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# Santa Clara County Minimum Wage Employer Survey

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# EXECUTIVE SUMMARY

BW Research Partnership, Inc. (BW Research) in collaboration with the City of San Jose and the Institute for Research on Labor and Employment (IRLE) developed and implemented a survey of over 500 (n=518) businesses In Santa Clara County. The purpose of the survey was to assess the attitudes, priorities and anticipated responses of Santa Clara County and City of San Jose businesses as they relate to a potential minimum wage increase.

The telephone and online survey was completed from February 17 to March 4, 2016 and the telephone survey was offered in English, Spanish and Vietnamese. The sampling plan for the survey was segmented by industry, firm size, and geography within Santa Clara County to ensure that a broad range of Santa Clara County businesses were included in the quantitative survey findings. Drawing on IRLE's research in comparable regions, the sampling plan was designed to reflect industries that are most likely be impacted by an increase in the minimum wage, and does not necessarily reflect the industry profile of the entire business community.

The majority of surveyed employers report that they will likely have to increase prices for customers, but that their employees will be more satisfied and productive under a minimum wage increase. Though the majority of surveyed employers agree that an increase in the minimum wage will positively impact the community, most also feel increasing the minimum wage will make it harder for new and emerging businesses. Impacted businesses more often selected "very likely" across all anticipated impacts compared to non-impacted industries, indicating that they agreed with both the positive and negative impacts of a minimum wage increase. Almost half of impacted businesses report that it is very likely their employees will be more satisfied and productive (46%) under a minimum wage increase, compared to 14% of non-impacted businesses. Forty-five percent of impacted businesses also report they will very likely increase prices given a minimum wage increase, compared 21% of non-impacted firms.

The survey found that both retail and food service firms are more likely to staff at least half of their workforce with employees at the current minimum wage, and are therefore more likely to be impacted by a minimum wage increase. Though these firms agree that their employees will be more satisfied and productive under a minimum wage increase, they also report that this will likely result in increased consumer pricing and a shift towards automation – firms will invest in technologies that reduce the need for labor. Food service firms were also particularly more likely to agree that an increase in the minimum wage will make it more difficult for companies to locate and grow new businesses in the region.

While participating Santa Clara County businesses indicated some concerns about the increased minimum wage, three out of four respondents stated they agreed (58%) or somewhat agreed (18%) with the statement "An increase in the minimum wage makes sense for our community, given our high cost of living." Only 14 percent of respondents disagreed (9%) or somewhat disagreed (4%) with the statement.

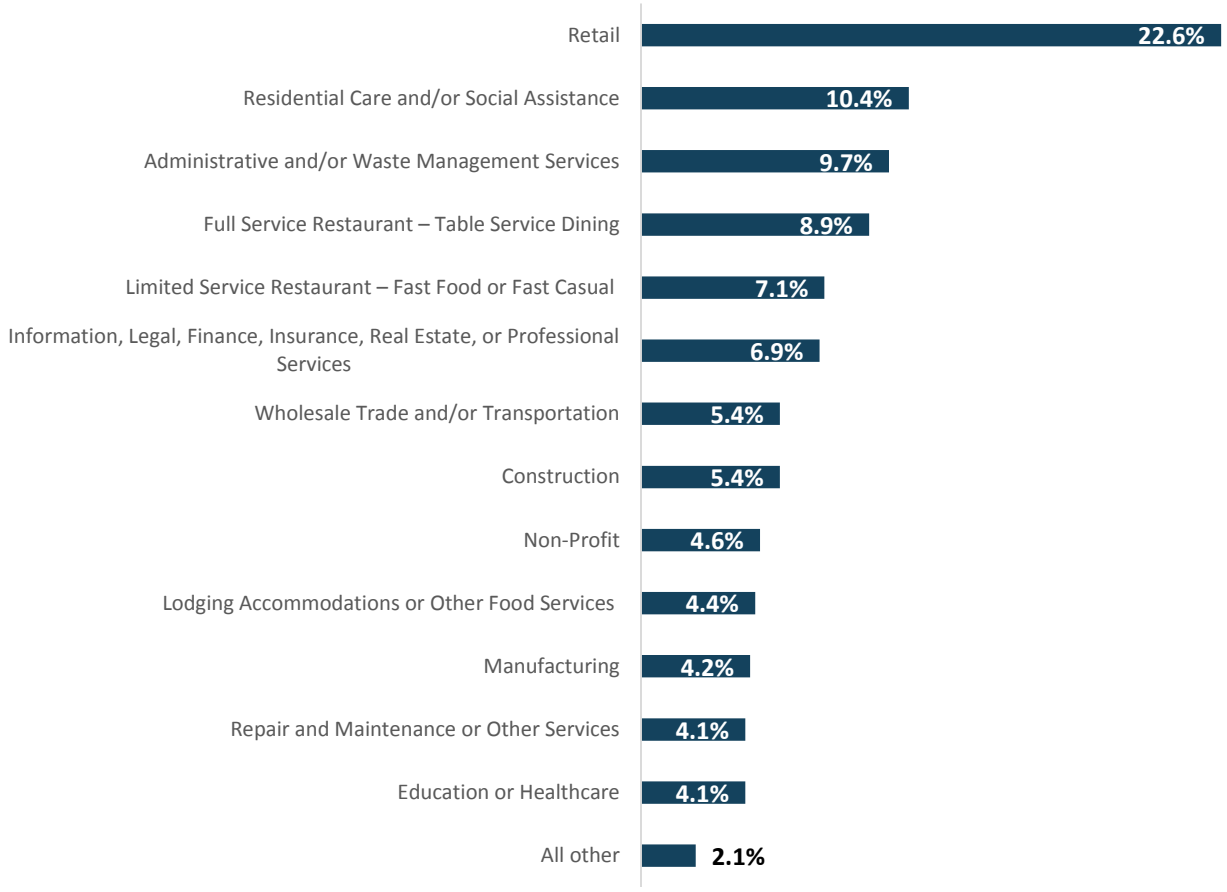
# MINIMUM WAGE – IMPACTED EMPLOYERS AND INDUSTRIES

## PROFILE OF SURVEY PARTICIPANTS

**The impacted business community, those employers that are more likely to be affected by an increase in the minimum wage, is largely comprised of four sectors – retail, residential care and social assistance, administrative services and waste management, and food service.**[1] Together, these industries represent over half (59%) of those employers that participated in the survey.

