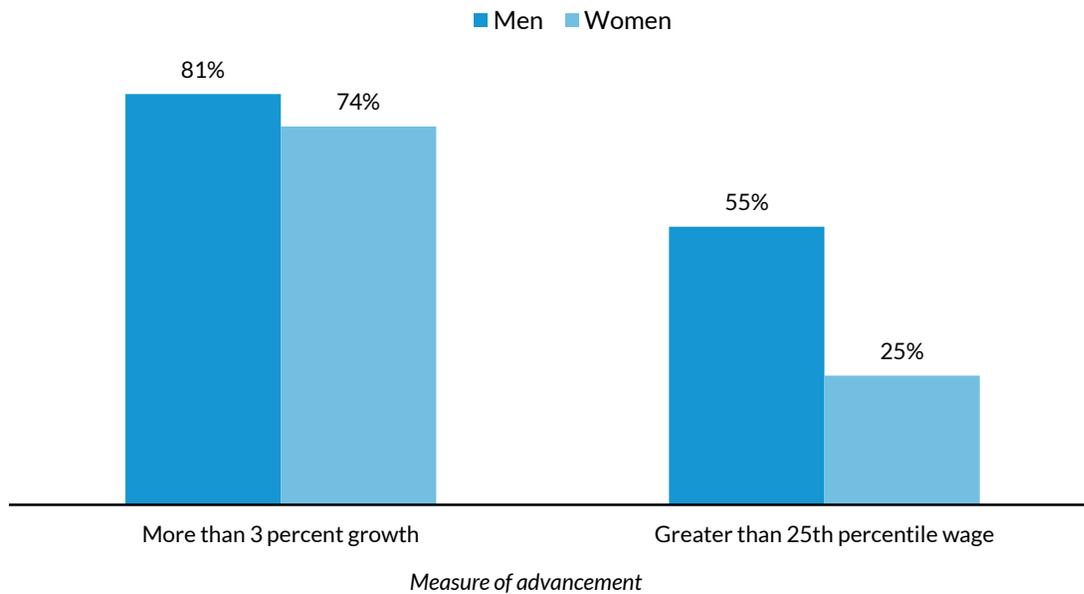


Source: Authors' calculations from the National Longitudinal Survey of Youth.

For those who remain in retail, advancement also differs by gender. On both measures of advancement, men are more likely to advance than women (figure 14). This could reflect that women and men tend to hold different jobs within the retail sector (Carré and Tilly 2017) and that these different jobs have varying advancement prospects. But retail wage advancement could also be mirroring wage advancement in many other sectors where women's wages have been shown to lag men's (Blau and Kahn 2016). This lag may be attributable to women's family obligations, a lack of affordable child care, discrimination in being provided advancement opportunities, or job structures that make child care difficult (e.g., unpredictable schedules).

FIGURE 14

Of Frontline Retail Workers Remaining in Retail, Women Were Less Likely to Advance



Source: Authors' calculations from the National Longitudinal Survey of Youth.

Our findings regarding advancement suggest that many early-career frontline workers are advancing, but they are advancing more often by leaving retail than by staying. Although many more nonretail jobs exist than retail jobs, and many of these frontline workers are in school for a nonretail career path, increasing the chance of advancement within retail for frontline workers could encourage more early-career frontline retail workers to stay in the industry. Results on who advances in retail among frontline workers suggest that advancement strategies could try to improve their education, provide employer-based training, and make sure to target assistance to women and workers who have children to increase their advancement possibilities.

