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Working for the Mouse

A Survey of Disneyland Resort Employees

February 2018

Peter Dreier, Occidental College

Daniel Flaming, Economic Roundtable



**ECONOMIC
ROUNDTABLE**
Knowledge for the Greater Good



Urban & Environmental
Policy Institute
OCCIDENTAL COLLEGE

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Peter Dreier
Daniel Flaming
Lucero Herrera
Martha Matsuoka
Jane Carlen
Patrick Burns

Underwritten by
The Coalition of Resort Labor Unions

Report available at:

www.economicrt.org

<https://www.oxy.edu/urban-environmental-policy-institute>

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I. Executive Summary

"It takes people to
make the dream a
reality."
Walt Disney

Disneyland Resort is one of the most well-known, popular, and iconic theme parks in the world.¹ Disneyland Resort's best-known characters and attractions are woven into America's national culture and recognized and celebrated around the world. In 2016, 27.2 million people visited the Anaheim, California theme park. It generated over \$3 billion in revenues for the Walt Disney Company.

Walt Disney is often quoted as saying, "***You can design and create, and build the most wonderful place in the world. But it takes people to make the dream a reality.***"² The Walt Disney Company promotes Disneyland Resort as the "happiest place on earth," but for many of the approximately 30,000 people who work there,³ it is not the happiest place to work.

Disneyland employees report high instances of homelessness, food insecurity, ever-shifting work schedules, extra-long commutes, and low wages. While there is national attention on the minimum wage and have been successful local efforts to raise the minimum wage to \$15 an hour, more than 85% of Disneyland workers earn less than \$15 an hour. Notwithstanding their economic hardships, more than three-quarters (80%) of employees say they are "proud of the work I do at the Disneyland Resort."

Despite steep increases in the cost of housing and other necessities, Disneyland workers have suffered steady pay cuts and continue to struggle to make ends meet.

- The average hourly wage for Disneyland Resort workers in real dollars dropped 15% from 2000 to 2017, from \$15.80 to \$13.36.
- Almost three-quarters (73%) say that they do not earn enough money to cover basic expenses every month.

Disneyland employees worry about keeping a roof over their heads.

- Over half (56%) of Disneyland Resort employees report concerns about being evicted from their homes or apartments.
- More than one out of ten (11%) Disneyland Resort employees – including 13% of employees with young children – report having been homeless – or not having a place of their own place to sleep – in the past two years.
- Over half (52%) of workers who rent their housing are overcrowded – squeezing too many family members, roommates or even multiple families into a unit that is too small to accommodate the number of occupants.

Many Disneyland workers do not have reliable access to a sufficient quantity of affordable, nutritious food.

- More than two-thirds (68%) of Disneyland Resort workers are food insecure.
- Three-quarters (76%) of Disneyland Resort employees with children under 18 are food insecure.

Disneyland employees often struggle with erratic work schedules.

- Only 28% of Disneyland Resort employees report having the same schedule every week.
- More than half (59%) of Disneyland Resort employees who are parents of young children say that their schedules at the park make it difficult to care for their families and children.
- 64% of employees report that “the scheduling of my work at the Disneyland Resort makes it difficult to find a second job.”

Disneyland parents are among the most negatively impacted by the resort’s policies.

- Among Disneyland Resort employees with children who pay for child care, 80% say they cannot make ends meet at the end of the month, 79% are food insecure, and 25% say that they are unlikely to be able to pay for housing that month.

Many Disneyland workers can’t afford healthcare or dental coverage.

- 43% of employees report that in the past year they needed, but could not afford, dental care.
- 37% of parents with young children said that in the past year there were times when they needed prescription medicine but could not afford it.
- 36% of employees enrolled in the Disneyland Resort’s health insurance plan report that they have to give up other necessities to pay the monthly premiums.

Most Disneyland workers are mature adults and the job is their career and their livelihood.

- 59% of workers are 30 to 54 years old and 18% are 55 and older.
- The job at Disneyland is the primary source of income for 91% of workers, but full-time employment is provided to only 54% of workers.

Many Disneyland workers live in outlying communities in order to find housing they can afford.

- 31% of Disneyland workers spend one or more hours commuting to work compared to only 4% of the total workforce in Los Angeles and Orange Counties.
- 34% of Disneyland workers have moved within the past two years.

Raising the wages of Disneyland workers will be a powerful regional economic stimulus.

- Raising the wage floor for Disneyland workers to \$20 an hour will increase their buying power by \$190 million a year.

- When workers spend their increased pay for things such as housing, groceries, restaurant meals, health care, car maintenance, and child care it will generate \$210 million more in sales by businesses in Anaheim and other communities where workers live.

Declining wages for Disneyland workers have weakened the regional economy.

- There is a backlog of \$1.4 billion in unpaid equitable wages that workers would have received if the wage level in 2000 had maintained a steady path to a wage floor of \$20 in 2017.
- Since 2000, the economies in communities where workers live have been diminished by \$1.6 billion in lost sales that businesses would have made if workers had received equitable wages.

There is an extraordinary pay gap between the Walt Disney Company CEO and frontline workers at Disneyland

- In each of the three years from 2015 to 2017, the compensation received by Disney CEO Robert Iger was greater than the total pay of more than 2,000 Disneyland workers.
- In 2018, Mr. Iger’s authorized compensation will equal the total pay of 9,284 Disneyland workers. It will make up 86% of the gap between the current wage and an equitable wage for Disneyland workers.
- When the wage floor for Disneyland workers is raised to \$20 an hour, Mr. Iger’s authorized compensation for 2018 will still equal the pay of 5,348 Disneyland workers.

Disneyland produces large profits and can afford to pay workers a living wage

- In the decade from 2007-2016, Disneyland’s attendance grew 21%, ticket prices grew 59%, and revenue grew 98%.
- Each full-time-equivalent employee at Disneyland generates an average of \$144,900 a year in revenue for the company.
- It would require only 5.7% of park revenue to raise the wage floor for Disneyland workers to \$20.

The findings in this report are based primarily on a survey conducted in October 2017 of approximately 5,000 Disneyland Resort employees. The survey revealed that while most Disneyland Resort employees – referred to as “cast members” by the company – are proud of the work they do, they feel undervalued, disrespected, and underpaid.

Disneyland Resort is a major profit center for the Walt Disney Company. Over the past decade, the number of visitors to Disneyland Resort has increased, the company has increased ticket prices, and overall revenues have grown dramatically. However, during that period, wages for Disneyland Resort workers

have steadily declined in real terms. The rank-and-file employees – who make Disneyland Resort such a profitable enterprise – have not shared in the park’s success.

In addition to the questions about specific topics – such as food insecurity, medical care, child care, and housing – the survey included an open-ended question. Respondents were invited to make comments about their experiences as employees at Disneyland Resort. Almost half of all survey respondents made comments in response to the open-ended question.

“I have been working for Disneyland for almost 28 years and I make less than \$20 an hour. If I didn’t have my husband to help with the bills and other life expenses, I would be living out of my car, or worse, homeless. Disney has increased admission tickets, food & merchandise has increased too. Yet, the front of line ‘Cast Members’ are struggling to pay their mortgage/rent, groceries, transportation and other daily/monthly bills. I am not asking to get rich by working for Disney, but I am asking for fair pay for fair work. I expect to be able to not worry, to not stress, about having food to eat and a roof over my head.”

- Merchandise host at Disneyland Resort for 28 years

“It’s really sad that after working 16 years for Disney I’m not making enough money to pay bills and when I do pay bills, there is not enough for other things like enjoying a nice meal with family or going on vacation. I sometimes stress on how I will pay rent, food, gas, and other expenses. I recently had to work Monday-Saturday and had 1 day off (Sunday) just to pay bills.”

- Merchandise employee

“I loved the work I did for the Disneyland Resort. It was one of the best, most fun, and rewarding (personally) jobs I’ve had. But making magic doesn’t pay the bills. It doesn’t feed my children, keep a roof over their heads, put clothes on their back, or keep the electricity on. How are we supposed to make magic when we can’t even afford to live?”

- Former employee who worked at the park for 3 years

“Disney has become a nightmare to work for. The long hours, lack of livable wages, and zero respect has got to stop.”

- Full-time worker:

“After 11 years at the resort I make \$12.02 as my base wage. Why should I drive 30 miles on the 91 and 5 freeways, almost always in heavy traffic, to earn a minimum wage?”

- Full-time merchandise host

“Disneyland truly is a magical place for the guests but it’s a life struggle for all the employees. Something needs to be done or more and more people will lose time with their families, friends and even their very lives.”

- Full-time wardrobe worker

As described in the Methodology section, over 17,000 Disneyland Resort employees represented by nine unions and 11 union locals who make up the Coalition of Resort Labor Unions (CRLU) were invited to take the survey. Approximately 5,000 employees took the survey. These respondents are representative of the population of 17,339 workers represented by CRLU in terms of age, full-time and part-time employment, hourly wage, length of time working at Disneyland Resort, and other characteristics. When we refer to “Disneyland Resort employees” we are referring to the employees represented by these unions, who constitute 58% of all employees at the resort.⁴

This report summarizes the key findings from the survey. The survey was sent to employees who are members of 11 union locals that have collective bargaining agreements with Disneyland Resort.

They represent the housekeepers, cooks, bakers, dishwashers, laundry attendants, uniform attendants, bartenders, bellmen, parking valets, cashiers, merchandise clerks, bakers and candy makers, security personnel, ticket takers, sewers and seamstresses, milliners, custodians, window washers, mailroom staff, waiters and waitresses, theater stagehands and technicians, assistant stage managers, sound shop and figure mechanics, hair stylists and make-up artists, musicians, singers, dancers, comedians, ice skaters, puppeteers, acrobats, circus performers, and other employees who serve Disneyland Resort’s visitors in myriad ways.

These unions include the American Guild of Variety Artists (AGVA); Bakery, Confectionery, Tobacco Workers & Grain Millers International Union Local 83; IATSE Local 504; IATSE Local 923; IATSE Local 706; Independent Employee Service Association (IESA); Orange County Musicians’ Association–American Federation of Musicians, Local 7; Service Employees International Union/United Service Workers West; United Food and Commercial Workers Local 324; UNITE HERE Local 11; and Workers United Local 50.



Photo credit: CheapFullCoverageAutoInsurance.com

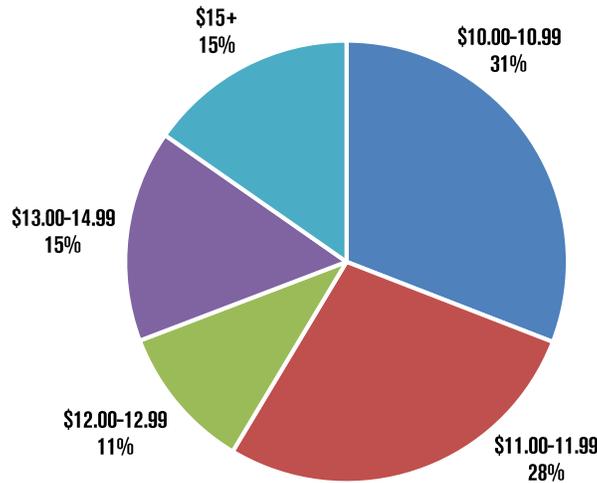
II. Making Ends Meet

85% of Disneyland workers earn less than \$15 an hour.

Hourly Wages for Disneyland Workers

Eighty-five percent of Disneyland Resort workers earn less than \$15 an hour, as shown in *Exhibit 1*. More than half earn less than \$12.00. The poverty wage for a family of four in 2017 – the wage below which a household is below the official poverty threshold – was \$11.82 an hour.⁵

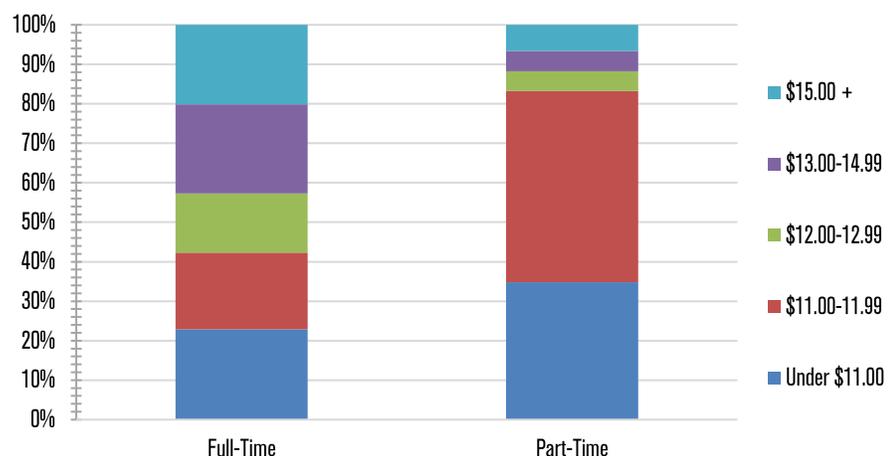
Exhibit 1: Hourly Wages of Disneyland Workers



Source: CRLU (Coalition of Resort Labor Unions) Disneyland Resort worker hourly wages, 2017.

More than half (52%) of Disneyland Resort employees who have worked there for more than 15 years still earn less than \$15 an hour, as shown in *Exhibit 2*. More than one in 10 employees who have worked at Disneyland Resort for over 15 years earn less than \$11 an hour. Even among full-time employees who have worked at Disneyland Resort for more than 15 years, over half (54%) earn less than \$15 an hour and 13% earn less than \$11 an hour.

Exhibit Wages 2: Wage Distribution of Full- and Part-Time Disneyland Workers



Source: CRLU (Coalition of Resort Labor Unions) Disneyland Resort worker residential locations, 2017.

Exhibit 3: Distribution of Hourly Wages by Years of Working at Disneyland Resort, Full-Time and Part-Time

	Full-Time						Part-Time					
	Less than 1 year	1-3 years	4-6 years	7-10 years	11-15 years	More than 15 years	Less than 1 year	1-3 years	4-6 years	7-10 years	11-15 years	More than 15 years
\$10.00-10.99	62%	38%	38%	13%	9%	13%	41%	47%	54%	--	--	--
\$11.00-11.99	--	38%	34%	15%	--	--	50%	43%	28%	27%	--	--
\$12.00-12.99	--	5%	6%	43%	24%	--	3%	3%	4%	37%	31%	--
\$13.00-14.99	21%	9%	11%	19%	49%	40%	4%	--	--	--	17%	--
\$15+	--	9%	11%	11%	18%	46%	3%	6%	14%	25%	51%	88%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: CRLU (Coalition of Resort Labor Unions) Disneyland Resort worker hourly wages and work status, 2017. Total may not add up to 100% because of rounding and because data in cells with small numbers of respondents is not shown.

The relationship between the hourly wages of the roughly 17,000 unionized workers at Disneyland Resort and their work schedules is shown in *Exhibits 2 and 3*. Predictably, a greater share full-time workers have higher hourly wages compared to part-time workers. Over 80% of part-time workers earn a maximum of \$11.99 per hour, while the proportion of full-time workers at that wage level is just over 40%. Low wages with part-time time hours are not sustainable for workers.

Almost three-quarters (73%) of Disneyland Resort workers say that they do not earn enough money to pay for basic expenses every month, as shown in *Exhibit 4*.

More than three-quarters (76%) who work at Disneyland Resort full-time (typically at least 30 hours a week for 50 weeks a year) run out of money for basic expenses at the end of the month. More than two-thirds (69%) of Disneyland Resort’s part-time employees face this kind of chronic economic insecurity.

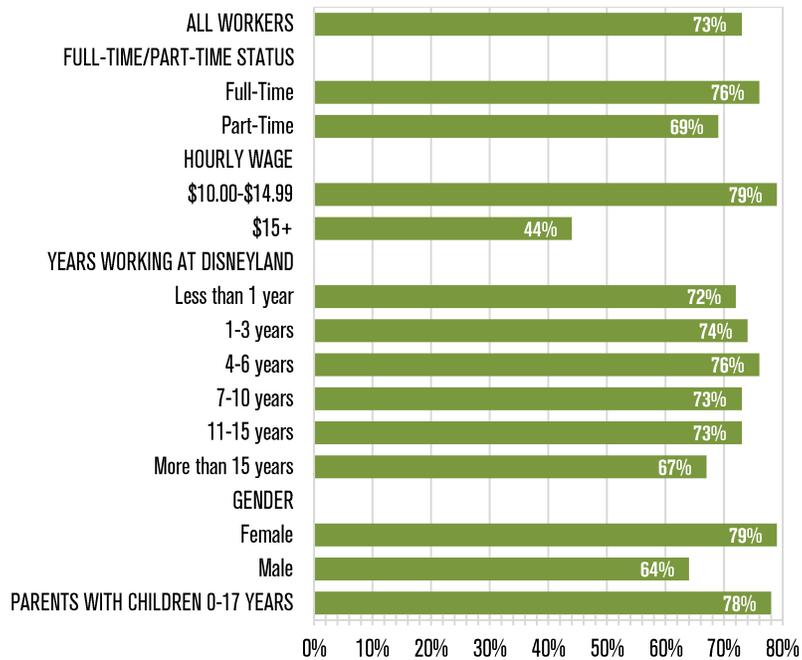
The combination of low wages and the cost of basic expenses, especially housing, puts the vast majority of Disneyland Resort workers in a precarious financial condition that affects the workers themselves, their families, and the wider communities in which they live.

Economic insecurity is widespread among Disneyland Resort workers. At least 73% of workers who earn \$10 to \$10.99 an hour, \$11 to 11.99 an hour, \$12 to \$12.99 an hour, and \$13 to \$14.99 an hour cannot make ends meet each month. Even among those at the highest pay level – over \$15 an hour – 44% cannot make ends meet.

Disneyland Resort newcomers and veterans share a similar level of economic insecurity. Among those who have worked at Disneyland Resort for one to three years, 74% cannot meet basic expenses each month. But even among those who have worked at Disneyland Resort for over 15 years, 67% can’t afford to pay their monthly bills.

Three-quarters of workers say they do not earn enough money to pay for basic expenses every month

Exhibit 4: Disneyland Workers Who Say They Do Not Earn Enough Money to Cover Expenses by Work Status, Wage, Tenure, Gender, and Family Status



Source: CRLU (Coalition of Resort Labor Unions) Disneyland Resort worker hourly wages, tenure and work status 2017.

More than three-quarters (78%) of Disneyland Resort employees who are parents of children under 18 cannot make ends meet. A higher proportion of female employees (79%) than male employees (64%) report that they cannot make ends meet.

Even 74% of Disneyland Resort employees who report having two jobs, and 48% of those who report having three jobs, cannot make ends meet. (As we'll discuss below, Disneyland Resort's scheduling practices make it difficult for part-time, and even full-time, employees to take second jobs.)

After adjusting for constant dollars, the average hourly pay for Disneyland workers has declined 15 percent since 2000.

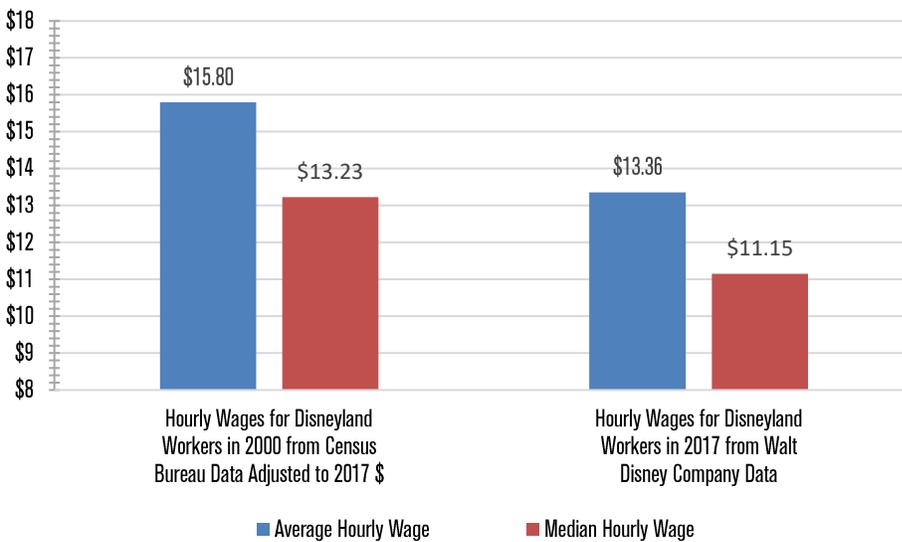
Declining Wages

While rents and other basic expenses have risen steadily, even dramatically, since 2000, in real dollars the average hourly wage for Disneyland Resort workers dropped 15% from 2000 to 2017, as shown in *Exhibit 5*.

Each year since 2000, the hourly wage shrank by an average of \$0.14 when earnings are adjusted to 2017 dollars. In real dollars, average hourly pay dropped from \$15.80 in 2000 to \$13.36 in 2017. There was a similar drop in the median wage – the wage paid to the typical worker, which decreased from \$13.23 to \$11.15.

By matching information provided by the Census Bureau for workers employed on the Disneyland Resort footprint we were able to estimate employee wages in 2000. This procedure is explained in the Methodology section. It produces current wage data that matches the wages of union members almost exactly, revealing the drop in the real value of wages shown in *Exhibit 4*.

Exhibit 5: Average Hourly Wage of Disneyland Resort Employees in 2017 Dollars



Sources: American Community Survey Public Use Microdata Sample (PUMS) 2000 and 2011-2015 records matched with U.S. Census Bureau LODES data for workers employed on Disneyland Resort footprint, and CRLU (Coalition of Resort Labor Unions). Wages adjusted based on the Consumer Price Index for All Urban Consumers in Los Angeles-Riverside-Orange County, California.

By applying the same methodology to employee and Census Bureau data from 2000, we get correspondingly accurate information about the wages paid to workers 17 years ago. After adjusting for constant dollars, the average hourly pay for employees has declined 15% since 2000 and the median pay has declined 16%.

While Disneyland Resort’s workers’ pay has stagnated, the number of yearly visitors and revenues have climbed and the resort has prospered correspondingly. Yet, Disneyland Resort workers have not shared in the resort’s increased prosperity.

“I’ve been 29 years with Disney. I only get \$15.70 an hour. I barely make a living. I have had to live with a friend now in a bedroom where I paid very little rent but still it is hard for me. Sometimes I go without food.”

– Full-time concierge

“I’ve been with the company for so long because I love the company. I love everything I do there. That’s why I haven’t quit. But this past 9 months have made me think about... finding a better paying job. [After paying for gas] I’m left with \$200 to buy my child diapers, clothes, and food, and pay for rent, phone bill, car payment, and car insurance for me and my son. I get WIC assistance for my son I’m grateful for the program. There’s times when I don’t have enough money to feed myself... I love what I do but I’m struggling to make it”

– Full-time worker

“Working here has literally put me in a financial hole that I have NEVER endured. I work six days a week at Disney, I went to school to receive my hours and I have been issued a professional license by the State of California. There is NO REASON why after

48 hours a week my bank account is in the negative. I have to stress about paying my rent every single month, going with only one meal of day. This low pay not only affects me financially, it also creates an emotional burden”

– Full-time cosmetologist

“I have a full-time job that does not allow me to live like a human being. My stress and anxiety levels are so high because I live paycheck to paycheck, asking people if I could borrow money for gas to get me to work. I’m so tired of being hungry and scared of not knowing if I’ll have money to survive. The pay is so poor I feel like I’m working for free. This company forgets we’re human beings, we are nothing but peasants to the castle to them.”

– Full-time worker

“Sometimes I have had to choose between paying rent and paying for food. No one should be making so little a wage that they are reduced to this to survive.”

– Full-time wardrobe worker

“I currently love the work I do. The struggle that I have is I’m living paycheck to paycheck...I’m always looking for a second job or to replace this job.”

– Full-time merchandise hostess

“With the literal billions of dollars the resort brings in, the Walt Disney Company can afford to pay their workers a decent, living wage.”

– Single mother

“If it weren’t for my other job I would sink and never survive. My rent is more than I make in a month here at the resort. Financially, I’ve seen several people lose homes, live in their cars, fail relationships and the list goes on, due to the lack of monies earned at the greatest place on Earth. I personally do what I love and love what I do, but I’ve got another job that pays my bills.”

– Single mom, full-time cosmetologist

“I have worked at the DLR for 11 years and make \$12.04 an hour...I have to rely on the generosity of my loved ones to make it every month because I cannot afford food rent and medications on my pay.”

– Full-time merchandise hostess



III. Food Insecurity

46% of
Disneyland
workers have very
low food security.

One consequence of the disparity between Disneyland Resort workers’ pay and the cost of living is the significant level of *food insecurity* among those who work at the iconic resort. More than two-thirds (68%) of Disneyland Resort workers are food insecure. Nationally, 12% (15.6 million) of U.S. households were food insecure in 2016, according to the U.S. Department of Agriculture.⁶ In California, 12% of the population is considered food insecure.⁷

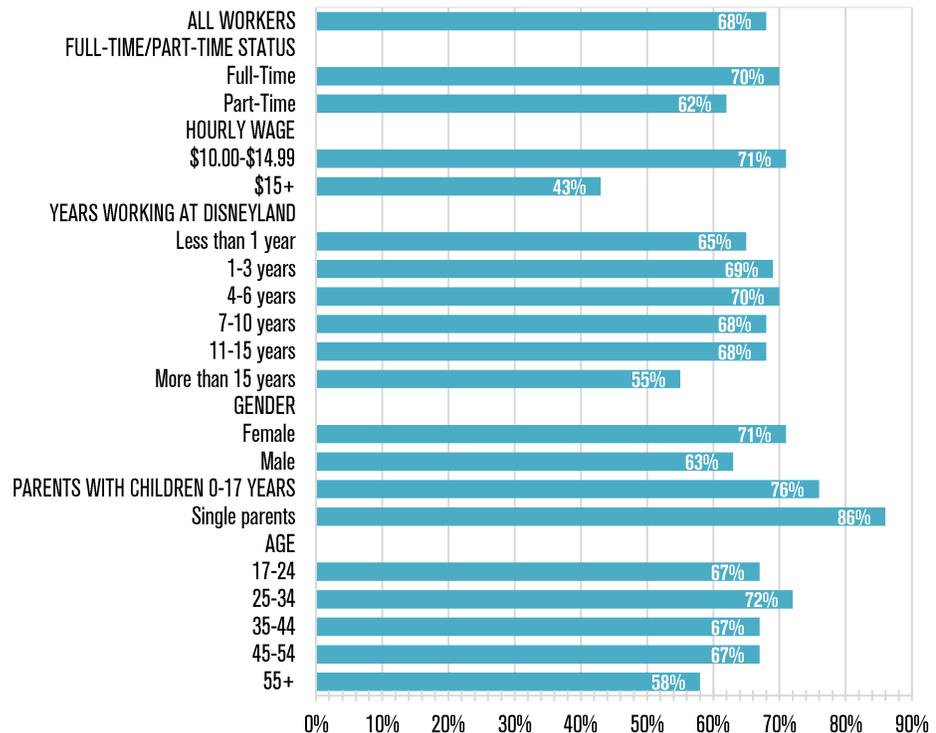
The United States Department of Agriculture (USDA) defines food insecurity as the lack of access to sufficient, safe, and nutritious food necessary to lead a healthy life.⁸ In the context of the United States — a prosperous country with overall food surplus — factors affecting food security largely involve household incomes and the competing costs of necessities such as housing and health care. Even in California, a relatively prosperous state with a large and steady food supply, food insecurity remains a serious problem, in part because of the gap between household incomes and the incomes needed to make ends meet.

Survey respondents were asked the six questions that comprise the U.S. Department of Agriculture Economic Research Service’s Short Form of the USDA Food Security Survey. The Six-Item Short Form is one of the accepted tools to measure food security developed by the agency.

To evaluate a household’s level of food security or insecurity, the sum of affirmative responses is used to generate a raw score, with a range of 0 to 6. The results are shown in *Exhibit 6*.

Among Disneyland Resort workers, 46% are classified as having “very low food security.” This condition is characterized by disrupted eating patterns and reduced

Exhibit 6: Food Insecurity by Selected Characteristics of Disneyland Workers



Source: Survey of Disneyland Resort employees.

Exhibit 7: Food Security and Insecurity by Hourly Wage, Full-Time and Part-Time

	Full-Time		Part-Time		All Workers
	\$10.00-\$14.99	\$15+	\$10.00-\$14.99	\$15+	All Wage Levels
Food secure	25%	52%	34%	74%	32%
Low food security	23%	21%	20%	15%	22%
Very low food security	51%	27%	46%	11%	46%
Total	100%	100%	100%	100%	100%

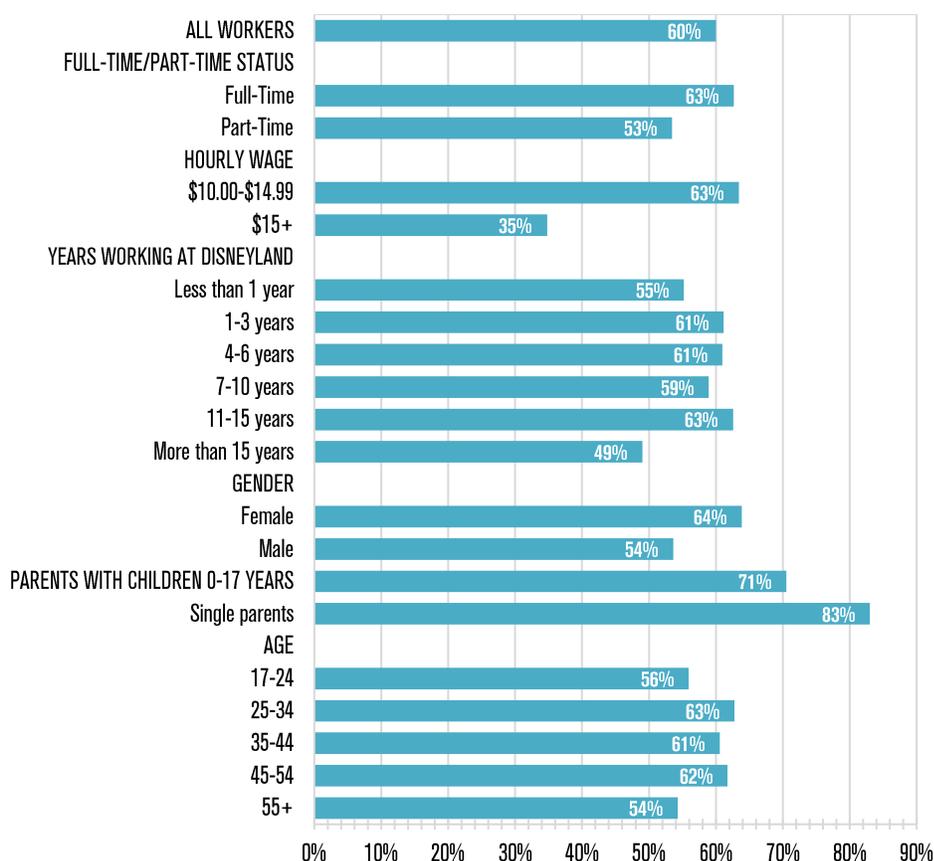
Source: Survey of Disneyland Resort employees. Total may not add up to 100% because of rounding.

food intake. Another 22% are classified as having “low food security.” This is characterized by reduced quality, variety, or desirability of the diet.

More than half (55%) of employees who have worked at Disneyland Resort for over 15 years are classified as food insecure.

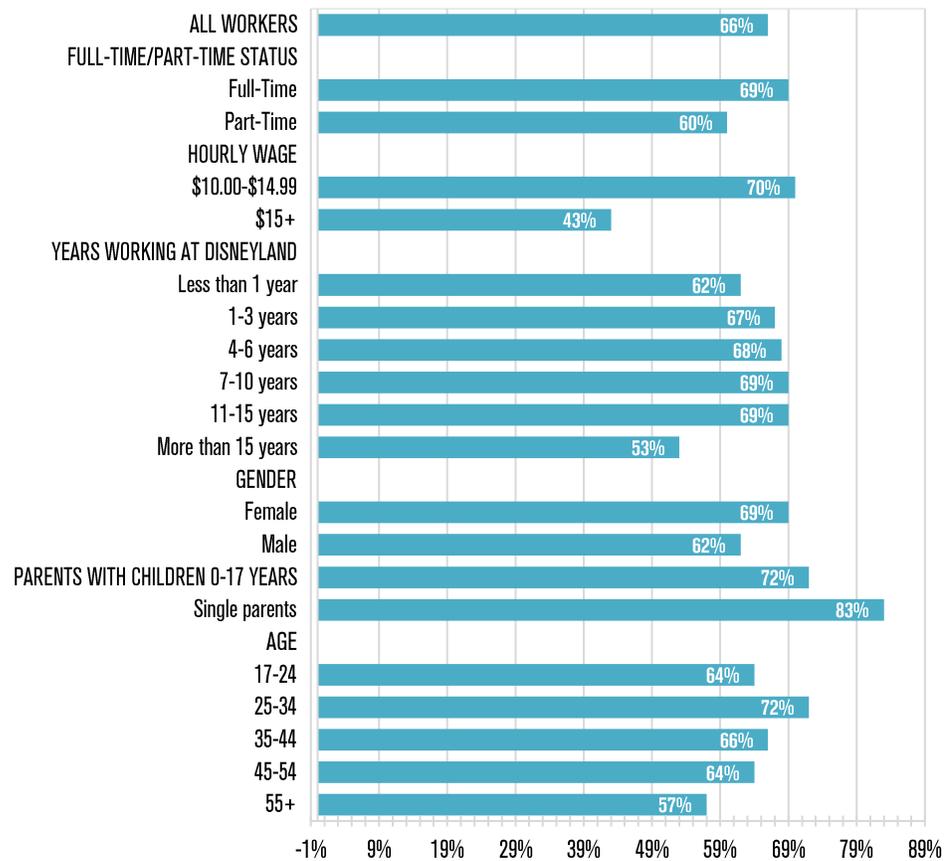
In terms of wage levels, 70% of employees who earn \$10–10.99 an hour are food insecure compared with 69% who earn \$11–11.99, 74% who earn \$12–12.99, 75% who earn \$13–\$14.99, and 43% who earn over \$15 an hour.

Exhibit 8: Disneyland Workers Agreeing with the Statement, "The food that I bought just didn't last, and I didn't have enough money to buy more."



Source: Survey of Disneyland Resort employees.

Exhibit 9: Disneyland Workers Agreeing with the Statement, "I couldn't afford to eat balanced meals."



Source: Survey of Disneyland Resort employees.

Among employees who work at Disneyland Resort full-time, 68% suffer from food insecurity, as shown in *Exhibit 7*. Among part-time employees, 62% suffer from food insecurity. For both full-time and part-time employees, the level of food insecurity declines significantly among those who earn \$15 an hour or more. Even so, 48% of full-time employees and 26% of part-time employees in the highest hourly pay category are food insecure.

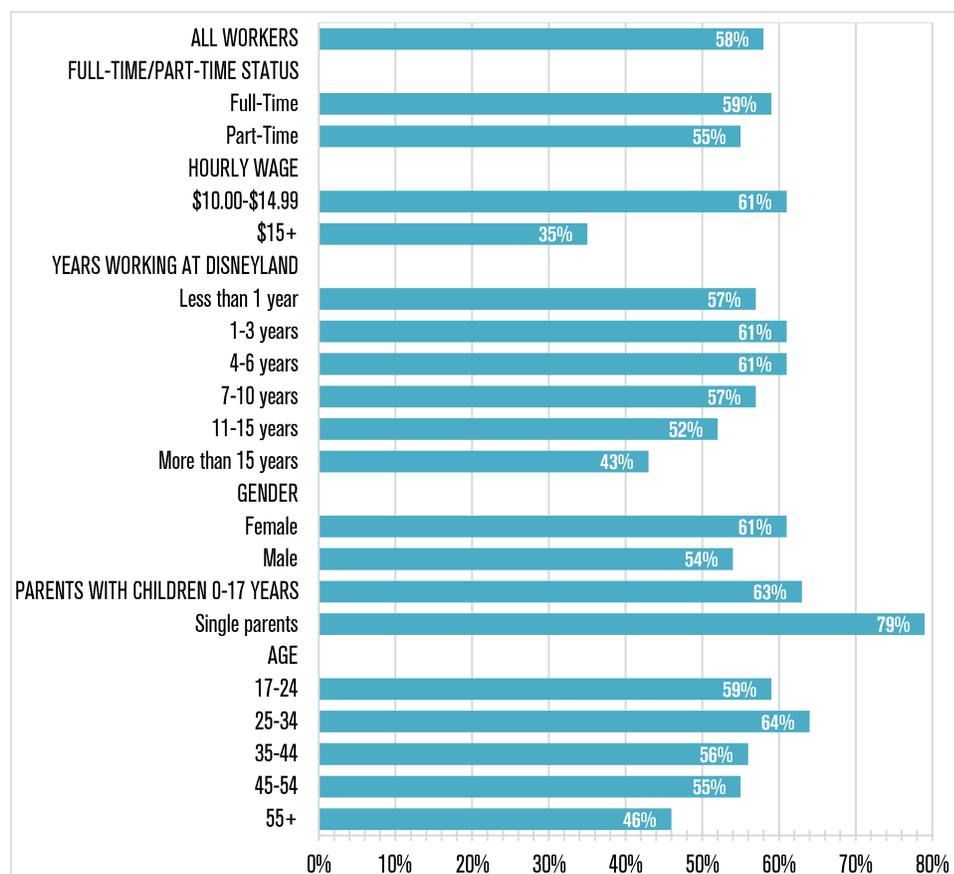
Resort workers who are parents of children under 18 have a slightly higher rate of food insecurity (76%) than Disneyland Resort workers in general. Single parents with children under 18 find it even harder to put affordable, nutritious food on the table; 86% of them confront food insecurity. Even worse, 68% of single parents with children under 18 are classified as having *very low* food security.

