



For release 10:00 a.m. (EDT) Thursday, July 25, 2019

USDL-19-1343

Technical Information: (202) 691-5606 • productivity@bls.gov • www.bls.gov/lpc
 Media Contact: (202) 691-5902 • PressOffice@bls.gov

**PRODUCTIVITY AND COSTS BY INDUSTRY: WHOLESALE TRADE,
 RETAIL TRADE, AND FOOD SERVICES AND DRINKING PLACES INDUSTRIES – 2018**

Labor productivity rose 1.6 percent in wholesale trade, 3.2 percent in retail trade, and 1.6 percent in food services and drinking places in 2018, the U.S. Bureau of Labor Statistics reported today. **Unit labor costs**, which reflect the total labor costs required to produce a unit of output, rose in wholesale trade and food services and drinking places and were unchanged in retail trade.

For wholesale trade in 2018, productivity, output, and hours worked all increased at a faster rate than in 2017. In retail trade and food services and drinking places, the growth in output continued to outpace the growth in hours worked in 2018. In these two industry groups, growth in hours worked was slower in 2018 compared to 2017 resulting in a larger productivity increase.

Chart 1. Largest changes in productivity in 4-digit wholesale trade, retail trade, and food services and drinking places industries, 2018

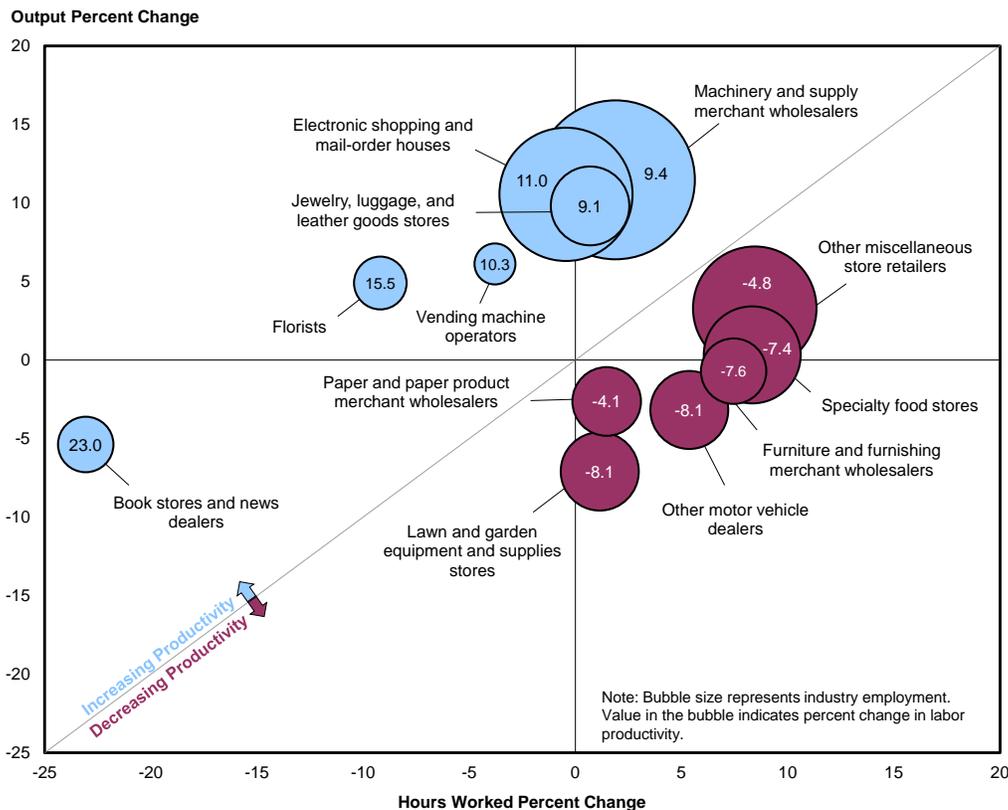


Chart 1 shows the percent changes in output and hours worked for industries with the largest increases and decreases in productivity in 2018. Change in productivity is approximately equal to the change in output minus the change in hours worked. Industries above the diagonal line experienced growth in productivity while industries below the diagonal line experienced declines.