*What industry or industries best describes the work that your firm is involved in and connected to?*

**Figure 1. Participating Business Industries**




**Businesses that participated in the survey were fairly evenly distributed in terms of how long they have had a business location in Santa Clara County.** About three in ten firms (32%) have been in business in the area for under five years, another quarter report about five to ten years,

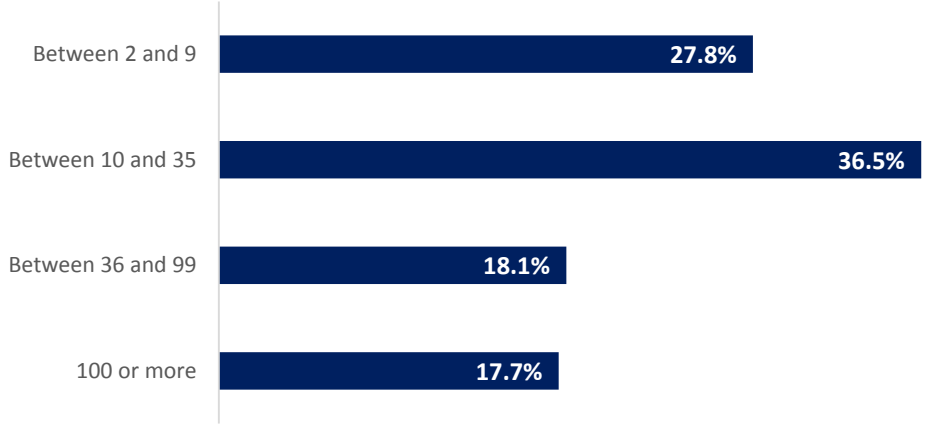
[1] Includes both full-service and fast food or fast casual restaurants

and roughly four in ten firms (43%) have been located in the County for ten years or more. See *Appendix B: Survey Toplines* for a detailed breakdown of respondents by length of business tenure in Santa Clara County.

**By design of the sampling plan, participating businesses were evenly distributed between small, medium, and large firms.** The largest chunk of firms have between 10 and 35 employees (37%), about three in ten employers also report either less than nine employees (28%) and almost two in ten reported 100 or more (18%).

*Including all full-time and part-time employees, how many **permanent, seasonal, and temporary** employees work at or from your location?*

**Figure 2. Firm Size**




**Just under half of surveyed businesses (46%) expect to grow total employment at their current business location**, while the other half expect employment to remain the same. Only three percent of surveyed firms project a decline in employment in the next 12 months. See *Appendix B: Survey Toplines* for a detailed breakdown of responses regarding projected growth for the next 12 months.

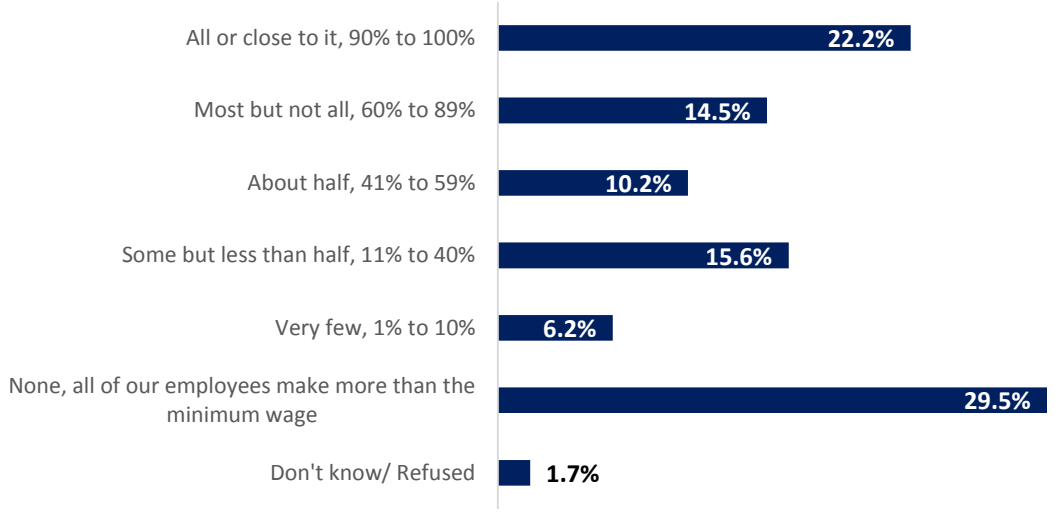
**However, just over half of surveyed employers report that hiring had remained flat over the last 3 years, or 36 months.** Fifty-three percent of firms note that employment across permanent, seasonal, and temporary workers has stayed the same in the last 3 years; three in ten firms did report employment growth during this time, with one in ten noting decline. See *Appendix B: Survey Toplines* for a detailed breakdown of responses regarding historical growth over the past 36 months.

## CURRENT MINIMUM WAGE EMPLOYMENT

Participating businesses were next asked, what percentage of their current workforce makes at or within a dollar of the minimum wage. **Nearly half (47%) of respondents report that about half to all of their employees are paid a wage at or around the minimum wage ($10 to $11 an hour).** Surveyed firms could be split into three groups, those that do not hire anyone at the minimum wage (30%), those that hire less than half of their employees at the minimum wage (22%), and those with about half or more at minimum wage (47%).