Female employees are more likely to be confronted with food insecurity (71%) than male employees (63%).

Almost one out of seven (15%) Disneyland Resort workers received benefits from a food stamp (SNAP) program, food banks, or other food donation programs. About one-quarter (23%) of the Disneyland Resort employees who have very low food security rely on Food Stamps or food donation programs, compared with 12% of those with low food security and even 4% of those who are considered food secure.

15% of
Disneyland
workers receive
food stamps.

Exhibit 10: Disneyland Workers Answering Yes to the Question, "In the last 12 months, since last September, did you ever cut the size of your meals or skip meals because there wasn't enough money for food?"



Source: Survey of Disneyland Resort employees.

Responses of Disneyland Resort employees to descriptions and questions used by the USDA to measure levels of food security and insecurity are shown in Exhibits 8–11.

Workers' answers about whether they are described by the statement, "the food that I bought just didn't last, and I didn't have enough money to buy more" are shown in Exhibit 7.

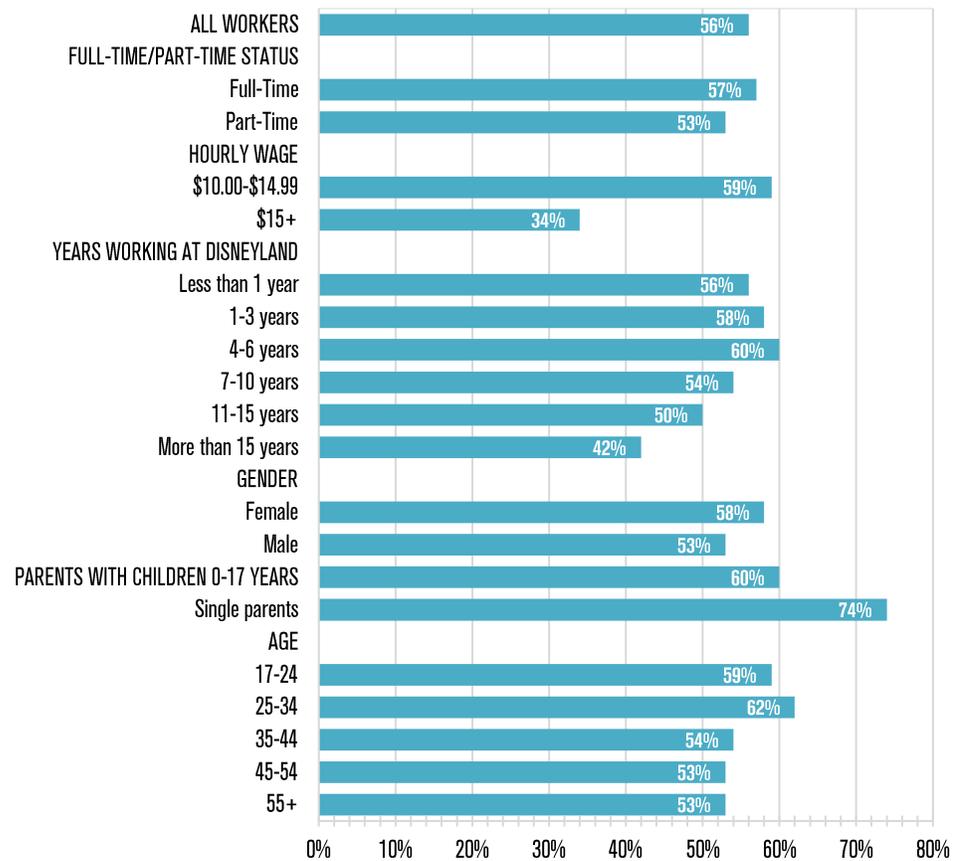
Workers' answers about whether they are described by the statement, "I couldn't afford to eat balanced meals" are shown in Exhibit 8.

Workers' answers to the question, "In the last 12 months, since last September, did you ever cut the size of your meals or skip meals because there wasn't enough money for food?" are shown in Exhibit 9.

Workers' answers to the question, "In the last 12 months, did you ever eat less than you felt you should because there wasn't enough money for food?" are shown in Exhibit 10.

Workers' answers to the question, "In the last 12 months, were you ever hungry but didn't eat because there wasn't enough money for food?" are shown in Exhibit 11.

Exhibit 11: Disneyland Workers Answering Yes to the Question, "In the last 12 months, did you ever eat less than you felt you should because there wasn't enough money for food?"



Source: Survey of Disneyland Resort employees.

46% didn't eat because there wasn't enough money for food.

- 60% say that in the past 12 months, “The food that I bought just didn’t last, and I didn’t have money to get more.”
- 66% say that in the past 12 months, “I couldn’t afford to eat balanced meals.”
- 58% say that in the past 12 months they had to “cut the size of meals or skip meals because there wasn’t enough money for food.”
- 56% say that in the past 12 month they ate less than they felt they should “because there wasn’t enough money for food.”
- 46% say that in the past 12 months, they were “hungry but didn’t eat because there wasn’t enough money for food?”

Workers’ personal descriptions of their struggles with food insecurity include:

“I am working 30–40 hours a week plus occasional overtime and I am still barely making \$200 a week after my health fees. I am struggling. Unless I find a second job very soon I fear that I may not be able to pay my bills or my share of rent this month or the coming months. I don’t know what to do and I can no longer sleep due to my level of stress. I eat twice a day now because I have to skip meals to save money. I’m hungry and tired. I want

to go back to school but I can't afford it. We need better pay if we are expected to live.... I am drowning and I know I am not the only one."

– Part-time busser

"I have to always smile and provide great guest service but then go home and not able to eat because I cannot afford food at the moment. They schedule me terrible hours and it is almost impossible to get more hours because they will not allow you to pick up or drop shifts. Something needs to change. If Disney wants us to 'make magic' then maybe the company should start 'making magic' for us."

– Part-time cashier

"I often skip meals because I can't afford to buy food."

– Part-time worker

"I live off of cereal... I have it for breakfast, lunch, and dinner, because it isn't time consuming and it's relatively cheap."

– Part-time merchandise worker

"I love working at the Disneyland resort. I get to make magic for people all around the world. But even with working usually 40 hours weekly, I lost 35 pounds in a matter of 2 months because I couldn't afford to eat more than one meal a day."

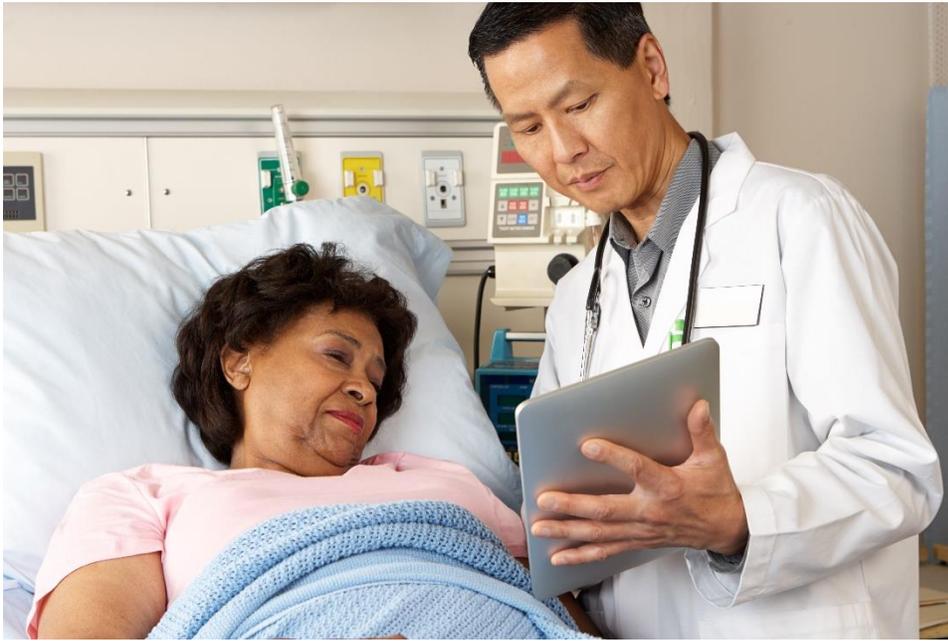
– Full time-cashier

"I've often skipped meals to make sure my daughter has formula and food. I've had to weigh out which bills to pay and which ones to not and just pay the late fee and fall behind to make sure I can put gas in my car to get to work."

– Full-time cosmetologist

"I often go days without eating anything but one meal since I can't afford more groceries. And the food I buy is for my children and there isn't usually enough for all 3 of us... We often only survive off spaghetti since it's so cheap, we can't even get sauce for it just butter. Disney used to be a great place to work, but not anymore."

– Single mom, full-time cook



IV. Health Care

Unmet Health Needs

Many Disneyland Resort employees lack access to affordable health care services. Even those who have health insurance report that the coverage is inadequate in terms of providing basic services.

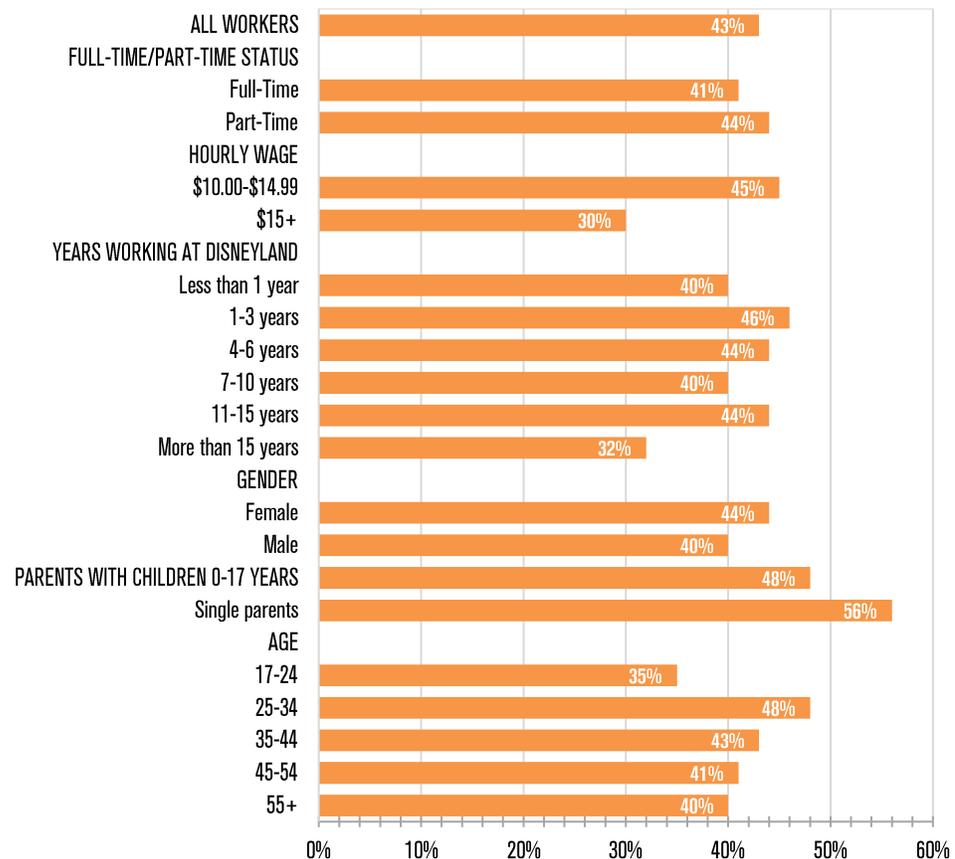
The Walt Disney Company asks its employees to adhere to what it calls the “Four Keys” to good customer service. Among them are “smile” and “make eye contact.”⁹ Many Disneyland Resort employees, however, need but cannot afford dental care, or glasses and contact lenses, making it harder to adhere to those guidelines.

For example, 43% of Disneyland Resort employees report that in the past year they needed, but could not afford, *dental care*, as shown in *Exhibit 12*. Among single parents, over half (56%) could not afford needed dental care.

Nearly a third (30%) report that in the past year they needed, but could not afford, *glasses or contact lenses*, as shown in *Exhibit 13*. Another quarter (24%) report that in the past year they needed, but could not afford, *follow-up medical care*. One fifth (21%) report that in the past year they needed, but could not afford, *prescription medicines*, while 16% report that in the past year they needed, but could

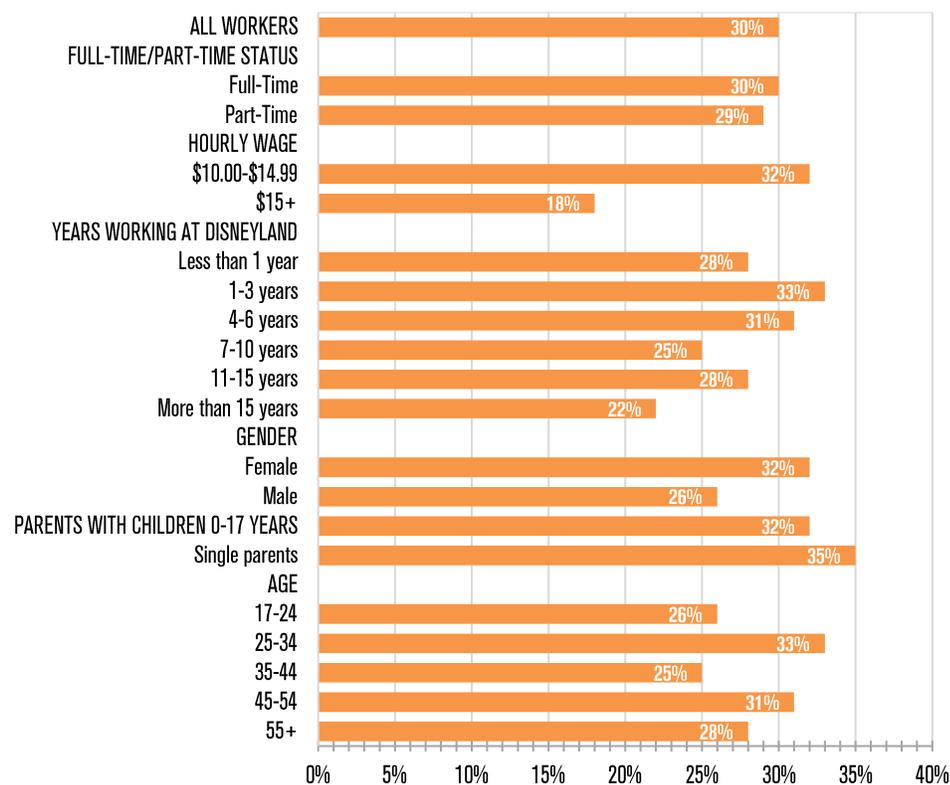
43% needed but could not afford dental care.

Exhibit 12: Disneyland Workers Who Needed but Could Not Afford DENTAL CARE in the Past Year



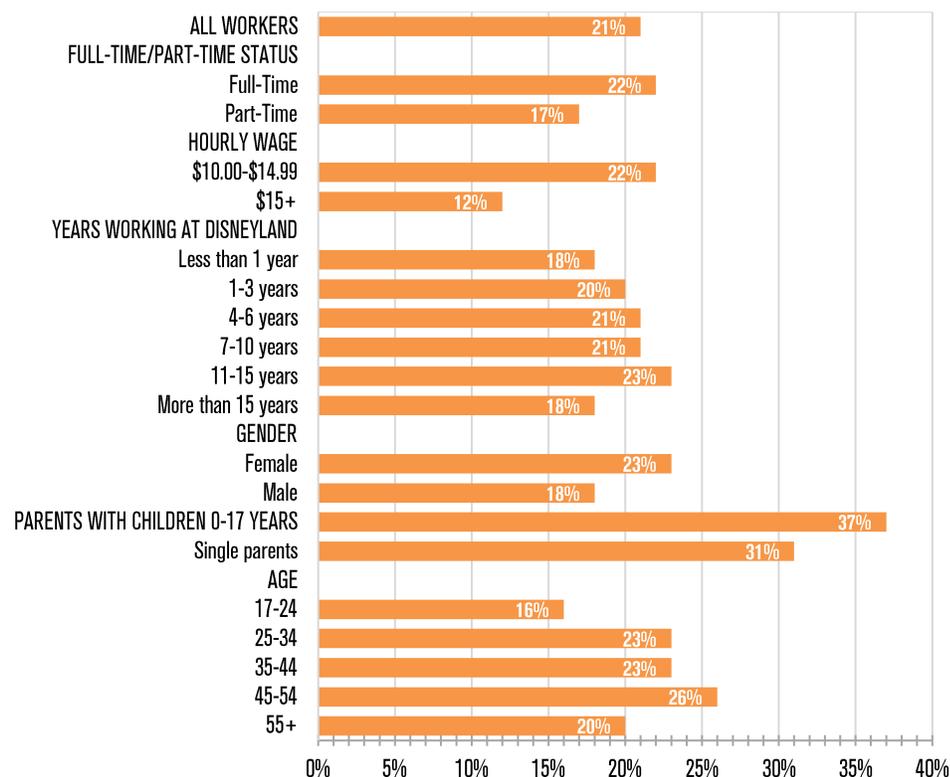
Source: Survey of Disneyland Resort employees.

Exhibit 13: Disneyland Workers Who Needed but Could Not Afford EYE GLASSES OR CONTACT LENSES in the Past Year



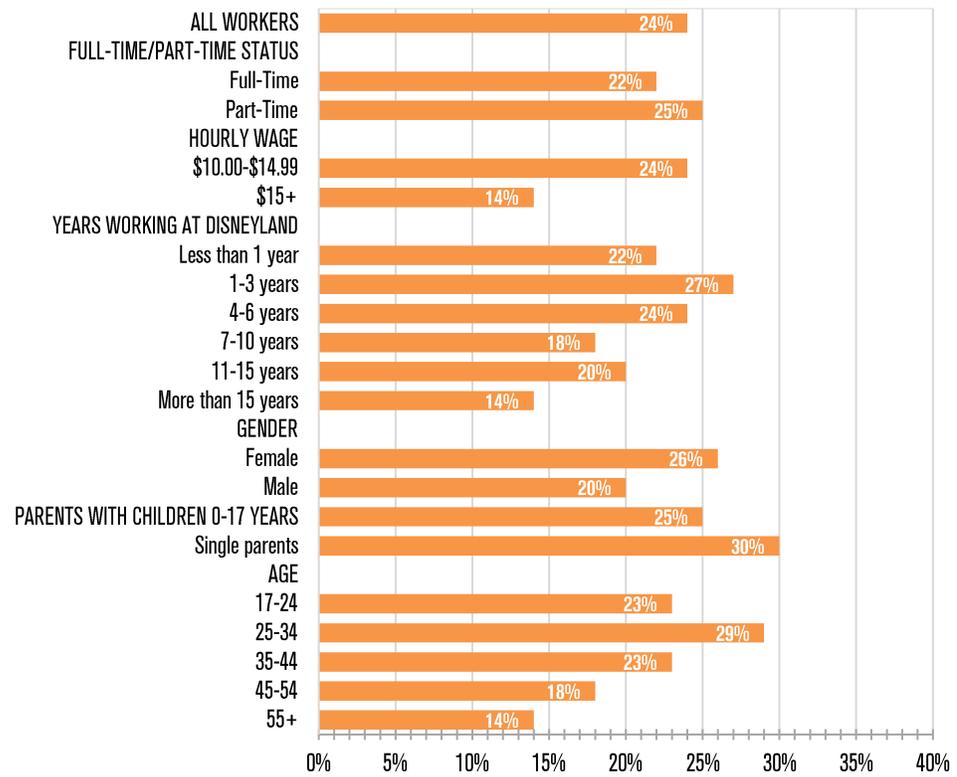
Source: Survey of Disneyland Resort employees.

Exhibit 14: Disneyland Workers Who Needed but Could Not Afford PRESCRIPTION MEDICINES in the Past Year



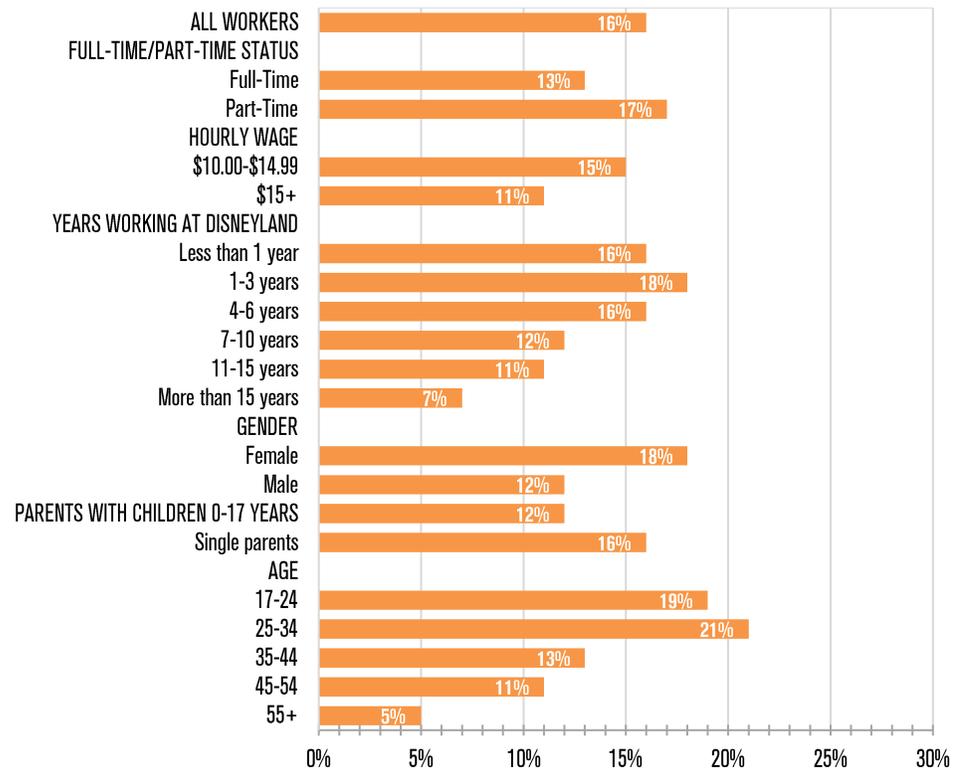
Source: Survey of Disneyland Resort employees.

Exhibit 15: Disneyland Workers Who Needed but Could Not Afford FOLLOW-UP MEDICAL CARE in the Past Year



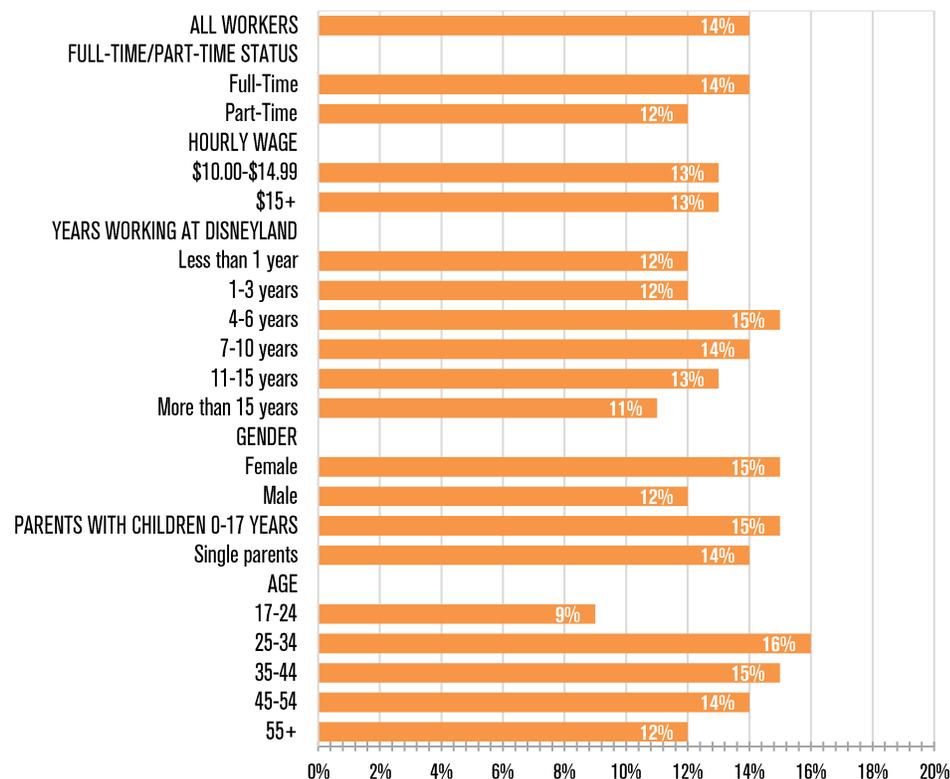
Source: Survey of Disneyland Resort employees.

Exhibit 16: Disneyland Workers Who Needed but Could Not Afford MENTAL HEALTH CARE OR COUNSELING in the Past Year



Source: Survey of Disneyland Resort employees.

Exhibit 17: Disneyland Workers Who Needed but Could Not Afford SPECIALIST MEDICAL ATTENTION in the Past Year



Source: Survey of Disneyland Resort employees.

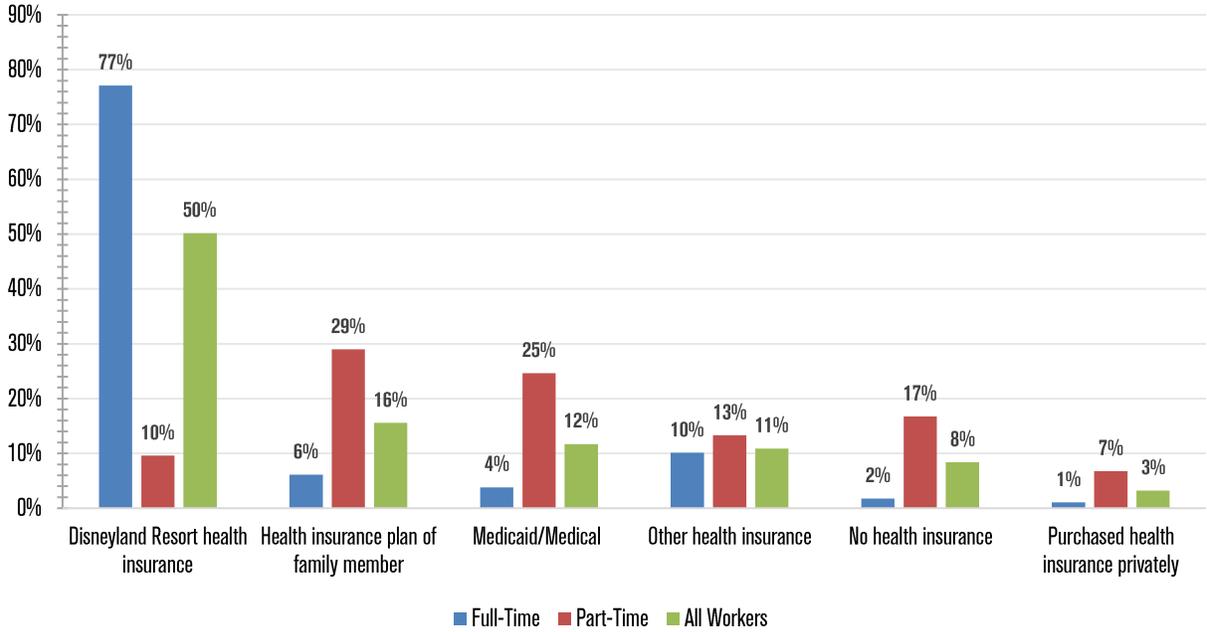
not afford, *mental health care or counseling* and 14% report that in the past year they needed, but could not afford, *medical attention from a specialist provider*.

Employees who earn \$15 an hour or more are much more likely to be able to afford these essential health care services. But even among this group, almost one-third (30%) cannot afford dental care and almost one-fifth (18%) cannot afford glasses or contact lenses, as shown in *Exhibits 12 and 13*.

Among full-time Disneyland Resort employees, 41% report that in the past year they needed, but could not afford, *dental care*; 30% report that in the past year they needed, but could not afford, *glasses or contact lenses*; 22% report that in the past year they needed, but could not afford, *prescription medicines*; 22% report that in the past year they needed, but could not afford, *follow-up medical care*; 13% report that in the past year they needed, but could not afford, *mental health care or counseling*; and 14% report that in the past year they needed, but could not afford, *medical attention from a specialist provider*.

More female than male Disneyland Resort employees cannot afford access to these key medical services. It is particularly a problem for parents of young children. Among employees who are the parents of children under 18, for example, almost half (48%) cannot afford access to dental care, including check-ups. It is even worse for single parents of young children, 56% of whom cannot afford dental care.

Exhibit 18: Type of Health Insurance Coverage among Disneyland Resort Employees



Source: Survey of Disneyland Resort employees.

Disneyland Resort Health Insurance

Half of Disneyland Resort employees utilize health insurance offered by the Disneyland Resort, as shown in *Exhibit 18*. More than one-tenth (12%) are covered by Medicaid or Medi-Cal. Another 3% purchase health insurance privately, while 16% rely on insurance from another member of their family. Another 11% have some other form of health insurance. Almost one-tenth (8%) of Disneyland Resort workers have no health insurance at all.

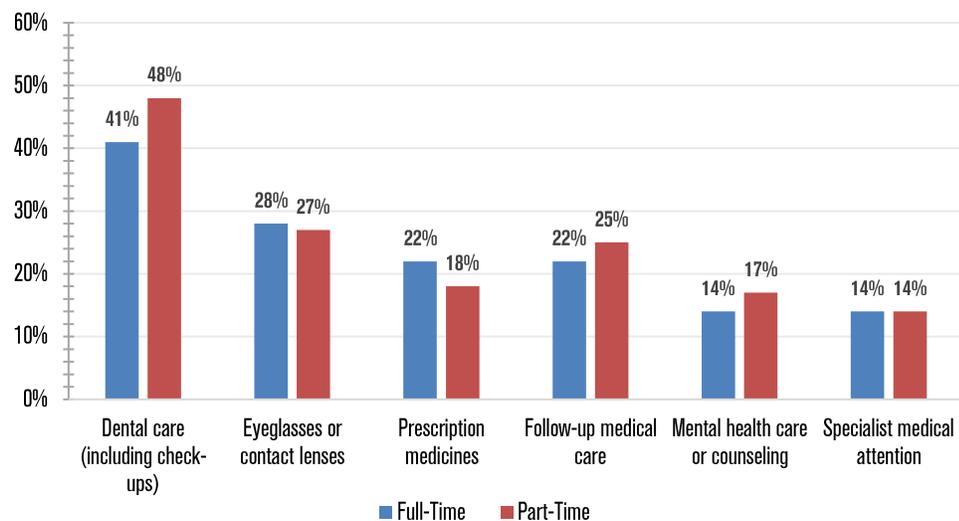
Among full-time employees, 77% are covered by the company’s health insurance plan, 6% rely on insurance from another member of their family, 1% purchase their health insurance privately, 4% rely on Medicaid or Medi-Cal, 10% have some other form of health insurance, and 2% have no health insurance at all.

Exhibit 19: Ability to Afford Health Insurance Premiums among Full-Time and Part-Time Disneyland Resort Employees Who Are Covered by Disneyland Resort Insurance

	Full-Time	Part-Time
Unable to afford monthly premiums	6%	9%
Gave up other necessities in order to pay the monthly health insurance premiums	36%	33%
Able to pay the monthly health insurance premium	50%	44%
The monthly health insurance premium is very affordable	8%	14%
Total	100%	100%

Source: Survey of Disneyland Resort employees.

Exhibit 20: Need but Cannot Afford Basic Medical Services among Full-Time and Part-Time Employees with Disneyland Resort Health Insurance



Source: Survey of Disneyland Resort employees.

Among part-time employees, 10% are covered by the company’s health insurance plan, while 29% rely on insurance from another member of their family, 7% purchase their health insurance privately, 25% rely on Medicaid or Medi-Cal, 13% have some other form of health insurance, and 17% have no health insurance at all.

Even among full-time Disneyland Resort employees who utilize the Disneyland Resort’s health insurance plan, 42% report that the monthly premiums are too expensive as shown in *Exhibit 19*. Thirty-six percent of full-time workers report that “I have to give up other necessities in order to pay the monthly health insurance premiums” and another 6% report that “It is impossible for me to afford the monthly health insurance premiums.”

For full-time and part-time Disneyland Resort employees alike, having the company’s health insurance plan is no guarantee that they will have access to basic medical services, as shown in *Exhibit 20*.

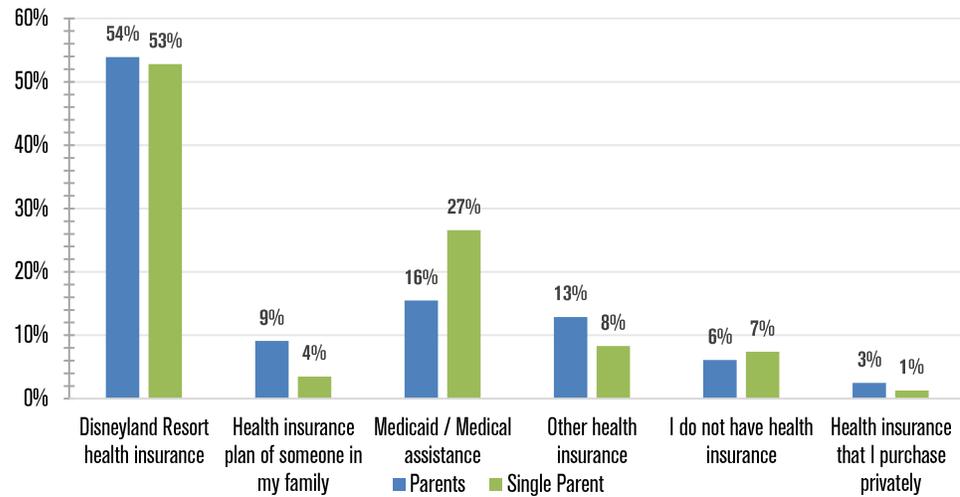
Among full-time employees covered by the company’s health plan, 41% needed but could not afford dental care (including check-ups); 28% needed but could not afford glasses or contact lenses; 22% needed but could not afford prescription medicines; 22% needed but could not afford follow-up medical care; 14% needed but could not afford mental health care or counseling; and 14% needed but could not afford specialist medical services. The access to health care of part-time employees is even more constrained.

Although Disneyland Resort offers health insurance to its full-time employees, many employees do not utilize it. Why is that?

Among the full-time employees who are not covered by Disneyland Resort’s insurance plan, 40% say it is too expensive. Almost half (45%) say they don’t need it because they are covered by another plan.

Among part-time employees, 10% are covered by the company’s health insurance plan. Among the part-time employees who are not covered by Disneyland

Exhibit 21: Type of Health Insurance Coverage among All Parents of Young Children and Single Parents of Young Children



Source: Survey of Disneyland Resort employees.

Resort’s insurance plan, over half (51%) say they are not eligible for it. Another 13% say that they can’t afford the company’s health plan because it is too expensive. About one-quarter (26%) of the part-timers are covered by another plan.

Among Disneyland Resort employees who are parents of children under 18, 54% utilize the company health insurance plan. Among Disneyland Resort employees who are single parents of children under 18, 53% utilize the company health insurance plan. Very few parents of young children can rely on other family members to provide health insurance and few can afford to purchase private health insurance on their own. Some are able to get Medicaid or Medi-Cal insurance. But among all the parents of young children, 6% have no health insurance at all. Among single parents of young children, 7% lack any health insurance, as shown in *Exhibit 21*.

“I have been with the company for six years. Prior to this, I never had any health concerns and now work-related stress has caused so much... Always having to stress over being able to afford a meal, pay rent, pay bills... I’ve never seen so many people struggling like I have at the Disneyland Resort. “

– Full-time costume support assistant

“Disneyland has good insurance but it’s expensive... I struggle to pay my rent and necessities. I’ve been with the company for ten years and I’m not even getting paid \$14.”

– Full-time food service worker



v. Pride and Respect at Work

79% of employees say they are “proud of the work I do at the Disneyland.”

Most Disneyland Resort employees are proud of the work they do providing fun and entertainment for the millions of visitors to the theme park. At the same time, they believe that the company does not respect the work they do in terms of how they are treated and how they are paid.

More than three-quarters (79%) of the employees say that they are “proud of the work I do at the Disneyland Resort.” Almost half (48%) strongly agree with this statement and almost one-third (31%) agree, as shown in *Exhibit 22*.

At the same time, less than half (46%) of Disneyland Resort employees think they are “treated with respect on the job,” as shown in *Exhibit 23*. Almost one-third (33%) believe that they are not treated with respect. More than one-fifth (22%) felt neutral on the subject, neither agreeing nor disagreeing with the statement.

Disneyland Resort employees are divided on whether they are “treated fairly on the job,” as shown in *Exhibit 24*. On that subject, 43% of employees agree, while 34% disagree. Almost one-quarter (23%) of Disneyland Resort employees neither agreed nor disagreed about being treated fairly.