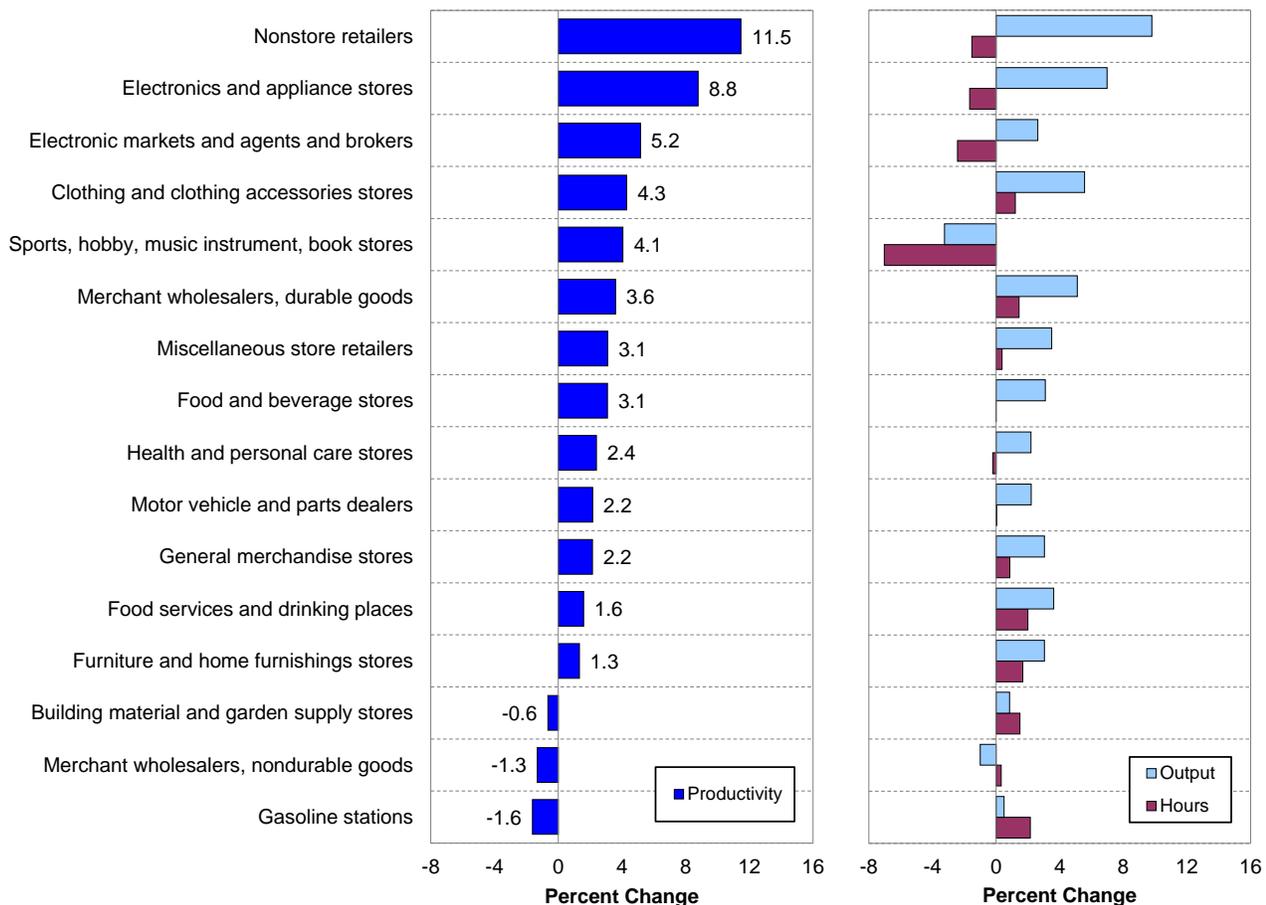
Among the six industries with the highest productivity growth, five reported growth in output while two industries showed growth in hours worked. Productivity growth was greatest in book stores and news dealers where the decline in hours worked far surpassed the decline in output.

