

Estimates of Workers Who Lack Access to Paid Sick Leave at 91 Large Service Sector Employers

The current health and economic crisis caused by Coronavirus/COVID-19 is unfolding rapidly. Workers in the retail and food service sectors have been particularly hard hit. Most of these workers were already in a financially precarious position and are now facing income shocks from store closures and reduced hours. Adding to these hardships, many also lack access to paid sick leave and would have to forgo much needed pay, or even risk job loss, if they were to stay home sick. The lack of paid sick leave has serious repercussions for service sector workers and for public health.

Beginning in the fall of 2016, The Shift Project has, twice per year, collected survey data from thousands of workers employed at large service sector companies in the United States. The Shift Project survey provides unique insight into job conditions for workers at large, named companies, including access to benefits such as paid leave.

Using the survey data collected between February 2018 and November 2019, in this brief we share tabulations of the **percent of hourly workers who report that they lack access to paid leave** from their employer. We then combine this information with the number of employees at each company, tabulated from the Reference USA database, to arrive at an estimated **number of workers at each company who report that they lack access to paid sick leave**. These tabulations are presented for 91 large service sector employers in Table 1. Several industry subsectors are color-coded: food service, grocery, retail, pharmacy, hospitality, and delivery.

▶ **Overall, 53% of hourly service sector workers at 91 large companies lack access to paid sick leave** (Table 1). In the many U.S. states and cities that do not mandate paid sick leave, an even higher share, 62% of workers, lack access to paid sick leave (author tabulations, not shown in tables).

▶ **There is dramatic variation across companies in access to paid sick leave.** At employers such as Waffle House, Zaxby's, and Bob Evans, 97% or more of workers surveyed expressed that they lacked access to paid sick leave from their employers. At the other end of the spectrum, only 3% of surveyed workers at IKEA and Costco and 7-8% at Home Depot and Fred Meyer reported lacking access to paid sick leave.

▶ **Lacking access to paid sick leave is the norm among employees of large food service firms.** Nineteen of 20 companies that top the list on employees reporting that they lack paid sick leave are in the fast food or casual dining subsector. Among the 29 food service companies in Table 1, only at Starbucks, Chipotle, and In-N-Out Burgers do more than half of workers report access to paid sick leave.

▶ **The grocery store sector is characterized by wide variation in access to paid sick leave.** At one extreme, 81% of the Wegmans workers we surveyed did not believe they had access to paid sick leave. The figure is even higher at Dollar General, which, while not classified as a grocery store in our data, does carry grocery items. At the other extreme, only 8% of the Fred Meyer workers we surveyed reported lacking paid sick leave.

► **Among the major big box retailers—Costco, Walmart, and Target—we also see wide variation in access to paid sick leave.** Only 3% of Costco workers report lacking access to paid leave, compared with 27% of Walmart workers, and 50% of workers at Target.

These statistics are based on workers' responses to the question: "Please look at the following list of benefits that employers sometimes make available to their employees. Which of the benefits on this list can you receive as part of your job at [EMPLOYER NAME]? Please mark all that apply," where the first response option is "paid sick days." The survey does not probe the reasons why workers do not mark this benefit. Workers may not report paid sick days because their employer does not provide any worker with paid sick days; because they do not qualify for paid sick days under their employer's policy; because they lack knowledge of the benefit; or because they feel that they cannot realistically access the benefit because of procedural hurdles, fears of managerial consequences, or workplace culture. Importantly, we do not capture official company policy with respect to paid sick days. Rather, we capture workers' beliefs about their ability to actually receive paid sick days. ■

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Table 1. Workers who do not believe they have access to paid sick leave (by employer)

● Food ● Grocery ● Retail ● Hospitality ● Delivery ● Pharmacy

Firm	Workers who do not believe they have access to paid sick leave	
	Percent of Surveyed Workers	Estimated Number in Workforce
Waffle House	99%	42,000
Zaxby's	97%	28,000
Bob Evans	97%	27,000
Cracker Barrel	95%	74,000
Sonic	94%	92,000
Outback Steakhouse	94%	55,000
Texas Roadhouse	93%	62,000
Dollar General	92%	109,000
Culver's	90%	27,000
Applebee's	89%	99,000
Pizza Hut	88%	156,000
IHOP	86%	64,000
Burger King	86%	165,000
Subway	86%	180,000
Dunkin' Donuts	85%	97,000
Domino's	85%	83,000
Wendy's	84%	133,000
Olive Garden	83%	85,000
Jimmy John's	83%	40,000
KFC	82%	69,000
Wegmans	81%	43,000
American Eagle	81%	19,000
Giant Eagle	79%	29,000
Chick-fil-A	78%	89,000
McDonald's	78%	518,000
Family Dollar	78%	39,000
Panera	78%	58,000
Victoria's Secret	78%	30,000
Taco Bell	77%	125,000
Bath & Body Works	77%	23,000
Old Navy	76%	38,000
Cheesecake Factory	75%	33,000
Meijer	75%	57,000
Whataburger	75%	23,000

Table 1. (continued)