The longer employees work at Disneyland Resort, the more their pride in their work declines and their feelings about being treated with respect and being treated fairly decline as well.

Among those who’ve worked there less than a year, 89% express pride in their work, but among those who have worked there between 11 and 15 years, the number dips to 74%, and among those who have 15 or more years’ experience, the pride factor is 77%. This can be seen in *Exhibit 25*.

Among those who’ve worked there less than a year, 75% say that they are treated with respect on the job, as shown in *Exhibit 26*. But among those who have worked there between one and three years, the number dips to 53%; among those who have seven to 10 years at the park, the number declines to 39%; and among those with

Exhibit 22: Workers agreeing with the Statement, “I am proud of the work I do at the Disneyland Resort”

	Percent
Strongly agree	48%
Agree	31%
Neither agree nor disagree	13%
Disagree	5%
Strongly disagree	3%
Total	100%

Source: Survey of Disneyland Resort employees.

Exhibit 23: Workers agreeing with the Statement, “I am treated with respect on the job”

	Percent
Strongly agree	14%
Agree	32%
Neither agree nor disagree	22%
Disagree	19%
Strongly disagree	14%
Total	100%

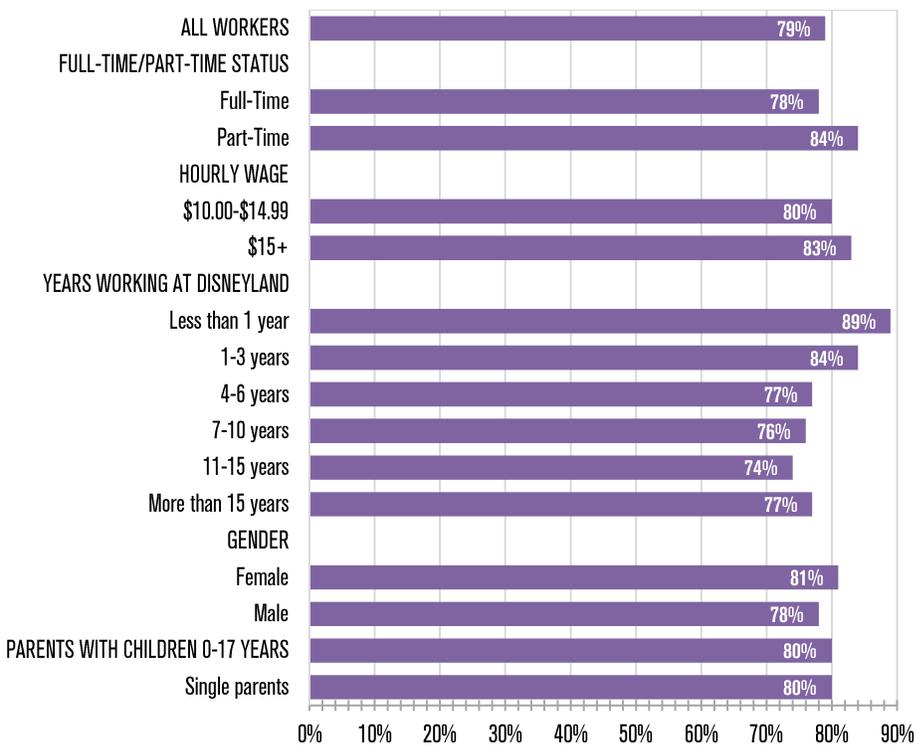
Source: Survey of Disneyland Resort employees.

Exhibit 24: Workers agreeing with the Statement, “I am treated fairly on the job”

	Percent
Strongly agree	12%
Agree	31%
Neither agree nor disagree	23%
Disagree	20%
Strongly disagree	14%
Total	100%

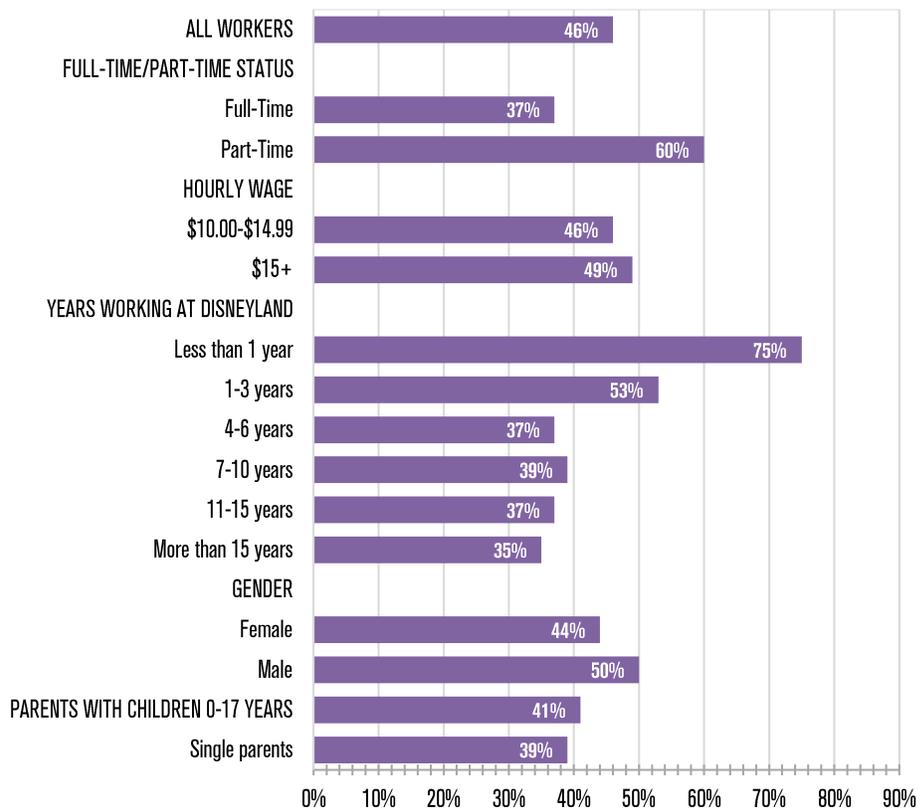
Source: Survey of Disneyland Resort employees.

Exhibit 25: Employees agreeing, "I am proud of the work I do at the Disneyland Resort"



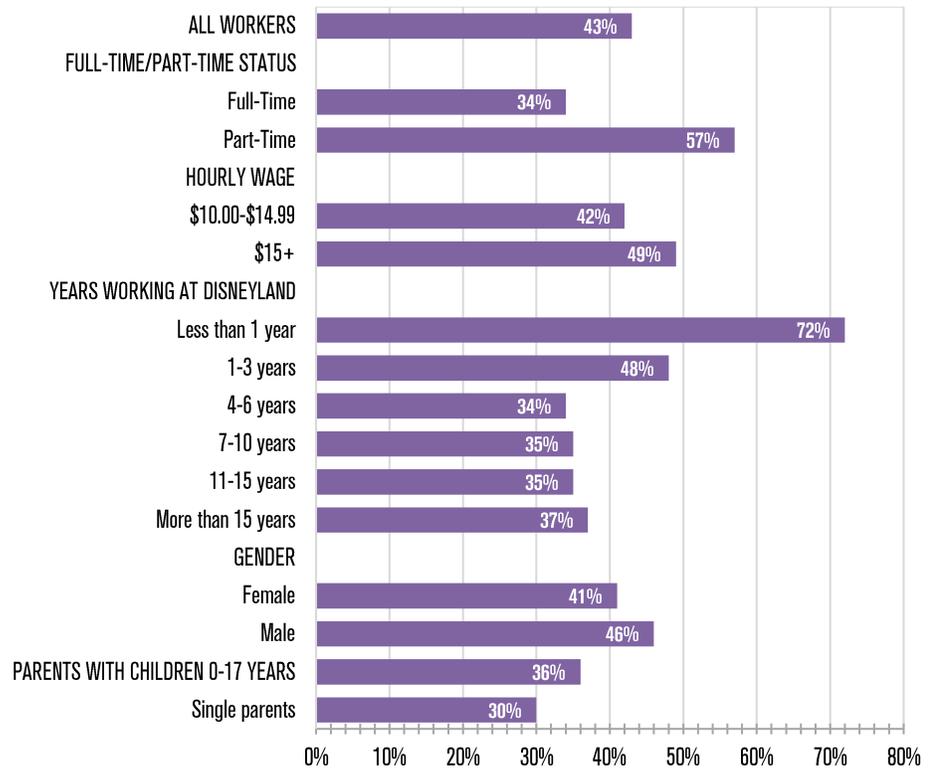
Source: Survey of Disneyland Resort employees.

Exhibit 26: Employees agreeing, "I am treated with respect on the job"



Source: Survey of Disneyland Resort employees.

Exhibit 27: Employees agreeing, "I am treated fairly on the job"



Source: Survey of Disneyland Resort employees.

15 years or more years working at Disneyland Resort, only 35% say they are treated with respect.

The proportion of Disneyland Resort employees who say that they are “treated fairly on the job” declines significantly after working there for more than a year, as shown in *Exhibit 27*. Among those who have worked at Disneyland Resort less than one year, 72% believe they are treated fairly, but among those who have worked at the park between one and three years, the number who feel they are treated fairly declines to 48%.

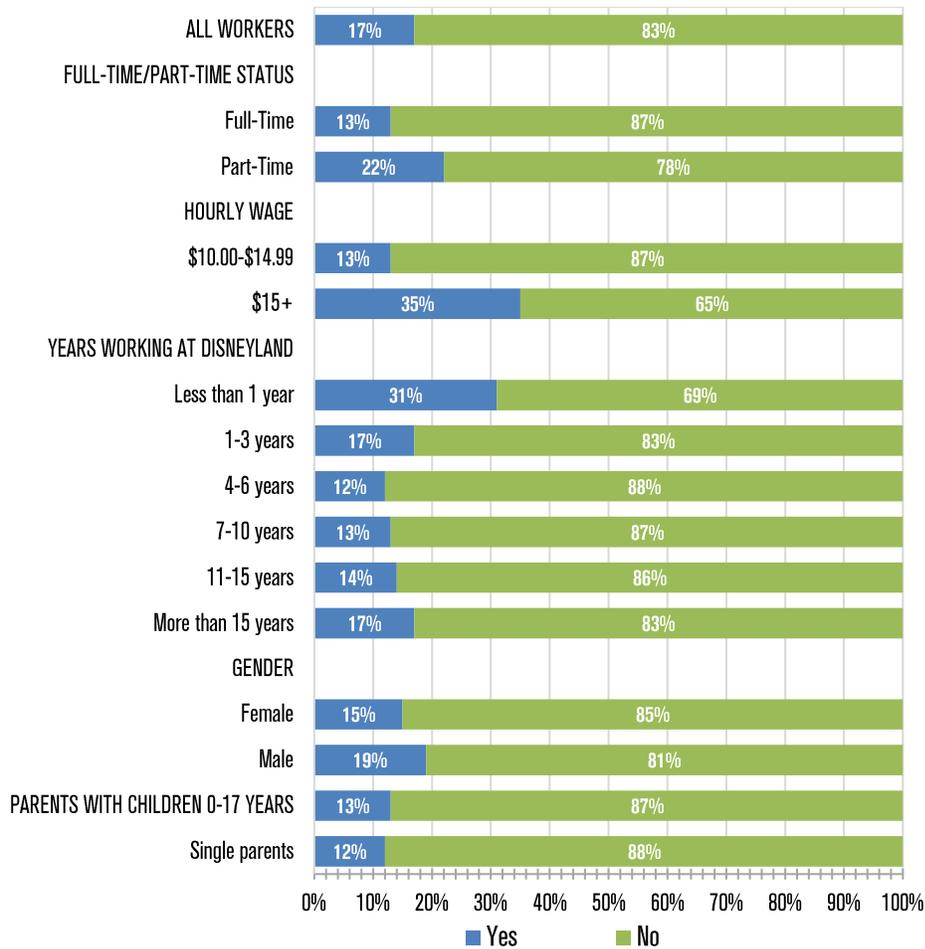
Among those with four to six years’ experience working at the park, the proportion who share that sentiment drops to 34% and remains roughly the same for workers with seven or more years at Disneyland Resort. Only 37% of Disneyland Resort employees with 15 years or more experience say they are treated fairly.

Among full-time employees, 78% express pride in their jobs, but only 37% feel they are treated with respect on the job and only 34% believe they are treated fairly.

Female employees report have slightly more pride in their work but feel slightly less respected and treated less fairly than male employees.

Looking at employees in terms of their hourly pay, employees who earn less than \$14.99 an hour express the least pride in their jobs, feel the least respected, and are least likely to say they are treated fairly, as shown in *Exhibit 28*. Among employees

Exhibit 28: Employees' Responses to the Question, "Do Your Wages and Benefits from Disneyland Resort Fairly Compensate You for the Work you do?"



Source: Survey of Disneyland Resort employees.

who earn \$15 or more, the proportion who feel pride in their work jumps from 74% to 83%; the proportion who say they are treated with respect increases from 22% to 23%, and the proportion who believe they are treated fairly increases significantly from 28% to 49%.

Fully 83% of Disneyland Resort employees respond “no” to the question: “Do your wages and benefits from Disneyland Resort fairly compensate you for the work you do?” Among full-time employees, 87% believe that they are not fairly compensated, while 78% of part-time employees share this view.

Moreover, this belief was consistent among employees regardless of how long they worked at Disneyland Resort, except during their first year. Among those who worked at Disneyland Resort less than a year, 69% do not feel fairly compensated. That number increases to 83% among those who have worked at the park for between one and three years, 87% among those who have worked there for between four and six years, 87% among those with seven to 10 years of service at Disneyland Resort, and 86% among those who have 11 to 15 years’ experience working at the park, and 83% among those who have worked for more than 15 years.

83% of employees say they are not fairly compensated for the work they do.

Not surprisingly, employees in the highest pay category are most likely to believe they are fairly compensated. Employees earning \$13–\$14.99 are the most disgruntled, with 94% reporting they are not fairly compensated. The proportion dips to 65% among those who earn \$15 or more. But even in that latter group, almost two-thirds do not think they are fairly compensated.

“They should pay us enough to live with dignity.”

– Full-time bus help, has worked at Disneyland Resort for 11 years

“I have been with the company for more than 21 years and I don’t make a fair wage to enjoy my family... I’m a very loyal cast member and I believe I deserve to be treated with respect and have better wages, insurance and work load.”

– Full-time parking cashier, mother

“Working for Disneyland has been one of the difficult and most stressful things I’ve ever done in my life. I don’t feel respected and I don’t feel like cast members are treated with the utmost respect and courtesy.... Working for Disney was my dream but most of the time I question if working here is worth it.”

– Part-time wardrobe worker

“We’re treated like slaves. I work my butt off for an average of 45-55 hours a week... We’re overworked and greatly underappreciated. And we’re expected to do so with a smile, knowing the unfair acts and wages that haunt us.”

– Full-time custodial worker, has worked at Disneyland Resort for 11 years

“I love working for the company meeting people from all around the world, but it’s getting hard to keep loving a job when there is no respect, pride, or magic.”

– Full-time cosmetologist, single mother

“Although I love my job I cannot wait to leave. I’ve been there for almost eight years and I only make \$11.32... I don’t feel appreciated enough by management... I know Disneyland offers comp tickets for family and friends but I would rather have a living wage than those perks.”

– Eight-year Disneyland Resort employee

“Some would ask, ‘why don’t you get a different job that pays more?’ but those people don’t quite understand how seriously we take our role in the hair and makeup department. Our relatively small staff has years of experience, training and development to hone our craft but we all struggle to pay our bills... We make just over minimum wage, but without us, dozens of characters, shows, parades and productions would cease to exist and leave thousands disappointed and robbed of a magical experience.”

– Full-time cosmetologist

“Disney expects 110% from each of its cast members, but is only willing to pay them slave wages, while its CEO is making over \$40 million a year. Making dreams come true should not come at the expense, or drain the lives, of those working hard to make the magic

happen. A company that makes billions in profits every year has no excuse to offer anything less than a living wage to its employees.”

– Part-time wardrobe worker, has worked at Disneyland Resort for 5 years

“I enjoy working for Disneyland because I can afford to. I married a woman who owns her house and has me on her health insurance. If it wasn’t for that, I’d be living in a truck camper and have no health insurance. Bob Iger made \$43.9 million last year; no human being deserves \$844,230 A WEEK, especially while their workers go hungry or homeless while struggling to survive on minimum wage.”

– Part-time custodial worker

“When I began working for the Disneyland Resort 9 years ago I felt hopeful and excited. I thought I was becoming a part of something great and magical and important. It took barely 2 years for that illusion to fall apart. None of us get paid enough to deal with what we do on a daily basis... Cast Members are struggling week to week, often living in their car or hotels. I spent almost a year hotel hopping because I couldn’t afford a place to live. I can barely afford food or anything else while working 40 + hours a week.”

– Full-time wardrobe worker

“We just want to contribute to Walt’s legacy while living happy lives, instead of struggling and stressing about whether or not we can pay rent or not. Thank you Disneyland for all that you do I’m extremely grateful to you, but you can do better, please.”

– Part-time merchandise host

“Disney workers love the work they do - but hate their jobs. Disney should be ashamed of this truth. Disney workers need to get paid a LIVABLE WAGE. That’s the bottom line.”

– Full-time performer



vi. Work Schedules

Only 28% of employees report having the same schedule every week.

Besides the low pay and inadequate benefits provided by Disneyland Resort discussed above, one of employees’ biggest concerns is how the company schedules their work at the theme park. The company’s scheduling policy makes it difficult for employees to balance family and work responsibilities as well as to find a second job. For many Disneyland Resort employees, there is no “typical” weekly work schedule.

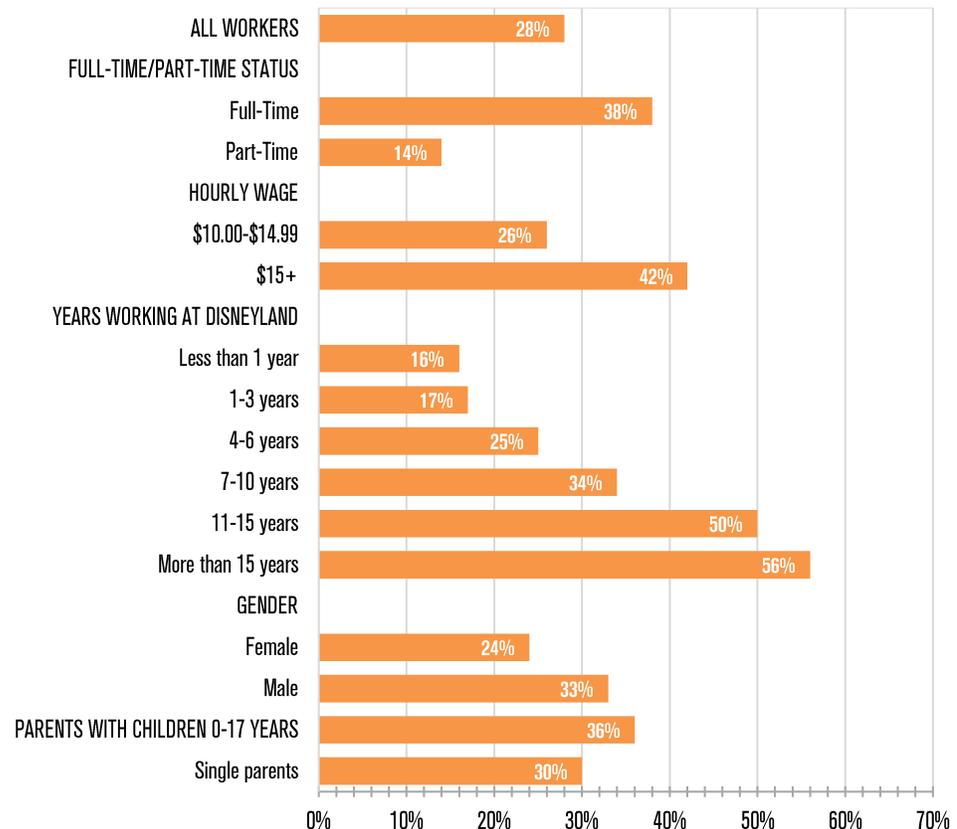
Only 28% of *all* Disneyland Resort employees report having the same schedule every week, as shown in *Exhibit 29*. Half (50%) report having a different schedule from week to week. Another 22% report that their schedule “changes once in a while.”

Only 38% of *full-time* Disneyland Resort employees report having the same schedule every week. Among full-time employees, 40% report that they have a different schedule from week to week and 22% say that their schedule “changes once in a while.”

The proportion of employees who have the same schedule each week increases with their longevity working at Disneyland Resort. Among those who have worked there for 11 to 15 years, half (50%) have the same schedule each week. Among those with 15 or more years of experience at the park, 56% have the same schedule each week.

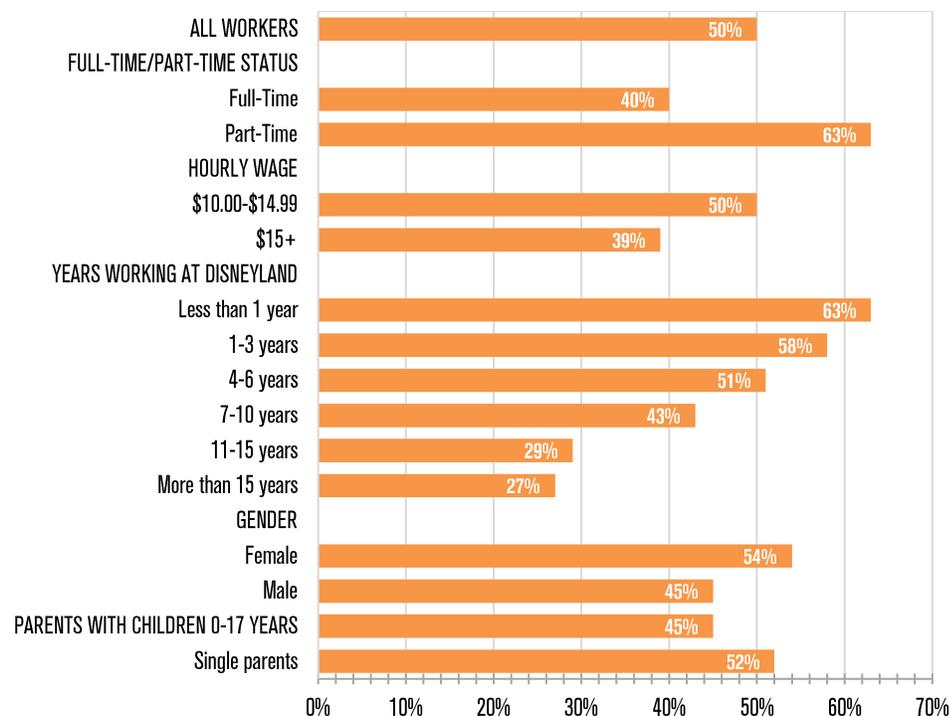
But even those with the most experience (15 or more years working at the resort) report having somewhat erratic schedules; 27% say that they have different

Exhibit 29: Same Schedule Every Week by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

Exhibit 30: “Different Schedule Week-to-Week” by Selected Worker Characteristics

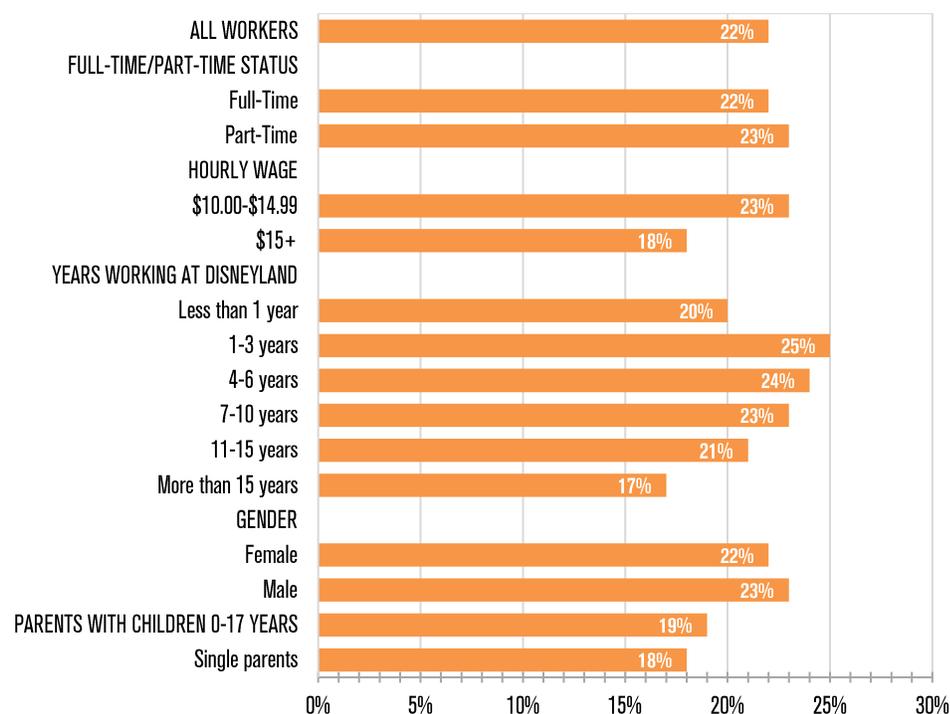


Source: Survey of Disneyland Resort employees.

schedules from week to week (*Exhibit 30*) and 17% report that their schedules “change once in a while” (*Exhibit 31*).

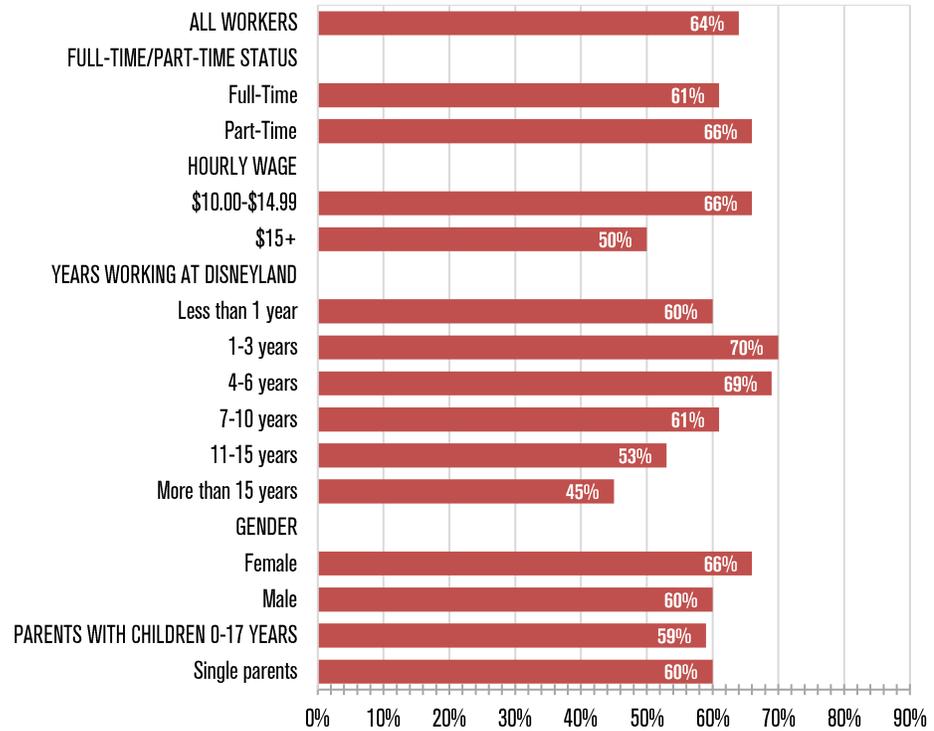
Having unsteady schedules is a particular hardship for parents with young children. Among Disneyland Resort employees with children under 18, only 36%

Exhibit 31: “Schedule Changes Once in a While” by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

Exhibit 32: "The scheduling of my work at the Disneyland Resort makes it difficult to find a second job" by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

have the same schedule every week, 45% have different schedules from week to week, and 19% report that their schedules “change once in a while.” Among single parents with children under 18, only 30% have the same schedule every week, 52% have different schedules from week to week, and 18% report that their schedules “change once in a while.”

Among full-time employees, scheduling is a big problem, regardless of how long they’ve worked at Disneyland Resort.

Significantly, 64% of Disneyland Resort employees report that “the scheduling of my work at the Disneyland Resort makes it difficult to find a second job,” as shown in *Exhibit 32*. This is a problem facing full-time and part-time employees alike. Among full-time employees, 61% say that scheduling was a problem in finding another job. Among part-time employees, 66% say that this was a problem.

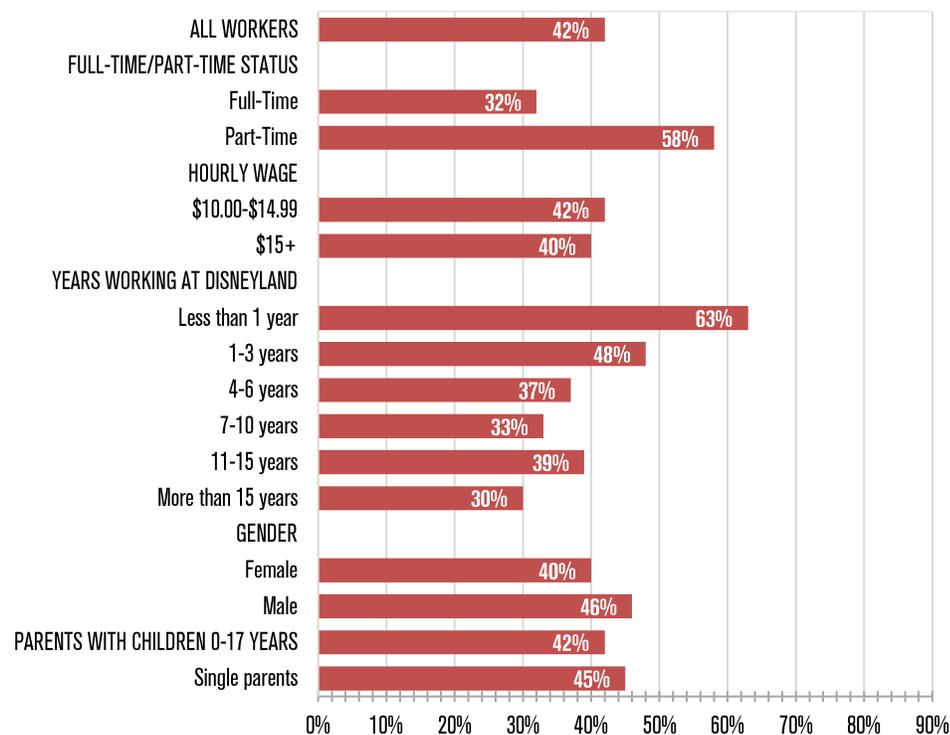
42% say they would “like to work more hours than I am currently offered.”

Many Disneyland Resort employees would like to work more hours at the park rather than have to juggle two or more jobs in addition to their family responsibilities. Among Disneyland Resort employees, 42% say that they would “like to work more hours than I am currently offered at the Disneyland Resort,” as shown in *Exhibit 33*. Only 26% of employees disagreed with that statement.

Even 32% of full-time employees want to work more hours at the resort. Among part-time employees, 58% would like to work more hours at the park.

More than half (59%) of Disneyland Resort employees who are parents of young children say that their schedules at the park make it difficult to care for their

Exhibit 33: "I would like to Work More Hours than I am Currently Offered at the Disneyland Resort" by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

families and children, as shown in *Exhibit 34*. This is true of 56% of full-time employees with children and 67% of part-time employees with children.

Even 46% of employees with the most seniority (15 or more years working at Disneyland Resort) say that their schedules make it difficult to care for family and children.

“Childcare is near impossible to arrange because I can be scheduled at any time on any day against my availability. Have you ever tried to find a baby sitter that will work any hour of the day any day of the week?”

– Full-time sound technician

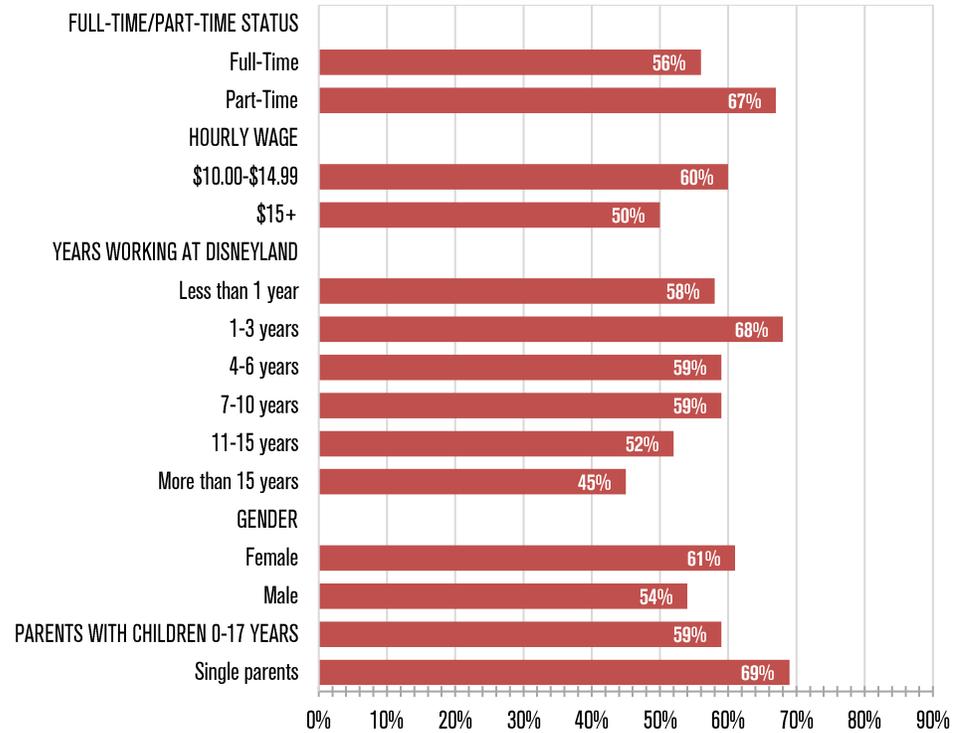
“Trying to pick up a second job with this schedule is nearly impossible. I don’t want a lot. I just want to be able to go out to dinner with friends and not worry if it will overdraw my bank account. I just want to be able to move out of my parents’ house... I want to be able to afford a simple life.”

– Full-time wardrobe worker, has worked at Disneyland Resort for 10 years

“Bringing home \$299/week is pathetic. I cannot live on this salary but because of my crazy schedule at work and due to the fact that I have to be available in weekends, it’s not possible for me to have a second job.”

– Worker whose sole income is from Disneyland Resort

Exhibit 34: "The Scheduling of My Work at the Disneyland Resort Makes it Difficult to Care for Family and Children" by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

“The weekly schedule makes it incredibly difficult to make any type of plans outside of work. I strive to get an education but I have faced scheduling difficulties because of Disney.”

– Full-time room attendant

“I enjoy working for the Disneyland Resort, and am proud of what I do, however, there needs to be more flexibility for students. It’s difficult to get a solid flexible schedule, and request days off (for school) without any trouble, and the work I do hardly pays for my tuition and expenses.”

– Part-time candy maker

“Going to school is hard when scheduling does not care one bit about your school schedule. It’s frustrating when you have worked here for 3 years and can’t get a schedule you want. It’s like a crime to be going to school here and trying to make a good life for myself. It used to be a joke saying you’re a “slave for the mouse”. Now it really does feel like it.”

– Full-time custodial worker

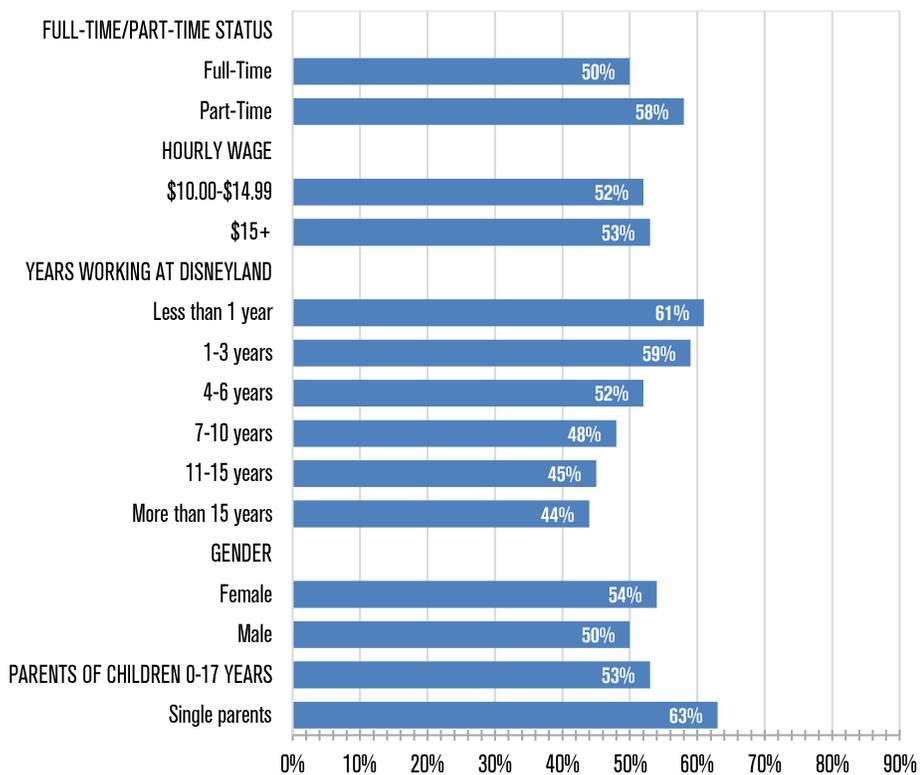


VII. Child Care

The Disney Company likes to call Disneyland Resort a “family oriented environment,”¹⁰ but many employees at the park find it difficult to balance work and family responsibilities. The Disney Company’s scheduling policies exacerbate employees’ ability to juggle jobs and child care. More and more employers take pride in adopting family-friendly workplace policies that make it easier for parents to make a living and take care of their children. According to many Disneyland Resort employees, the Disney Company is not one of them.