Of the six industries with the largest declines in productivity, hours worked increased in all six and output increased in two, other miscellaneous store retailers and specialty food stores. The two industries with the greatest decrease in productivity were lawn and garden equipment and supplies stores (-8.1 percent) and other motor vehicle dealers (-8.1 percent).

Labor Productivity Rose in Majority of Industries in 2018

Productivity increased in 13 of the 16 3-digit NAICS industries studied in 2018. Five industries had productivity gains of at least 4.0 percent, with the highest in nonstore retailers (11.5 percent) which also had the largest increase in output (9.8 percent). Among the three industries with productivity declines, gasoline stations experienced the largest drop (-1.6 percent). (See chart 2).

Chart 2. Productivity change in 3-digit wholesale trade, retail trade, and food services and drinking places industries, 2018



Productivity increased in 32 of the 49 4-digit NAICS industries studied in 2018. Output grew in 35 industries while hours worked grew in 29 industries. (See table 1).

In **wholesale trade**, productivity rose 1.6 percent as output grew 2.3 percent and hours worked increased 0.7 percent.

- Productivity grew 3.6 percent in durable goods wholesalers and fell 1.3 percent in nondurable goods wholesalers.
- Productivity increased in 10 of the 19 4-digit wholesale trade industries while output rose in 11 industries and hours worked grew in 12.
- The most rapid increase in productivity occurred in machinery and supply merchant wholesalers (9.4 percent) because output grew at five times the rate of hours worked.

In **retail trade**, productivity increased by 3.2 percent as output grew faster (3.3 percent) than hours worked (0.2 percent).

- Productivity increased in 20 of the 27 4-digit retail trade industries while output grew in 20 industries and hours worked rose in 14.
- The largest productivity increase occurred in book stores and news dealers (23.0 percent) as hours worked declined at over four times the rate of output.
- Electronic shopping and mail-order houses experienced the largest growth in output (10.6 percent) resulting in an 11.0 percent increase in productivity.

In **food services and drinking places**, productivity increased by 1.6 percent as growth in output (3.6 percent) outpaced growth in hours worked (2.0 percent).

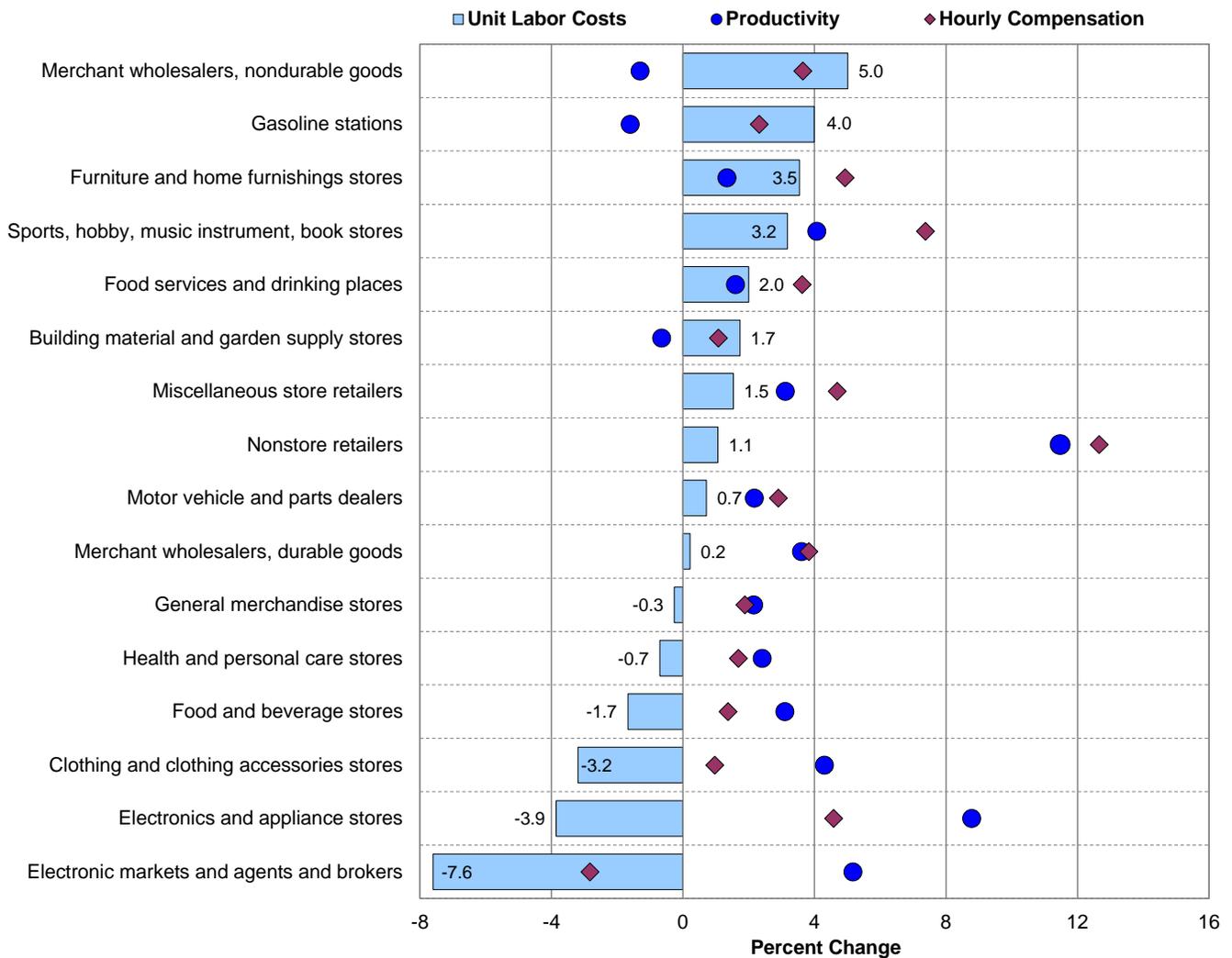
- Within this industry group, drinking places (alcoholic beverages) was the only 4-digit industry with a productivity decline (-0.7 percent).
- All three 4-digit industries had increases in hours worked and output.