*Thinking about the **current employees** at your location, approximately how many are paid a wage of $10 to $11 an hour?*

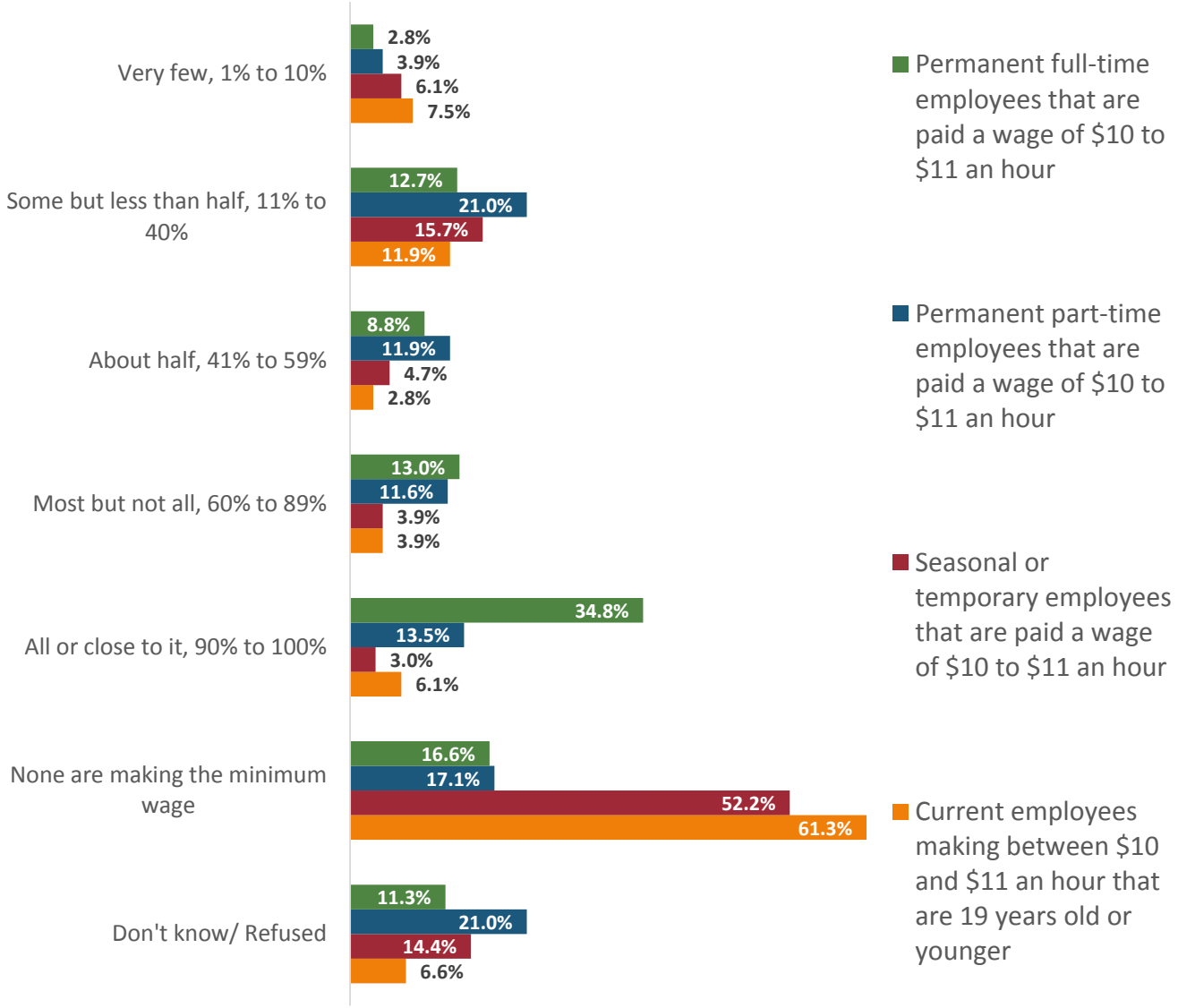
**Figure 3. Employees that Earn $10 to $11 per Hour**



**Minimum wage employees across surveyed firms are more likely to be in permanent full- or part-time positions.** Fifty-seven percent of firms report that about half to all of their permanent full-time employees are paid the minimum wage, and four in ten (37%) surveyed employers also reported that their permanent part-time employees earn the minimum wage. Very few minimum wage workers are seasonal employees or teenagers; six in ten employers (61%) report that they have no minimum wage employees that are 19 years old or younger, and just over half of surveyed firms (52%) also reported they have no minimum wage employees that are seasonal or temporary workers.

*How many of your current employees making between $10 and $11 an hour are permanent, full-time workers; permanent-part time workers; seasonal or temporary workers; 19 years old or younger?*