Skill Gaps and Advancement in Retail

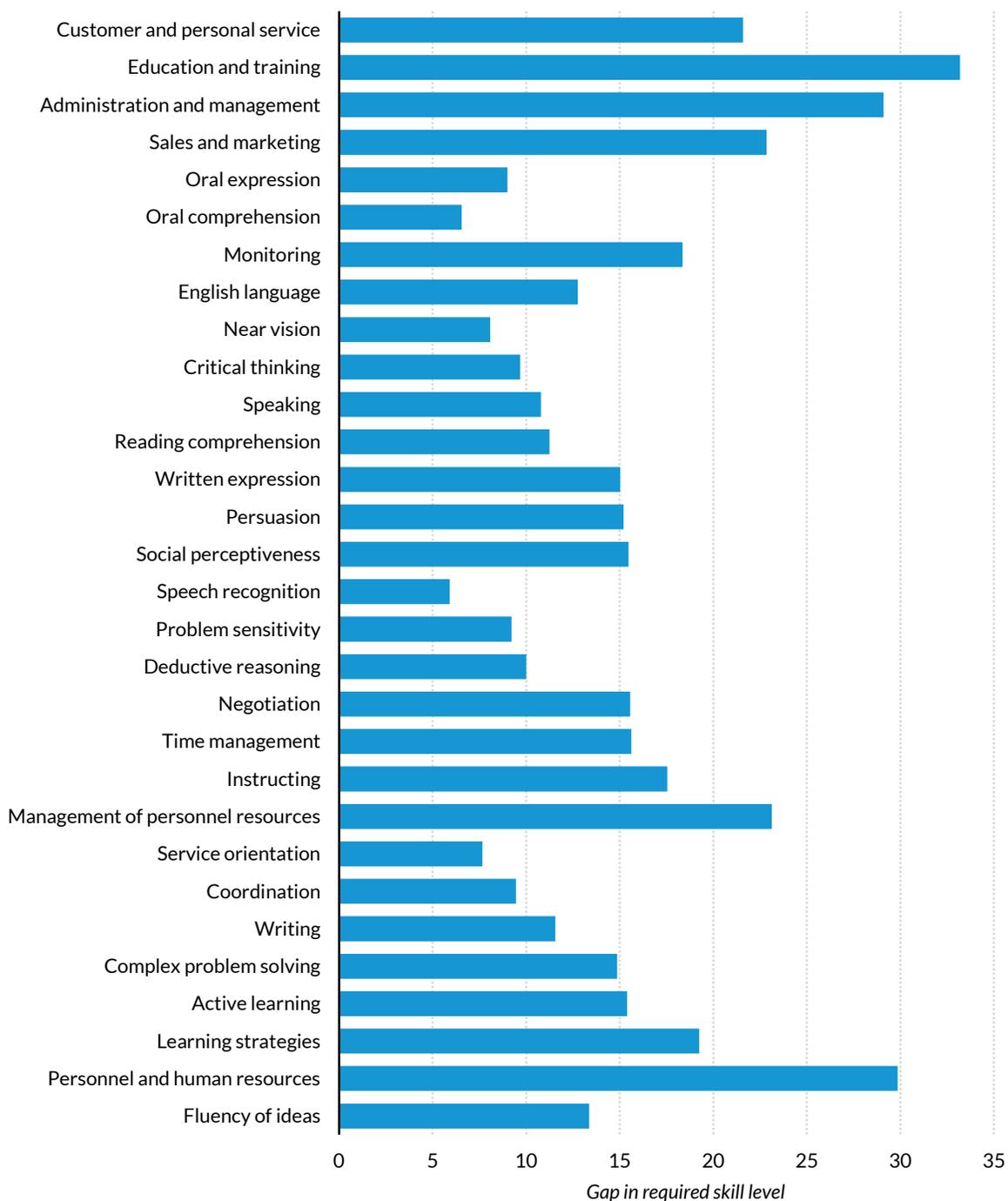
Here we present information on gaps between the skills required for frontline retail jobs and those needed to be a retail supervisor. We base our examination of retail supervisor skills on those needed for an initial supervisory position in retail, direct supervision of frontline retail sales workers.³³ This occupation does not represent all retail supervisors, but does represent the skills required for a first-level supervisory position. The skill gaps we identify may help retailers and workers understand where to focus efforts to build skills for advancement.