Unit Labor Costs Decline in One Third of Industries in 2018

When productivity gains outpace hourly compensation, unit labor costs decline.

- Unit labor costs fell in 6 out of 16 3-digit industries in 2018. All unit labor cost declines occurred in industries where productivity rose. (See chart 3).
- Unit labor costs declined in 5 of 19 wholesale trade and 12 of 27 retail trade 4-digit industries. Two of three food services and drinking places industries had increases in unit labor costs.
- Hourly compensation, defined as labor compensation per hour worked, rose in 41 of the 49 4-digit industries.

Chart 3. Unit labor costs, productivity, and hourly compensation in 3-digit wholesale trade, retail trade, and food services and drinking places industries, 2018



Labor Productivity Increases Over the Long Term in Most Industries

From 1987 to 2018, **labor productivity** increased at an average annual rate of 2.7 percent in wholesale trade, 2.9 percent in retail trade, and 0.5 percent in food services and drinking places. (See table 2.)

- Among the 4-digit industries, productivity rose in 46 industries, declined in 2 industries, and was unchanged in 1 industry from 1987 to 2018.
- Of the 46 4-digit industries with increasing productivity growth, 43 experienced rising output while 27 had an increase in hours worked.
- Median productivity among 4-digit industries grew at an average annual rate of 1.9 percent.
- Compared to the period 1987-2007, all three industry groups experienced a productivity slowdown from 2007 to 2018. (See chart 4).
- The number of 4-digit industries with increasing productivity dropped from 45 out of 49 during the 1987-2007 period to 34 during the 2007-2018 period.