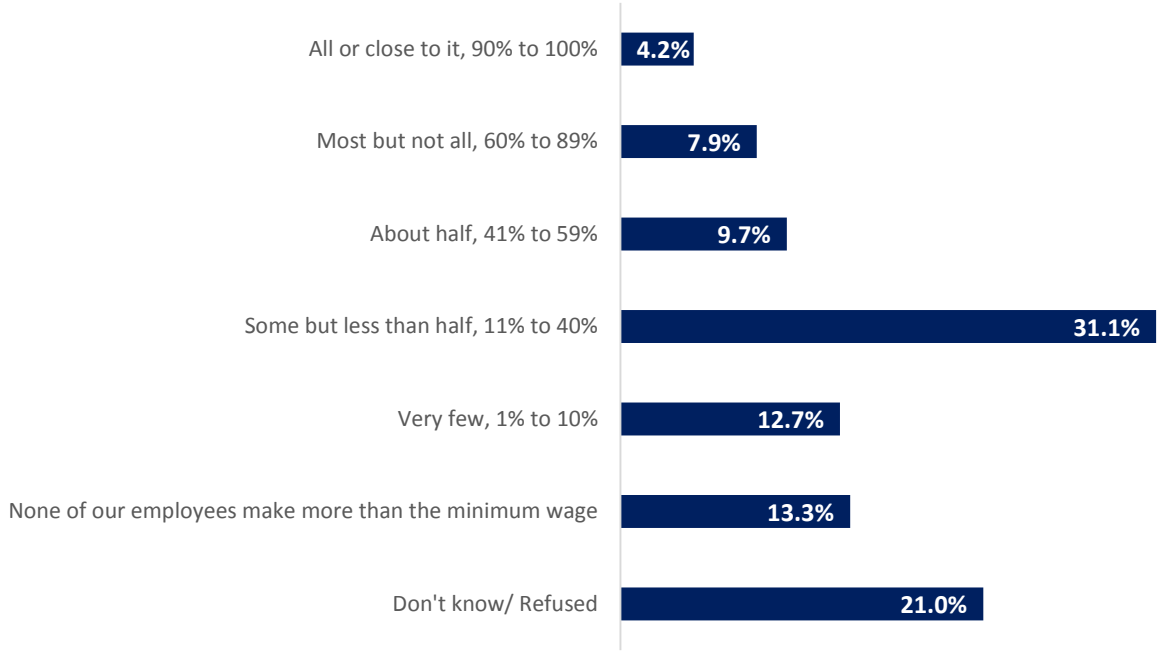
**Figure 4. Employees that Earn $10 to $11 per Hour, by Employment Status and Age**



Of those firms that provided an estimate of wages for this question, just over 50 percent indicated that some to about half (11 to 59 percent) of their employees earn between $11.01 and $15 an hour[2].

*How many of your current employees make between $11.01 and $15 an hour?*

**Figure 5. Employees that Earn between $11.01 and $15 per Hour**




[2] The proportion is derived based on the 79 percent of respondents that provided an estimate of their workforce that makes between $11.01 and $15 an hour.

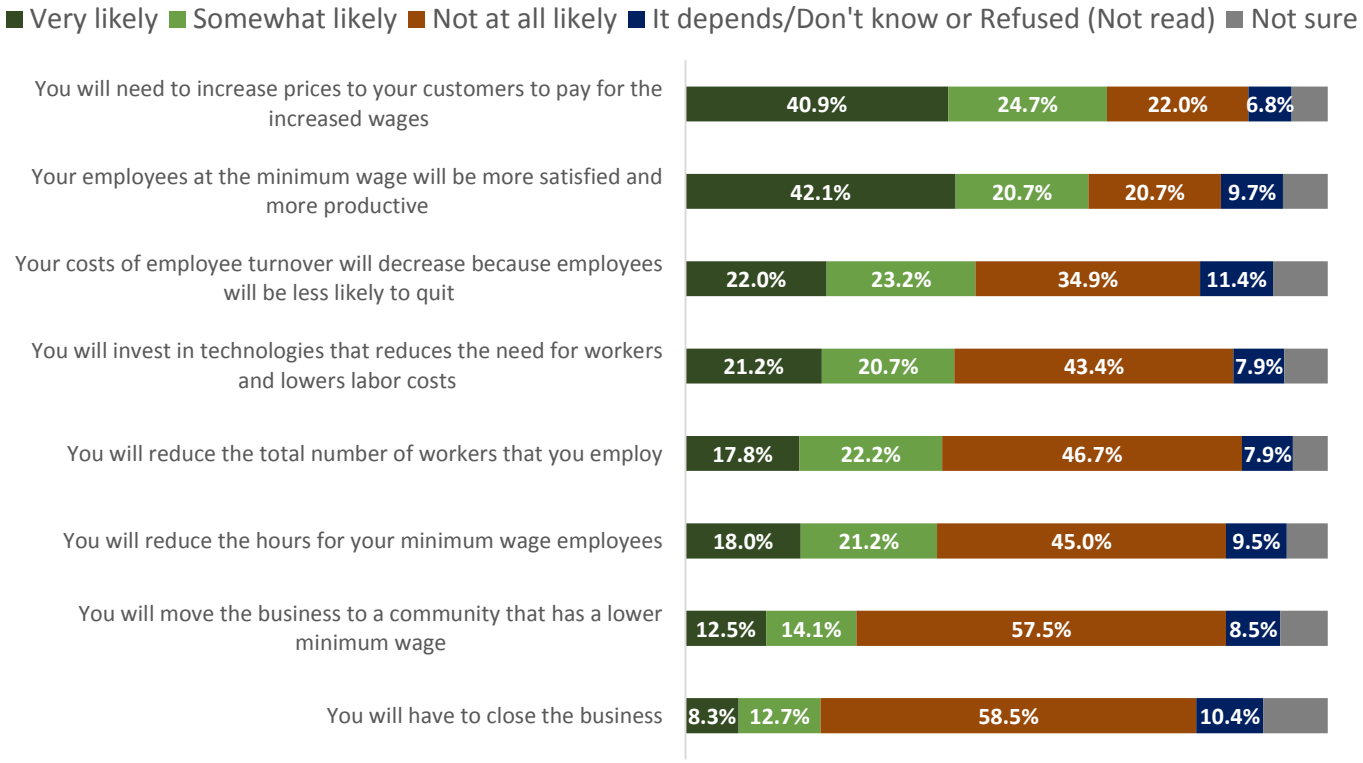
## Minimum Wage – Stated Impacts and Attitudes

Participating businesses were asked how they would respond if the minimum wage in Santa Clara County was gradually increased to $15 an hour by 2019. Survey respondents were given different options, and asked how likely that scenario was for their business.

**The majority of surveyed employers report that they will likely (very + somewhat likely) have to increase prices for customers, but that their employees will be more satisfied and productive given a minimum wage increase.** Approximately two out of three firms (66%) reported that they will likely (very + somewhat) raise prices in order to pay for increased wages and just over three in five firms (63%) noted that employees will likely be more satisfied and productive with an increase in the minimum wage. About four in ten surveyed employers also believe a minimum wage increase will likely reduce employee turnover (45%), but increase likelihood of automation (42%) and generally reduce the number of employed workers (40%). The majority of survey participants indicated that it was not at all likely that they would move or close their business because of a minimum wage increase.