The skill requirements for first-line supervisors of retail workers come from the Department of Labor's O*NET database, which ranks the importance of 120 skills on a scale of 0 to 100.³⁴ Figure 15 lists the 25 most important skills required for first-line retail supervisors (in descending order of importance) and shows the gap for each skill between the level required for first-line supervisors and the level required for frontline retail workers.³⁵ The larger the gap, the more frontline retail work differs from supervisory work in use of this skill. For example, there is a larger gap in customer and personal service (22) than in oral expression (9), meaning the difference in customer and personal services skill between frontline retail workers and supervisors is greater than the difference in oral expression skills. The skills that are higher on the list (more important for retail supervisory positions) and that have larger gaps should be the focus of efforts to assist frontline workers in advancing.

For the 25 skill areas in figure 15, frontline retail workers are in jobs that require lower skill levels than retail supervisors. The gaps in skill levels are highest in the areas of customer and personal service, education and training (which involves knowledge of training and instruction for individuals and groups), administration and management, sales and marketing, management of personnel resources, and personnel and human resources, although these last two are less important for first-line retail supervisors. Some of these gaps are for skills that are generalizable across occupations and could be closed with education and training programs, which would help workers advance in occupations other than retail. Other gaps are for skills that are likely best learned through on-the-job or employer-based training.

FIGURE 15

Skill Gaps between First-Line Retail Supervisors and Frontline Retail Workers, by Required Skill



Source: Authors' calculations using SIPP and Bureau of Labor Statistics O*NET database.

Notes: Knowledge, skills, and abilities shown are the 25 most important for first-line retail supervisors and are listed in descending order of importance. "Gap in required skill level" represents the numerical importance ranking of the first-line retail supervisor skill minus the importance ranking of the same skill for a frontline retail worker. Numbers are rounded to nearest whole number.

Conclusions

Creating pathways and opportunities for frontline retail workers to advance is important, and many employers and their partners are exploring strategies to increase retention and advancement in the retail sector. These include comprehensive entry-level training programs, educational assistance programs for off-the-job training, English language classes at work, clear career advancement pathways and efforts to educate workers about them, career coaches and formal mentoring programs, policies and practices toward gender equity, and innovative scheduling systems allowing frontline workers greater scheduling autonomy. To support and expand the implementation of these types of employer approaches to retention and advancement, we profile frontline retail workers in this report, providing information on their characteristics, circumstances, and early career advancement. These findings can help employers and their partners develop and target these strategies.

Our findings show that many early-career frontline retail workers, as well as midcareer women working full-time frontline retail jobs, are highly educated and could be targets for advancement. Some women could advance by making lateral career moves to other occupations within frontline retail. Some part-time workers want to work more hours, and later-career workers have long retail experience and loyalty to their employers. We also found that many early-career frontline retail workers are advancing in retail. Those with higher education, who are receiving training on or off the job, who don't have children, and who are male are more likely to advance.

This report is the first in a two-part Urban Institute study examining frontline retail workers. The second phase will explore promising advancement strategies that some retail employers now use. This research will tell us more about targeted advancement strategies that build upon the strengths of current retail workers and highlight the opportunities for careers within retail.