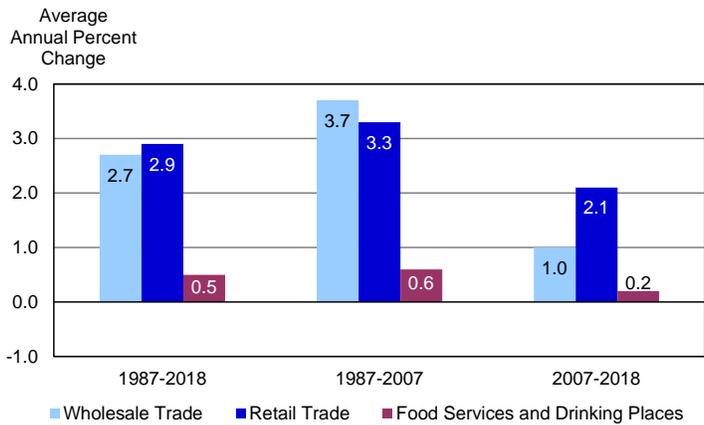
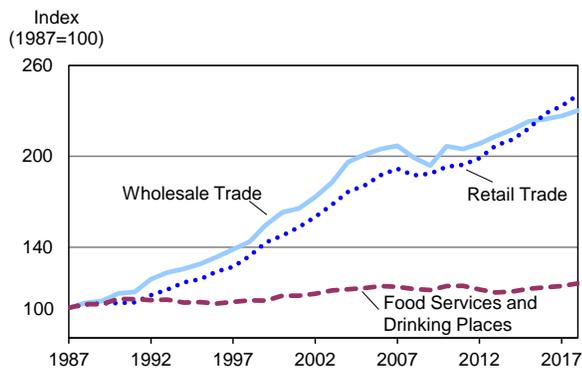
Long-term Trends in Unit Labor Costs Vary by Sector

From 1987 to 2018, **unit labor costs** increased at an average annual rate of 3.0 percent in food services and drinking places, the greatest change among the three industry groups. Unit labor costs increased by 0.9 percent in wholesale trade and were unchanged in retail trade. (See table 2.)

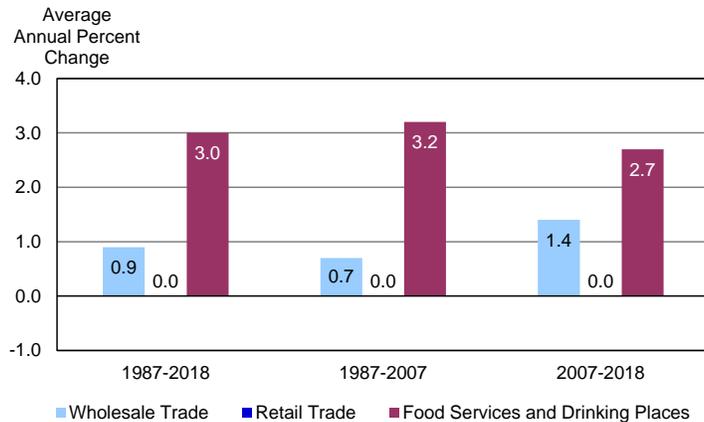
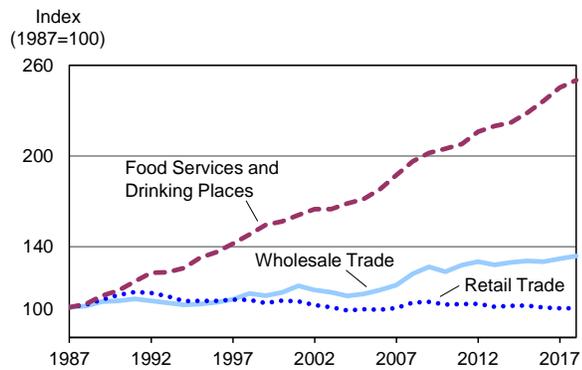
- Among the 4-digit industries, unit labor costs fell in 15 out of 49 industries from 1987 to 2018. Unit labor costs declined in 2 out of 19 wholesale trade and in 13 out of 27 retail trade industries. Unit labor costs increased in all food services and drinking places industries.
- From 2007 to 2018, unit labor costs declined in 13 out of 49 industries. All industries with declines in unit labor costs experienced increases in productivity.
- During the 1987 to 2007 and 2007 to 2018 periods, electronics and appliance stores had the largest unit labor cost declines and the largest productivity gains among the 3-digit industries.