One-third (33%) of Disneyland Resort employees have children – 24% live with a spouse or partner and 9% are single parents. Almost one-quarter (24%) of Disneyland Resort employees live with at least one child under 18 years old. Among full-time Disneyland Resort employees, 30% are parents of children under 18, compared with 17% of part-time employees.

Exhibit 35: Proportion of Disneyland Resort Employees with Young Children Who Pay for Child Care While Working at the Park, by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

More than half (53%) of Disneyland Resort employees with children under 18 – including 50% of full-time employees and 58% of part-time employees – pay for child care while they working at the park, as shown in *Exhibit 35*.

Sheryl Sandberg, until recently a member of the Walt Disney Company board of directors, has written about the dilemmas that women face trying to balance work and family. This is particularly true for women – though men can experience similar difficulties – who do not earn middle-class incomes and cannot afford full-time child caretakers, housecleaners, and other kinds of help. In their daily lives, many Disneyland Resort employees face those challenges. We’ve already noted

Exhibit 36: Parents Who Pay for Child Care and Cannot Make Ends Meet, Are Food Insecure, and Have Difficulty Paying for Housing

	Yes	No	Total
Cannot pay for basic expenses at end of the month	80%	20%	100%
Food insecure	79%	21%	100%
Have difficulty paying for housing	25%	75%	100%

Source: Survey of Disneyland Resort employees.

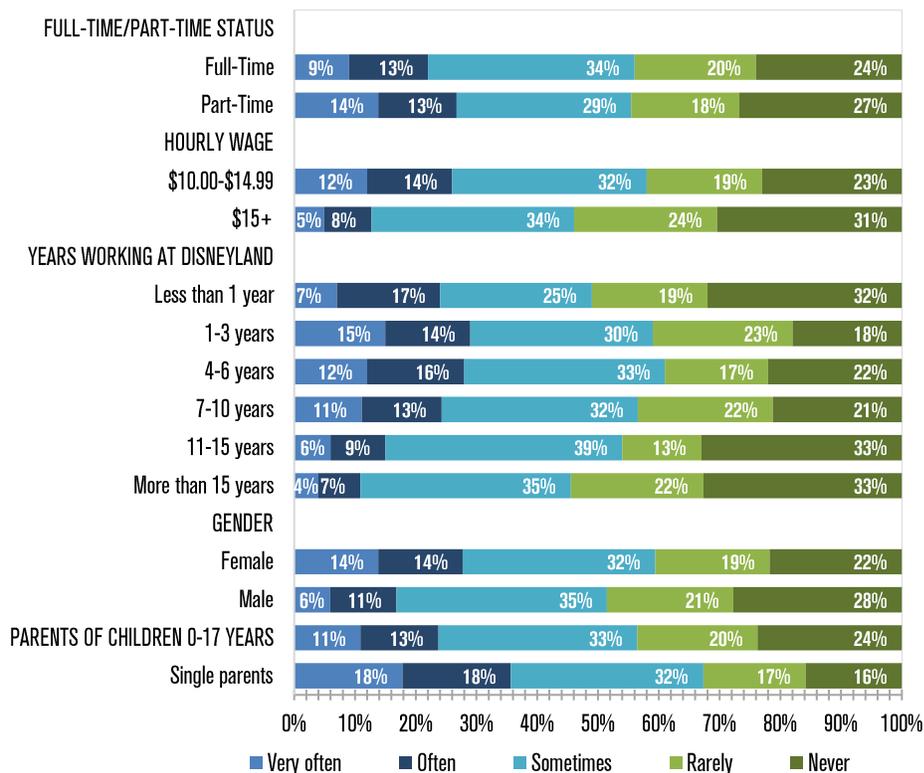
that more than half (59%) of Disneyland Resort employees say that their schedules at the park make it difficult to care for their families and children.

Four-fifths (80%) of parents who pay for child care report that they cannot pay for basic expenses at the end of the month, as shown in *Exhibit 36*. Another four-fifths (79%) say they are food insecure, and a quarter (25%) say they have difficulty paying for housing.

Disneyland Resort employees face another kind of work-life challenge. As *Exhibit 37* reveals, more than half (57%) of Disneyland Resort employees with children report that in the last year they missed working a shift at the park because they could not find adequate child care. One-tenth (11%) faced this problem “very

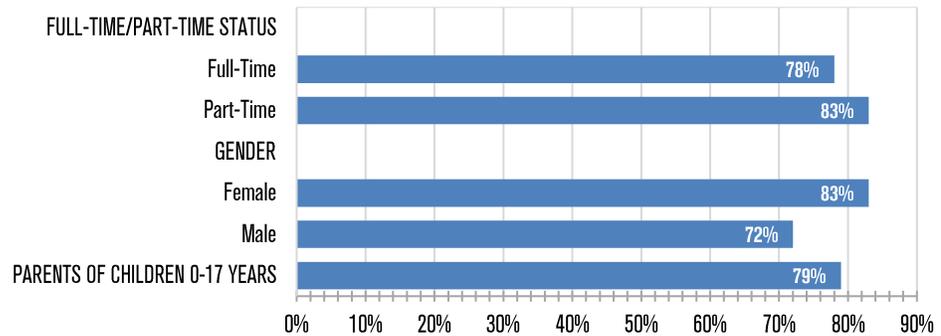
57% of employees with children missed a shift because they could not find adequate child care.

Exhibit 37: Proportion of Disneyland Resort Employees with Young Children Who Have Missed a Shift Because They Could Not Find Adequate Children Care, by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

Exhibit 38: Proportion of Disneyland Resort Employees with Young Children Who Would Use On-Site Reduced Child Care If It Was Available, by Full-Time and Part-Time and Gender



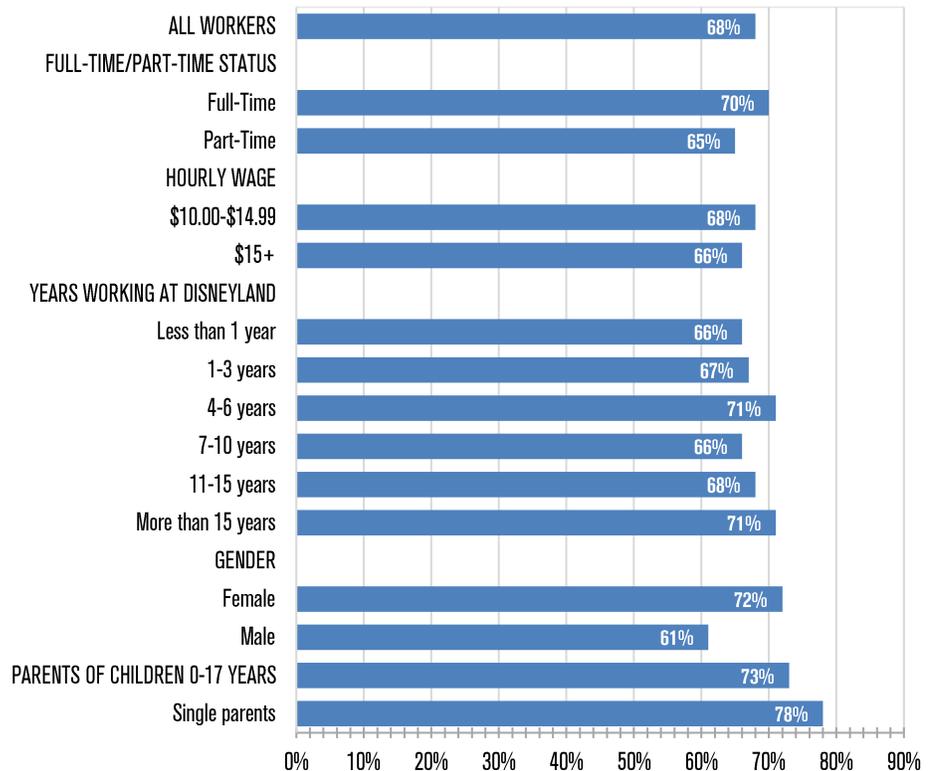
Source: Survey of Disneyland Resort employees.

often,” 13% faced it “often” and 33% faced it “sometimes.” This obstacle confronted full-time and part-time employees at roughly the same rate.

Employees who earned over \$15 an hour were the least likely to face this problem, but even among that group, 47% missed work because they could not find adequate child care.

Female employees were more likely (60%) to experience this problem than male employees (52%) and were much more likely to experience it “very often” (14% and 6%, respectively). Not surprisingly, single parents of children under 18 were

Exhibit 39: Proportion of Disneyland Resort Employees with Young Children Who Would Use On-Site Reduced Child Care If It Was Available, by Full-Time and Part-Time and Gender



Source: Survey of Disneyland Resort employees.

most likely to miss work because they couldn't find adequate child care. More than two-thirds of single parents (68%) reported having this problem. Almost one-fifth of them (18%) had this problem "very often."

There is no onsite subsidized child care facility at the Disneyland Resort for use by employees, but employees would like the company to provide such a service, as shown in *Exhibit 38*. Among those employees with children under 18, 79% say that they would use onsite, reduced-cost child care if the Disney Company provided it. This is true of both full-time employees (78% would use it) and part-time employees (83% would use it).

The proportion of employees who would use child care facilities changes little regardless of how long they've worked at the park or their hourly wages. Most mothers of young children (83%) would avail themselves of a child care facility if it were available, but so would 72% of fathers of young children.

The concern for child care is widely held among Disneyland Resort employees, regardless of whether they have young children, as shown in *Exhibit 39*. More than two-thirds (68%) of all Disneyland Resort employees believe that the company should provide onsite child care at a reduced cost. Another 27% believe that "maybe" the company should do so. But only 5% of employees responded "no" when asked if the company should provide a child care facility at Disneyland Resort at a reduced cost. About the same proportion of full-time and part-time employees agree with that sentiment.

Employees who have worked at the park for 15 or more years are more supportive of that idea (71%) than those with less experience. There is little difference in support for a subsidized child care facility based on hourly wages, except that employees who earn \$13-14.99 an hour are the strongest (75%) supporters of the idea.

68% of all employees believe that the company should provide onsite child care at a reduced cost.

"It would be nice to have an onsite daycare for employees. I would love that for my 2 year old and 3 year old to know that they would be on property close to me and would not have to worry about rushing home in 2 hours of traffic to go get them."

– Part-time ticket seller

"I always wondered why Disney never had child care services for their cast members. I think daycare would be beneficial for working parents and single parents."

– Full-time hostess, has worked at Disneyland resort for 5 years

"I'm constantly struggling to find babysitters on a daily basis because child care, even low cost, is too expensive. Me and my wife don't share any days off because we can't afford child care, so there is rarely a day when we can spend a day as a family. A second job could potentially give me child care, but with a 40 hour work week with Disney, a second job would only put more strain on my family since I'd be there less often. My hope would be to be able to work at a place I love, a place where it used to be possible to provide for a family as a cast member."

– Full-time cashier

“We struggle every week to find someone to watch our son and daycare is far too expensive. It would be another \$400 a month, which we just do not have... There are so many people that would use it and appreciate it and would work more and be on time or if child care was provided.”

– Full-time merchandise worker, has worked at Disneyland Resort for 18 years.

“My partner and I both work there and trying to juggle family and work is not easy. We have no help with our daughter, so I take days and she works nights and it has to be that way because childcare is way too expensive and we already live paycheck to paycheck. I worry about money every single day and it's overwhelming at times.”

– Full-time custodial worker



New York City apartment sold by Walt Disney Company CEO for \$18.75 million in 2018.

VIII. Housing

Precariously Housed Workers

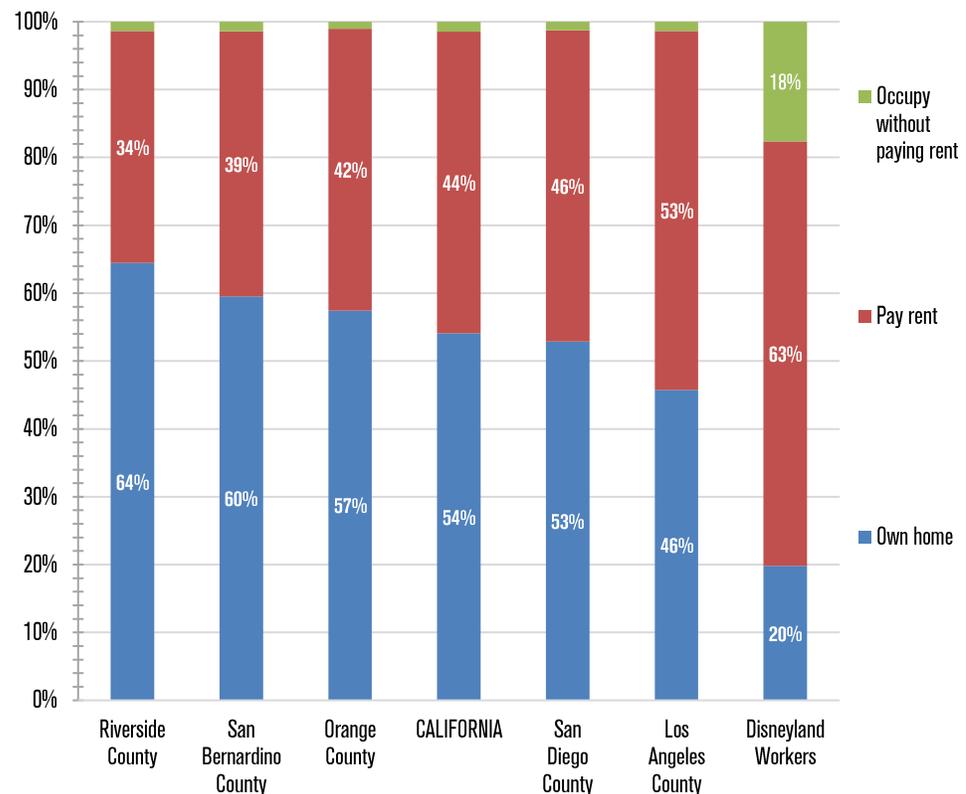
Disneyland Resort employees have a hard time paying the rent. They devote a large part of their household incomes just to put a roof over their heads. Even so, many Disneyland Resort employees live in overcrowded conditions. To afford a place to live, many rent homes a great distance from Disneyland Resort and have long commutes to get to work. Disneyland Resort employees' wages do not align with southern California's high housing costs. As a result, some Disneyland Resort employees find themselves in precarious circumstances. They fear getting evicted because they can't afford the rent. They move frequently either because of eviction or in search of more affordable housing.

Some Disneyland Resort employees find themselves on the brink of homelessness and some actually find themselves with no permanent place to live, making do by sleeping in their cars, "couch surfing" between friends and family, or ending up on the street or in a homeless shelter.

Even full-time Disneyland Resort workers confront the spectrum of precarious, uncertain, unstable, and insecure housing conditions which creates chaos and hardship for themselves and, in some cases, their families.

Among Disneyland Resort employees, only 20% own their own houses or condominiums and 63% rent their houses or apartments. Another 18% live with family members or friends but do not pay rent or otherwise help with housing

Exhibit 40: Homeownership Rates for California, Selected Counties and Disneyland Workers



Sources: American Community Survey Public Use Microdata Sample, 2011-2015 and survey of Disneyland Resort employees.

payments (the total is more than 100% because of rounding), as shown in *Exhibit 40*.

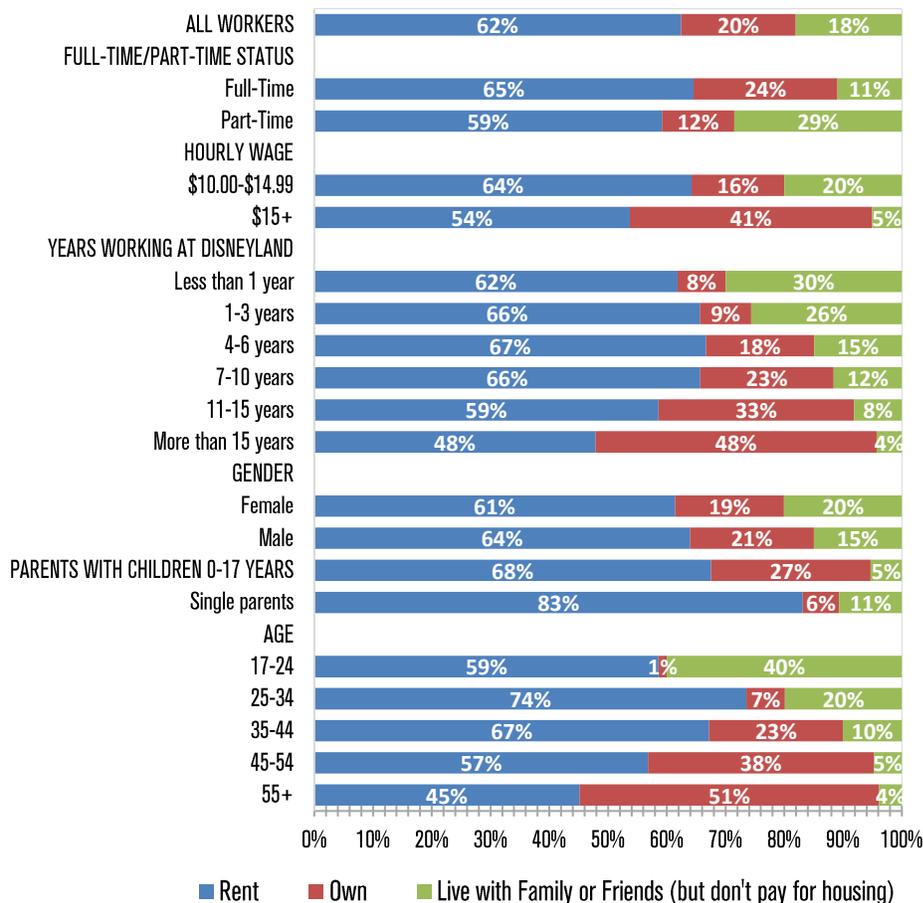
Among full-time employees, 23% own their own homes. Among part-time employees, 12% own their own homes.

Only one in five Disneyland Resort employees share in the American dream of owning their home, compared to over half of California and Orange County households. Almost two-thirds of workers are renters, compared to 44% of all Californians and 42% of Orange County households. A remarkable 18% of workers occupy housing without contributing to rent or mortgage payments. In many cases these are young adults who do not earn enough to move out of their parents' or relatives' homes to live on their own.

The homeownership rate for Disneyland Resort employees increases the longer they have worked at the park, but it remains relatively low (compared with other residents in the region) among those who have worked at the park for seven to 10 years (22%), 11-15 years (32%), and even among employees who have worked at Disneyland Resort for over 15 years (47%). This can be seen in *Exhibit 41*.

Slightly more than one-third (37%) of Disneyland Resort employees who are 45-54 years old, and less than half (49%) of employees who are 55 years old or more,

Exhibit 41: Proportion of Disneyland Resort Employees Who Own, Rent, or Live with Others but Do Not Pay for Housing, by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

own their own homes. The “American Dream” of homeownership is out of reach for most Disneyland Resort employees, even after they’ve worked there many years and reached middle age.

Even among full-time employees who have worked at Disneyland Resort for 15 years or more, only 45% own their own homes.

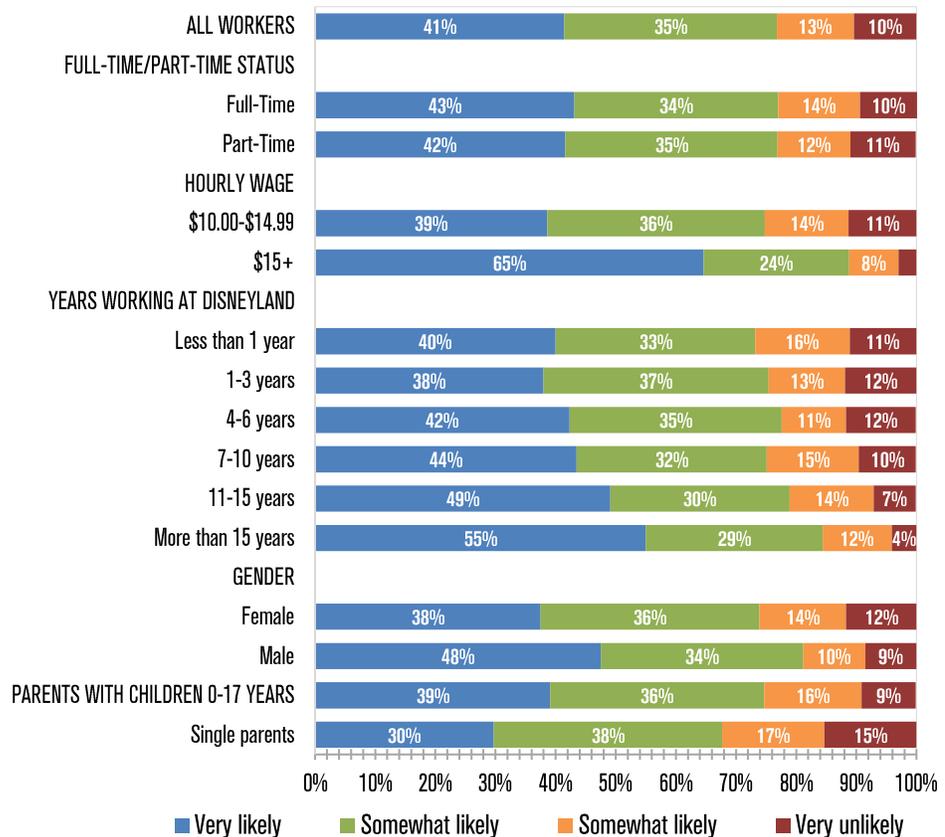
Similarly, less than half (45%) of full-time employees who are 55 years old or more own their own homes.

As noted above, 73% of Disneyland Resort employees say that they do not earn enough money to pay for basic expenses every month. In most households, people first pay for their housing so that they will have a place to live. Whatever is left over after paying rent or the mortgage then goes to pay for food, clothing, transportation, child care, health care, and other necessities.

Almost one quarter (23%) of Disneyland Resort employees can barely afford to keep a steady roof over their heads, as shown in *Exhibit 42*. One in ten (10%) say that it is “very unlikely” that they will be able to pay for housing that month; another 13% say that it is “somewhat unlikely” that they will be able to do so.

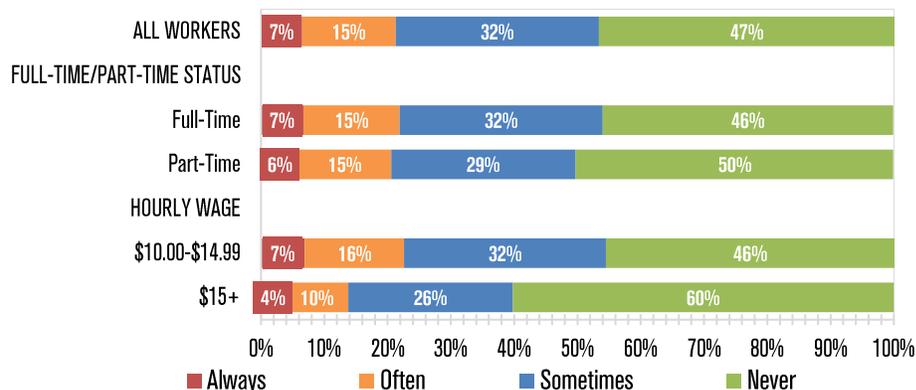
Among full-time Disneyland Resort employees, almost a quarter (24%) can barely afford to pay for their housing costs – 10% say it is “very unlikely” and 14% say it

Exhibit 42: Likelihood of Making Housing Payments, by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

Exhibit 43: Frequency of Being Late With Rent Payments by Full-Time and Part-Time, and Hourly Wages



Source: Survey of Disneyland Resort employees.

is “somewhat unlikely” that they will be able to pay for housing that month. Part-time employees have very similar situations.

A quarter (25%) of parents with children under 18 confront this severe housing cost problem – 9% say it is “very unlikely” and 16% say it is “somewhat unlikely” that they will be able to make their monthly rent or mortgage payments.

Renters are less likely to be able to pay for their housing (20%) than owners (14%), but both figures indicate that many Disney employees confront insecure housing conditions.

In fact, among Disneyland Resort employees who rent, more than half (53%) report that their households have “sometimes” (32%), “often” (15%), or “always” (7%) been late with a rent payment since living at their current residence.

Even among full-time Disneyland Resort employees who rent, 54% report that their households have “sometimes” (32%), “often” (15%), or “always” (7%) been late with a rent payment since living at their current residence, as shown in *Exhibit 43*.

The situation is somewhat better among the better-paid employees. Among those who earned \$10–10.99 per hour, 53% reported having problems making their rent or mortgage payments, compared with 40% of those with hourly pay over \$15.

Given that precarious situation, it is not surprising that **56% of Disneyland Resort employees are worried about being evicted from their residences**, as shown in *Exhibit 44*.

The figure is even higher among full-time Disneyland Resort employees,

56% of employees are worried about being evicted from their residences.

Exhibit 44: Proportion of Employees Who Worry About Being Evicted, by Full-Time and Part-Time

	Full time	Part time
Very often	12%	10%
Somewhat often	13%	11%
Worry from time to time	34%	27%
Almost never worry	41%	52%
Total	100%	100%

Source: Survey of Disneyland Resort employees.

59% of whom say they are worried about being evicted from their residences.

Not surprisingly, renters are more worried about being evicted (58%) than owners (47%).

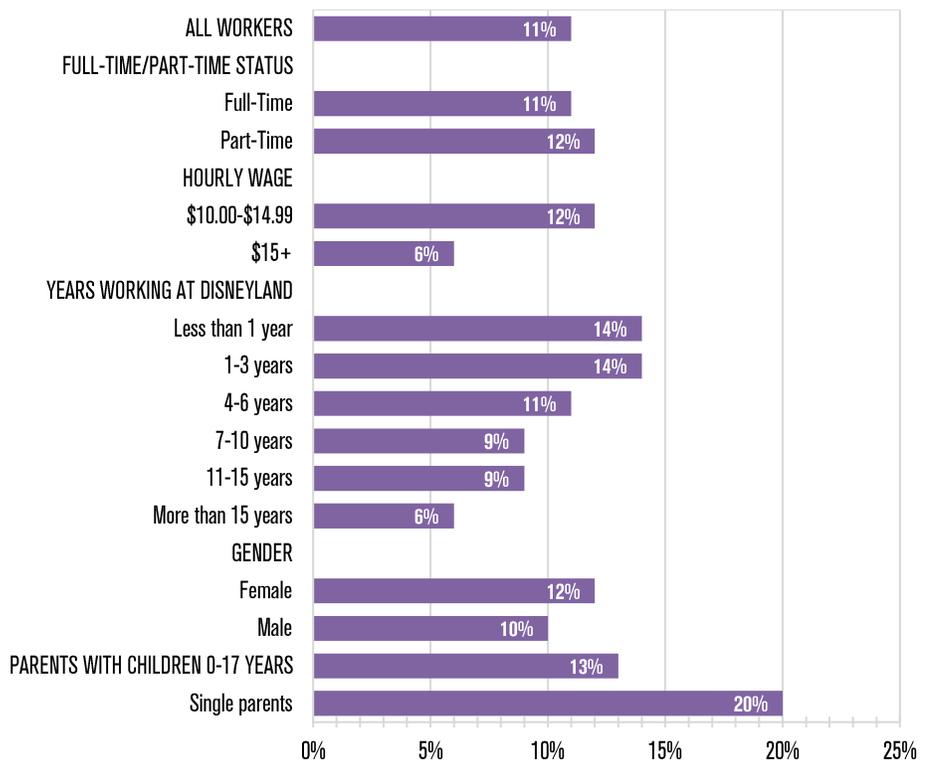
Disneyland Workers Experiencing Homelessness

Anyone who lives in or has just visited southern California has witnessed the region's profound homelessness crisis. The region has the largest homeless population of any metropolitan area in the country. In 2016, Los Angeles and Orange counties accounted for 9% of all homeless individuals in the United States, even though they account for only 4% of the total population.¹¹ Low wages together with high housing costs account for much of this tragedy.

Unfortunately, a significant number of Disneyland Resort employees fall into this category. More than **one out of ten (11%) Disneyland Resort employees report having been homeless** – or did not have their own place to live or sleep – in the previous two years. Close to half (44%) of employees who have been homeless have been working for Disneyland Resort for at least four years. Among full-time employees, 11% were in this precarious situation compared with 12% of part-time employees, as shown in *Exhibit 45*.

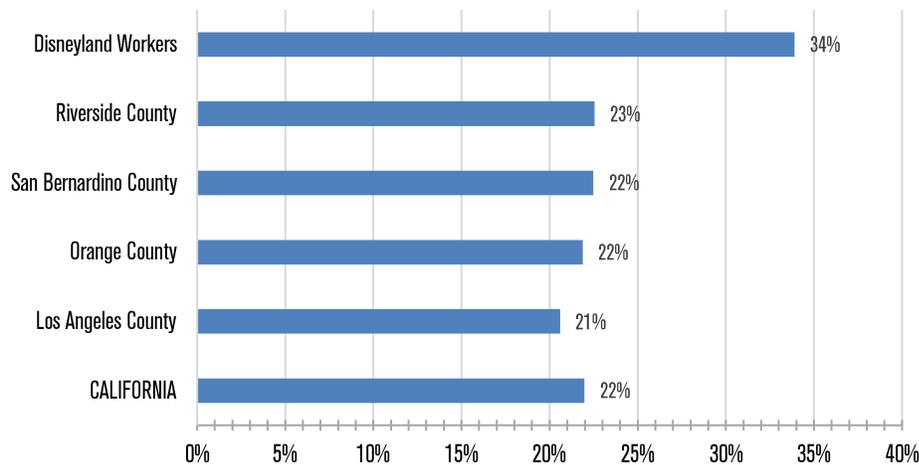
11% of employees report having been homeless in the past 2 years.

Exhibit 45: Proportion of Disneyland Resort Employees Who Were Homeless or Did Not Have Their Own Place to Sleep, by Selected Worker Characteristics



Source: Survey of Disneyland Resort employees.

Exhibit 46: Percent Who Moved to Their Current Residence within the Past 2 Years

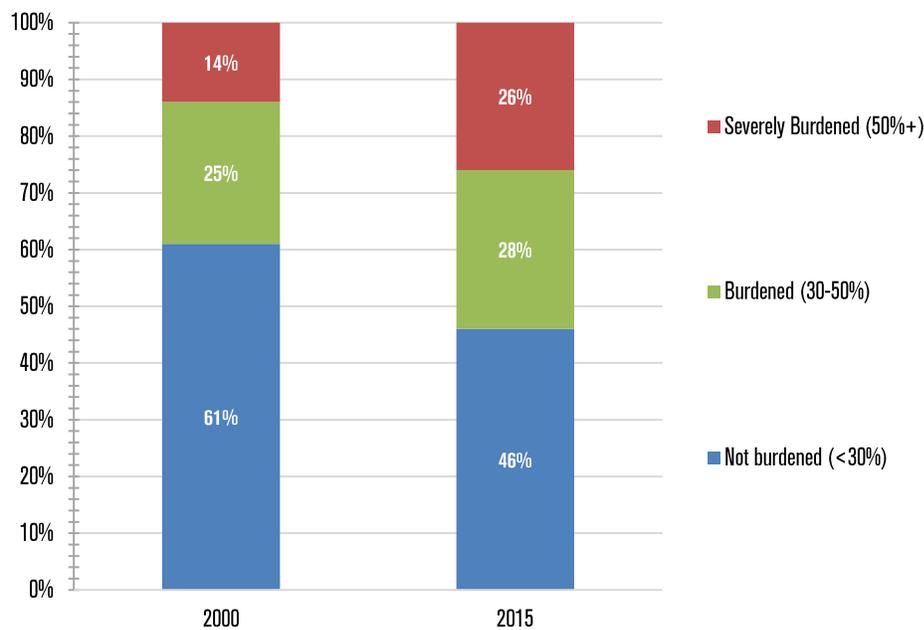


Sources: American Community Survey Public Use Microdata Sample, 2011-2015 and survey of Disneyland Resort employees.

Among Disneyland Resort employees who are parents of children under 18, 13% experienced homelessness in the past two years. Among single parents, one-fifth (20%) experienced homelessness in the past two years.

Employees who earned \$15 an hour or more are least likely to have been homeless or lack their own place to live and sleep. Even so, it is concerning that 6% of Disneyland Resort employees in the highest hour pay category found themselves in such desperate circumstances.

Exhibit 47: Rent Burden for Disneyland Workers in 2000 and 2015



Sources: American Community Survey Public Use Microdata Sample (PUMS) 2000 and 2011-2015 records matched with U.S. Census Bureau LODES data for workers employed on Disneyland Resort footprint, and CRLU (Coalition of Resort Labor Unions). Data is for renters.

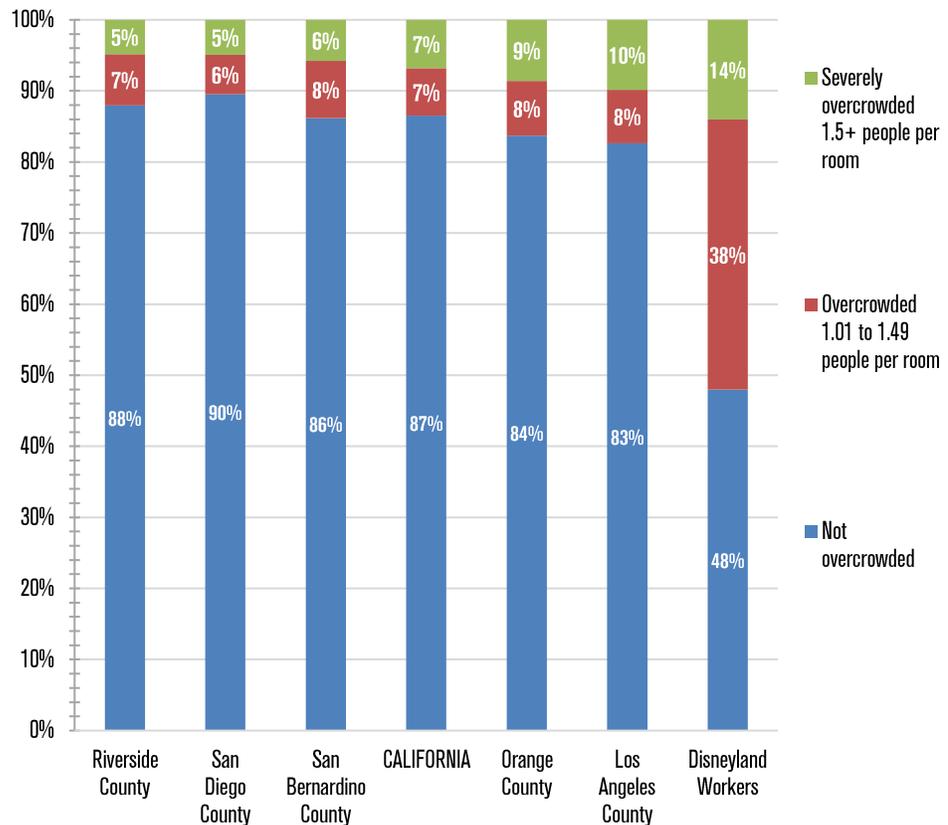
Among Disneyland employees who reported being homeless in the previous two years, almost a quarter (23%) reported spending the night some place other than a home or apartment of their own in the last 30 days.

Among those who spent nights in the last 30 days somewhere other than their own dwelling, 46% spent the night at the home or apartment of a friend; 26% spent the night in a car, truck, van, or camper; 20% spent the night in a hotel or motel; 8% spent the night sleeping outdoors; 3% spent the night in an emergency shelter; and 20% spent the night in some other circumstance. This breakout totals more than 100% because some individuals spent nights in multiple settings. The responses indicate that current housing conditions of many of the workers who have experienced homelessness are precarious and unstable, and include current episodes of homelessness.

Rent Burden and Overcrowding

Disneyland Resort employees move frequently compared to other Californians and other Americans. More than one-third of them (34%) report having moved at least once during the previous two years, as shown in *Exhibit 46*. In contrast, only

Exhibit 48: Overcrowding among Renters - Disneyland Workers, California and Selected Counties



Sources: American Community Survey Public Use Microdata Sample (PUMS) 2011-2015 for California and selected counties, with records matched with U.S. Census Bureau LODES data for workers employed on Disneyland Resort footprint. Data is for renters.

22% of California households and Orange County households had moved in the past two years.

When asked to explain the main reason for moving to their current residences, the most frequent response (22%) was the desire for cheaper or more affordable housing. And 5% say that they experienced eviction or foreclosure from their previous home. A significant number (16%) moved in order to live closer to work.