Appendix: Frontline Retail Worker Characteristics

TABLE A1
Characteristics of Frontline Retail Workers, January 2015

Characteristics	Frontline Retail Workers (millions)											
	All (ages 19 to 75)		Early career (ages 19 to 24)		Full-time men mid-career (ages 25 to 54)		Full-time women mid-career (ages 25 to 54)		Part-time mid-career (ages 25 to 54)		Later career (ages 55 to 75)	
	%	#	%	#	%	#	%	#	%	#	%	#
All	100	12.60	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Gender												
Male	59	7.41	50	1.35	100	3.66	0	0.00	38	0.73	59	1.64
Female	41	5.18	50	1.37	0	0.00	100	1.48	62	1.19	41	1.13
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Race/ethnicity												
Non-Hispanic white	62	7.87	54	1.47	58	2.12	58	0.86	61	1.17	80	2.22
Non-Hispanic African American	13	1.58	17	0.47	15	0.55	11	0.17	11	0.22	6	0.18
Asian	5	0.62	3	0.08	6	0.20	5	0.07	8	0.15	4	0.11
Hispanic	17	2.10	21	0.58	18	0.68	23	0.34	15	0.29	8	0.21
Other	3	0.42	4	0.12	3	0.11	3	0.04	5	0.10	2	0.05
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Marital status												
Married	45	5.69	7	0.20	56	2.06	45	0.67	44	0.85	69	1.91
Separated	3	0.32	1	0.02	3	0.10	5	0.07	4	0.07	2	0.06
Divorced	12	1.47	1	0.02	12	0.43	16	0.24	13	0.26	19	0.52
Widowed	2	0.23	0	0.00	0	0.01	2	0.03	1	0.03	6	0.16
Never married	39	4.88	91	2.48	29	1.06	32	0.47	38	0.73	4	0.11
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Dependent child <5 years in household												
No	90	11.38	93	2.53	84	3.09	88	1.30	86	1.67	100	2.76
Yes	10	1.21	7	0.19	16	0.57	12	0.18	14	0.26	0	0.00
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Employment status												
Part time	37	4.68	66	1.79	0	0.00	0	0.00	100	1.93	35	0.96
Full time	63	7.87	34	0.93	100	3.66	100	1.48	0	0.00	65	1.79
<i>Total</i>	100	12.54	100	2.72	100	3.66	100	1.48	100	1.93	100	2.76

Frontline Retail Workers (millions)

Characteristics	All (ages 19 to 75)		Early career (ages 19 to 24)		Full-time men mid- career (ages 25 to 54)		Full-time women mid- career (ages 25 to 54)		Part-time mid-career (ages 25 to 54)		Later career (ages 55 to 75)	
	%	#	%	#	%	#	%	#	%	#	%	#
Hours worked												
1-10	5	0.65	10	0.27	0	0.00	0	0.00	11	0.22	6	0.17
11-20	13	1.63	28	0.76	0	0.00	0	0.00	26	0.51	13	0.36
21-30	15	1.87	23	0.64	0	0.00	0	0.00	47	0.90	12	0.33
31-34	4	0.53	5	0.13	0	0.00	0	0.00	16	0.30	4	0.10
35+	63	7.87	34	0.93	100	3.66	100	1.48	0	0.00	65	1.79
<i>Total</i>	100	12.54	100	2.72	100	3.66	100	1.48	100	1.93	100	2.76
Educational attainment												
Less than a HS degree	9	1.18	6	0.17	11	0.41	10	0.15	9	0.18	10	0.26
High school grad/GED	39	4.94	34	0.91	45	1.66	33	0.49	34	0.66	44	1.21
Some college, no degree or certificate	23	2.94	44	1.19	14	0.52	20	0.30	23	0.44	17	0.48
College certificate or 2- year degree	14	1.71	11	0.31	14	0.52	14	0.21	16	0.31	13	0.35
BA/graduate/professional degree	14	1.81	5	0.15	15	0.55	22	0.32	18	0.34	17	0.46
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Enrolled in school												
No	87	10.90	52	1.40	98	3.59	96	1.42	88	1.69	100	2.76
Yes	13	1.69	48	1.32	2	0.07	4	0.05	12	0.23	0	0.01
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
If enrolled in school, school grade												
<HS	2	0.03	2	0.02	0	0.00	12	0.01	0	0.00	0	0.00
HS	12	0.20	14	0.18	19	0.01	8	0.00	2	0.00	16	0.00
Undergraduate	73	1.24	76	1.00	47	0.03	59	0.03	72	0.17	0	0.00
Professional or graduate	4	0.08	3	0.04	19	0.01	7	0.00	8	0.02	0	0.00
Vocational tech	7	0.11	4	0.06	14	0.01	14	0.01	15	0.03	0	0.00
Enrolled, no degree	2	0.03	1	0.02	0	0.00	0	0.00	3	0.01	84	0.01
<i>Total</i>	100	1.69	100	1.32	100	0.07	100	0.05	100	0.23	100	0.01
English spoken in the home												
No	16	2.06	16	0.44	18	0.67	16	0.57	19	0.37	11	0.31
Yes	84	10.53	84	2.28	82	3.00	84	2.97	81	1.56	89	2.46
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	3.54	100	1.93	100	2.77
Job tenure (months)												
1	16	1.96	24	0.64	12	0.42	11	0.17	22	0.42	10	0.28
2-6	12	1.46	25	0.67	7	0.27	9	0.14	13	0.26	4	0.12
7-12	10	1.23	17	0.45	8	0.30	10	0.15	11	0.21	4	0.12
13-24	13	1.61	18	0.50	12	0.43	12	0.18	13	0.26	9	0.25
25-36	8	1.05	8	0.23	8	0.29	8	0.12	11	0.20	7	0.21
37-60	9	1.15	5	0.15	11	0.40	10	0.14	12	0.22	9	0.24