Chart 4. Long-term changes in productivity and unit labor costs for wholesale trade, retail trade, and food services and drinking places industry groups

Labor Productivity



Unit Labor Costs



Additional Information

The trade and food services and drinking places measures in this release incorporate benchmark data from the Census Bureau's Service Annual Survey (November 2018), Annual Wholesale Trade Report (April 2019), Monthly Wholesale Trade Survey (May 2019), Annual Retail Trade Survey (April 2019), Annual Revision of the Monthly Retail and Food Services: Sales and Inventories (June 2019), and Nonemployer Statistics (June 2019). Accordingly, the labor productivity and output series for all industries have been revised for 2017 and earlier years. Additionally, the unit labor cost measures incorporate preliminary data from the BLS Quarterly Census of Employment and Wages (June 2019).

Access the productivity data dashboard at www.bls.gov/lpc/lpc_by_industry_dashboard.xlsx for

- Additional industries and sectors
- Detailed data series: indexes of productivity and related measures; rates of change; and levels of industry employment, hours worked, nominal value of production, and labor compensation
- Additional years and long-term data

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Technical Note

Labor Productivity: Labor productivity describes the relationship between real output and the labor hours involved in its production. These measures show the changes from period to period in the amount of goods and services produced per hour worked. Although the labor productivity measures relate output in an industry to hours worked of all persons in that industry, they do not measure the specific contribution of labor to growth in output. Rather, they reflect the joint effects of many influences, including: changes in technology; capital investment; utilization of capacity, energy, and materials; the use of purchased services inputs, including contract employment services; the organization of production; the characteristics and effort of the workforce; and managerial skill.

Unit Labor Costs: Unit labor costs represent the cost of labor required to produce one unit of output. The unit labor cost indexes are computed by dividing an index of nominal industry labor compensation by an index of real industry output. Unit labor costs also describe the relationship between compensation per hour worked (hourly compensation) and real output per hour worked (labor productivity). When hourly compensation growth outpaces productivity, unit labor costs increase. Alternatively, when productivity growth exceeds hourly compensation, unit labor costs decrease.

Output: Industry output is measured as an annual-weighted index of the changes in the various products (in real terms) provided for sale outside the industry. Real industry output for data in this release is derived by deflating nominal sales or values of production using price indexes. Industry output measures are constructed primarily using data from the economic censuses and annual surveys of the U.S. Census Bureau, U.S. Department of Commerce, together with information on price changes from BLS.

Labor Hours: Labor hours are measured as annual hours worked by all employed persons in an industry. Data on industry employment and hours come primarily from the BLS Current Employment Statistics (CES) survey and Current Population Survey (CPS). CES data on the number of total and production worker jobs held by wage and salary workers in nonfarm establishments are supplemented with CPS data on self-employed and unpaid family workers to estimate industry employment. Hours worked estimates are derived using CES and CPS employment, CES data on the average weekly hours paid of production workers, CPS data on hours of nonproduction, self-employed, and unpaid family workers, and ratios of hours worked to hours paid based on data from the National Compensation Survey (NCS). For some industries, employment and hours data are supplemented or further disaggregated using data from the BLS Quarterly Census of Employment and Wages (QCEW), the Census Bureau, or other sources. Hours worked are estimated separately for different types of workers and then are directly aggregated; no adjustments for labor composition are made.

Labor Compensation: Labor compensation, defined as payroll plus supplemental payments, is a measure of the cost to the employer of securing the services of labor. Payroll includes salaries, wages, commissions, dismissal pay, bonuses, vacation and sick leave pay, and compensation in kind. Supplemental payments include both legally required expenditures and payments for voluntary programs. The legally required portion consists primarily of federal old age and survivors' insurance, unemployment compensation, and workers' compensation. Payments for voluntary programs include all programs not specifically required by legislation, such as the employer portion of private health insurance and pension plans. Industry compensation measures are constructed primarily using data from the BLS QCEW and the economic censuses of the Census Bureau, U.S. Department of Commerce.