*How likely are the following statements to occur at your business location, if the minimum wage in Santa Clara County is gradually increased to $15 an hour by 2019: very likely, somewhat likely, not at all likely, or not sure?*

**Figure 6. Minimum Wage Increase – Anticipated Impacts**



The questions for anticipated impacts and employer attitudes were further analyzed by key segments within the surveyed business community. Of particular interest was the difference in opinion among “impacted and “non-impacted” business communities. Survey respondents were delineated by the degree of impact given a minimum wage increase based on their current minimum wage staffing. **Impacted businesses are defined as those that support any portion of their workforce at the current minimum wage or up to $15 an hour and they represent 84 percent of the survey respondents**. Non-impacted businesses are those that currently employ all of their workers above $15 an hour, and they represent eight percent of the survey respondents. The remaining eight percent of survey respondents did not respond to the inquiry regarding the portion of their workforce that makes between $11.01 and $15 an hour.

**Impacted businesses more often selected “very likely” across all anticipated impacts compared to non-impacted industries.** Almost half of impacted businesses report that it is very likely their employees will be more satisfied and productive (46%) under a minimum wage increase, compared to 14% of non-impacted businesses. Forty-five percent of impacted businesses also report they will very likely increase prices given a minimum wage increase, compared 21% of non-impacted firms.

**Table 1. Anticipated Impacts by Impacted and Non-Impacted Businesses**

| | | Very likely | Somewhat likely | Not at all likely | It depends/Don't know or Refused (DON'T READ) | Not sure |
|---|---|---|---|---|---|---|
| **Your employees at the minimum wage will be more satisfied and more productive** | Impacted | 46.0% | 21.6% | 19.8% | 7.4% | 5.3% |
| | Not impacted | 14.0% | 7.0% | 34.9% | 34.9% | 9.3% |
| **You will reduce the total number of workers that you employ** | Impacted | 19.3% | 25.3% | 42.8% | 7.6% | 5.1% |
| | Not impacted | 4.7% | 4.7% | 79.1% | 9.3% | 2.3% |
| **You will reduce the hours for your minimum wage employees** | Impacted | 20.2% | 23.7% | 42.3% | 8.0% | 5.7% |
| | Not impacted | 7.0% | 7.0% | 69.8% | 14.0% | 2.3% |
| **Your costs of employee turnover will decrease because employees will be less likely to quit** | Impacted | 24.4% | 24.6% | 32.9% | 10.1% | 8.0% |
| | Not impacted | 4.7% | 11.6% | 58.1% | 20.9% | 4.7% |
| **You will have to close the business** | Impacted | 9.4% | 14.0% | 55.6% | 10.8% | 10.1% |
| | Not impacted | 0.0% | 4.7% | 81.4% | 11.6% | 2.3% |
| **You will need to increase prices to your customers to pay for the increased wages** | Impacted | 45.1% | 26.2% | 18.2% | 5.7% | 4.8% |
| | Not impacted | 20.9% | 9.3% | 58.1% | 9.3% | 2.3% |

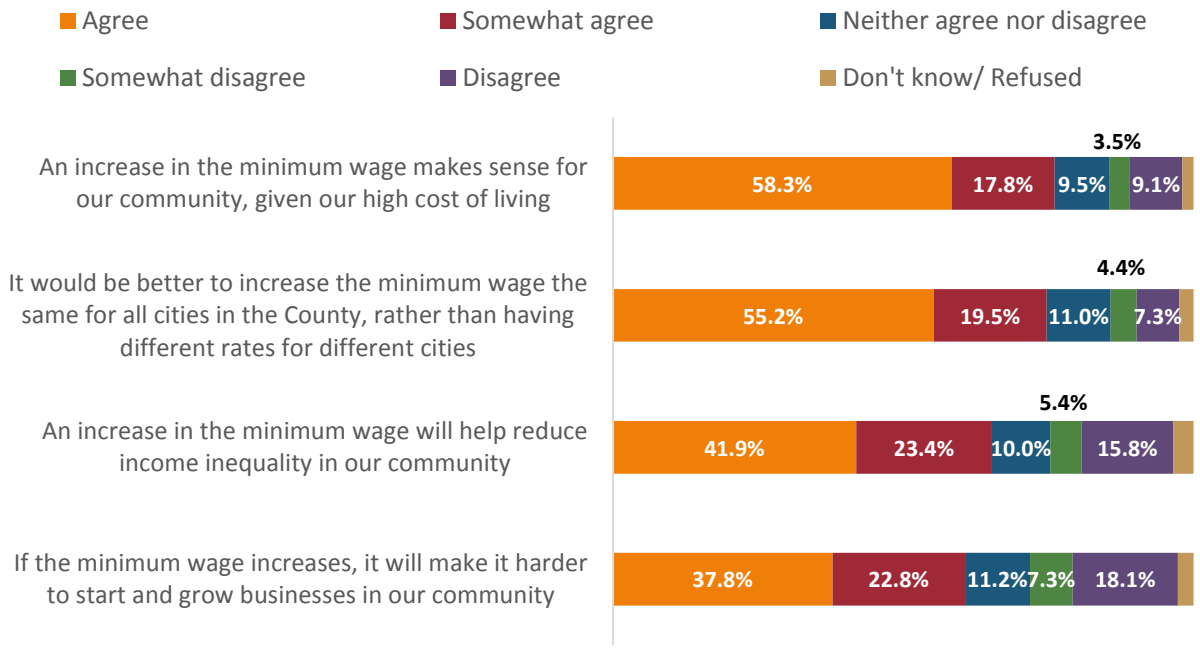
| | | | | | | |
|---|---|---|---|---|---|---|
| **You will move the business to a community that has a lower minimum wage** | Impacted | 14.0% | 15.2% | 55.2% | 9.2% | 6.4% |
| | Not impacted | 7.0% | 2.3% | 81.4% | 7.0% | 2.3% |
| **You will invest in technologies that reduces the need for workers and lowers labor costs** | Impacted | 23.7% | 21.1% | 42.3% | 6.2% | 6.7% |
| | Not impacted | 4.7% | 11.6% | 62.8% | 18.6% | 2.3% |

Participating businesses were next asked their level of agreement with different statements regarding a minimum wage increase.