Frontline Retail Workers (millions)

Characteristics	All (ages 19 to 75)		Early career (ages 19 to 24)		Full-time men mid- career (ages 25 to 54)		Full-time women mid- career (ages 25 to 54)		Part-time mid-career (ages 25 to 54)		Later career (ages 55 to 75)	
	%	#	%	#	%	#	%	#	%	#	%	#
61-120	15	1.83	3	0.08	21	0.78	19	0.28	10	0.20	18	0.50
121+	18	2.30	0	0.00	21	0.78	21	0.30	8	0.16	38	1.06
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Hourly wage												
<\$7.25	16	1.85	27	0.70	3	0.10	7	0.10	30	0.51	18	0.43
\$7.26-\$9.99	28	3.18	51	1.35	10	0.33	29	0.40	41	0.71	16	0.37
\$10.00-\$11.99	14	1.63	13	0.35	13	0.40	17	0.24	15	0.26	16	0.37
\$12.00-\$15.99	16	1.84	6	0.16	22	0.70	25	0.35	9	0.16	20	0.47
\$16.00-\$20.99	9	1.07	1	0.04	19	0.61	12	0.17	3	0.05	9	0.21
>\$20.99	15	1.73	2	0.04	33	1.03	10	0.14	2	0.04	21	0.48
<i>Total</i>	100	11.31	100	2.64	100	3.17	100	1.40	100	1.73	100	2.34
Respondent's annual earnings as a percentage of household income												
<25%	21	2.60	47	1.26	5	0.18	13	0.19	35	0.65	12	0.32
25-50%	24	2.95	22	0.59	20	0.72	33	0.49	26	0.49	24	0.66
51-75%	17	2.06	5	0.14	24	0.86	15	0.22	11	0.21	23	0.64
76-100%	39	4.78	26	0.72	51	1.85	38	0.56	28	0.53	41	1.12
<i>Total</i>	100	12.38	100	2.70	100	3.60	100	1.46	100	1.89	100	2.73
Shift schedule												
Regular daytime schedule	58	7.32	43	1.17	66	2.40	74	1.09	53	1.01	59	1.63
Regular evening shift	9	1.08	20	0.53	6	0.21	4	0.06	8	0.15	4	0.12
Regular night shift	6	0.71	6	0.16	6	0.23	5	0.08	4	0.09	6	0.15
Rotating shift	6	0.71	7	0.19	6	0.20	4	0.06	7	0.14	4	0.10
Split shift	1	0.10	1	0.02	0	0.01	1	0.01	1	0.02	2	0.04
Irregular shift	20	2.51	23	0.64	15	0.56	10	0.15	24	0.46	25	0.68
Other	1	0.17	0	0.01	1	0.05	1	0.02	2	0.05	1	0.04
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77
Reason for shift schedule												
Requirement of job	85	10.75	78	2.12	94	3.43	85	1.26	77	1.48	88	2.45
Could not get any other job	1	0.08	1	0.02	0	0.01	1	0.02	2	0.03	0	0.00
Other involuntary reasons	2	0.25	2	0.05	1	0.04	1	0.01	4	0.07	3	0.07
Better pay	1	0.12	1	0.02	1	0.03	2	0.03	0	0.01	1	0.03
Better childcare arrangements	2	0.26	1	0.03	1	0.04	4	0.06	7	0.13	0	0.00
Better arrangements for care, other family member	1	0.15	1	0.02	0	0.01	1	0.02	2	0.05	1	0.04
Allows time for school	4	0.55	15	0.42	1	0.02	1	0.01	5	0.09	0	0.00
Other	3	0.43	1	0.04	2	0.08	4	0.06	4	0.08	6	0.17
<i>Total</i>	100	12.59	100	2.72	100	3.66	100	1.48	100	1.93	100	2.77