As wages have stagnated and declined since 2000, Disneyland Resort workers have become increasingly rent-burdened, as shown in *Exhibit 47*. Twenty-six percent of workers devote over half of their households' income to rent, compared to just 14% in 2000.

Many workers find it necessary to rent housing that is too small for their families, or to squeeze too many roommates or multiple families into a unit that is small enough to be affordable. The result is overcrowding, as can be seen in *Exhibit 48*.

Over half of Disneyland Resort workers who are renters live in overcrowded housing, compared to just 14% of California renters and 17% of Orange County renters. Fourteen% of Disneyland Resort workers are severely overcrowded, with more than 1.5 people per room in their housing units.

Over half of workers who are renters live in overcrowded housing.

"I work too hard to be so broke. I am 45 years old and live with my sister and nephew because I cannot afford to pay any rent. I cannot afford an apartment any longer or even rent a room."

– Part-time merchandise worker

"Since working at Disney I have become homeless and barely scraping by... I have no medical insurance... With diabetes I'm now spending \$200 a month in medical."

– Full-time cosmetologist

"The pay is so poor I worry every month if I'll be living in my car again or not be able to pay my car payment and live in the streets."

– Full-time worker

"I personally know three cast members that live in their car."

– Single mother, works as a cosmetologist

"I just saw another cast member sleeping in their car and drying laundry on top of their car yesterday."

– Full-time costume support assistant

"We can barely afford a one bedroom apartment at \$1800 dollars. We have to move an hour away inland to get something decent. Disney needs to set an example. It's embarrassing that everyone knows that a lot of Disney employees are out on the streets because they aren't able to afford an apartment or that we live in our cars or that we're too tired to function because we have to work so much overtime to make a decent living."

– Mother, works as a full-time security officer



IX. Transportation and Commuting

Time Spent Commuting

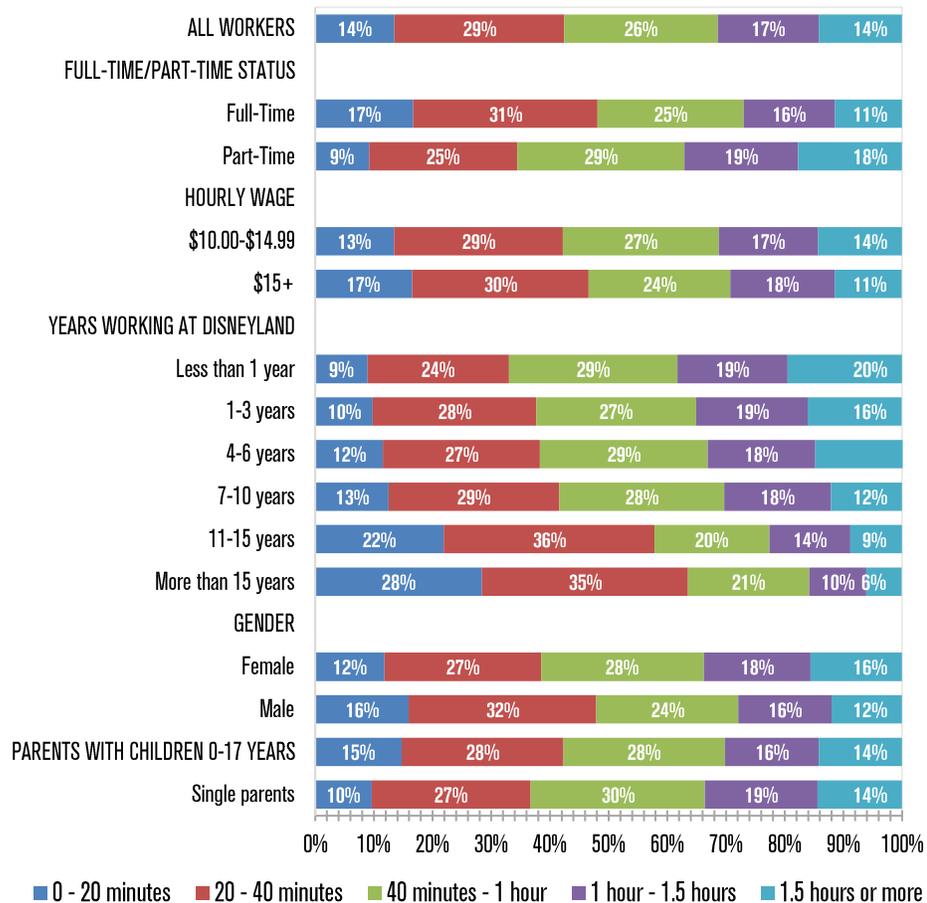
People decide where to live for many reasons, including the quality of schools, their ability to afford home prices and rents, nearby family members, and the distance to work for wage-earners in the household. Given their modest pay, Disneyland Resort employees have limited choices when it comes to housing. They often have to sacrifice living close to work in order to afford a place to live.

Almost one-third (31%) of Disneyland Resort employees commute more than an hour to get to the park from their homes, as shown in *Exhibit 49*. That, of course, is just one way, so the overall daily commute is more than two hours for these workers. One out of seven employees (14%) have one-way commutes of over 90 minutes, or more than three hours to and from Disneyland Resort. More than one-third of female employees (34%) compared with 28% of male employees, travel more than an hour one-way to get to Disneyland Resort.

More than one-quarter (27%) of full-time employees commute more than an hour one way. Long commutes are a particular burden for parents of young children because they have to balance getting to and from work with arranging for their children to attend school or child care. As *Exhibit 49* shows, 28% of Disney employees with children under 18 have one-way commutes of between

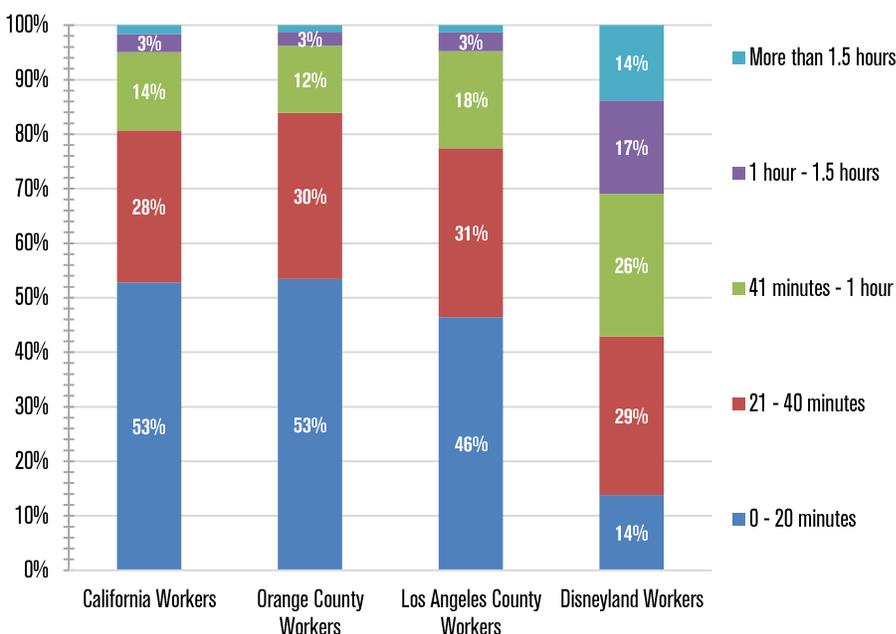
31% of employees commute more than an hour to get to the park.

Exhibit 49: Time Spent Commuting to Work by Disneyland Workers and All Workers in California, Orange County and Los Angeles County



Source: Survey of Disneyland Resort employees.

Exhibit 50: Time Spent Commuting to Work (1-way) by Disneyland Workers and All Workers in California, Orange County and Los Angeles County



Sources: Survey of Disneyland Resort employees and American Community Survey Public Use Microdata Sample (PUMS) 2011-2015 for California, Orange County and Los Angeles County.

40 minutes and an hour; another 16% travel between an hour and 90 minutes to get to work; and 14% travel 90 minutes or more, one way, to get to work at Disneyland Resort.

Disneyland Resort workers spend much more time commuting to work than is typical for workers throughout California, Orange County, or Los Angeles County, as shown in *Exhibit 50*. Thirty-one percent of Disneyland Resort workers spend one or more hours commuting to work compared to only 5% of workers statewide and 4% in both Los Angeles and Orange Counties. Only 14% of Disneyland Resort workers have commutes of 20 minutes or less, compared to 53% of workers statewide and in Orange County, and 46% in Los Angeles County.

For at least one-fifth (21%) of Disneyland Resort employees – including 19% of full-time employees and 23% of part-time employees – the commute to and from work is so onerous that between shifts employees sometimes stay with friends, rent a hotel room, or sleep in their cars rather than return home and then come back to work for their next shift. This can be seen in *Exhibit 51*.

The limited public transportation to and from Disneyland Resort forces most employees (80%) to commute by car. Owning a car –

Exhibit 51: Rather than commute to your residence between your shifts at Disneyland Resort, do you ever stay with friends, sleep in your car, or rent a hotel room?

	Full time%	Part time%	Total%
Yes	19%	23%	21%
No	81%	77%	79%
Total	100%	100%	100%

Source: Survey of Disneyland Resort employees.

purchasing the vehicle and paying for insurance, gas, maintenance, and repairs – poses a significant financial burden on the low-wage employees who constitute the vast majority of Disneyland Resort workers. To deal with this burden, 8% of employees carpool to work. Only 8% of employees rely primarily on bus or train (Metrolink, Amtrak, and other rail) to get to the park. Full-time and part-time employees utilize these different modes of transportation at the same rate.

Commuting Distance

Commuting to Disneyland Resort is difficult, even though the park is located alongside Interstate 5, and is in close proximity to several other interstate and state freeways. Slow traffic speeds on these freeway and major surface roads together with long commuting distances explain the unusually large amount of time spent commuting shown above.

Workers’ distance between their home and job is affected by many things, including rent levels and housing costs, the desire to live near family, other household members’ jobs or schools, or just familiar neighborhoods. They may not be able to move closer to their Disneyland Resort jobs because they cannot afford the cost of housing that is located within a reasonable commuting distance.

Fifty-two percent of Disneyland Resort workers represented by the Coalition of Resort Labor Unions (CRLU) live somewhere in Orange County, relatively close to work (*Exhibit 52*). Within Orange County, the City of Anaheim is home to the most workers – 19%. These 3,338 Disneyland Resort workers add up to almost 2% of Anaheim’s working-age population.¹² The City of Garden Grove is home to 5% of workers, Santa Ana 4%, Fullerton 4%, and the City of Orange 3%.

Nearby Los Angeles County is home to 33% of Disneyland Resort workers, this includes 4% in the City of Long Beach and 3% in the City of Los Angeles.

Workers Place Residence Based on Wages and Work Status

The locations where Disneyland Resort’s roughly 17,000 CRLU workers reside, are shown in *Exhibit 53*, with wage categories in different colors. While the pattern of these unionized workers’ residences and wages is somewhat random, the highest category (\$15 an hour or more) is predominant in the coastal and northern parts of Los Angeles, up through Hollywood, Glendale, Burbank, North Hollywood, and Van

Nuys. It may be that some of these unionized workers at Disneyland Resort have family members who work at Disney’s headquarters in Burbank or another company facility outside of Anaheim.

Exhibit 52: Disneyland Workers by County of Residence

County	Number of Jobs	Percent of Jobs
Orange	9,047	52%
Los Angeles	5,786	33%
Riverside	1,198	7%
San Bernardino	1,065	6%
Other Areas	242	2%
Total, All Areas	17,339	100%

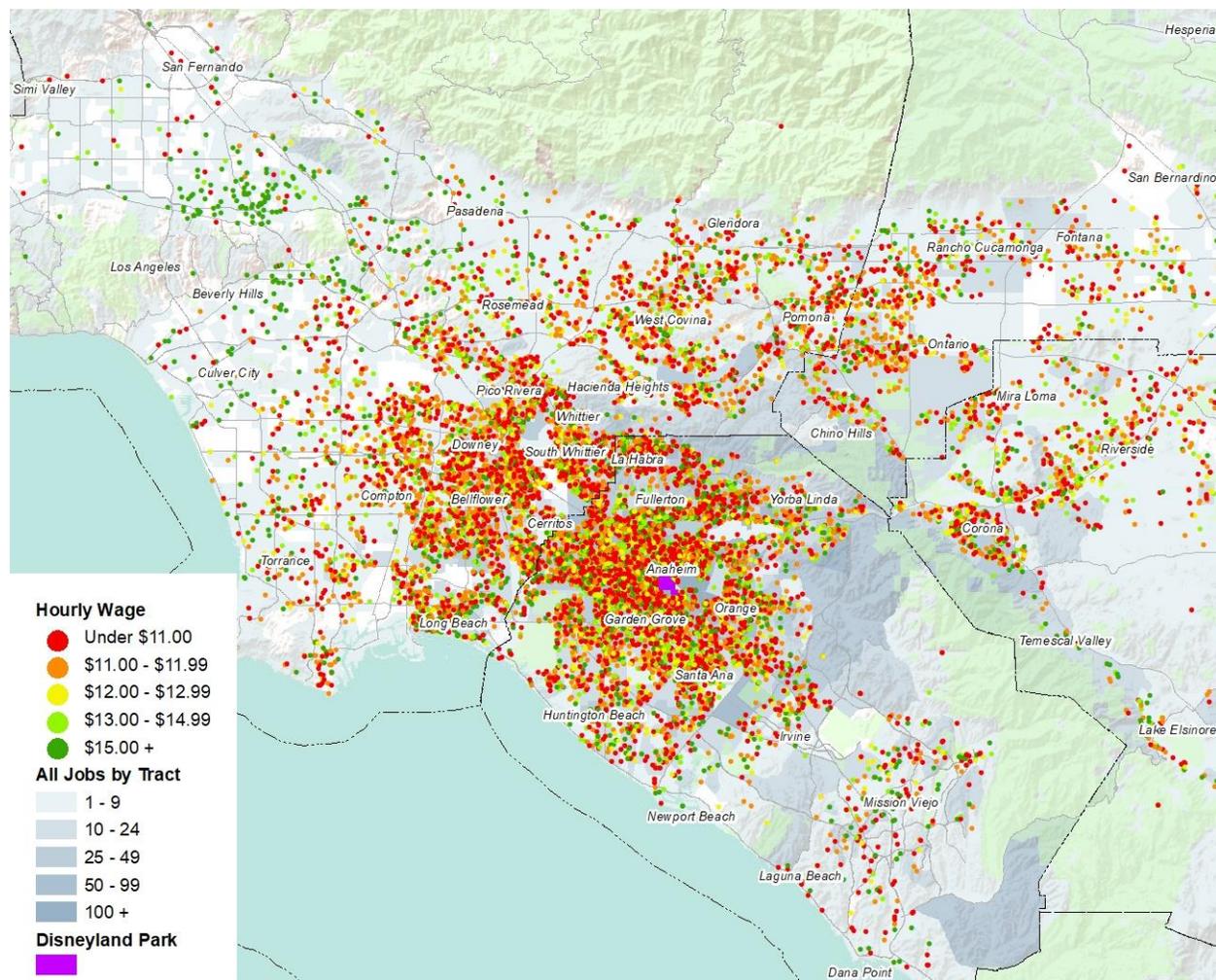
Source: CRLU (Coalition of Resort Labor Unions), 2017.

Workers in the lowest wage category, earning the statewide minimum wage up through \$10.99 per hour, sometimes live in communities very distant from Disneyland Resort. This is often because housing near Disneyland Resort is too expensive for them. The time and cost of their commute compared to their earnings point to other inequities in addition to their low wages – disproportionately large costs for automobile maintenance and operation as well as disproportionately large loss of time with families and children because of the hours spent commuting to and from work.

We broke out the locations where workers reside by full-time and part-time work status and found that those working part-time and temporary schedule frequently live far away from work. This suggests that many workers would benefit from full-time schedules that provide enough hours of work to justifying their long commutes.

“I had to move back with my parents because I didn’t have a place to live out by work. I was doing a 56 miles, one way, commute to work 5 days a week. I barely got any sleep and

Exhibit 53: Unionized Disneyland Resort Employees by Place of Residence and Hourly Wage Bands



Source: Foreground is CRLU (Coalition of Resort Labor Unions) Disneyland Resort worker residential locations, 2017, showing hourly wage bands; background is LEHD Origin-Destination Employment Statistics (LODES) Version 7, 2014, Workplace Area Characteristics (WAC), Primary Jobs enumerated by 2010 census blocks with 2-digit industry sector. The background includes all Disneyland Resort workers, unionized or not.

it was worse when Scheduling would give me an 11 hour turn around. After my commute driving home, I would only be able to get 4-5 hours of sleep before having to wake up and get ready to leave for work to miss traffic hours.”

– Full-time ticket seller

“Working for the Disneyland resort was a dream come true in the beginning. But living so far away makes it nearly impossible to work a four hour shift since I can barely afford the gas it takes to get to and from work.”

– Single mother, works as a cashier

“I have to move back with my family now because I’m unable to afford to live on my own. Because my family lives 1 hour and 20 minutes from the resort WITHOUT TRAFFIC, I’m not really sure if the commute is even worth the pay. I’m just going to end up spending half of my check on gas.”

– Full-time cosmetologist

“I loved my job. Helping guests was a highlight of my day. It was just very frustrating having to leave home 2 hours early to make it on time to make sure I had the right costume, go to my location and clock in on time.... At times, I would get maybe 3 hours of sleep to make sure I would make it on time. Lots of us have family we also have to take care of and it makes it difficult.”

– Full-time custodial worker

“I live far away from work I drive about 1 hour one direction just to come to work. Unfortunately, the cost of travel and the cost of bills is barely covered by my wages here at the Disneyland Resort. I have to live with my parents because I am unable to afford my own place. There are times that I have to borrow money or ask for food so that I do not starve that month.”

– Part-time security officer

“I just wish that I made enough money to be able to move closer to work. I currently travel 50 miles to get to work each day. The only reason I live so far is because I live in a converted garage at a very reasonable rate. Sometimes, due to the short turnaround I have to rent a room, or sleep in the cast parking lot. I would love to afford housing near work. There are weeks where I work 50-60 hours and I still can’t afford renting an apartment nearby. It’s a goal. But \$10 an hour to do what most other companies pay \$20 for is tough.”

– Full-time candy maker

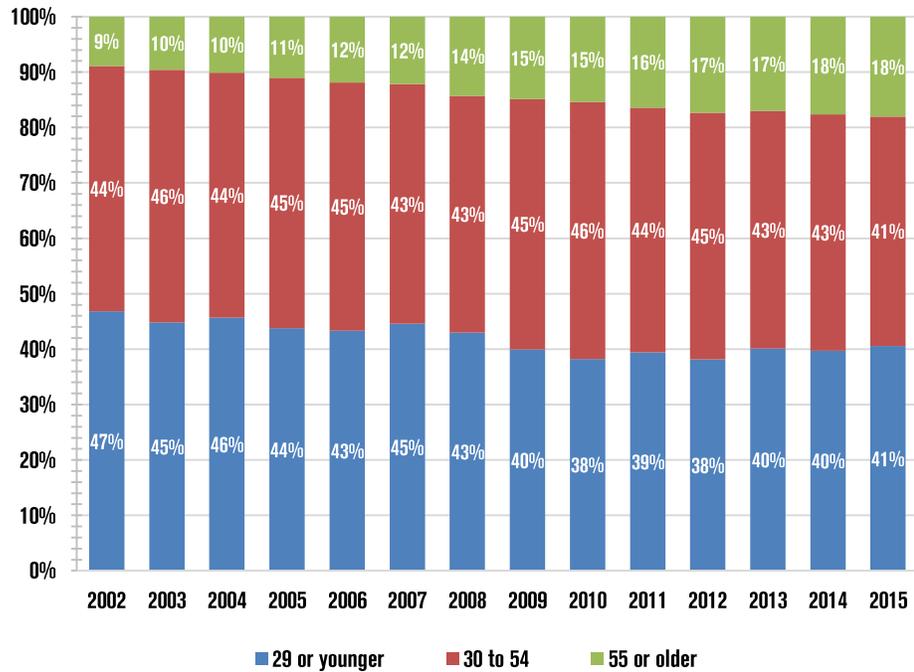


X. Workforce Profile

Aging Labor Force

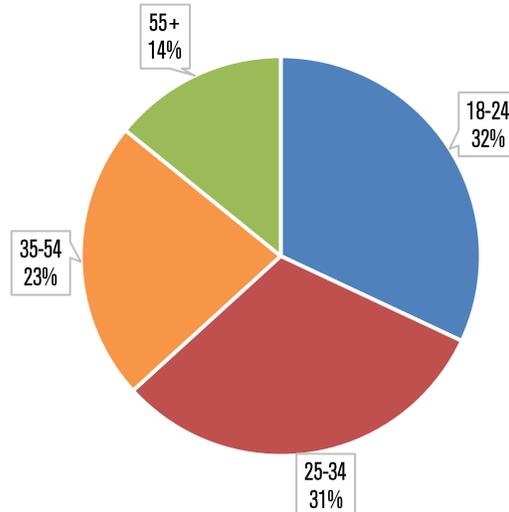
We tracked the breakdown of Disneyland Resort employees by age using Census Bureau LODES data for all workers employed on the Disneyland footprint from 2002 to 2015. This includes both union and non-union employees, although CRLU union members make up the majority (58%) of the total labor force that is shown. The age distribution for all Disneyland employees is shown in *Exhibit 54*.

Exhibit 54: Age Distribution of All Disneyland Workers Over Time, 2002-2015



Source: LEHD Origin-Destination Employment Statistics (LODES), 2002-2015.

Exhibit 55: Age Distribution of Disneyland Workers Represented by CRLU



Source: CRLU (Coalition of Resort Labor Unions) Disneyland Resort workers' age, 2017.

An increasing portion of Disneyland Resort’s total labor force is 55 years of age or older, with the percentage doubling from 9% in 2002 to 18% in 2015. Meanwhile, the portion of workers under 30 has shrunk by roughly 13%, and now makes up about two-fifths of workers.

The conception of Disneyland Resort workers as young people with few financial responsibilities does not match reality. For instance, the Disneyland survey results report that only one-sixth of workers, regardless of age, reported living with family or friends without having to pay rent.

The age distribution of union workers represented by CRLU shows a similar story (*Exhibit 55*). Less than a third (32%) of workers are under 25 years of age, 14% are 55 years of age or older, and over half (54%) are in the prime working years of their lives – 25 to 54 years of age.

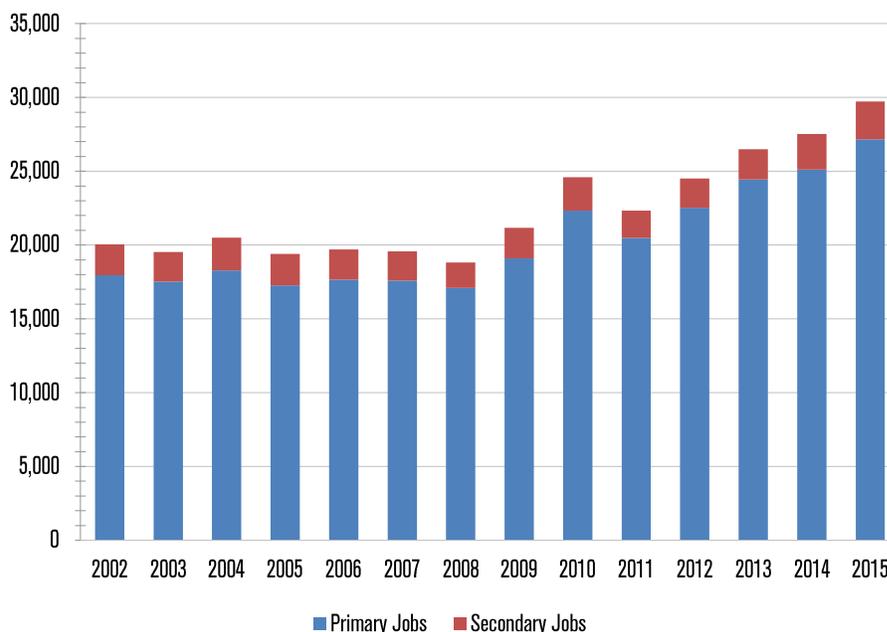
Most Disneyland workers are mature adults and the job is their career and their livelihood.

Full-Time vs. Part Time Employment

Furthermore, *Exhibit 56* shows that for the vast majority of workers, including both union and non-union workers, employment at Disneyland Resort is their primary job. Since 2011, Disneyland has been the primary source of earnings for over 91% of all workers employed there.

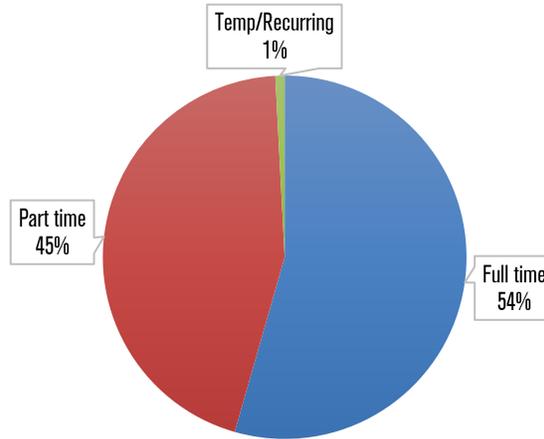
Although work at Disneyland Resort is the primary job for most employees, only slightly more than half (54%) of workers represented by CRLU have full-time work, as shown in *Exhibit 57*. As shown in *Exhibit 33*, 32% of full-time and 58% of part-time workers would like to be working more hours at the park.

Exhibit 56: Number of Primary and Secondary Jobs for Total Disneyland Labor Force, 2002-2015



Source: LEHD Origin-Destination Employment Statistics (LODES), 2002-2015.

Exhibit 57: Full-time vs Part-time Status of Disney Union Workers Represented by CRLU



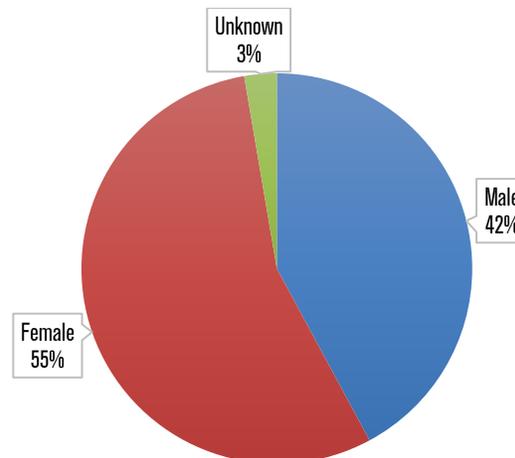
Source: CRLU (Coalition of Resort Labor Unions) Disneyland Resort worker residential locations, 2017.

Most Disneyland workers are mature adults and the job is their career and their livelihood.

Gender

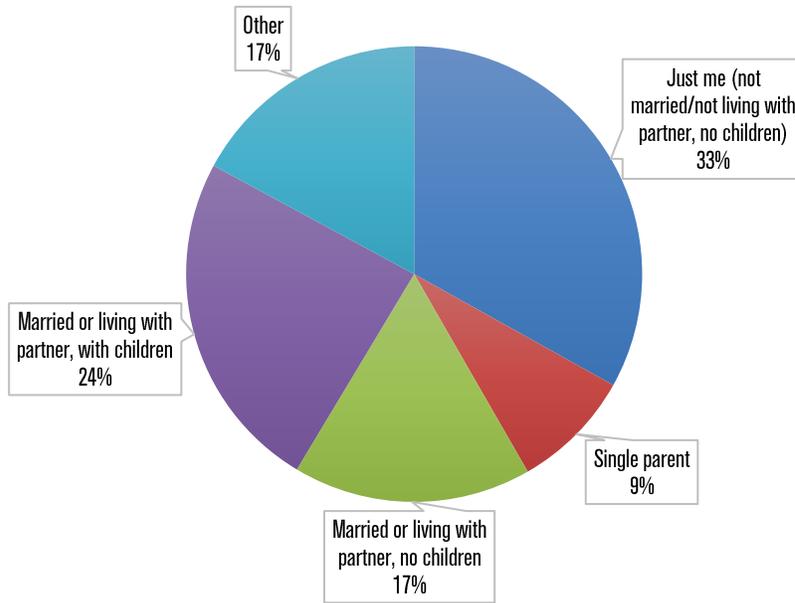
The gender breakdown of Disneyland Resort union workers is presented in *Exhibit 58*. Gender was estimated for the full union roster using the imputation method described in the Methodology section. Females account for 13% more of the workforce represented by CRLU than males. The portion of *Exhibit 58* that is unknown consists of individuals with first names that did not appear in the data set used for imputation. A limitation of our gender imputation method is that it is not able to estimate the proportion of workers with non-binary gender identity. It is important to note that Disneyland survey data included 0.7% of individuals who did not identify as either male or female.

Exhibit 58: Gender of Disneyland Union Workers Represented by CRLU



Source: CRLU (Coalition of Resort Labor Unions), 2017.

Exhibit 59: Family Types of Disneyland Workers

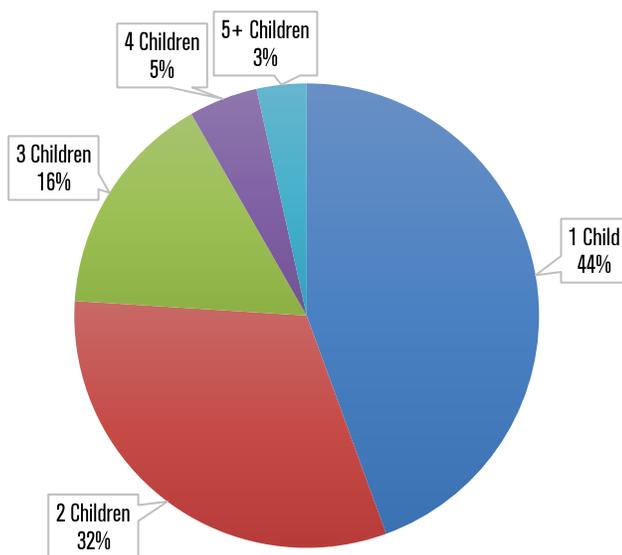


Source: Survey of Disneyland Resort employees.

Family Structure

Roughly a third of workers represented by CRLU have children, whether as single parents (9%) or married parents (24%), as shown in *Exhibit 59*. Two-thirds (66%) of families with children have two or more children, as shown in *Exhibit 60*.

Exhibit 60: Number of Children under 18 in the Household for Families with Children

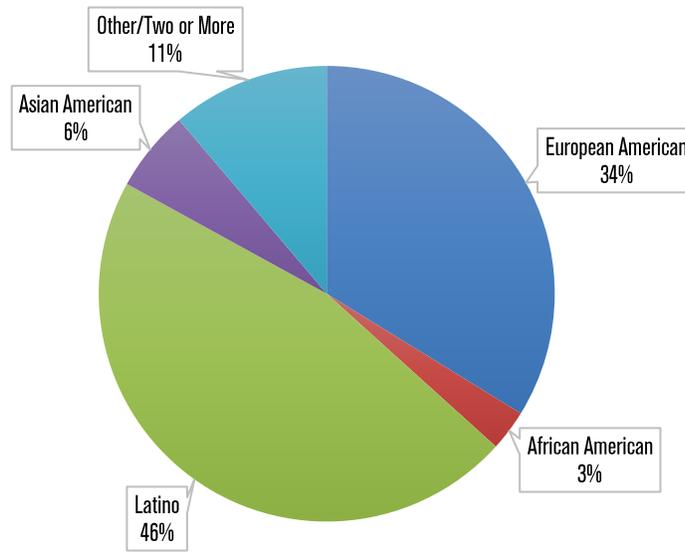


Source: Survey of Disneyland Resort employees.

Ethnicity

Almost half (46%) Disneyland workers represented by CRLU who responded to the survey are Latino, a third (34) European American, 6% are Asian American, 3% are African American, and 11% are another ethnicity or multiple ethnicities, as shown in *Exhibit 61*.

Exhibit 61: Ethnicity of Disney Workers



Source: Survey of Disneyland Resort employees.



XI. The Walt Disney Company

History and Scale

What is today known as the Walt Disney Company began in 1923 when Walt Disney arrived in California to make and distribute animated films. That year, he and his brother Roy started the Disney Brothers Cartoon Studio and soon changed the name to the Walt Disney Studio. Walt Disney's first major success was *Steamboat Willie*, a 1928 cartoon featuring a new character, Mickey Mouse, which earned rave reviews. After making more Mickey Mouse cartoons, Disney began merchandising his new character. Soon pencils, dolls, dishes, radios, figurines, toothbrushes, and other items bore Mickey's likeness and generated revenues for the growing company. The first Mickey Mouse book and Mickey Mouse newspaper comic strip were published in 1930.

Disney expanded his business over the next several decades, becoming an iconic figure in American culture. He died December 15, 1966, and the company continued to grow after his death. The Walt Disney Company is now a diversified global entertainment and media company. In 2017 it earned \$55.1 billion in revenue and a net profit of \$9.3 billion, and had approximately 199,000 employees.¹³ *Fortune* magazine ranked The Walt Disney Company as the 54th largest company in the United States.¹⁴ The company is organized around four segments.

The *Media Networks* segment is involved in the sale and distribution of television programming. It includes cable and broadcast TV networks, TV production operations, TV distribution, domestic TV stations and radio networks and stations. Some of its cable networks include ESPN, the Disney Channels, and ABC Family (renamed Freedom). In 2017, this segment reported revenues of \$23.5 billion accounting for 42.6% of the company's total revenue.¹⁵

The *Parks and Resorts* segment is involved in the operation of theme parks. It operates the Disneyland Resort in Anaheim, the Walt Disney World Resort in Florida, Aulani (a Disney Resort & Spa in Hawaii), the Disney Vacation Club, the Disney Cruise Line, and Adventures by Disney. It holds an 81% stake in Disneyland Resort Park, a 47% stake in Hong Kong Disneyland Resort, and a 43% stake in Shanghai Disney Resort. The company also licenses the operation of the Tokyo Disney Resort in Japan. As of 2017, Parks and Resorts is the company's second largest segment. It reported revenues of \$18.4 billion, which accounted for 33.4% of the company's total revenue.¹⁶

The *Studio Entertainment* segment is involved in the creation and distribution of films, the creation and distribution of music, and the production of stage plays. It distributes its films under the banners Walt Disney Pictures, Pixar, Marvel, Lucasfilm, Touchstone, and (in India) UTV. (At one time the company owned the National Hockey League's Mighty Ducks franchise and the Major League Baseball California Angels franchise, but it sold both teams.) As of October 2016, the company had released domestically about 1,000 full-length live-action feature films and 100 full-length animated feature films, including some of most famous films in movie history, including *Mary Poppins*, *Fantasia*, *Snow White and the Seven Dwarfs*, *Pinocchio*, *Pirates of the Caribbean*, *Good Morning, Vietnam*, *The Color of Money*, *Toy Story*, *Dead Poets Society*, and *The Help*. In the international market, it has produced and acquired about 1,600 live-action films and 600 animated titles. The company has several record labels as well as music publishing and concert

production divisions. In 2017, this segment reported revenues of \$8.4 billion, 15.2% of the company's total revenue.¹⁷

The *Consumer Products and Interactive Media* segment licenses characters from the company's film, television, and other properties for use on consumer merchandise, published materials, and in multi-platform games and from operating internet shopping sites and retail stores. It owns and operates 223 retail stores in North America, 78 stores in Europe, 48 stores in Japan, and one in China. It also produces children's books and magazines and comic books and operates English language learning centers. This segment reported \$4.8 billion in revenues, or 8.8% of the company's total revenues.¹⁸

Revenue and Profit

The company's revenues have increased significantly since 2000. When adjusted for inflation, revenues have increased from \$37.8 billion to \$55.1 billion in 2017 dollars, an increase of 45%, as revealed in *Exhibit 62*.¹⁹

The company's **profit (net income) increased by 582% from 2000 to 2017**, from \$1.4 billion to \$9.4 billion in 2017 dollars, as shown in *Exhibit 63*.²⁰

In its 2017 Proxy Statement, the company reported that shareholder return continues to substantially exceed both the S&P 500 and that of its "media peer" companies like Twenty-First Century Fox, CBS, Time Warner, Viacom, and Comcast over five- and ten-year periods, as shown in *Exhibit 64*.²¹

The share of the company's total revenues from the Parks and Resorts segment has increased since 2000, from 27% to 33%, as shown in *Exhibit 65*.²² During the first quarter of 2017, the Parks and Resorts segment significantly outperformed the other three segments in terms of both revenue and operating income.²³

The Parks and Resorts segment of the company had dramatic growth in revenue and profit in the first quarter fiscal 2018 compared to the first quarter of 2017. Revenues for the quarter increased 13% to \$5.2 billion and profit (operating income) increased 21% to \$1.3 billion.²⁴

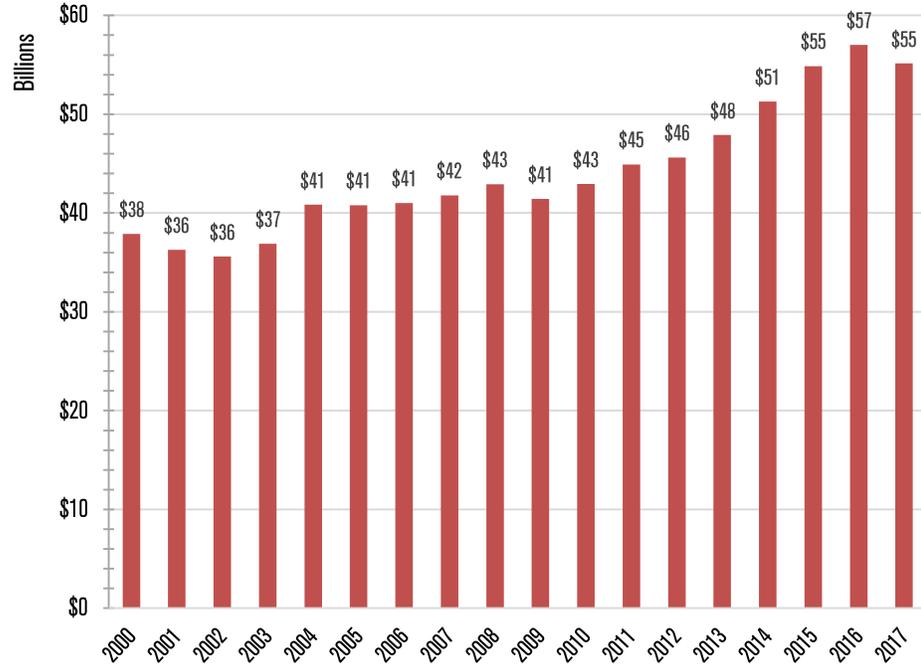
Profit increased by
582% from 2000
to 2017.