**Though the majority of surveyed employers agree that an increase in the minimum wage will positively impact the community, most also feel increasing the minimum wage will make it harder for new and emerging businesses.** Three-quarters of surveyed firms (76%) agree that a minimum wage increase makes sense for the community, especially given the region's high cost-of-living; in fact, 65% of employers also agree that increasing the minimum wage will alleviate income inequality. Despite this, six in ten firms (61%) also agree that if the minimum wage is increased, new businesses located in Santa Clara County will face more barriers to growth.

*Please tell me whether you agree or disagree with each of the following statements. Here's the (first/next) one: _____. (READ ITEM AND ASK:) Do you agree, somewhat agree, neither agree nor disagree, somewhat disagree, or disagree with the statement?*

**Figure 7. Minimum Wage Increase – Employer Attitudes**



The majority of firms across both impacted and non-impacted business communities agree that an increase in the minimum wage makes sense given the cost of living and that a minimum wage increase would be best implemented at the county-level.

**Table 2. Employer Attitudes by Impacted and Non-Impacted Businesses**

| | | Agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Disagree | Don't know/ Refused (DON'T READ) |
|---|---|---|---|---|---|---|---|
| **An increase in the minimum wage will help reduce income inequality in our community** | Impacted | 41.1% | 25.1% | 10.3% | 6.0% | 15.2% | 2.3% |
| | Not impacted | 46.5% | 14.0% | 7.0% | 2.3% | 23.3% | 7.0% |
| **If the minimum wage increases, it will make it harder to start and grow businesses in our community** | Impacted | 39.8% | 24.1% | 11.5% | 6.9% | 15.9% | 1.8% |
| | Not impacted | 34.9% | 14.0% | 7.0% | 7.0% | 34.9% | 2.3% |
| **An increase in the minimum wage makes sense for our community, given our high cost of living** | Impacted | 57.7% | 17.9% | 10.3% | 3.9% | 9.0% | 1.1% |
| | Not impacted | 62.8% | 14.0% | 4.7% | 0.0% | 16.3% | 2.3% |
| **It would be better to have the same increase in the minimum wage throughout the County than to have different rates in different cities** | Impacted | 55.9% | 20.2% | 10.1% | 5.1% | 7.4% | 1.4% |
| | Not impacted | 58.1% | 11.6% | 14.0% | 0.0% | 11.6% | 4.7% |

### *How Manufacturing and Logistics Firms Responded*

Though the sample size for Manufacturing and Logistics is relatively small (n=50), the following key findings illustrate relevant cross-tabulation data for these firms:

**Manufacturing and Logistics have fewer current workers at the minimum wage.** Just over a third (36%) of surveyed firms in these industries employ at least four in ten workers at $10 to $11 an hour, compared to 51% of all respondents.

**These firms are less likely to agree with the benefits of increasing the minimum wage.** Twenty-eight percent are very likely to agree that increasing the minimum wage would result in worker satisfaction and productivity, compared to 42% of all respondents.

**Manufacturing and Logistics firms are also less likely to agree with the negative impacts of an increased minimum wage.** Two in ten surveyed firms (20%) report that it is very likely a minimum wage increase would cause an increase in prices, compared to 41% of all respondents.

### *How Small Businesses Responded (35 employees or less at a location)*

Small businesses account for 64% or 331 out of 515 survey participants. The following cross-tabs illustrate key findings from small businesses with 35 or less employees at their establishment location:

**Small businesses have slightly fewer employees at the current minimum wage.** Less than half (48%) of respondent small business firms employ 40% or more of their employees at $10 to $11 an hour, compared to 57% of firms with 36 or more employees.

**Small businesses are less likely to agree with benefits resulting from an increased minimum wage.** Thirty-eight percent report that it is very likely that a minimum wage increase would result in greater worker productivity and satisfaction, compared to 50% of surveyed firms with 36 or more employees.

**Small businesses are also less likely to agree with the negative impacts of an increased minimum wage.** One in ten note that it is very likely an increased minimum wage would result in them moving their business to a community with a lower minimum wage, compared to 18% of firms who have 36 or more employees.

# APPENDIX A: SURVEY METHODOLOGY

A telephone and web survey of 518 Santa Clara County businesses was conducted for this study. The sampling plan was designed to represent those employers that were more likely to be impacted by an increase in the minimum wage.

## *Survey Design*

Through an iterative process, BW Research worked closely with City of San Jose staff, IRLE (Institute for Research on Labor and Employment) staff and an advisory committee to develop a survey instrument that met the research objectives of the study. In developing the survey instrument, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error within the survey.

After the survey was finalized it was translated into Spanish and Vietnamese and offered in those languages, for the phone portion of the survey, for those business respondents that were not comfortable speaking English.

## *Sampling Method*

BW Research developed a sampling plan by industry, employer size, and geography within Santa Clara County to reflect those businesses that were more likely to currently hire at a minimum wage and be impacted by a raise to the minimum wage. The sampling plan was based upon previous analyses[3] done by IRLE of industries that were more likely to currently hire or be impacted by an increase in the minimum wage.