Frontline Retail Workers (millions)												
Characteristics	All (ages 19 to 75)		Early career (ages 19 to 24)		Full-time men mid- career (ages 25 to 54)		Full-time women mid- career (ages 25 to 54)		Part-time mid-career (ages 25 to 54)		Later career (ages 55 to 75)	
	%	#	%	#	%	#	%	#	%	#	%	#
Number of employees												
<26	5	0.41	4	0.08	6	0.14	3	0.04	5	0.07	4	0.08
26-50	3	0.28	2	0.04	4	0.09	4	0.04	3	0.04	4	0.07
51-100	3	0.31	3	0.06	5	0.11	4	0.04	3	0.04	2	0.04
101-200	4	0.31	2	0.04	4	0.09	4	0.05	2	0.03	6	0.10
201-500	5	0.48	3	0.06	9	0.22	6	0.06	2	0.03	5	0.10
501-1,000	5	0.43	3	0.06	7	0.17	4	0.05	4	0.06	5	0.10
1,000+	75	6.60	84	1.76	65	1.48	76	0.86	81	1.18	73	1.32
<i>Total</i>	100	8.81	100	2.10	100	2.29	100	1.14	100	1.45	100	1.82
Employer offered health coverage to any of its employees?												
No	56	4.53	56	1.39	62	1.05	54	0.45	53	0.82	55	0.81
Yes	44	3.49	44	1.09	38	0.63	46	0.38	47	0.73	45	0.66
<i>Total</i>	100	8.03	100	2.48	100	1.68	100	0.83	100	1.55	100	1.47

Source: Authors' calculations from the Survey of Income and Program Participation, 2015.

Note: Percentages are rounded to nearest whole number

TABLE A2

Characteristics of Early-Career Workers at Time of First Frontline Retail Job

Characteristic	%
Gender	
Male	49
Female	51
Race	
African American	17
Hispanic	13
Non-Hispanic mixed race	1
Non-African American, non-Hispanic	69
Children	
Children live in household	13
Children do not live in household	3
No children	84
Married	
Yes	7
No	93
Highest Degree Earned	
Less than HS	15
HS diploma/GED	80
Associate of Arts or tech degree	1
4-year or higher degree	3
Hourly Wage	
<\$7.25	61
\$7.26-\$9.99	28
\$10.00-\$15.99	8
>\$16.00	2

Source: Authors' calculations from the National Longitudinal Survey of Youth.

Note: One percent or fewer of respondents are missing data in each category.

Last two categories sum to 99 percent due to rounding.