Executive Compensation

The Disney Company board of directors met six times in FY 2017. Each board member is also expected to attend meetings of the committees of which he or she is a member.²⁵ Among the board members, only Disney Company CEO Robert Iger is also an employee of the company. Directors are listed in *Exhibit 66*.

Board members are compensated for their service to the board. In 2016, their compensation ranged from \$124,964 to \$385,709. The median annual compensation for these board members was \$312,375. In addition to their compensation, board members are also reimbursed for up to \$15,000 annually of Disney Company merchandise, services, and experiences for themselves, which they may share with their spouses, children, and grandchildren.

Exhibit 62: Walt Disney Company Revenue, 2000-2017 (2017 Dollars)

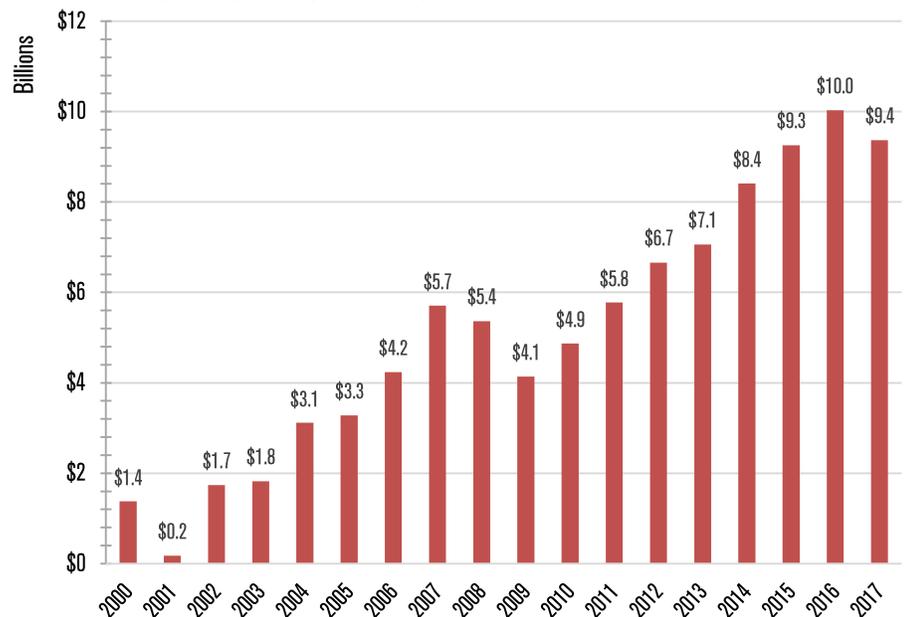


Source: *The Walt Disney Company Annual Financial Report (Form 10-K), fiscal years 2000-2017.*

According to the company’s Proxy Statement, this is intended “to encourage Directors to experience the Company’s products, services, and entertainment offerings personally.”²⁶ Directors are reimbursed for travel expenses or are provided with company transportation.

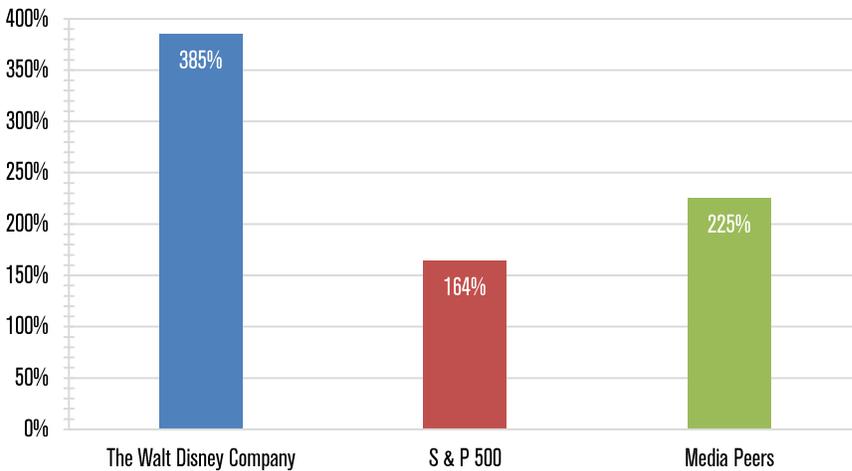
The Walt Disney Company has been led by two CEOs during the past 17 years. The current CEO, Robert Iger, took over from his predecessor, Michael Eisner, in 2006. In addition to the CEO, the company lists five or six “named executive officers” in its Security and Exchange Commission filings. Specific titles change

Exhibit 63: Walt Disney Company Operating Profit (Earnings before Interest and Taxes) 2000-2017 (2017 Dollars)



Source: *The Walt Disney Company Annual Financial Report (Form 10-K), fiscal years 2000-2017.*

Exhibit 64: Increase in Total Shareholder Returns from 2005 to 2017

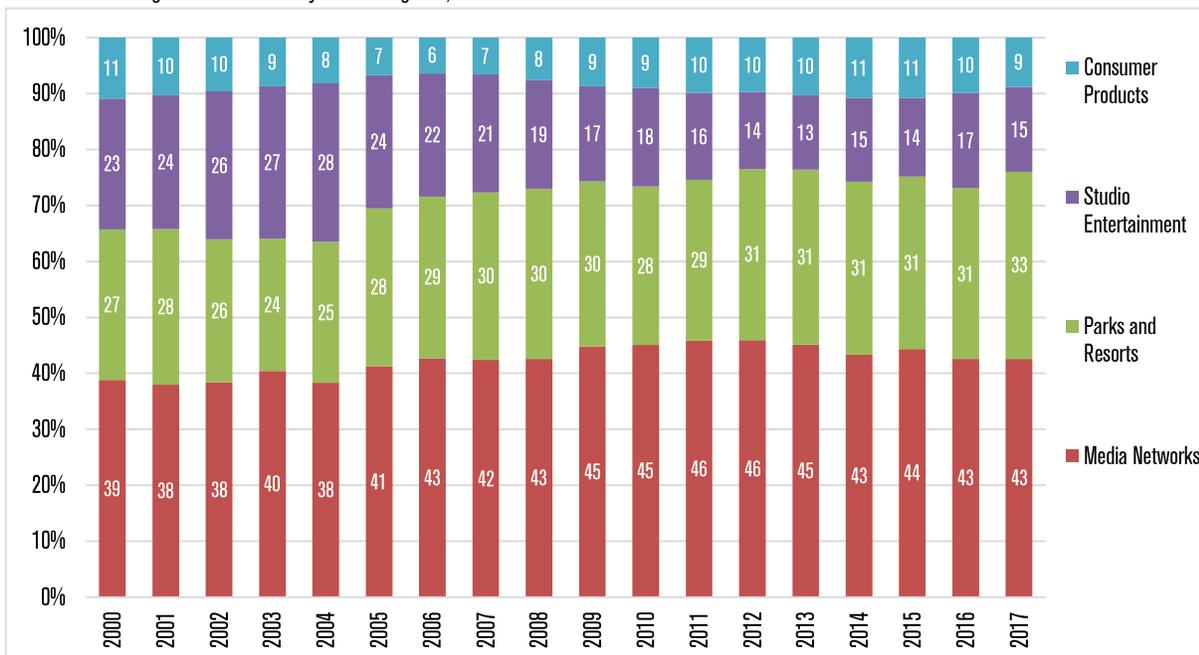


Source: The Walt Disney Company Proxy Statement (Form DEF 14A) 2018.

from year to year, but these five executives typically include a Chief Financial Officer, general counsel, strategy officer, and human resources officer.

In addition to their regular compensation, company officers at the vice president level and above receive “benefits and perquisites” that include complimentary access to the company’s theme parks and some resort facilities, discounts on Company merchandise and resort facilities, relocation assistance, and reimbursement for up to \$1,000 annually for wellness-related purposes such as fitness, nutrition, and physical exams. Named executive officers are also entitled to basic financial planning services, enhanced excess liability coverage, increased relocation assistance, an automobile benefit, and a company matching gift amount of \$50,000.²⁷

Exhibit 65: Percentage of Total Revenue by Business Segment, 2000-2017



Source: The Walt Disney Company Annual Financial Report (Form 10-K), fiscal years 2000-2017.

Exhibit 66: Walt Disney Company Board of Directors

The Walt Disney Company is governed by a Board of Directors, including the members listed below.

- *Susan E. Arnold*, operating executive of The Carlyle Group, an equity investment firm. Former board member of McDonald's Corporation (2008 to 2016) and NBTY, Inc. (2013 to 2017)
- *Mary T. Barra*, Chairman and CEO of General Motors Company. Former board member of General Dynamics Corporation (2011 to 2017)
- *Safra A. Catz*, CEO of Oracle Corporation. Former board member of HSBC Holdings (2008 to 2015).
- *John S. Chen*, Executive Chair and CEO of BlackBerry, Ltd. Board member of Wells Fargo & Company since 2004.
- *Jack Dorsey*, CEO, Twitter, Inc.
- *Francis A. deSouza*, President and Chief Executive Officer of Illumina, Inc. Former board member of Citrix Systems, Inc. (2014 to 2016)
- *Robert A. Iger*, Chairman and CEO of The Walt Disney Company. Board member of Apple, Inc.
- *Maria Elena Lagomasino*, CEO and Managing Partner of WE Family Offices. Current board member of the Coca-Cola Company (since 2008) and former board member of Avon Products, Inc. (2001 to 2016)
- *Fred H. Langhammer*, Chairman, Global Affairs, The Estée Lauder Companies Inc. Former board member of Central European Media Enterprises, Ltd. (2009 to 2014), The Shinsei Bank Limited (2005 to 2009), and AIG (2006 to 2008).
- *Aylwin B. Lewis*, former Chairman and CEO of Potbelly Corporation. Former board member (and CEO) of Sears Holdings Corporation and Kmart. Former board member of Starwood Hotels & Resorts Worldwide (2013 to 2016). Current board member of Marriott International Inc. (since 2016).
- *Robert W. Matschullat*, former Vice Chairman and Chief Financial Officer of The Seagram Company Ltd. Current board member of the Clorox Company and Visa Inc.
- *Mark G. Parker*, President, Chairman and CEO of NIKE, Inc.
- *Sheryl K. Sandberg*, Chief Operating Officer, Facebook, Inc. Former board member of Starbucks Corp. (2009 to 2012) and eHealth, Inc. (2006 to 2008). Current board member of SurveyMonkey.
- *Orin Smith*, former President and CEO, Starbucks Corporation. Former board member of Nike, Inc. (2004 to 2015) and Washington Mutual, Inc. (2005 to 2012).

Catz and deSouza were elected in December 2017 and began serving on the board effective February 1, 2018. Dorsey, Matschullat, Sandberg, and Smith are scheduled to leave the board in early 2018.

Exhibit 67: Compensation for Top Executive Officers, Walt Disney Company, 2016

Name and Title	Annual Compensation
Robert A. Iger , Chairman and Chief Executive Officer	\$43,882,396
Alan N. Braverman , Senior Executive VP and General Counsel	\$11,118,951
Christine M. McCarthy , Senior Executive VP and Chief Financial Officer	\$10,198,510
Kevin A. Mayer , Senior Executive VP and Chief Strategy Officer	\$10,125,349
M. Jayne Parker , Senior Executive VP and Chief Human Resources Officer	\$5,604,394

Source: Walt Disney Company Proxy State, January 12, 2018

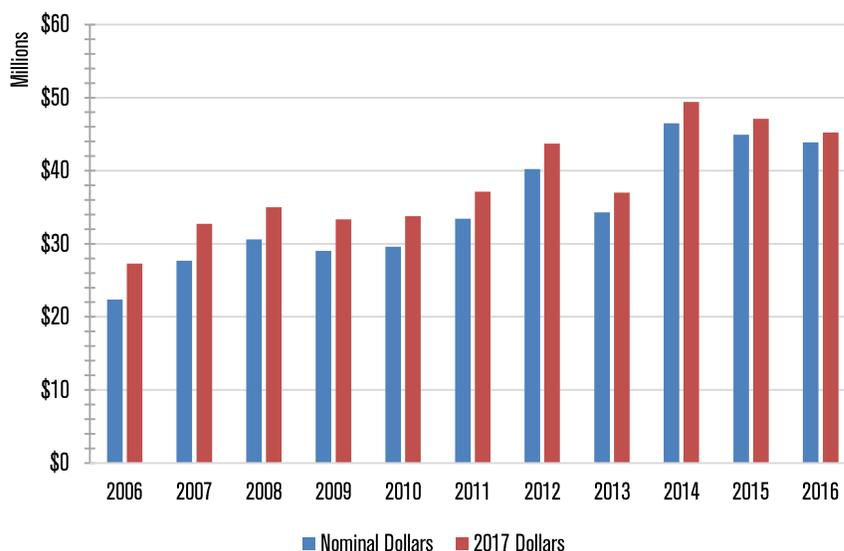
The board determines the compensation – salaries, bonuses, stock options, and other benefits – of the company’s top executives. In 2016, the compensation for the company’s five top executive officers totaled \$80,929,600, as *Exhibit 67* shows. The average compensation was \$16.2 million.²⁸

In 2005, his last year as CEO, Michael Eisner earned \$10.2 million. The following year, new CEO Robert Iger earned \$22.3 million – an increase from his previous year’s compensation of \$9.8 million as the company’s President and Chief Operating Officer.

Between 2006 and 2016, Iger’s total compensation increased from \$22.3 million to \$43.8 million, as shown in *Exhibit 68*. This is an increase of 66%, adjusted for inflation. In fact, as an article in *Variety* in January 2017, “Robert Iger’s Pay as Disney CEO Dips Slightly in 2016 to \$43.9 million,” suggested, Iger’s salary has not increased steadily each year.²⁹

The average compensation for CEOs of the 350 largest U.S. firms was \$15.6 million in 2016.³⁰ Robert Iger’s total compensation ranked seventh among CEO’s of corporations with revenues over \$1 billion in 2016, according to an analysis by the *New York Times*. Two other Disney company board members ranked in the

Exhibit 68: Total Compensation for Walt Disney Company CEO Robert Iger, 2006 to 2016



Source: The Walt Disney Company Proxy Statement (Form DEF 14A), 2007-2017.

top ten in terms of CEO compensation. Nike CEO Mark Parker ranked fifth with a total compensation of \$47.6 million. Oracle CEO Safra Catz ranked eighth with total compensation of \$40.9 million. Another Disney board member – Mary Barra, CEO of General Motors – earned \$22.5 million, ranking 38th.³¹

CEO compensation in the United States has grown dramatically since 1970s. According to the Economic Policy Institute, CEO compensation grew by 937% between 1978 and 2016. During same period, worker salaries increased by 11%, adjusted for inflation. In 1965, CEOs of the largest firms earned 20 times more than workers. By 2014, the ratio had jumped to 299-to-1. It dropped slightly, to 271-to-1, by 2016.³²

PayScale partnered with Equilar, an executive compensation firm, to calculate ratios in 2016 for some of the highest-paid CEOs in the U.S.³³ Only companies with annual revenue over \$1 billion were considered. The study looked only at cash compensation for both CEOs (including base pay and bonuses, but excluding stock options and perks) and workers because data about CEO stock options (which can more than quadruple CEO annual pay) is not available for employees. Worker pay was based on the median pay for all employees of The Walt Disney Company.

The Walt Disney Company ranked third (367-to-1) in terms of the gap between the cash pay of its CEO and median worker annual pay, behind CVS Health Corporation (434-to-1) and CBS Corporation (395-to-1). Although Disney CEO Robert Iger's total compensation was \$43.4 million, the study only calculated his cash pay of \$26.2 million compared with the median worker's annual pay of \$71,000.³⁴

As discussed below, the median worker annual pay at Disneyland Resort is considerably lower than that for the Walt Disney Company as a whole, but these company-wide statistics reveal how Disney compares with other large American corporations.



XII. Disneyland Resort

Disneyland – the Most Instagrammed Location on Earth

In 1953, the Walt Disney Company purchased a 160-acre site in Anaheim. Construction began the next year and the park was opened to the public on July 16, 1955.

Since it opened, Disneyland has undergone several expansions and renovations. For example, New Orleans Square was added in 1966, Bear Country (now called Critter Country) in 1972, and Mickey’s Toontown in 1993. Star Wars: Galaxy’s Edge is scheduled to open next year. In 2001, the company opened California Adventure Park on the site of Disneyland’s original parking lot. At that point, the company changed the name of Disneyland to Disneyland Resort Park. The Disneyland Resort includes Disneyland Park and Disney California Adventure, three resort hotels and Downtown Disney, a retail, dining, and entertainment complex. We refer to the entire complex as Disneyland Resort.

The Disneyland Resort is the second largest theme park in the country in terms of annual attendance. Only Disney World in Florida is larger.³⁵ Combined, the Disneyland Resort and Disney World attracted 19% of the visitors of the 14 largest theme parks in the country, as shown in *Exhibit 69*.

The Walt Disney Company now owns 486 acres and has the rights under long-term lease for use of an additional 55 acres of land in Anaheim. The company plans to build a 6,500-space parking structure adjacent to its existing 10,000-space Mickey & Friends garage. It also announced plans to construct a 700-room hotel to open in 2021.³⁶

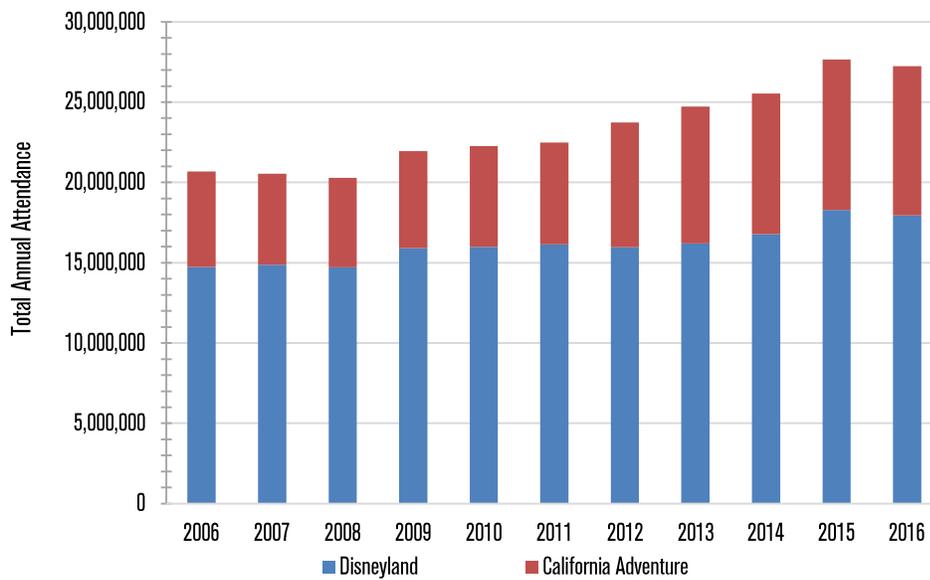
In 2017, people shared more photographs from their visits to Disneyland than from any other place in the world, making it the most instagrammed location on earth.³⁷

Exhibit 69: Largest Theme Parks in the United States by Attendance, 2016]

Theme Park	Attendance
Walt Disney World (Buena Vista, Florida)	53,727,000
Disneyland Resort (Anaheim, CA)	27,238,000
Universal (Orlando, Florida)	19,360,000
Universal Studios Hollywood (Universal City, CA)	8,086,000
Seaworld Florida (Orlando, Florida)	4,402,000
Busch Gardens Tampa Bay (Tampa, Florida)	4,169,000
Knott’s Berry Farm (Buena Park, CA)	4,014,000
Cedar Point (Sandusky, Ohio)	3,604,000
Seaworld San Diego (San Diego, CA)	3,528,000
Kings Island (King’s Island, Ohio)	3,384,000
Six Flags Magic Mountain (Valencia, CA)	3,332,000
Hershey Park (Hershey, PA)	3,276,000
Six Flags Great Adventure (Jackson, NJ)	3,220,000
Six Flags Great America (Gurnee, Illinois)	2,950,000

Source: *Theme Index and Museum Index 2016: Global Attractions Attendance Report*

Exhibit 70: Attendance at Disneyland Resort 2006 to 2016

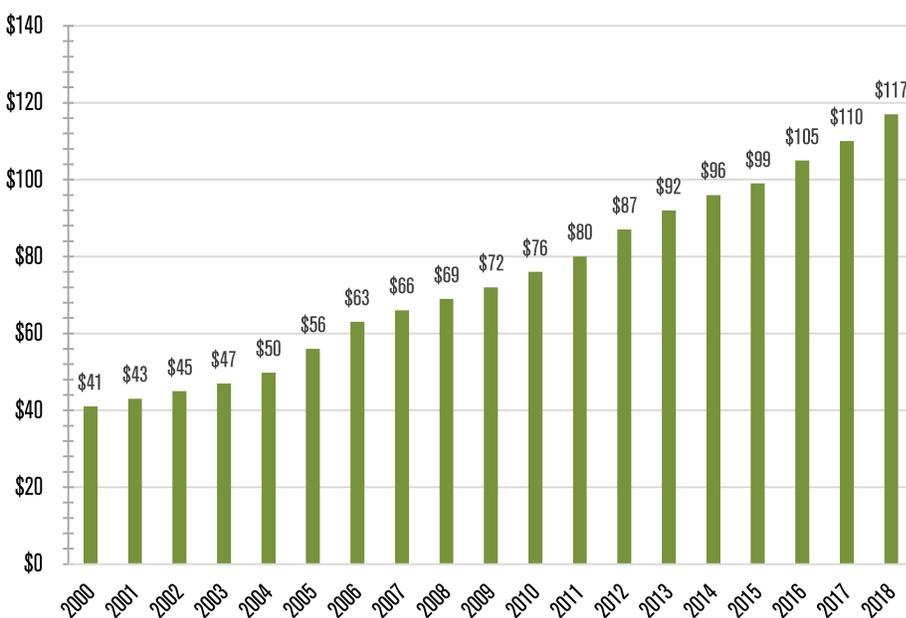


Source: Themed Entertainment Association annual reports, 2006 - 2016

Revenue Growth and Wage Equity

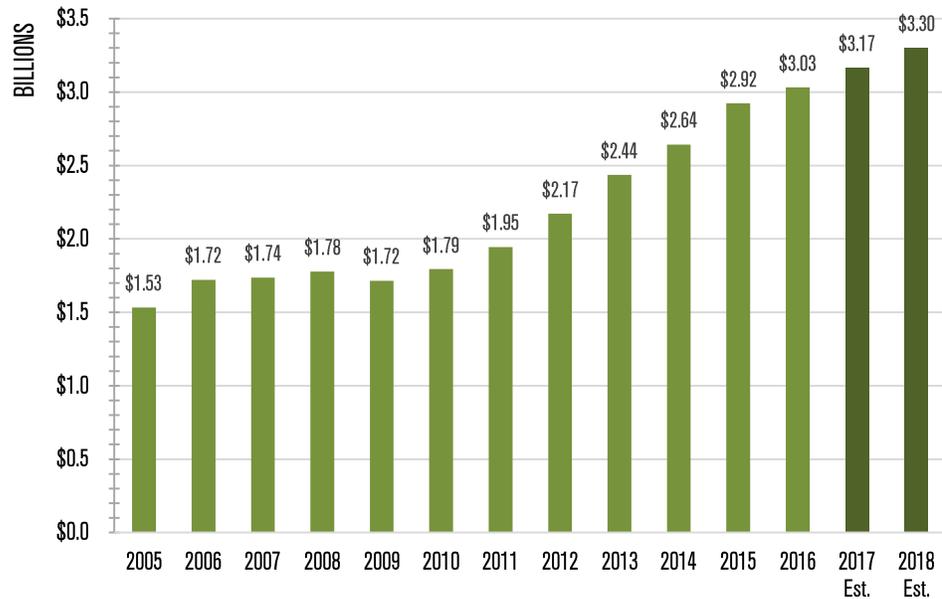
The Walt Disney Company’s theme park in Anaheim has seen a steady increase in visitors in the past decade. Attendance at both the Disneyland and California Adventure parks have increased from 20.6 million in 2006 to 27.2 million in 2016 – **attendance has grown 32%**.³⁸ This is shown in *Exhibit 70*.

Exhibit 71: Single Day Tickets for 1 Park at Disneyland Resort, 2000 to 2018



Source: Orange County Register. Ticket prices are in nominal dollars and are for 1 day at 1 park.

Exhibit 72: Revenue from Disneyland and California Adventure, 2005 to 2016



Source: Morgan Stanley stock analyst reports, nominal dollars. 2017-2018 estimated based on 2005-2016 linear trend.

By reallocating 5.7% of revenue to augment its payroll, Disneyland can provide an equitable wage for workers.

Single day ticket prices have increased from \$41 in 2000 to \$119 dollars in 2018. In dollars adjusted for inflation, this represents an **increase of 91% in ticket prices**,³⁹ and is shown in *Exhibit 71*.

The revenue generated by Disney’s Anaheim theme parks have increased from \$1.89 billion in 2006 to \$3.03 billion in 2016, and is projected to grow to \$3.3 billion in 2018. This represents a **69% increase in revenues**, adjusted for inflation, from 2005 to 2018. Revenue growth is shown in *Exhibit 72*.

When we divide Disneyland’s projected revenue in 2018 by the number of full-time-equivalent employees, we find that **each employee generates an average of \$144,900 in annual revenue for the company**.

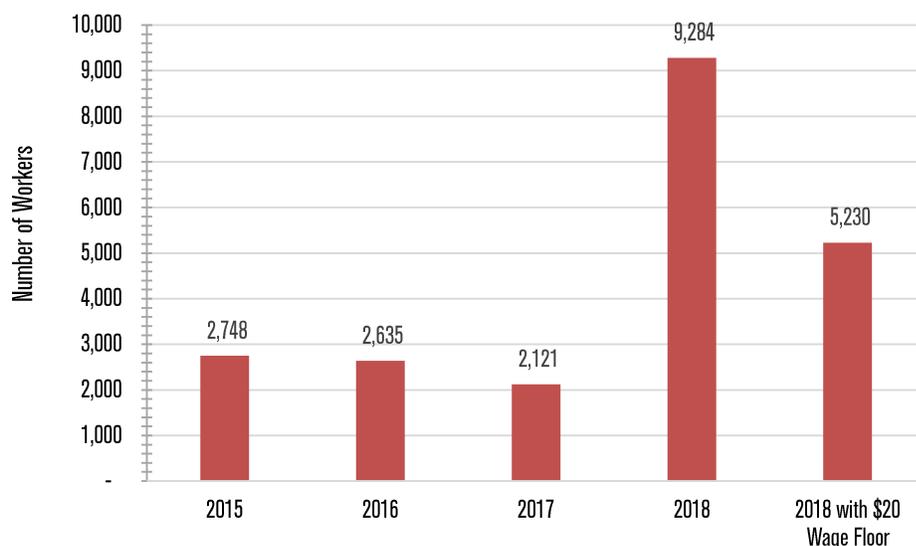
When we divide Disneyland’s projected revenue of \$3.3 billion in 2018 by the \$189 million cost shown in the next chapter for raising the wage floor to \$20, we find that **by reallocating 5.7% of resort revenue to augment its payroll, Disneyland can provide an equitable wage for its workers**.

Ratio of CEO Pay to Worker Pay

Robert Iger, the Walt Disney Company CEO, is reported to have signed a compensation contract for 2018 that includes his regular compensation, which was \$2.5 million in 2017, plus \$100 million in stock awards, plus a cash bonus of \$60 million if goals for growth in operating income are achieved.⁴⁰ The total amount of this compensation is \$162.5 million.

Based on Census records adjusted to match Disneyland workers (see the Methodology section), a Disneyland worker represented by CRLU had average earnings of \$17,116 in 2017, and median earnings of \$17,018. This is substantially lower than the median worker pay for the entire Walt Disney Company in 2016

Exhibit 73: Ratio of Pay for the CEO of Walt Disney Company to Average Pay of Disneyland Workers Represented by the Coalition of Resort Employee Labor Unions



Sources: Walt Disney Company proxy statements for CEO compensation 2015-2017, Bloomberg News for CEO compensation 2018, and Coalition of Resort Labor Unions for employee wages, adjusted to nominal dollars.

of \$71,400 that was reported by PayScale.⁴¹ When the wage floor for workers is raised to \$20, the average wage for all workers will be \$20.74, because some members currently earn more than \$20. Members now work an average of 1,465 hours per year. Working the same number of hours with the new wage floor, the average annual earnings for members will be \$30,384.

The ratio of the total annual compensation for Mr. Iger, including base wage, bonuses and stock options/grants, to the annual earnings of workers represented by the CRLU (adjusted to nominal dollars to be comparable to Mr. Iger's earnings) is shown in *Exhibit 73*.⁴²

In the three years from 2015 to 2017, the ratio ranged from 1-to-2,784 in 2015, to 1-to-2,121 in 2017, as shown in *Exhibit 72*. In each of these years, Mr. Iger's pay exceeded the total pay of more than 2,000 Disneyland workers.

In 2018, Mr. Iger's authorized compensation will equal the total pay of 9,284 workers with their wage level in 2017 adjusted upward to account for inflation. This is based on total authorized compensation, including salary, stock awards and cash bonuses. **Mr. Iger's authorized compensation would make up 86% of the gap between the current wage and an equitable wage for Disneyland workers.**

When the pay of these workers is raised to a more equitable level of at least \$20 an hour, Mr. Iger is still projected earn as much as 5,348 Disneyland workers in 2018.

Mr. Iger's compensation would make up 86% of the gap between the current wage and an equitable wage for Disneyland workers.

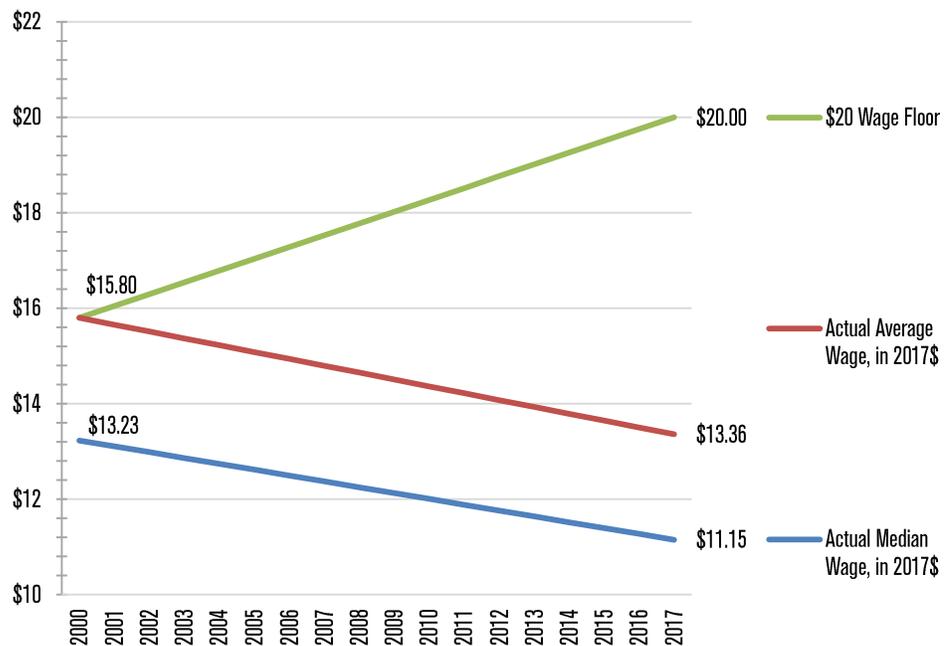
Gap in Wage Equity for Disneyland Workers from 2000 to 2017

The gap in unpaid wages from 2000 to 2017 totals over \$1.4 billion.

There is a backlog of unpaid equitable wages to workers and economic benefits to communities that would have accrued if past wages for workers had risen on a trajectory to the 2017 target of to \$20 an hour. These lost economic impacts are shown in *Exhibit 74*. We projected backwards to the year 2000 and charted workers' equitable wages vs. the actual wages they were paid. In 2000, the average wages of unionized workers was \$10.57, or \$15.80 when adjusted into current 2017 dollars. By 2017, these workers' average wages have *declined* to \$13.36, adjusted for inflation. The median wage, received by the typical worker, declined from \$13.23 to \$11.15, again adjusted for inflation.

The gap between the workers average real wages (red line) vs. the needed trajectory toward a more sustainable \$20 an hour grew each year. *Exhibit 75* details the year-by-year economic impacts that could have been achieved in the communities where Disneyland Park's unionized workers reside, if wages had followed a path toward economic sustainability for workers. **The gap in unpaid wages from 2000 to 2017 totals over \$1.4 billion and the gap in lost economic output in the region totals roughly \$1.6 billion.** This table includes an estimate of the number of affected union workers each year, along with the year-by-year estimate of the aggregate annual wage increase that workers would have earned by year estimate of the aggregate annual wage increase that workers would have earned on a path to \$20 an hour in 2017.

Exhibit 74: Disneyland CRLU Worker Wages, Actual vs. Equitable, in 2017 Dollars



Sources: Economic Roundtable analysis; U.S. Census Bureau. 2017. *American Community Survey, 5-Year Public Use Microdata Sample (PUMS), 2011-2015*; LEHD *Origin-Destination Employment Statistics (LODES) Version 7, Origin-Destination data (OD), Primary Jobs enumerated by 2010 census blocks.*

Exhibit 75: Induced Economic Impacts of a \$20 Wage Floor for Unionized Disneyland Workers, Projected back to 2000, All Areas

Year	Annual Wage Increase	Additional Employment	Additional Labor Income	Additional Value Added	Additional Sales (Output)
2000	\$0	0	\$0	\$0	\$0
2001	\$7,116,000	51	\$2,699,000	\$4,830,000	\$7,886,000
2002	\$14,606,000	104	\$5,539,000	\$9,913,000	\$16,185,000
2003	\$21,349,000	153	\$8,097,000	\$14,490,000	\$23,657,000
2004	\$29,854,000	213	\$11,322,000	\$20,262,000	\$33,081,000
2005	\$35,327,000	253	\$13,398,000	\$23,976,000	\$39,146,000
2006	\$43,043,000	308	\$16,325,000	\$29,213,000	\$47,697,000
2007	\$49,906,000	357	\$18,928,000	\$33,871,000	\$55,302,000
2008	\$54,865,000	392	\$20,808,000	\$37,237,000	\$60,796,000
2009	\$69,413,000	496	\$26,326,000	\$47,111,000	\$76,918,000
2010	\$89,568,000	640	\$33,970,000	\$60,790,000	\$99,252,000
2011	\$89,494,000	640	\$33,942,000	\$60,739,000	\$99,170,000
2012	\$107,136,000	766	\$40,633,000	\$72,713,000	\$118,719,000
2013	\$125,434,000	897	\$47,573,000	\$85,132,000	\$138,996,000
2014	\$140,397,000	1,003	\$53,248,000	\$95,287,000	\$155,576,000
2015	\$162,390,000	1,161	\$61,589,000	\$110,214,000	\$179,947,000
2016	\$175,384,000	1,254	\$66,517,000	\$119,033,000	\$194,346,000
2017	\$188,616,000	1,348	\$71,548,000	\$128,036,000	\$209,046,000
TOTAL	\$1,403,896,000	10,034	\$532,462,000	\$952,847,000	\$1,555,720,000

Source: Minnesota IMPLAN Group, Inc., IMPLAN System 2016 (Orange and Los Angeles Counties) and 2014 (United States) data, 2016 software; U.S. Census Bureau. 2017. American Community Survey, 5-Year Public Use Microdata Sample (PUMS), 2011-2015; LEHD Origin-Destination Employment Statistics (LODES) Version 7, Origin-Destination data (OD), Primary Jobs enumerated by 2010 census blocks. Note: "Employment" is measured in person-years of employment, and includes full-time and part-time jobs in ratios present in each industry of the local economy.