● Food ● Grocery ● Retail ● Hospitality ● Delivery ● Pharmacy

Workers who do not believe they have access to paid sick leave		
Firm	Percent of Surveyed Workers	Estimated Number in Workforce
Holiday Inn	70%	89,000
Kroger	70%	189,000
Forever 21	69%	12,000
Wawa	69%	18,000
Gap	68%	35,000
J.Crew	65%	6,000
Ulta Beauty	65%	21,000
JCPenney	64%	69,000
Dollar Tree	62%	56,000
Michaels	62%	26,000
Kohl's	61%	78,000
Kmart	60%	37,000
Ace Hardware	60%	24,000
Office Depot	55%	11,000
Jack in the Box	51%	28,000
GameStop	50%	13,000
Publix	50%	89,000
Target	50%	151,000
Nordstrom	49%	28,000
Petco	49%	14,000
Ross	48%	28,000
TJ Maxx	46%	28,000
Giant	46%	19,000
ShopRite	45%	26,000
Marshalls	44%	23,000
Marriott	43%	139,000
Walgreens	43%	78,000
CVS	43%	74,000
Best Buy	43%	47,000
Dillard's	41%	22,000
Macy's	41%	44,000
Amazon	41%	5,000
PetSmart	39%	19,000
Hannaford	37%	8,000

Table 1. (continued)

● Food ● Grocery ● Retail ● Hospitality ● Delivery ● Pharmacy

Workers who do not believe they have access to paid sick leave		
Firm	Percent of Surveyed Workers	Estimated Number in Workforce
Whole Foods	36%	30,000
Barnes & Noble	36%	10,000
QuikTrip	36%	4,000
Hobby Lobby	35%	10,000
Walmart	27%	347,000
Trader Joe's	33%	11,000
UPS	31%	37,000
Starbucks	30%	68,000
Sam's Club	29%	34,000
O'Reilly Auto Parts	24%	13,000
Chipotle	20%	11,000
Safeway	18%	22,000
Lowe's	18%	44,000
Harbor Freight Tools	18%	3,000
In-N-Out Burger	15%	3,000
Stop & Shop	14%	7,000
Disney	13%	1,000
FedEx	12%	14,000
Aldi	11%	2,000
Fred Meyer	8%	3,000
Home Depot	7%	22,000
Costco	3%	4,000
Ikea	3%	1,000
	53%	5,066,000

Notes: Data were collected by The Shift Project between February, 2018 and November 2019, except for Walmart where data pertain to period March 2019 to November 2019.

We define paid sick leave coverage based on the survey item: Please look at the following list of benefits that employers sometimes make available to their employees. Which of the benefits on this list can you receive as part of your job at [EMPLOYER NAME]? Please mark all that apply. Paid sick days

Total employee counts at each firm are estimated from Reference USA data that Shift Project purchased and processed. These counts pertain to workers employed at each firm in the United States, excluding corporate offices.

We estimate the number of workers at each company who report that they lack access to paid sick leave by multiplying the percent of hourly workers who report that they lack access to paid leave by the total employee count at each firm.

Methodological Appendix

The Shift Project has collected survey data from hourly service sector workers employed at large retail and food establishments since the fall of 2016. This brief focused on a subsample of 35,349 hourly service sector workers employed at 91 of the largest food service and retail firms who were interviewed between February 2018 and November 2019. The survey data collection was national in scope and the survey sample includes respondents from all 50 U.S. states and Washington, D.C. Uniquely, The Shift Project data identify the firm at which each respondent works and contains substantial numbers of respondents at each of the 91 firms described here. The average number of respondents per firm is 388.

The Shift Project recruits survey respondents using online Facebook/Instagram advertisements, targeted to workers employed at large retail and food service employers. Those who responded to the Shift survey invitation were automatically routed to a survey landing page where they were asked to consent to participate in the study, then began the online self-administered survey using the Qualtrics platform. As an incentive, those who completed the survey and provided contact information were entered into a lottery for an Apple iPad. The survey included modules on job characteristics, work schedules, demographics, economic stability, health, parenting, and child outcomes. To screen out invalid survey responses, we used an attention filter (a question that instructed respondents to select a particular response category to verify the accuracy of their responses) as well as a speed filter (discarding data for surveys that were completed too hastily).

The survey recruitment approach yields a non-probability sample of workers, which may differ from the broader population of service sector workers. Therefore, the estimates in this brief may differ somewhat from the percent and number of workers who lack paid sick leave in the broader population of workers. On the one hand, our estimates may underestimate the percent who lack access to paid sick leave because the workers in our sample disproportionately work in jurisdictions with paid sick leave laws in place. On the other hand, our estimates may overestimate the percent who lack access to paid sick leave, because female workers are overrepresented in our sample and female workers are more likely than male workers to lack access to paid sick leave. On net, these two biases will tend to be offsetting. Nevertheless, these potential biases should be kept in mind when interpreting the percent of surveyed workers lacking access to paid sick leave and the estimated number of workers lacking paid sick leave.

For a detailed discussion of The Shift Project data collection, methodology, and data validation, see Schneider, D. and K. Harknett. 2019. "What's to Like? Facebook as a Tool for Survey Data Collection." *Sociological Methods & Research*. <https://doi.org/10.1177/0049124119882477>.