To implement the sampling plan, a database of 8,604 Santa Clara County firms was acquired from InfoUSA for interviews over the phone and additional online web panels were secured for web completes. The sampling followed a detailed plan targeting industries at the two and three digit NAICS level and with developed quotas for firm size: 2 to 9 employees at a location, 10 to 35 employees at a location, 36 to 99 employees at a location, 100 or more employees at a location, and geography within Santa Clara County (within the City of San Jose and outside the City, but within Santa Clara County). Quotas were closed as they were filled by industry, size and geography within Santa Clara County.

## *Data Collection*

Prior to beginning data collection, BW Research conducted interviewer training and also pre-tested the survey instrument to ensure that all words and questions were easily understood by the respondents. Telephone interviews were generally conducted from 9:00am to 4:30pm Monday through Friday. The data collection period was February 17, 2016 – March 4, 2016.

[3] Based upon previous research completed by IRLE on Contra Costa County, Oakland, Sacramento and San Francisco.

A web version of the survey was also developed and businesses in Santa Clara County were contacted through web panels.

### *A Note about Margin of Error and Analysis of Sub-Groups*

The overall maximum margin of error for the survey, at the 95 percent level of confidence, is +/- 4.29 percent for questions answered by all 518 respondents, for the approximately 72,000[4] business locations with 2 or more employees in Santa Clara County. It is important to note that questions asked of smaller groups of respondents (such as questions that were only asked to firms based off their previous responses) as well as results presented separately for industry clusters will have a margin of error greater than +/- 4.29 percent, with the exact margin of error dependent on the number of respondents in each sub-group and the distribution of responses to a given question.

[4] Source: InfoUSA, March 2016

# APPENDIX B: SURVEY TOPLINES

**Screener Questions**

A. Do you have a business location with at least one employee other than yourself in Santa Clara County, California?

**56.6% Yes, we have a location in San Jose**

**43.4% Yes, we have a location in Santa Clara County, but not San Jose**

**SECTION 1 - Organization-Related Questions – Business PROFILE**

For this survey, we will just be asking about the employees that work from or directly report to your current location.

1. How many years have you had at least one business location in Santa Clara County?

**11.4% 0 to 2 years**

**20.5% more than 2 up to 5 years**

**24.3% more than 5 up to 10 years**

**18.3% more than 10 years up to 20 years**

**25.1% more than 20 years**

**0.4% (DON'T READ) Don't know/ Refused**

Next I would like to ask about the industry that is most important to your firm.

2. What industry or industries best describes the work that your firm is involved in and connected to?

**22.6% Retail**

**10.4% Residential Care and/or Social Assistance**

**9.7% Administrative and/or Waste Management Services**

**8.9% Full Service Restaurant – Table Service Dining**

**7.1% Limited Service Restaurant – Fast Food or Fast Casual Dining**

**6.9% Information, Legal, Finance, Insurance, Real Estate, or Professional Services**

**5.4% Construction**

**5.4% Wholesale Trade and/or Transportation**

**4.6% Non-Profit**

**4.4% Lodging Accommodations or Other Food Services (catering, banquet, etc.)**

**4.2% Manufacturing**

**4.1% Education or Healthcare**

**4.1% Repair and Maintenance or Other Services**

**2.1% All other**

3. Including all full-time and part-time employees, how many **permanent, seasonal and temporary** employees work at or from your location? [IF NEEDED: As of today, how many people work at or from your current location]

**12.9% Less than 5**
**14.9% Between 5 and 9**
**26.8% Between 10 and 24**
**15.6% Between 25 and 49**
**12.2% Between 50 and 99**
**17.6% 100 or more**

4. If you currently have [TAKE Q3 #] full-time and part-time **permanent, seasonal and temporary** employees at your location, how many more or how many fewer employees do you expect to have at your location 12 months from now?

**45.6% More**
**3.3% Fewer**
**49.8% Same number of employees**
**1.4% (DON'T READ) Don't know/ Refused**

**Expected Employment in 12 months – Outliers Removed (*companies expecting to add 50 or more employees and an expected growth rate of 50% or higher*)**
**(Calculated by only examining businesses with both current and projected data)**

| | Current | 12 months |
|---|---|---|
| **n** | **454** | **454** |
| **Mean** | **126.09** | **129.49** |
| **Median** | **15.00** | **16.00** |
| **Total Employees** | **57,247** | **58,790** |
| **Change** | | **1,543** |
| **% Growth** | | **2.7%** |

**[IF Q1>1 THEN ASK Q5, OTHERWISE SKIP]**

5. Over the last three years, has your company grown, declined or stayed about the same in terms of permanent, seasonal and temporary employees at your current location? [If it has grown or declined, ask] By about how many people?

**31.4% Grown**
**10.3% Declined**
**53.0% Stayed the same**

**5.3% (DON'T READ) Don't know/ Refused**

**Reported employment growth over the last 36 months – Outliers Removed (*companies that added 50 or more employees with a growth rate of 50% or higher*)**
**(Calculated by only examining businesses with both current and past data)**

| | 36 months ago | Current |
|---|---|---|
| **n** | **346** | **346** |
| **Mean** | **119.63** | **129.45** |
| **Median** | **12.50** | **13.00** |
| **Total Employees** | **41,391** | **44,789** |
| **Change** | | **3,398** |
| **% Growth** | | **8.2%** |

**SECTION 2 – MW BUSINESS PROFILE**
Now I would like to ask about your organization's payment structure.

6. Thinking about the ***current employees*** at your location, approximately how many are paid a wage of $10 to $11 an hour?