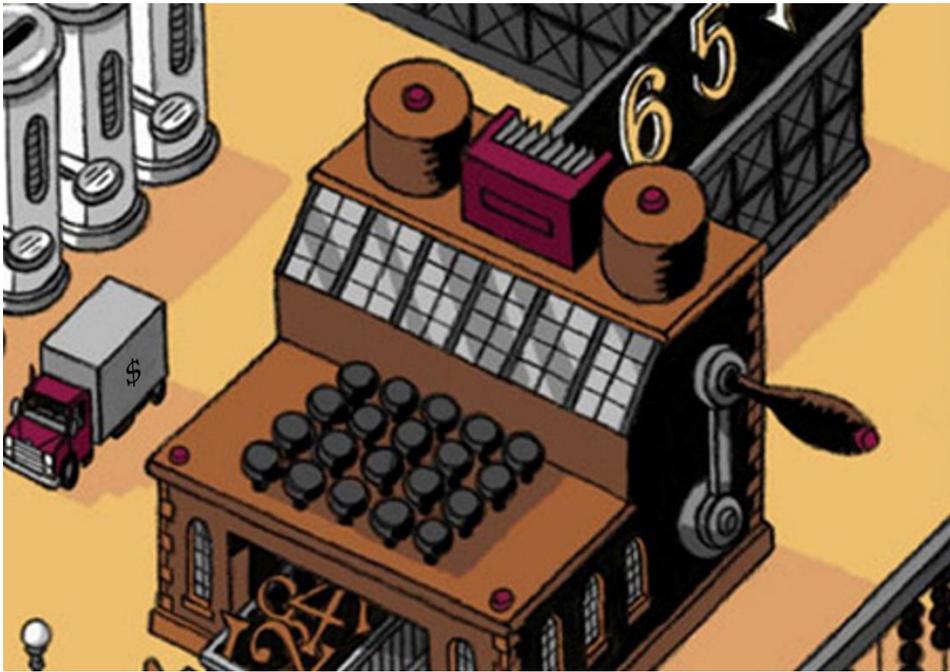
This estimate of economic impacts that are missing because Disneyland workers lost an average of \$2.44 an hour in real dollars since 2000 instead of having wages moving upwards to \$20 an hour by 2017, represents sacrifices made by workers and their families when they were unable to afford basic necessities. This also represents diminished economies in the communities where workers live. Their additional household spending over the years since 2000 would have supported over 10,000 person years of new employment in the region – starting small in 2001 but growing to over 1,300 a year by 2017.

Support Provided by the City of Anaheim

Disneyland Resort has had a close financial relationship with the City of Anaheim. For example, in 1996, the City agreed to fund the construction of a six-story Mickey and Friends concrete parking structure. The cost of construction was \$108.2 million at the time. The City leases this structure to Disney for \$1 a year as part of a deal to encourage the Walt Disney Company to expand the Disneyland Resort (the eventual expansion was the California Adventure Park). Visitors to Disneyland Resort pay to park in the structure. All of this revenue goes to the Disney Company.⁴³

In 1996, the City of Anaheim also entered into an agreement with Disney that essentially made the Disneyland Resort exempt from any entertainment taxes for the first 15 years of the new park expansion.⁴⁴ While it is illegal to take away voters' power to levy a new tax, the agreement circumvents this by promising to rebate any taxes collected back to Disney. In 2016, Anaheim extended this agreement for another 30 years, contingent on Disney making a \$1 billion investment in a third theme park at the Disneyland Resort, with the possibility to extend for an additional 15 years for a \$500 million investment at that time.⁴⁵

In 2016, the City of Anaheim granted Disney the largest hotel subsidy in the city's history, allowing Disney to keep 70% of the room taxes generated by its hotel, with no cap on the total amount of revenue that Disney can retain. Based on Disney's own estimations for the hotel's revenue generation, the deal would return at least \$200 million in tax revenue to Disney. In their application for subsidy, Disney stated that the hotel would produce 1,150 full-time jobs related to hotel operations.⁴⁶



XIII. Economic Impacts of Higher Wages

Economic Impacts of a Higher Wage

A higher wage for workers at Disneyland Resort not only provides greater economic self-sufficiency for them and their families, but it creates positive impacts in the communities where they live and spend the earnings. The economic ripple effects of their higher wages touches local retailers, restaurants, grocery stores, doctors' offices, movie theatres, and other places workers spend their earnings. We utilize input-output models of the Orange County, Los Angeles County, and U.S. national economy for estimating the local and overall economic impacts of additional household spending that will result from raising the wage floor for Disneyland Resort workers to \$20 an hour. References in this chapter to Disneyland workers refer specifically to the 17,339 workers represented by the Coalition of Resort Labor Unions (CRLU).

When the wage floor for Disneyland workers is raised to \$20, the average wage for this labor force will be \$20.74, because some workers currently earn more than \$20. When we project the impacts of raising the wage floor, we are effectively estimating outcomes that result from the average wage increasing from its current level of \$13.36 to a new average of \$20.74. Impacts are projected using IMPLAN input-output modelling software and regional accounts data.

Identifying a More Sustainable Hourly Wage

Given the low current wages and unsustainable economic conditions of many workers at Disneyland Resort, we identified a near-term sustainable wage based on the *Living Wage* calculator for Orange County. The *Living Wage* standard is based on a family's "likely minimum food, child care, health insurance, housing, transportation, and other basic necessities (e.g., clothing, personal care items) costs" and provides a reliable benchmark for the wages needed to pay for families' basic necessities.⁴⁷ Taking into account family size and the number of wage earners per family, the 2017 benchmark for a living wage is a \$23.94 an hour.⁴⁸

We use **\$20 an hour wage floor** as the threshold wage for projecting economic impacts of taking the first step toward a sustainable wage floor for Disneyland Resort workers, assuming that follow-on wage increases will bring all workers up to a living wage.

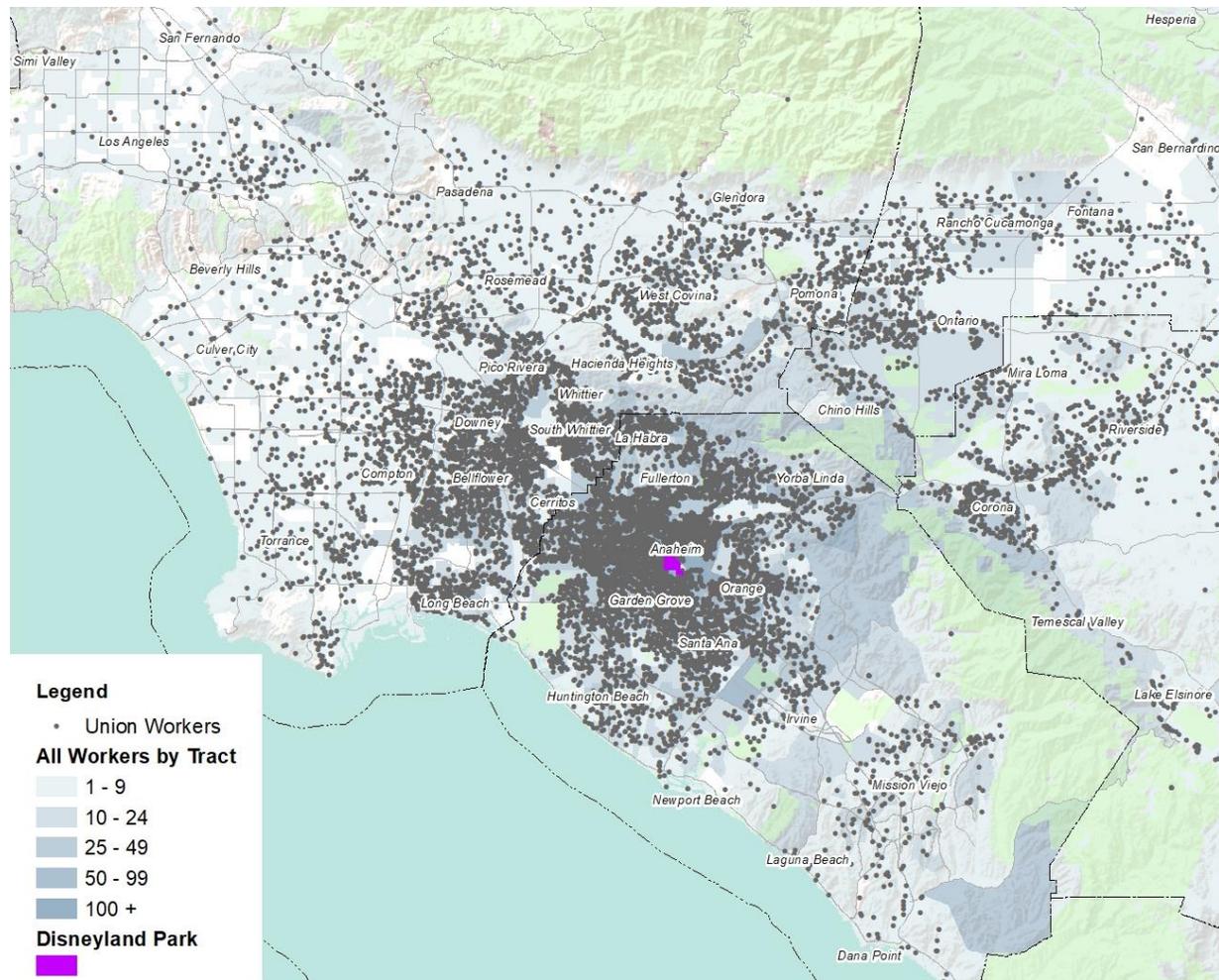
Impacts of a \$20 Hourly Wage

When wages for workers are raised to a minimum of \$20 an hour, it will affect businesses and workers throughout the region. In 2017, the average wage for Disneyland workers was \$13.36 an hour. There are 15,881 workers who earn less than \$20 an hour, and their average wage is \$11.95. We calculated the difference between the average wage for workers paid less than \$20 an hour and the target wage of \$20. This wage gap is the basis for our estimate of economic impacts from raising the wage floor.

This method produces a conservative estimate of overall impacts, because in addition to direct wage increases for workers paid less than \$20 an hour, there will

Raising wages to a minimum of \$20 an hour adds \$189 million to workers' pay.

Exhibit 76: Disneyland Resort Employees by Home Address, Unionized and Overall



Sources: Residences of union workers are represented by dots in the foreground. Data for the residential locations of union workers is from CRLU (Coalition of Resort Labor Unions), 2017; background shading shows the geographic distribution of the total Disneyland Resort labor force and is from LEHD Origin-Destination Employment Statistics (LODES) Version 7, 2014.

be indirect increases for workers who are supervisors or who currently receive wages higher than the workers whose wages will rise to \$20. These ripple increases maintain wage parity in the labor force and are likely to benefit an additional 20% of workers.⁴⁹

We annualized and aggregated the average wage increase for directly impacted workers, taking into account the mix of full- and part-time workers, estimating that the average hours worked represent 71% of a full-time equivalent position.

The aggregate annual direct increase of raising wages from their level in 2017 to a minimum of \$20 an hour adds up to \$189 million, or an average of over \$11,000 in added earnings for each worker who is currently paid less than \$20 an hour. This does not take into account the likely ripple increases for roughly 20% more workers.

This aggregate annual wage increase of \$189 million is the additional earnings that workers will take home when they get a raise to \$20 an hour. Since much of their added household income will be spent locally, it is informative to know where

Exhibit 77: Induced Economic Impacts of a \$20 Wage Floor for Disneyland Workers Who Live in Orange County

Household Income Ranges	Percent of Workers	Annual Wage Increase	Additional Jobs Created	Additional Labor Income	Additional Value Added	Additional Sales (Output)
<\$15,000	3%	\$2,837,000	22	\$1,163,000	\$2,108,000	\$3,254,000
\$15-30,000	9%	\$8,643,000	67	\$3,521,000	\$6,213,000	\$9,629,000
\$30-40,000	10%	\$9,930,000	73	\$3,841,000	\$6,915,000	\$10,764,000
\$40-50,000	10%	\$9,798,000	62	\$3,274,000	\$6,038,000	\$9,387,000
\$50-70,000	24%	\$23,851,000	155	\$8,230,000	\$15,076,000	\$23,525,000
\$70-100,000	17%	\$16,891,000	117	\$6,177,000	\$11,222,000	\$17,629,000
\$100-150,000	18%	\$18,276,000	115	\$6,004,000	\$10,923,000	\$17,167,000
\$150-200,000	6%	\$5,971,000	35	\$1,791,000	\$3,227,000	\$5,042,000
\$200,000+	3%	\$2,738,000	10	\$473,000	\$874,000	\$1,361,000
Orange Co. Total	100%	\$98,936,000	656	\$34,474,000	\$62,596,000	\$97,758,000

Exhibit 78: Induced Economic Impacts of a \$20 Wage Floor for Disneyland Workers Who Live in Los Angeles County

Household Income Ranges	Percent of Workers	Annual Wage Increase	Additional Jobs Created	Additional Labor Income	Additional Value Added	Additional Sales (Output)
<\$15,000	3%	\$1,815,000	15	\$830,000	\$1,446,000	\$2,281,000
\$15-30,000	9%	\$5,528,000	43	\$2,279,000	\$3,910,000	\$6,199,000
\$30-40,000	10%	\$6,351,000	43	\$2,289,000	\$4,020,000	\$6,405,000
\$40-50,000	10%	\$6,267,000	36	\$1,964,000	\$3,518,000	\$5,594,000
\$50-70,000	24%	\$15,255,000	91	\$4,934,000	\$8,795,000	\$14,028,000
\$70-100,000	17%	\$10,803,000	68	\$3,696,000	\$6,567,000	\$10,510,000
\$100-150,000	18%	\$11,689,000	67	\$3,599,000	\$6,401,000	\$10,233,000
\$150-200,000	6%	\$3,819,000	20	\$1,085,000	\$1,904,000	\$3,020,000
\$200,000+	3%	\$1,751,000	5	\$279,000	\$502,000	\$792,000
L.A. County Total	100%	\$63,299,000	389	\$20,955,000	\$37,062,000	\$59,063,000

Exhibit 79: Induced Economic Impacts of a \$20 Wage for Disneyland Workers Who Live in All Other Areas

Household Income Ranges	Percent of Workers	Annual Wage Increase	Additional Jobs Created	Additional Labor Income	Additional Value Added	Additional Sales (Output)
<\$10,000	1%	\$320,000	4	\$218,000	\$392,000	\$714,000
\$10-15,000	2%	\$466,000	6	\$322,000	\$576,000	\$1,052,000
\$15-25,000	5%	\$1,444,000	19	\$1,026,000	\$1,806,000	\$3,289,000
\$25-35,000	9%	\$2,385,000	31	\$1,668,000	\$2,932,000	\$5,345,000
\$35-50,000	15%	\$4,038,000	50	\$2,693,000	\$4,762,000	\$8,729,000
\$50-75,000	24%	\$6,606,000	78	\$4,158,000	\$7,341,000	\$13,522,000
\$75-100,000	17%	\$4,678,000	52	\$2,785,000	\$4,909,000	\$9,049,000
\$100-150,000	18%	\$5,062,000	53	\$2,807,000	\$4,907,000	\$9,009,000
\$150,000+	9%	\$2,403,000	16	\$833,000	\$1,452,000	\$2,656,000
Other Areas Total	100%	\$27,409,000	311	\$16,510,000	\$29,076,000	\$53,364,000

Source: IMPLAN System 2016 (Orange and Los Angeles Counties) and 2014 (United States) data, 2016 software. Data for the residential locations of union workers is from CRLU (Coalition of Resort Labor Unions), 2017. Note: "Employment" is measured in person-years of employment.

Exhibit 80: Induced Economic Impacts of a \$20 Wage Floor for Disneyland Workers, Summary of All Areas

Where Workers Live	Percent of Workers	Annual Wage Increase	Additional Jobs Created	Additional Labor Income	Additional Value Added	Additional Sales (Output)
Orange County	52%	\$98,936,000	656	\$34,474,000	\$62,596,000	\$97,758,000
Los Angeles Co.	33%	\$63,299,000	389	\$20,955,000	\$37,062,000	\$59,063,000
All Other Areas	14%	\$27,409,000	311	\$16,510,000	\$29,076,000	\$53,364,000
Total, All Areas	100%	\$189,644,000	1,356	\$71,938,000	\$128,734,000	\$210,185,000

Source: Minnesota IMPLAN Group, Inc., IMPLAN System 2016 (Orange and Los Angeles Counties) and 2014 (United States) data, 2016 software. Data for the residential locations of union workers is from CRLU (Coalition of Resort Labor Unions), 2017. Note: "Additional Jobs Created" is measured in person-years of employment.

these workers live. The largest clusters are in the cities of Anaheim, Garden Grove, Santa Ana, Fullerton, and Long Beach, as shown in *Exhibit 76*. Additional information about where workers live was shown in the chapter on *Transportation and Commuting*.

Given the geographic distribution of workers' homes, we split the impacts of the Aggregate Annual Direct Wage Increase between Orange County (53%), Los Angeles County (33%) and the balance of the US (14%).

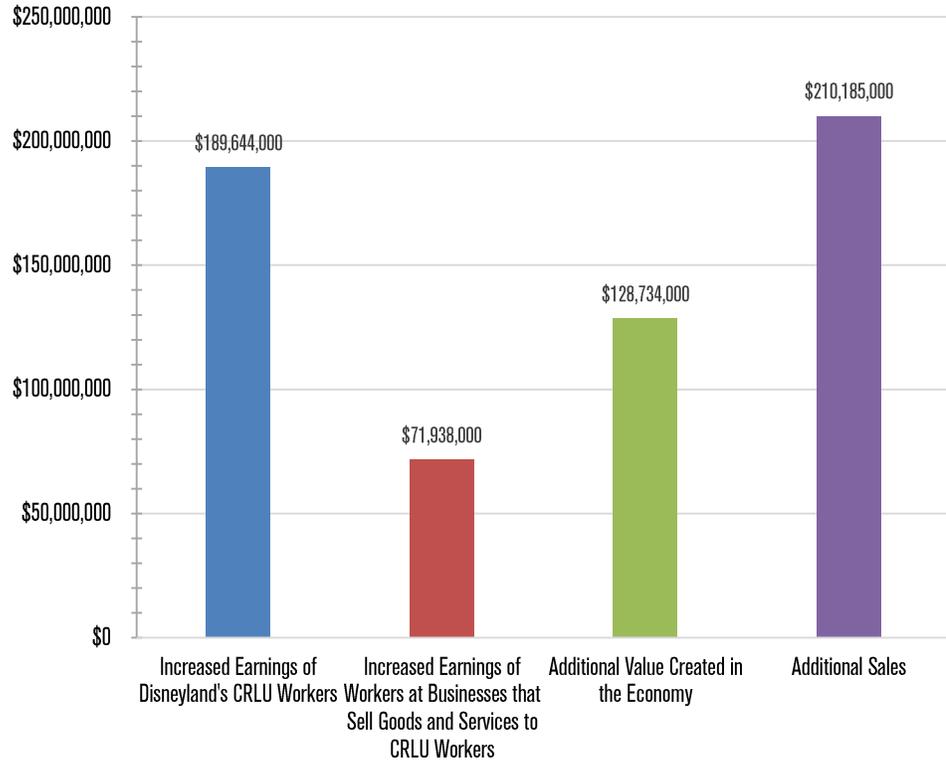
Within each of these three regions, economic impacts also differ by the overall household incomes of workers, because spending and savings patterns vary by combined household income. Taking all of these factors into consideration, the local impacts for workers living in Orange County appear in *Exhibit 77*, Los Angeles County in *Exhibit 78*, and the balance in *Exhibit 79*.

The additional household spending created when the wage floor for workers at Disneyland Resort is raised to \$20 an hour will support significant economic benefits to the region (*Exhibit 80*), including:

- *Induced Employment of 1,356 additional year-long jobs*, which is supported by the added consumer demand that a raise to \$20 brings when spent at retail and grocery stores, repair shops, restaurants, doctors' offices, and elsewhere.⁵⁰
- *Induced Sales (Output) of \$210 million*, which is the amount of additional sales at businesses that a raise to \$20 an hour income stimulates. Sales (output) is the sum of value added and intermediate purchases (purchases of products consumed in production).⁵¹
- *Induced Value Added of \$129 million*, which is the difference between the value of businesses' total sales and the cost of their intermediate inputs (supplies) purchased from other business. For example, if a grocery store has \$100 in sales, but \$70 of that revenue is passed along to the makers of the food items on that grocery store's shelves, the remaining \$30 is the portion of the total sales value that the grocery store itself adds.⁵²
- *Induced Labor Income of \$72 million*, which is the combination of employee compensation⁵³ and proprietor income from the additional employment generated by increased household consumption by union workers.⁵⁴

Raising wages to \$20 creates 1,356 new jobs and stimulates \$210 million in new sales.

Exhibit 81: Economic Impacts from Raising the Wage Floor for Disneyland CRLU Workers to \$20



Sources: Economic Roundtable projections of economic impacts.

The projected impacts when workers at Disneyland Resort take their added annual earnings home and purchase necessities for their families from local businesses are shown in *Exhibit 81*.

Increased Tax Revenues from Household Spending

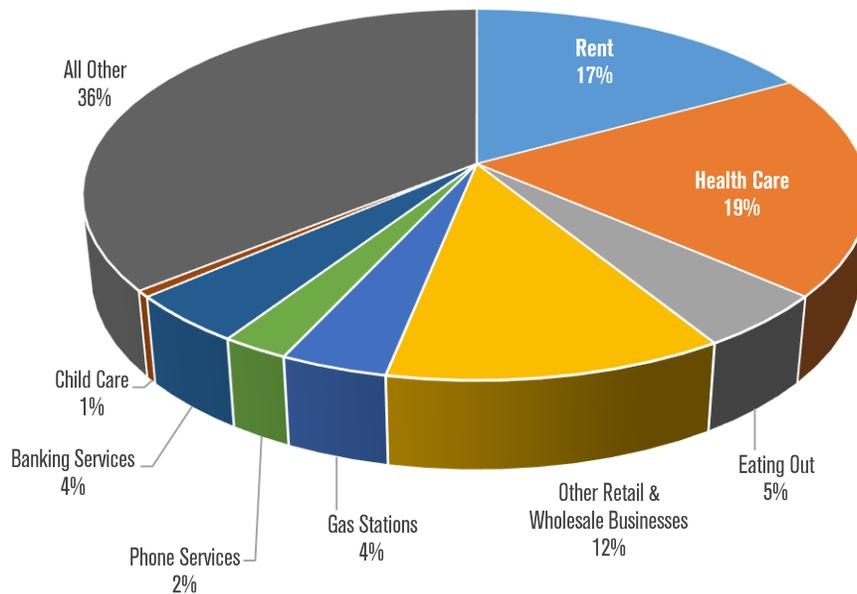
Additional benefits occur when Disneyland Resort workers get a raise to \$20 an hour and spend most of it in their local communities; local, state, and federal tax revenues will rise with the added sales. *Exhibit 82* summarizes these added federal, state, and local tax revenues.

Exhibit 82: Summary of Tax Impacts Resulting from a \$20 Wage for Disneyland CRLU Workers

Where Workers Live	Percent of Workers	Annual Wage Increase	Additional Federal Tax Revenue	Additional State/Local Tax Revenue
Orange County	52%	\$98,936,000	\$1,492,000	\$288,000
Los Angeles Co.	33%	\$63,299,000	\$850,000	\$165,000
All Other Areas	14%	\$27,409,000	\$758,000	\$113,000
Total, All Areas	100%	\$189,644,000	\$3,099,000	\$566,000

Source: Minnesota IMPLAN Group, Inc., IMPLAN System 2016 (Orange and Los Angeles Counties) and 2014 (United States) data, 2016 software. Data for the residential locations of union workers is from CRLU, 2017.

Exhibit 83: Worker Household Spending Patterns



Source: Economic Roundtable projection based on the IMPLAN input/output model and national household survey data. Minnesota IMPLAN Group, Inc., IMPLAN System 2016 data and 2016 software.

The added household spending will generate over \$3.1 million in new federal tax revenue. The largest portion of this – 32% of the total – will be additional federal income tax collected by the Internal Revenue Service. State and local tax revenue will increase by over half a million dollars. The largest contributors to this added state and local tax revenue will be sales taxes (38%), followed closely by added property tax revenues (33%). Personal income taxes are a smaller percentage of state and local tax revenues than federal tax revenues, 12%.

These added tax revenues benefit workers, their families, and their communities by supporting public roads and infrastructure, schools and colleges, social services, hospitals, public assistance programs, public safety, and local and county government administration.

Where Added Wages Are Spent

The projected industry impacts of Disneyland Resort workers' added household spending will be spread across dozens of industries, as shown in *Exhibit 83*.⁵⁵ The breakout of industries that typically benefit from increased consumption of goods and services by households with the mix of incomes represented by Disneyland workers includes:

- Health services at hospitals, doctor's office and clinics – 19%
- Housing, in the form of rent and mortgage payments – 17%
- Grocery, retail, and wholesale goods – 12%
- Food and beverages at restaurants and bars – 5%
- Gas for private vehicles – 4%
- Bank and financial services – 4%
- Phone services – 2%
- Childcare services – 1%



XIV. Methodology

Background

In January 2017, the CRLU approached the Urban & Environmental Policy Institute at Occidental College for research assistance to assess the housing, transportation, and economic conditions of their union members employed at the Disneyland Resort in Anaheim, California. The “Resort” refers to the Disneyland theme park, California Adventure theme park, Disneyland Hotel, Disney’s Grand Californian Hotel & Spa, Disney’s Paradise Pier Hotel, parking structures and lots, maintenance facilities, warehouses, and Circle D Ranch.

Occidental College researchers along with researchers at The Economic Roundtable developed the following methodology.

Worker survey

Survey Implementation

A survey was conducted of union members belonging to the member unions of the CRLU. All workers in these unions, 17,339 workers in total, were invited to take the survey.

The Coalition of Resort Labor Unions is comprised of:

- American Guild of Variety Artists (AGVA)
- Bakery, Confectionery, Tobacco Workers & Grain Millers International Union Local 83
- IATSE Local 504
- IATSE Local 706
- IATSE Local 923
- Independent Employee Service Association (IESA)
- Orange County Musicians’ Association–American Federation of Musicians, Local 7
- Service Employees International Organization /United Service Workers West (SEIU USWW)
- Unite Here! Local 11
- United Food & Commercial Workers Local 324
- Workers United Local 50

The survey questions were developed by Occidental College/Economic Roundtable and conducted online through a website set up by Occidental College.

The survey questions about food insecurity were based on the six-question short form version of the standardized survey instrument developed by the USDA. The short form questions ask survey respondents to answer the questions as they pertain to the previous 12 months. To evaluate a household’s level of food security or insecurity, the sum of affirmative responses is used to generate a raw score, with a range of 0 to 6. Households that respond affirmatively to none or one of the questions are classified as “food secure.” Households that respond affirmatively to two, three, or four of the questions are classified as having “low food security.” This is characterized by reduced quality, variety, or desirability of

the diet. Households that respond affirmatively to five or six questions are classified as having “very low food security.” This condition is characterized by disrupted eating patterns and reduced food intake. USDA’s Six-Item Food Security Module includes the following questions:

1. “The food that (I/we) bought just didn’t last, and (I/we) didn’t have money to get more.” Was that often, sometimes, or never true for (you/your household) in the last 12 months?
2. “(I/we) couldn’t afford to eat balanced meals.” Was that often, sometimes, or never true for (you/your household) in the last 12 months?
3. In the last 12 months, since last (name of current month), did (you/you or other adults in your household) ever cut the size of your meals or skip meals because there wasn’t enough money for food?
4. [IF YES ABOVE, ASK] How often did this happen—almost every month, some months but not every month, or in only 1 or 2 months?
5. In the last 12 months, did you ever eat less than you felt you should because there wasn’t enough money for food?
6. In the last 12 months, were you ever hungry but didn’t eat because there wasn’t enough money for food?

The webpage and the survey tool were translated into Spanish, Vietnamese, and Tagalog. See the following chapter for the survey tool. The survey was administered through an online link to a Qualtrics survey. It was pre-tested and was active from September 29, 2017 through October 31, 2017. With the exception of each respondent’s Disneyland Resort worker identification number, no identifying information such as name or email address was collected in the survey. Individual responses were aggregated and summarized in this report to further protect respondents’ confidentiality.

Participants & Response

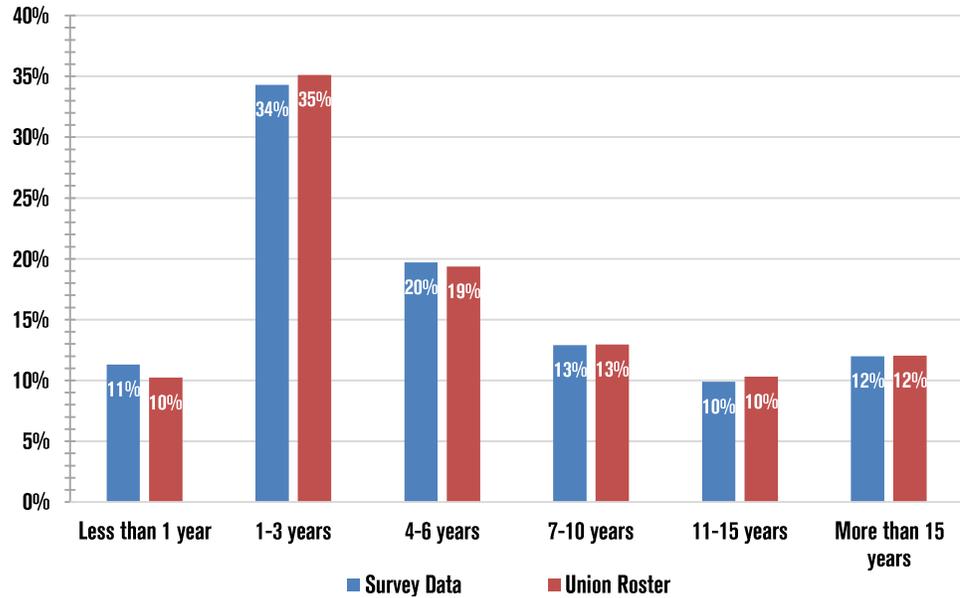
Since respondents were asked to provide their Disney worker identification number, their responses were matched to the information provided by the most up-to-date union rosters. Such lists contain additional information required for our analysis, such as original date of hire, hourly pay group, full-time or part-time status, and zip codes. These union rosters were compiled into one master list, henceforth referred to as ID Spine. The ID Spine was checked for duplicates and errors, and provided the base for the profiling of the survey universe, which contains over 17,000 union members.

After data cleaning, the survey achieved a 29% overall response rate.

Survey Representativeness

We used information about the full union roster from the ID Spine to investigate whether the survey sample was representative of the entire population of Disneyland Resort union workers. We found that our sample was largely representative of the target population in terms of wages, gender, race/ethnicity and tenure at Disneyland Resort. We discovered some bias in our survey results in

Exhibit 84: Length of Time Employed at Disneyland Resort: Survey Respondents Compared to All Union Members



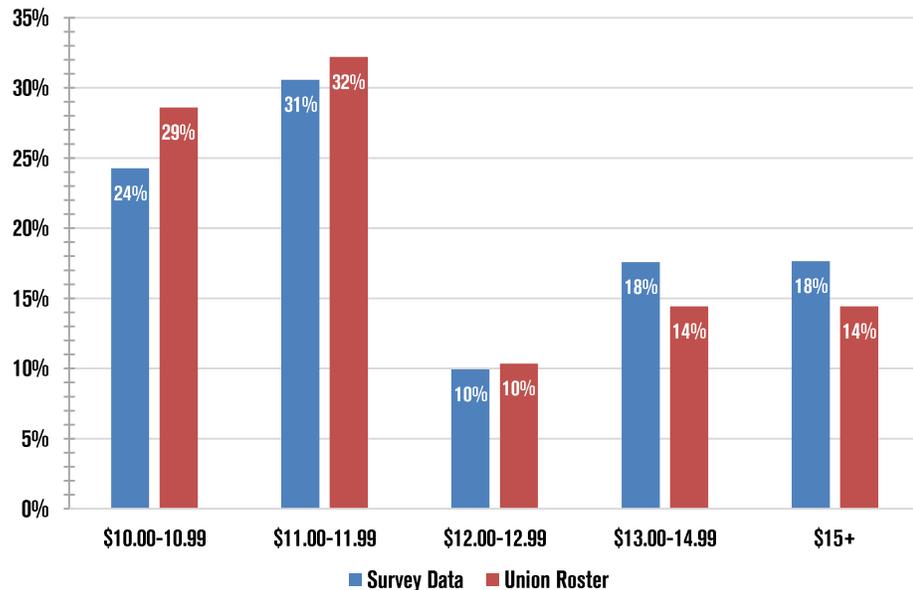
Sources: Survey of Disneyland Resort employees and CRLU (Coalition of Resort Employee Labor Unions).

terms of over-representation of full-time workers as compared to part-time workers. The following exhibits detail these findings.

The distribution of survey respondents based on *length of time employed at Disneyland Resort* matches the overall union membership very closely, as shown in *Exhibit 84*.

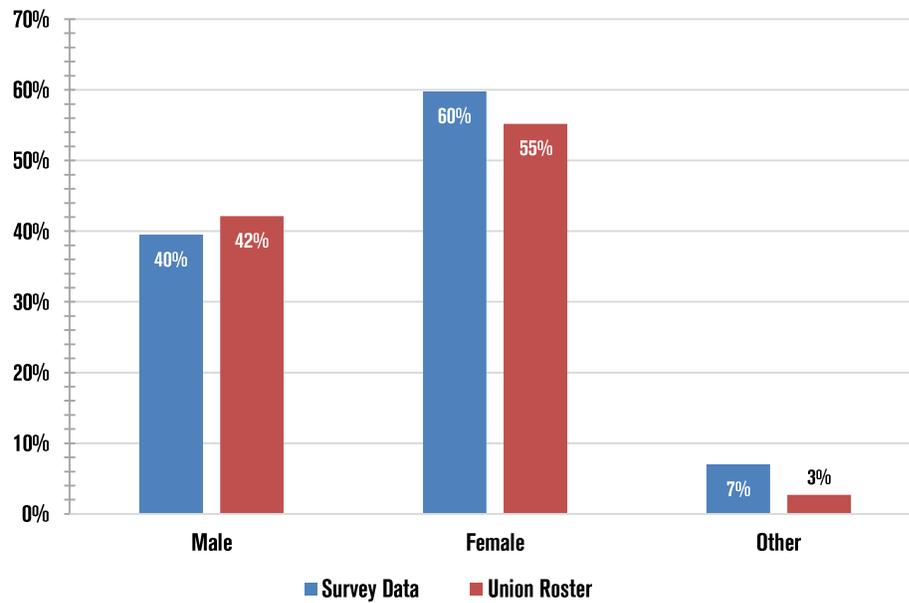
The distribution of survey respondents based on *wage level* corresponds with overall union membership very closely, as shown in *Exhibit 85*.

Exhibit 85: Hourly Wage Level: Survey Respondents Compared to All Union Members



Sources: Survey of Disneyland Resort employees and CRLU (Coalition of Resort Labor Unions).

Exhibit 86: Gender: Survey Respondents Compared to All Union Members



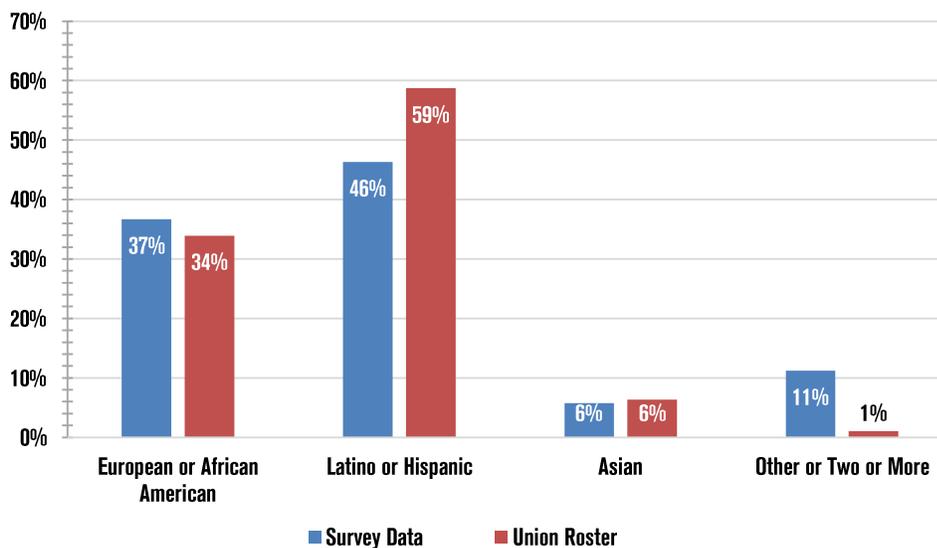
Sources: Survey of Disneyland Resort employees and CRLU (Coalition of Resort Employee Labor Unions).

The distribution of survey respondents based on *gender* matches the overall union membership closely, as shown in *Exhibit 86*

The distribution of survey respondents based on *ethnicity* generally matches the overall union membership, as shown in *Exhibit 87*.