Notes

- ¹ Authors' calculation from analysis for this study using National Longitudinal Survey of Youth data.
- ² A survey of hiring managers found that 69 percent say the retail industry equips employees with a wide variety of skills and experience, and 72 percent say it provides its employees with job skills training. See National Research Federation (2015).
- ³ See Dorfmann (2014).
- ⁴ For more details and specific employer examples, see Hanleybrown, Hawkins, and Medrano (forthcoming), Gilsdorf and Hanleybrown (2017), Opportunity Nation (n.d.), Zenyap (2014), and specific employer examples at Aspen Institute's Upskill America website (<http://www.upskillamerica.org>).
- ⁵ Specifically, we use here the US Department of Labor's occupational classification "First-line supervisors of retail sales workers" defined as those who "directly supervise and coordinate activities of retail sales workers." This occupation does not include all direct supervisors of workers we have defined as frontline retail workers.
- ⁶ These data are from the "Table B-1a. Employees on Nonfarm Payrolls by Industry Sector and Selected Industry Detail, Seasonally Adjusted," US Department of Labor, Bureau of Labor Statistics, Current Employment Statistics Establishment Data, accessed February 12, 2019, <https://www.bls.gov/web/empsit/ceseeb1a.htm>. The federal government uses the North American Industry Classification System (NAICS) to categorize individual establishments into sectors. Given the methodology behind this classification and the changing nature of the retail sector, the NAICS has been shown to mistakenly categorize some retail employment in nonretail sectors, leading to an underestimate of workers in the retail sector. Partly because of this, we include some workers in our definition of frontline retail workers discussed in this section who are in a retail occupation, whether or not they are classified as being in the retail industry. For more information on NAICS classification, see Fort and Klimek (2018). For discussion of ecommerce jobs that might be missed in official reports, see Mandel (2017).
- ⁷ Authors' calculation from analysis for this study using National Longitudinal Survey of Youth data.
- ⁸ See Dorfmann (2014).
- ⁹ See FHI 360 (2016).
- ¹⁰ For more details and specific employer examples, see Hanleybrown, Hawkins, and Medrano (forthcoming), Gilsdorf and Hanleybrown (2017), Opportunity Nation (n.d.), Zenyap (2014), and specific employer examples at Aspen Institute's Upskill America website (<http://www.upskillamerica.org/>).
- ¹¹ These occupation categories are developed and used by the Bureau of Labor Statistics and are the basis of the occupational categories available in the data used for this study. These occupations are the most detailed categorization possible to identify types of jobs in these data. That is, we cannot identify in more detail the types of retail jobs within these occupational categories. As noted in table 1, for some of the listed occupations we only include workers whose employer is categorized as being in the retail sector. We do this for occupations where the defined job activities are common across multiple industries in order to limit our sample to retail jobs. For example, shipping and receiving clerks can work in multiple industries (manufacturing, mining, etc.)
- ¹² We chose January to avoid some of the cyclical bumps in retail caused by seasonal hiring of temporary workers in summer or for end-of-year holidays.
- ¹³ The actual measure is whether English is the primary language spoken in their home. We use this as a proxy in our discussion for whether English is the worker's primary language.
- ¹⁴ See Carré and Tilly (2008). Many press articles have been written about the importance of diversity in management (for example, Glen Llopis, "Diversity Management Is the Key to Growth: Make It Authentic," *Forbes*, June 13, 2011).