**6.2% Very few, 1% to 10%**
**15.6% Some but less than half, 11% to 40%**
**10.2% About half, 41% to 59%**
**14.5% Most but not all, 60% to 89%**
**22.2% All or close to it, 90% to 100%**
**29.5% None, all of our employees make more than $10 an hour the minimum wage**
**1.7% (DON'T READ) Don't know/ Refused**

[IF Q6>0, ask Q7 – Q10 OTHERWISE SKIP TO Q11]

7. How many of your current employees making between $10 and $11 an hour are permanent, full-time workers? (n=362)

**2.8% Very few, 1% to 10%**
**12.7% Some but less than half, 11% to 40%**
**8.8% About half, 41% to 59%**
**13.0% Most but not all, 60% to 89%**
**34.8% All or close to it, 90% to 100%**
**16.6% None of our permanent full-time employees make the minimum wage**
**11.3% (DON'T READ) Don't know/ Refused**

8. How many of your current employees making between $10 and $11 an hour are permanent, part-time workers? (n=362)

| | |
|---|---|
| **3.9%** | **Very few, 1% to 10%** |
| **21.0%** | **Some but less than half, 11% to 40%** |
| **11.9%** | **About half, 41% to 59%** |
| **11.6%** | **Most but not all, 60% to 89%** |
| **13.5%** | **All or close to it, 90% to 100%** |
| **17.1%** | **None of our permanent part-time employees make the minimum wage** |
| **21.0%** | **(DON'T READ) Don't know/ Refused** |

9. How many of your current employees making between $10 and $11 an hour are seasonal or temporary workers? (n=362)

| | |
|---|---|
| **6.1%** | **Very few, 1% to 10%** |
| **15.7%** | **Some but less than half, 11% to 40%** |
| **4.7%** | **About half, 41% to 59%** |
| **3.9%** | **Most but not all, 60% to 89%** |
| **3.0%** | **All or close to it, 90% to 100%** |
| **52.2%** | **None of our seasonal or temporary employees make the minimum wage** |
| **14.4%** | **(DON'T READ) Don't know/ Refused** |

10. How many of your current workers making between $10 and $11 an hour are 19 years old or younger? (n=362)

| | |
|---|---|
| **7.5%** | **Very few, 1% to 10%** |
| **11.9%** | **Some but less than half, 11% to 40%** |
| **2.8%** | **About half, 41% to 59%** |
| **3.9%** | **Most but not all, 60% to 89%** |
| **6.1%** | **All or close to it, 90% to 100%** |
| **61.3%** | **None of our minimum wage employees are 19 years old or younger** |
| **6.6%** | **(DON'T READ) Don't know/ Refused** |

11. How many of your current employees make between $11.01 and $15 an hour?

| | |
|---|---|
| **12.7%** | **Very few, 1% to 10%** |
| **31.1%** | **Some but less than half, 11% to 40%** |
| **9.7%** | **About half, 41% to 59%** |
| **7.9%** | **Most but not all, 60% to 89%** |
| **4.2%** | **All or close to it, 90% to 100%** |
| **13.3%** | **None of our employees make between $11.01 and $15 an hour** |

**21.0% (DON'T READ) Don't know/ Refused**

**SECTION 3 – Minimum Wage – Impact on Business**
Now I would like to ask how an increase in the minimum wage would impact your business at the current location.

12. How likely are the following statements to occur at your business location, if the minimum wage in Santa Clara County is gradually increased to $15 an hour by 2019: very likely, somewhat likely, not at all likely or not sure?

**RANDOMIZE**

| | Very likely | Somewhat likely | Not at all likely | (DON'T READ) DKNA/It depends | Not sure |
|---|---|---|---|---|---|
| **A. Your employees at the minimum wage will be more satisfied and more productive** | **42.1%** | **20.7%** | **20.7%** | **9.7%** | **6.9%** |
| **B. You will reduce the total number of workers that you employ** | **17.8%** | **22.2%** | **46.7%** | **7.9%** | **5.4%** |
| **C. You will reduce the hours for your minimum wage employees** | **18.0%** | **21.2%** | **45.0%** | **9.5%** | **6.4%** |
| **D. Your costs of employee turnover will decrease because employees will be less likely to quit** | **22.0%** | **23.2%** | **34.9%** | **11.4%** | **8.5%** |
| **E. You will have to close the business** | **8.3%** | **12.7%** | **58.5%** | **10.4%** | **10.0%** |
| **F. You will need to increase prices to your customers to pay for the increased wages** | **40.9%** | **24.7%** | **22.0%** | **6.8%** | **5.6%** |
| **G. You will move the business to a community that has a lower minimum wage** | **12.5%** | **14.1%** | **57.5%** | **8.5%** | **7.3%** |
| **H. You will invest in technologies that reduce the need for workers and lowers labor costs** | **21.2%** | **20.7%** | **43.4%** | **7.9%** | **6.8%** |

13. Please tell me whether you agree or disagree with each of the following statements.

Here's the (first/next) one: _____. (READ ITEM AND ASK:) Do you agree, somewhat agree, neither agree nor disagree, somewhat disagree, or disagree with the statement?

**RANDOMIZE**

| | Agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Disagree | (DON'T READ) Don't know/ Refused |
|---|---|---|---|---|---|---|
| **A. An increase in the minimum wage will help reduce income inequality in our community** | **41.9%** | **23.4%** | **10.0%** | **5.4%** | **15.8%** | **3.5%** |
| **B. If the minimum wage increases, it will make it harder to start and grow businesses in our community** | **37.8%** | **22.8%** | **11.2%** | **7.3%** | **18.1%** | **2.7%** |
| **C. An increase in the minimum wage makes sense for our community, given our high cost of living** | **58.3%** | **17.8%** | **9.5%** | **3.5%** | **9.1%** | **1.9%** |
| **D. It would be better to have the same increase in the minimum wage throughout the County than to have different rates in different cities** | **55.2%** | **19.5%** | **11.0%** | **4.4%** | **7.3%** | **2.5%** |

**Since it sometimes becomes necessary for the project manager to call back and confirm responses to certain questions, I would like to verify your contact information.**

A. First and Last Name_____

B. Position_____

C. Phone_____

D. Email _____

E. Company Name_____

F. Company Address (including City, State, Zip) _____

**Those are all the questions I have.**
**Thank you very much for your time.**