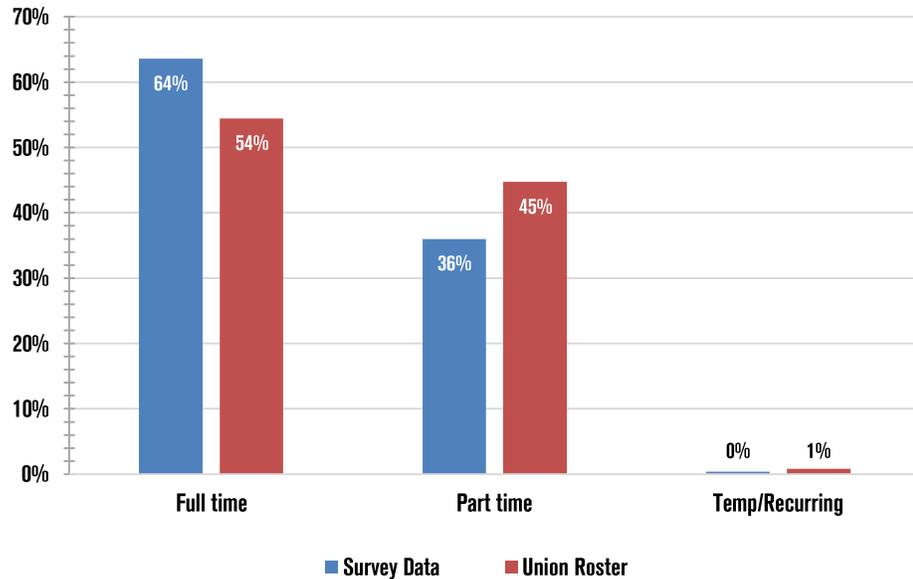
The distribution of survey respondents based on *full-time vs. part-time work status* generally matches the overall union membership, as shown in *Exhibit 88*.

Exhibit 87: Ethnicity: Survey Respondents Compared to All Union Members



Sources: Survey of Disneyland Resort employees and CRLU (Coalition of Resort Employee Labor Unions).

Exhibit 88: Full-Time vs. Part-Time Work Status: Survey Respondents Compared to All Union Members



Sources: Survey of Disneyland Resort employees and CRLU (Coalition of Resort Employee Labor Unions).

In summary, the distributions of hourly wages and gender among survey respondents are close to the distributions of those attributes among Disneyland Resort union workers at large. There is a slightly higher percentage of survey respondents earning near \$15/hour and slightly lower percentage of survey respondents earning near \$10/hour than among the full population of Disneyland Resort union workers. This is likely due to the over-representation of full-time workers in the survey, which we describe below. The average and median wages of full-time Disneyland Resort union workers are \$1.63 and \$1.45 higher, respectively, than they are for part-time workers.

The gender of union employees at large was imputed based on employee first names. We calculated the empirical distribution of gender by first name for an Economic Roundtable data set with verified gender and ethnicity information for 4 million Los Angeles County residents. We used that to assign the more likely gender to each name. For over 95% of names, the probability of a specific gender was greater than 80%. The race/ethnicity of employees was imputed by the same method using full names. For imputation we grouped European-American and African-American workers together because we were not able to precisely distinguish them based on names.

Although the above chart shows a discrepancy in the estimated percentage of Latino or Hispanic workers, this may be a result of the number of survey respondents selecting “other/two or more.” Our imputation method does not recover such a category. It is reasonable to conclude that the higher proportion of Latino or Hispanic workers estimated by imputation includes some who would classify themselves as “other/two or more.”

The distribution of workers by tenure, i.e., number of years working at Disneyland Resort, is also very similar between the survey data and full union

roster. Note that when calculating proportions for the full roster we excluded the roughly one-fifth of workers whose tenure was not listed.

Finally, we compare the full-time vs. part-time status of survey respondents against the full roster of union employees. In this case, we find some bias in our survey results. The proportion of full-time employees responding to the survey is 9% higher than the proportion of full-time employees overall. This is not surprising, given that full-time employees had greater exposure to the survey. This discrepancy suggests that the situation of Disneyland Resort workers is even more dire than the survey results show, because part-time workers are generally worse-off than full-time workers.

Workforce Analysis

To corroborate and expand on the information provided by the Disneyland worker survey, we incorporated publicly available U.S. Census Bureau data into our analysis. Our primary source of public data on Disneyland employees is the Longitudinal Employer-Household Dynamics (LEHD) program of the U.S. Census Bureau.⁵⁶ Specifically, LEHD Origin-Destination Employment Statistics (LODES) provide the number of individuals who work and reside in a given pair of census blocks in a given year. We restrict this data set to entries for which the work census block is in the Disneyland footprint (shown in *Exhibit 91* at the end of the Methodology section), and we consider these subsets from 2002 to 2015, the most recent year available. This allows us to explore changes in the workforce over time.

LODES Data Overview

For each pair of work-home census blocks in California, LODES provides the number of workers broken down by three categories.

- Age group (three levels: ≤ 29 , 30-54, 55+)
- Income group (three levels: $\leq \$1250/\text{month}$, $\$1251 - \$3333/\text{month}$, $\$3334+/\text{month}$)
- Industry (three categories: goods producing; trade, transportation, and utilities; all other services)

To focus our study on the mainstream conditions of Disneyland workers, we further restrict the LODES data to entries with home census blocks in the six counties closest to Disneyland. This excludes a small portion of records. For example, from the 2002 LODES data set we excluded about 4% of the entries in the data.⁵⁷

PUMS Data Overview

The categorical information from LODES provides only a baseline description of Disneyland workers. To access detailed economic, housing, social, and demographic data to describe the living conditions of Disneyland workers we incorporated data from the Public Use Microdata Sample (PUMS) of the American Community Survey (ACS) of the U.S. Census Bureau.⁵⁸ ACS reaches approximately a 5% sample of the U.S. population over a five-year period. Over

200 variables are measured, including number of hours worked, housing cost burden, and number of people and rooms per household.⁵⁹ PUMS includes individuals from almost every town and county in the country,⁶⁰ but the precise location of individuals is not given. Rather, the individuals are segmented at the geographic level of Public Use Microdata Areas (PUMAs).

Each PUMA contains no fewer than 100,000 people. PUMAs are large enough to provide detailed information about individuals without compromising their privacy, but small enough to be relatively homogenous. Although we are not able to isolate Disneyland Resort workers from PUMS data, we restricted and weighted this data to correspond as closely as possible with those workers. To do this we used information from LODES about workers on the Disneyland footprint as a baseline for re-weighting. We describe this process below.

Methodology for Weighting PUMS Data

First, we restricted the PUMS data to exclude as many non-Disneyland union employees as possible while retaining as many Disneyland union employees as possible. To do this we filtered the data in several ways:

1. Only include individuals reporting work in the following industries:
 - 1.1. Retail Trade
 - 1.2. Arts, Entertainment and Recreation
 - 1.3. Accommodation and Food Services
2. Only include data from PUMAs in the six counties closest to Disneyland. This restriction was also imposed on the LODES data for Disneyland workers.
3. Exclude data from PUMAs in which no entry in the LODES data reported the PUMA as an origin (home) location.

After filtering, we added several columns of **weights** to the PUMS data that can be used to re-weight it in agreement with the LODES data with respect to certain variables of interests. We considered several weighting schemes involving the following variables:

- Age group (three LODES levels)
- Income group (three LODES levels)
- Industry (three LODES categories)
- North American Industry Classification System (NAICS) industry (three levels)
- PUMA of residence

The weighting scheme we employed throughout this report is:

$$(\text{Income} \times \text{NAICS}) \times \text{PUMA}$$

In other words, the entries in PUMS were re-weighted so that on aggregate the distribution of entries had the same proportion of individuals in each category of income and NAICS industry as the LODES data. This weight was then multiplied

by a PUMA weight, under which the distribution of residential PUMAs in PUMS proportionally matched the LODES data. Formally:

- Let L be a 3×3 matrix, such that $L_{i,j}$ is the proportion of individuals in our LODES data in income group i and NAICS category j .
- Let P be a 3×3 matrix, such that $P_{i,j}$ is the proportion of the total weight of entries in our PUMS data in income group i and NAICS category j .
- Let U_L be a vector whose i th entry is the number of individuals in our LODES data with residential PUMA i . Note that entries corresponding to PUMAs with fewer than five entries in our PUMS data were given zero weight. This was to ensure that a small number of PUMS entries did not have outside influence.
- Let U_P be a vector whose i th entry is the total weight of entries in our PUMS data with residential PUMA i .

For an entry i in the PUMS data, if p_i is its person weight in PUMS⁶¹; i^* is its income group; j^* is its NAICS class; and i' is its residential PUMA, then its adjusted weight is:

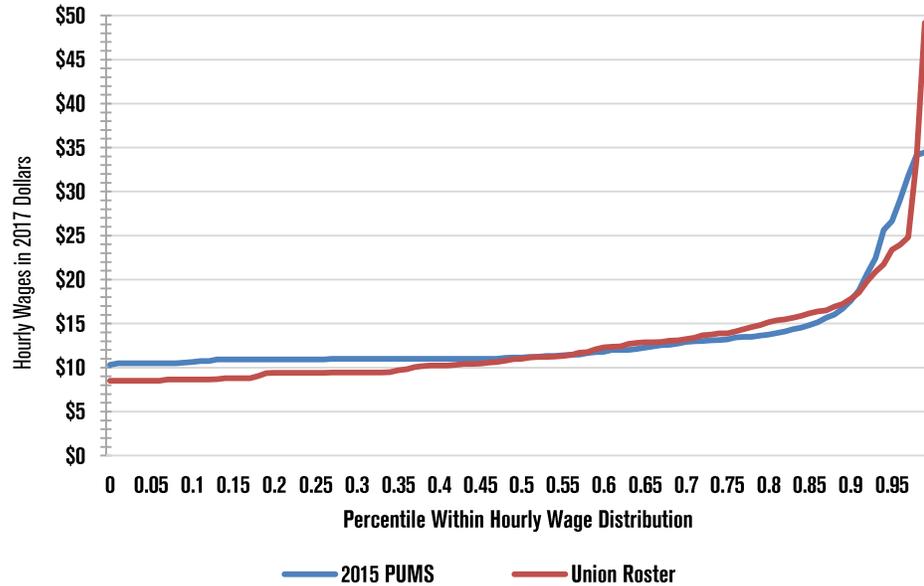
$$w_i = p_i \frac{L_{i^*,j^*} U_{L,i'}}{P_{i^*,j^*} U_{P,i'}}$$

Ideally we would have used the joint distribution of all three variables (income, NAICS industry, and PUMA) to re-weight our PUMS data. However, this joint distribution was not available. The joint distribution of income category and NAICS industry for Disneyland workers comes from the LODES Workplace Area Characteristics (WAC) data, which does not include information about worker home location.

After applying this weighting scheme, we evaluated whether the weighted PUMS data matched the LODES data for workers employed on the Disneyland Resort footprint based on age, gender, ethnicity, industry sector, and place of residence. These comparisons confirmed a close match between the two datasets.

We also found that our re-weighted 2015 PUMS data set⁶² included greater representation of high-wage workers than our complete union data. This may be a result of our LODES data including non-union employees on the Disneyland Resort footprint, such as managers and supervisors. We subsequently excluded from our PUMS data any entries with an occupation of manager or supervisor. We also excluded from our 2015 PUMS data set the entries with annual income greater than \$35,000 or less than \$750 in 2017 dollars, to further ensure that we are only capturing Disneyland Resort union workers. The upper cutoff value is based on the hourly wage distribution of union workers reported in the full union data. The 90th percentile of this hourly wage distribution is approximately \$17.5. A worker earning this amount for 40 hours per week, 50 weeks per year, would earn \$35,000 annually. Since most workers work less than 2000 hours per year,

Exhibit 89: Survey Respondents Compared to All Union Members: 2015 PUMS vs. Union Roster

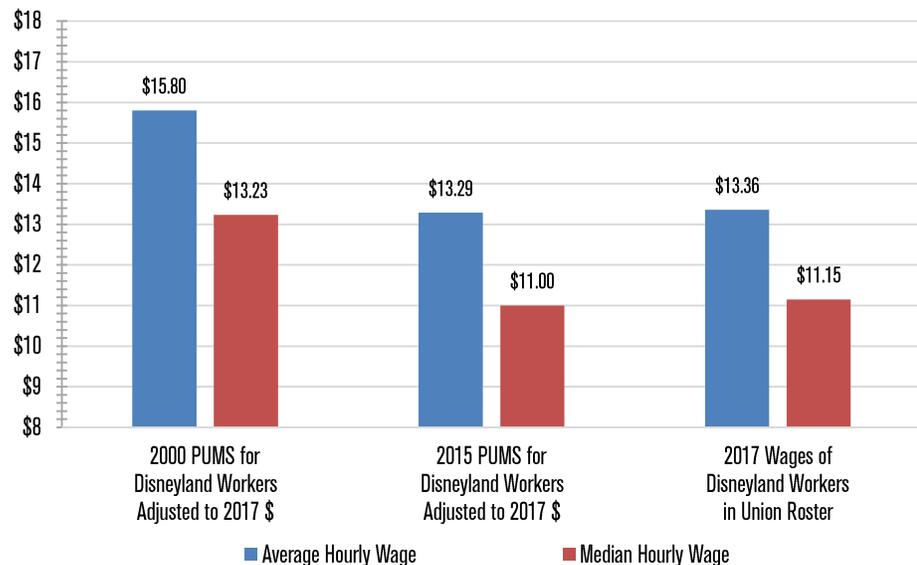


Sources: Survey of Disneyland Resort employees and CRLU (Coalition of Resort Employee Labor Unions).

this \$35,000 income ceiling excludes only the highest percentiles of earners in our target population.

The distribution of hourly wages calculated from 2015 PUMS data after implementing these restrictions tracks closely to the distribution reported in the full union roster data is shown in *Exhibit 89*. The discrepancy for lower wage earners is due the fact that the California minimum wage was lower when our

Exhibit 90: Wages of Disneyland Resort Workers: Reweighted 2000 and 2015 PUMS vs. Union Roster



Sources: American Community Survey Public Use Microdata Sample (PUMS) 2000 and 2011-2015 records matched with U.S. Census Bureau LODES data for workers employed on Disneyland Resort footprint, and CRLU (Coalition of Resort Employee Labor Unions). Wages adjusted based on the Consumer Price Index for All Urban Consumers in Los Angeles-Riverside-Orange County, California.

2015 PUMS data was collected (2011-2015). The California minimum wage was \$8.00 until July, 2014 and \$9.00 subsequently. However, it rose to \$10.00 in 2016, before our union data was gathered⁶³. Accordingly, the 2015 PUMS wage curve stays slightly below the Disneyland union roster curve until the 2017 minimum wage is exceeded.

In order to make comparisons between 2015 and 2000 PUMS data we applied the same set of restrictions on occupation and income level to the 2000 PUMS data set. However, we adjusted the wage ceiling for the 2000 PUMS data. Income of \$35,000 in 2017 dollars is approximately the 80th percentile of earners in our weighted PUMS 2015 data set, after excluding managers, supervisors, and those earning less than \$750. Because we did not have access to Disneyland union wage data for 2000, we found the 80th percentile value of the corresponding distribution of earners in 2000. This resulted in a wage ceiling of \$49,361 in 2017 dollars for 2000 PUMS data.

The results of this process are shown in *Exhibit 90*. Adjusted PUMS wages for 2015 using the methodology described in this section match actual wages of union workers within a few cents. The average PUMS wage is \$13.29 and the average union wage is \$13.36. This precise outcome validated applying this methodology to 2000 PUMS data to estimate wages paid to the same group of workers in that year.

Corporate Research – Walt Disney Company

Corporate research was conducted drawing on public domain information from financial reports, annual reports, company websites, market and investment reports, and published books and articles. In addition to news media coverage this included stock analyst reports from:

- CreditSuisse
- Deutsche Bank
- J.P.Morgan
- Macquarie Research
- Morgan Stanley

Exhibit 91: Disneyland footprint with 2000 and 2010 Census Blocks Overlaid



Sources: U.S. Census Bureau LODES data for workers employed on Disneyland Resort footprint.

XV. Survey Questionnaire

Disneyland Worker Survey

Welcome to the Disneyland Resort Worker Survey. This survey is **not** sponsored by the Disneyland Resort or any companies related to The Walt Disney Company. The purpose of this survey is to gather information about Disney workers and the housing, food, and employment issues they may be experiencing. Participation in this research is voluntary. The survey will take approximately 10-15 minutes.

Do you wish to continue?

- Yes
- No

1. In the first questions below, you will be asked about your union affiliation and Disney worker identification numbers so that UEPI/College and the Economic Roundtable can monitor and analyze survey responses and provide summarized information about race and gender to the respondents' respective union contracted in this research project. We ask for your Disneyland Worker Identification in order to verify that you are a Disneyland employee and so that UEPI/College and the Economic Roundtable can monitor and summarize survey responses for each participating union in this survey. No personally identifying information will be shared in this report; the report will only include a summary of the survey responses and will not include any individual information.

2. **PLEASE ENTER YOUR DISNEY EMPLOYEE ID NUMBER IN THE TEXT BOX BELOW.** This number is found on your ID badge (please include all zeros).
3. Which union represents you?
- IATSE Local 504
 - IATSE Local 923
 - IATSE Local 706
 - AGVA
 - AFM Local 7
 - Independent Employee Service Association
 - SEIU/USWW
 - Unite Here! Local 11
 - Workers United Local 50
 - UFCW Local 324
 - I don't know
 - I am a member of a union not listed here
4. What year were you born?
5. What is your gender identity?
- Male
 - Female
 - Other
6. Which racial or ethnic group do you identify with?
- White
 - African American
 - Latino or Hispanic
 - Asian
 - Native American
 - Two or More
 - Other
7. How many hours per week do you USUALLY work at your Disneyland Resort job?
8. How many hours per week do you USUALLY work at your other job(s)?
Please skip this question or enter 0 if you do not have other jobs.

9. Including your work at the Disneyland Resort, altogether, how many jobs do you have?
- 1 job
 - 2 jobs
 - 3 jobs
 - 4 jobs
 - 5 or more jobs
10. Which of the following best describes your Disneyland Resort work schedule on a weekly basis?
- Same schedule every week
 - Different schedule from week to week
 - Schedule changes once in a while
 - I don't know
 - I prefer not to answer
11. Do your wage and benefits from Disneyland fairly compensate you for the work you do?
- Yes
 - No
 - I don't know
12. In the last year, how often have you missed a shift at Disneyland because you could not find adequate child care?
- Very often
 - Often
 - Sometimes
 - Rarely
 - Never
 - Does not apply/I do not have children
13. In the last year, how often have you missed a shift at Disneyland because you lacked reliable transportation?
- Very often
 - Often
 - Sometimes
 - Rarely
 - Never
 - Does not apply

Please indicate how strongly you agree with the following statements:

14. The scheduling of my work at the Disneyland Resort makes it difficult to find a second job.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- I don't know

15. I would like to work more hours than I am currently offered at the Disneyland Resort.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- I don't know

16. I am proud of the work I do at the Disneyland Resort.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- I don't know

17. I am treated with respect on the job.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- I don't know

18. I am treated fairly on the job.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- I don't know

19. Please tell us about where you live.

- I pay rent
- I own my home (with or without a mortgage)
- I live with family members or friends, but do not pay them rent or help with housing payments
- Other

20. How long have you lived at your current residence?

- Less than one year
- Between one and two years
- Between three and five years
- Between six and ten years
- Between eleven and fifteen years
- Between sixteen and twenty years
- More than twenty years
- Not sure

21. What was your main reason for moving to this residence?

- Change in family size
- To be closer to work
- Wanted a new or better home
- Wanted a better neighborhood or less crime
- Wanted cheaper or more affordable housing
- Was foreclosed or evicted from previous home
- Other

22. Since living at your current residence, how often have you or the people you live with been late with a rent payment?

- Always
- Often
- Sometimes
- Never

23. How likely is it that you will be able to pay for your housing (rent/mortgage) this month?

- Very likely
- Somewhat likely
- Somewhat unlikely
- Very unlikely

24. Do you earn enough money to pay for basic expenses every month?

- Yes
- No

25. Where have you spent the night in the last 30 days?

*Please check **ALL that apply**.*

- My apartment or home
- The apartment or home of an acquaintance, friend or relative who provided basic accommodation at no cost
- Car, truck, van, RV, or camper
- Hotel or motel
- Outdoors
- Emergency shelter
- Other

26. How safe do you feel in your neighborhood?

- Not at all safe
- A little bit safe
- Somewhat safe
- Quite safe
- Very safe
-

27. How often do you personally worry about being evicted from your residence?
- Very often
 - Somewhat often
 - Worry from time to time
 - Almost never worry
 - Does not apply
28. In the past two years, how many times have you moved?
29. Thinking back over the past two years, was there ever a time when you were homeless or did not have your own place to live or sleep?
- Yes
 - No
30. In the past 12 months, did you receive benefits from a Food Stamp Program, CalFresh, SNAP, food banks, or other food donation programs?
- Yes
 - No
31. “The food that I bought just didn’t last, and I didn’t have enough money to buy more.”
Was that sometimes, often, or never true for your household in the last 12 months?
- Sometimes true
 - Often true
 - Never true
32. “I couldn’t afford to eat balanced meals”
Was that often, sometimes, or never true for your household in the last 12 months?
- Sometimes true
 - Often true
 - Never true
33. In the last 12 months, since last September, did you ever cut the size of your meals or skip meals because there wasn’t enough money for food?
- Yes
 - No

34. If yes, how often did this happen?
- Almost every month
 - Some months but not every month
 - Only 1 or 2 months
35. In the last 12 months, did you ever eat less than you felt you should because there wasn't enough money for food?
- Yes
 - No
36. In the last 12 months, were you ever hungry but didn't eat because there wasn't enough money for food?
- Yes
 - No
37. Thinking about your daily commute to work last week, how many minutes did it usually take you to get from your residence to your Disneyland Resort job? This includes the time spent on the employee shuttle.
- 0 - 20 minutes
 - 20 - 40 minutes
 - 40 minutes - 1 hour
 - 1 hour - 1.5 hours
 - 1.5 hours - 2 hours
 - 2 hours - 2.5 hours
 - 2.5 hours - 3 hours
 - 3 or more hours
38. Rather than commute to your residence between your shifts at Disneyland Resort, do you ever stay with friends, sleep in your car, or rent a hotel room, etc.?
- Yes
 - No

39. How did you usually get to your Disneyland Resort job last week?

If you used more than one mode of transportation, please select the one used for most of the distance.

- Personal vehicle
- Walk
- Bicycle
- Bus
- Metro link, Amtrak, or other rail system
- Carpool
- Other

40. During the past 12 months, was there any time when you needed any of the following but didn't get it because you couldn't afford it?

Please select ***ALL that apply.***

- Prescription medicines
- Eyeglasses or contact lenses
- Dental care (including check-ups)
- Follow-up medical care
- Mental health care or counseling
- Specialist medical attention

41. Which best describes your family:

- Just me (not married/not living with partner, no children)
- Single parent
- Married or living with partner, no children
- Married or living with partner, with children
- Other

42. Including yourself, how many people live in your household?

Please do not include anyone who usually lives somewhere else or is just visiting, such as a college student away at school. Please include roommates and/or tenants.

43. How many children under the age of 18 live with you?
44. If you have children, do you pay for the care of these children while you work at the Disneyland Resort?
- Yes
 - No
 - I do not have children
45. If you have children, tell us if you agree or disagree with the following statement: The scheduling of my work at the Disneyland Resort makes it difficult to care for family and children.
- Strongly agree
 - Agree
 - Neither agree nor disagree
 - Disagree
 - Strongly disagree
 - Don't know
 - Does not apply/I do not have children
46. Should Disneyland provide onsite, reduced cost childcare?
- Yes
 - Maybe
 - No
47. Would you use onsite, reduced cost childcare if Disneyland provided it?
- Yes
 - No
 - I don't have children/plan to have children
48. What kind of health insurance plan are you covered by?
- Disneyland Resort health insurance
 - Health insurance plan of someone in my family
 - Health insurance that I purchase privately
 - Medicaid / Medical assistance
 - Other health insurance
 - I do not have health insurance

49. **IF** you **ARE** covered by Disneyland Resort health insurance, are you able to afford your health insurance premium every month?
- No. It is impossible for me to afford the monthly health insurance premium
 - I have to give up other necessities in order to pay the monthly health insurance premiums
 - I am able to pay the monthly health insurance premium
 - The monthly health insurance premium is very affordable

50. **IF** you **ARE NOT** covered by Disneyland Resort health insurance, why not?
- Can't afford it / too expensive
 - Not eligible due to working status
 - Don't need it because I am covered by another plan
 - Health insurance is not a high priority for me
 - Other reason

51. Thank you for your responses. The final question invites you to share your experience working for Disneyland Resorts, reflect on how working for the company has changed since you began, and to tell us your story. (There is no word limit)

Please remember that your responses will be confidential. We will not attribute your comments to you and will not share any details that may be used to identify you.

XVI. Acknowledgements

The authors wish to thank the following people for their help on various aspects of this report: Flor Barajas-Tena, Megan Bomba, Emily Erickson, Joanne Franco, Clara Turner, and John Zerolnick.

We would like to express our appreciation to the Coalition of Resort Labor Unions (CRLU) for underwriting this report and for their commitment to using evidence-based research to improve the lives of workers. The CRLU members include: American Federation of Musicians Local 7; American Guild of Variety Artists (AGVA); Bakery, Confectionery, Tobacco Workers & Grain Millers International Union Local 83; IATSE Local 504; IATSE Local 923; IATSE Local 706; Independent Employee Service Association (IESA); Service Employees International Union/United Service Workers West; and Workers United Local 50.

We express the same appreciation to United Food and Commercial Workers Local 324 and UNITE HERE Local 11, which work closely with but are not formal members of the CRLU.

We also wish to thank Orange County Communities Organized for Responsible Development (OCCORD) for making it possible to include Clara Turner as part of the research team.

XVII. Authors' Biographies

Peter Dreier is E.P. Clapp Distinguished Professor of Politics and chair of the Urban & Environmental Policy Department at Occidental College. He earned his Ph.D. from the University of Chicago.

Daniel Flaming is president of the Los Angeles Economic Roundtable, a nonprofit urban research organization that analyzes economic, social, and environmental conditions. He earned his Ph.D. from the University of Southern California.

Lucero Herrera is a research analyst at the UCLA Labor Center. She earned her B.A. at the University of Chicago and her Master's Degree in Urban and Regional Planning at UCLA.

Martha Matsuoka is Associate Professor of Urban & Environmental Policy, and director of the Urban & Environmental Policy Institute, at Occidental College. She earned her Ph.D. in Urban and Regional Planning at UCLA.

Jane Carlen is the Economic Roundtable's statistician. She earned her Ph.D. from UCLA.

Patrick Burns is senior researcher at the Economic Roundtable. He earned his Master's Degree in Economic Geography at Kent State University.

XVIII. End Notes

¹ Disneyland Resort is comprised of the original Disneyland theme park as well as the California Adventure theme park.

² Walt Disney Animation Studios, <https://www.disneyanimation.com/studio/studiolife>.

³ 29,723 full- and part-time employees were shown to be employed on the Disneyland Resort footprint in 2015 by the U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics.

⁴ The unions and union locals whose members took the survey include the following: the American Guild of Variety Artists (AGVA); Bakery, Confectionery, Tobacco Workers & Grain Millers International Union Local 83; IATSE Local 504; IATSE Local 923; IATSE Local 706; Independent Employee Service Association (IESA); Orange County Musicians' Association-American Federation of Musicians, Local 7; Service Employees International Union/United Service Workers West; United Food and Commercial Workers Local 324; UNITE HERE Local 11; and Workers United Local 50.

⁵ The poverty threshold for a family of four in 2017 was \$24,600. An individual earning \$11.82 an hour, working 40 hours a week for 52 weeks a year, earns \$24,585 a year. The federal poverty guidelines are listed here: <https://aspe.hhs.gov/prior-hhs-poverty-guidelines-and-federal-register-references>

⁶ Alisha Coleman-Jensen, Matthew P. Rabbitt, Christian A. Gregory, and Anita Singh, Household Food Security in the United States in 2016, Washington, D.C., U.S. Department of Agriculture, Economic Research Service, September 2017. <https://www.ers.usda.gov/webdocs/publications/84973/err-237.pdf?v=42979>. See also: <https://www.ers.usda.gov/topics/food-nutrition-assistance/food-security-in-the-us/key-statistics-graphics.aspx>; <http://www.feedingamerica.org/assets/pdfs/fact-sheets/poverty-and-hunger-fact-sheet.pdf>

⁷ U.S. Department of Agriculture, Economic Research Service; and, Gundersen, C., A. Dewey, A. Crumbaugh, M. Kato & E. Engelhard. Map the Meal Gap 2017: Food Insecurity and Child Food Insecurity Estimates at the County Level. Feeding America, 2017; and . <https://www.ers.usda.gov/topics/food-nutrition-assistance/food-security-in-the-us/key-statistics-graphics.aspx#map>

⁸ Food security is assessed nationwide by using variations of a standardized survey instrument developed by the USDA. This study utilized the 6-question short form version of the survey, in which survey respondents are asked to answer the questions as they pertain to the previous 12 months. To evaluate a household's level of food security or insecurity, the sum of affirmative responses is used to generate a raw score, with a range of 0 to 6. Households that respond affirmatively to none or one of the questions are classified as "food secure." Households that respond affirmatively to two, three, or four of the questions are classified as having "low food security." This is characterized by reduced quality, variety or desirability of the diet. Households that respond affirmatively to five or six questions are classified as having "very low food security." This condition is characterized by disrupted eating patterns and reduced food intake. USDA's Six-Item Food Security Module includes the following questions:

1. "The food that (I/we) bought just didn't last, and (I/we) didn't have money to get more." Was that often, sometimes, or never true for (you/your household) in the last 12 months?

2. “(I/we) couldn’t afford to eat balanced meals.” Was that often, sometimes, or never true for (you/your household) in the last 12 months?
3. In the last 12 months, since last (name of current month), did (you/you or other adults in your household) ever cut the size of your meals or skip meals because there wasn’t enough money for food?
4. [IF YES ABOVE, ASK] How often did this happen—almost every month, some months but not every month, or in only 1 or 2 months?
5. In the last 12 months, did you ever eat less than you felt you should because there wasn’t enough money for food?
6. In the last 12 months, were you every hungry but didn’t eat because there wasn’t enough money for food?

⁹ A previous version of Disneyland Resort’s customer service guidelines for employees was called the “Seven Service Guidelines.” These are discussed in the following: Lee Cockerell, Creating Magic: 10 Common Sense Leadership Strategies from a Life at Disney, Crown, 2008. (Cockerell is the former Executive Vice President for operations at Walt Disney World Resort); Theodore Kinni and the Disney Institute, Be Our Guest: Revised and Updated Edition: Perfecting the Art of Customer Service, 2011;

<https://www.acast.com/disneymagic/seven-guest-service-guidelines>. See also John Van Maanen, "The Smile Factory: Work at Disneyland," in Peter J. Frost, Larry F. Moore, Meryl Reis Louis, Craig C. Lundberg, and Joanne Martin, editors, Reframing Organizational Culture, Sage Publications, 1991; and Robert Niles, “Me vs. the Walt Disney World Smiling Police,” Theme Park Insider, September 2, 2010 <http://www.themeparkinsider.com/flume/201009/2082/>

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¹² U.S. Census Bureau, 2016 American Community Survey 1-Year Estimate, Table S0101: Sex and Age, City of Anaheim, California. The 3,338 CRLU workers residing in the City of Anaheim comprise 1.51% of the population age 18 to 64 years.

¹³ 2017 Annual Report, pages 18 and 23 <https://ditm-twdc-us.storage.googleapis.com/2017-Annual-Report.pdf>

¹⁴ <http://fortune.com/fortune500/disney/>

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2014 Annual Report, page 32; <https://ditm-twdc-us.storage.googleapis.com/2015/10/2014-Annual-Report.pdf>; 2015 Annual Report, page 31; <https://ditm-twdc-us.storage.googleapis.com/2015-Annual-Report.pdf>; 2016 Annual Report, page 31; <https://ditm-twdc-us.storage.googleapis.com/2016-Annual-Report.pdf>; 2017 Annual Report, page 30; <https://ditm-twdc-us.storage.googleapis.com/2017-Annual-Report.pdf>

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Family type and employment status	Percent of Workers in Disneyland Workforce	Mean Number of Persons in Household	Number of Wage Earners	Orange County Living Wage
Married-couple family: Husband and wife in Labor Force	36%	4.396	2	\$18.29
Married-couple family: Husband in labor force, wife not in Labor Force	13%	4.82	1	\$36.13
Married-couple family: Husband not in Labor Force, wife in Labor Force	5%	5.608	1	\$36.13
Other family: Male householder, no wife present, in Labor Force	8%	4.127	1	\$30.61
Other family: Female householder, no husband present, in Labor Force	19%	3.613	1	\$30.61
Not a family [assumed to be roommates]	20%	2.659	3	\$14.48
Weighted Average Living Wage for Disneyland Workers				\$23.94

⁴⁹ The ripple effect and the estimated scale of impacts is described by Michael Reich, Ken Jacobs, Annette Bernhardt and Ian Perry, *The Proposed Minimum Wage Law for Los Angeles: Economic Impacts and Policy Options*, Institute for Research on Labor and Employment, University of California, Berkeley (2015).

⁵⁰ “Person-years of employment” describes the number of jobs supported for one year by each sector’s change in economic activity. The IMPLAN input-output model counts each job, whether full-time or part time, the same. When seasonal employment is stimulated by this added household spending, the equivalent number of year-round jobs is supported (two six-month jobs equal one year-long job). When part-time employment is stimulated by this added household spending, the equivalent number of year-round jobs is supported (two six-month jobs equal one year-long job).

⁵¹ “Purchases of intermediate inputs in IMPLAN consist of the goods and services—such as energy, materials, and purchased services—that are purchased and used for the production of other goods and services rather than for final consumption. These inputs are sometimes referred to as current-account expenditures. They do not include any capital-account purchases nor do they include the inputs from the primary factors of production (capital and labor) that are components of value added. (BEA).” Source: Olson, Doug and Scott Lindall. 2010. *IMPLAN Version 3.0 User’s Guide*. MIG, Inc., 1725 Tower Drive west, Suite 140, Stillwater, MN 55082, www.implan.com.

⁵² “*Value added* in IMPLAN consists of compensation of employees, taxes on production and imports less subsidies (formerly indirect business taxes and nontax payments), and gross operating surplus (formerly “other value added”).” Value added excludes the “*purchases of intermediate inputs* consist of the goods and services; see next note for a definition of this latter category. Source: Olson, Doug and Scott Lindall. 2010. *IMPLAN Version 3.0 User’s Guide*. MIG, Inc., 1725 Tower Drive west, Suite 140, Stillwater, MN 55082, www.implan.com. It is “[t]he difference between an industry’s (or an establishment’s) total sales (output) and the cost of its intermediate inputs ... (consumption of goods and services purchased from other industries or imported). Value added consists of compensation of employees, taxes on production and imports less subsidies (formerly indirect business taxes and nontax payments), and gross operating surplus.” Source: Olson, Doug and Scott Lindall. 2010. *IMPLAN Version 3.0 User’s Guide*, www.implan.com.

⁵³ “*Employee compensation* in IMPLAN is the total payroll cost of the employee paid by the employer. This includes wage and salary, all benefits (e.g., health, retirement) and payroll taxes (both sides of social security, unemployment taxes, etc.).” Source: Olson, Doug and Scott Lindall. 2010. *IMPLAN Version 3.0 User’s Guide*. MIG, Inc., 1725 Tower Drive west, Suite 140, Stillwater, MN 55082, www.implan.com.

⁵⁴ “*Labor income* in IMPLAN consists of “All forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income” (typically owners of unincorporated small businesses). Source: Olson, Doug and Scott Lindall. 2010. *IMPLAN Version 3.0, User’s Guide*. MIG, Inc., 1725 Tower Drive west, Suite 140, Stillwater, MN 55082, www.implan.com.

⁵⁵ In addition to the household spending patterns shown in the figure (derived from national surveys), the U.S. Bureau of Labor Statistics conducts a survey to estimate the average annual expenditures and characteristics of all consumers:

Consumer Items	2012	Percent
Total	\$51,442	100%
Food	\$6,599	13%
At home	\$3,921	8%
Away from home	\$2,678	5%
Housing	\$16,887	33%
Apparel and services	\$1,736	3%
Transportation	\$8,998	17%
Health care	\$3,556	7%
Entertainment	\$2,605	5%
Cash contributions	\$1,913	4%
Personal insurance and pensions	\$5,591	11%
All other expenditures	\$3,557	7%

Source: U.S. Bureau of Labor Statistics. 2013. Economic New Release: Consumer Expenditures—2012 (USDLE-13-1833), Retrieved from: <http://www.bls.gov/news.release/cesan.nr0.htm>

⁵⁶ <https://lehd.ces.census.gov/data/>

⁵⁷ This is distinct from the percentage of people excluded, since each entry corresponds to a work-home census block pair.

⁵⁸ <https://www.census.gov/programs-surveys/acs/technical-documentation/pums.htm>

⁵⁹ <https://www.census.gov/programs-surveys/acs/guidance/subjects.html>

⁶⁰ <https://www.census.gov/programs-surveys/acs/technical-documentation/pums/about.html>

⁶¹ https://usa.ipums.org/usa-action/variables/PERWT#description_section

⁶² To achieve a 5% sample, the PUMS 2015 data set includes data collected in 2011–2015.

⁶³ <https://www.dir.ca.gov/iwc/minimumwagehistory.htm>