- ¹⁵ For midcareer full-time workers, we present results for men and women separately because of the prominent differences between these groups on median wage, educational attainment, shift schedule, and annual earnings as a share of household income. Although small gender differences do exist within the other three groups of early-career, midcareer part-time, and later-career workers, the most prominent differences are by age and hours worked.
- ¹⁶ We compare both early-career and later-career workers with workers of all ages, full-time female workers with full-time male workers, and all part-time workers with all full-time workers. Complete results on all factors for each group and all frontline workers are presented in the appendix.
- ¹⁷ The percentage of frontline retail workers who are female in this study is somewhat lower than in other studies (Aspen Institute 2012), which report the workforce to be about half female. This is because we focus on a broader set of occupations that are not always included in discussions of frontline retail work, but that reflect changes in this sector.
- ¹⁸ Having a high school diploma or GED is only a proxy for having the basic skills necessary to move on to certificate training. Research shows that many individuals with this level of education still have low levels (less than eighth grade) of basic reading, writing, and math skills.
- ¹⁹ Other research suggests the percentage of individuals who do not speak English as their first language may underestimate those for whom limited English skills may be an issue and who could benefit from additional education and training in this area. Bergson-Shilcock (2017) reports 29 percent of workers in service sector industries do not speak English as their first language.
- ²⁰ The monthly separation rate (the total number of job terminations occurring in a month for any reason – voluntary or involuntary- relative to employment) for October 2018 (the most recently available data) was 50 percent for the retail industry as a whole compared to 37 percent for all nonfarm employment. See Bureau of Labor Statistics, “Job Openings and Labor Turnover—December 2018,” news release, February 12, 2019, <https://www.bls.gov/news.release/pdf/jolts.pdf>.
- ²¹ Employment by race and ethnicity for the entire labor force in January 2015 is from the Bureau of Labor Statistics, “The Employment Situation—January 2015,” news release, February 6, 2015, https://www.bls.gov/news.release/archives/empst_02062015.pdf.
- ²² Because workers report these employer sizes, it is possible that workers in small establishments that are part of larger companies may have misreported their employer size, which suggests these numbers overestimate the number of workers working for small employers.
- ²³ See FSG (2017) for a discussion of strategies to advance women in the retail workforce.
- ²⁴ As described in Box 2, we excluded from our sample of frontline retail workers those who are working at a non-retail full-time job and work in retail part-time as a secondary job. For all the part-time workers included in this section, their retail job is their primary job.
- ²⁵ The Bureau of Labor Statistics defines involuntary part-time work as workers who report they are working part time because they could not find a full-time job or there is slack work or materials shortages on their job, causing their hours to be less than usual.
- ²⁶ This study uses the Health and Retirement Survey and defines “low-income workers” as those earning 300 percent or less of the federal poverty level “older workers” as those age 50 or above.
- ²⁷ This group is approximately the same as the early-career-workers group profiled in the previous section. We include here workers who held their first frontline retail jobs from age 19 to 28. The vast majority (95%) of these first frontline retail jobs are for young workers ages 19 to 24. The average age at which they started a frontline retail job is 20. We do not include first jobs prior to age 18 to avoid including part-time jobs held while in high school.

²⁸ See, for example, Andersson, Holzer, and Lane (2005).

²⁹ This is higher than the annual wage growth for all workers, as early-career workers across all sectors start at lower wages and experience higher wage growth.

³⁰ US Department of Labor, Bureau of Labor Statistics, Current Employment Statistics Establishment Data accessed June 2018, <https://www.bls.gov/web/empsit/ceseeb1a.htm>.

³¹ See Dorfman (2014).

³² This includes workers with children living in the household or living outside of the household.

³³ Specifically, we use here the US Department of Labor's occupational classification "First-line supervisors of retail sales workers" defined as those who "directly supervise and coordinate activities of retail sales workers." This occupation does not include all direct supervisors of workers we have defined as frontline retail workers.

³⁴ O*NET collects and presents information on the required skills for each occupation. It separates requirements into three categories: knowledge, defined as "organized sets of principles and facts that apply to a wide range of situations"; skills, defined as "developed capacities that facilitate learning and the performance of activities that occur across jobs"; and abilities, defined as "enduring attributes of an individual that influence performance." We present all three of these under the term "skills."

³⁵ We use the same definition of frontline workers described earlier. The skill requirements of each included occupation are weighted by the size of employment in that occupation among all frontline retail workers.

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