Table 1. Recent labor productivity, unit labor costs, and related data

Industry	2012 NAICS code	2018 Employment (thousands)	Percent change, 2017-2018				
			Labor productivity	Unit labor costs	Output	Hours worked	Labor compensation
Wholesale Trade							
Wholesale trade.....	42	5,977.1	1.6	1.4	2.3	0.7	3.7
Merchant wholesalers, durable goods.....	423	3,214.8	3.6	0.2	5.1	1.4	5.3
Motor vehicles and parts.....	4231	352.5	4.3	-0.8	3.9	-0.4	3.1
Furniture and furnishings.....	4232	119.7	-7.6	5.2	-0.7	7.5	4.4
Lumber and construction supplies.....	4233	247.3	-1.8	5.4	-0.7	1.1	4.6
Commercial equipment.....	4234	692.4	5.4	1.2	4.5	-0.8	5.7
Metals and minerals.....	4235	137.1	3.2	2.6	7.1	3.7	9.9
Appliances and electric goods.....	4236	359.5	2.6	-0.4	5.1	2.4	4.6
Hardware and plumbing.....	4237	280.8	-1.8	4.5	2.3	4.1	6.8
Machinery and supplies.....	4238	704.0	9.4	-5.2	11.5	1.9	5.7
Miscellaneous durable goods.....	4239	321.5	2.4	0.1	3.6	1.2	3.7
Merchant wholesalers, nondurable goods.....	424	2,206.4	-1.3	5.0	-1.0	0.3	4.0
Paper and paper products.....	4241	131.4	-4.1	3.3	-2.6	1.5	0.6
Druggists' goods.....	4242	237.3	-0.9	9.8	1.6	2.5	11.5
Apparel and piece goods.....	4243	155.7	0.4	2.6	-1.5	-1.8	1.1
Grocery and related products.....	4244	811.9	-1.9	3.6	-1.6	0.3	2.0
Farm product raw materials.....	4245	72.4	4.7	-2.7	-0.4	-4.9	-3.1
Chemicals.....	4246	150.8	-0.4	0.6	5.2	5.6	5.9
Petroleum.....	4247	103.9	-3.1	15.0	-4.3	-1.3	10.0
Alcoholic beverages.....	4248	201.3	0.3	1.0	3.4	3.1	4.4
Miscellaneous nondurable goods.....	4249	341.7	-1.6	4.1	-4.4	-2.8	-0.5
Electronic markets and agents and brokers.....	425	555.9	5.2	-7.6	2.6	-2.4	-5.2
Electronic markets and agents and brokers.....	4251	555.9	5.2	-7.6	2.6	-2.4	-5.2
Retail Trade							
Retail trade.....	44-45	16,679.8	3.2	0.0	3.3	0.2	3.4
Motor vehicle and parts dealers.....	441	2,074.5	2.2	0.7	2.2	0.0	2.9
Automobile dealers.....	4411	1,332.4	2.6	-0.5	2.7	0.1	2.2
Other motor vehicle dealers.....	4412	169.6	-8.1	14.1	-3.2	5.4	10.4
Auto parts, accessories, and tire stores.....	4413	572.5	2.3	2.0	0.7	-1.6	2.7
Furniture and home furnishings stores.....	442	526.9	1.3	3.5	3.0	1.7	6.7
Furniture stores.....	4421	245.0	3.4	-0.7	6.5	3.0	5.7
Home furnishings stores.....	4422	281.9	-1.1	8.6	-0.8	0.3	7.8
Electronics and appliance stores.....	443	509.7	8.8	-3.9	7.0	-1.7	2.8
Electronics and appliance stores.....	4431	509.7	8.8	-3.9	7.0	-1.7	2.8
Building material and garden supply stores.....	444	1,336.4	-0.6	1.7	0.8	1.5	2.6
Building material and supplies dealers.....	4441	1,165.9	0.4	0.9	2.0	1.6	2.9
Lawn and garden equipment and supplies stores.....	4442	170.5	-8.1	7.9	-7.1	1.1	0.2
Food and beverage stores.....	445	3,166.4	3.1	-1.7	3.1	0.0	1.4
Grocery stores.....	4451	2,724.4	4.2	-2.3	3.1	-1.0	0.7
Specialty food stores.....	4452	262.7	-7.4	7.0	0.3	8.3	7.4
Beer, wine and liquor stores.....	4453	179.3	-0.6	-0.1	4.3	5.0	4.2
Health and personal care stores.....	446	1,114.2	2.4	-0.7	2.2	-0.2	1.5
Health and personal care stores.....	4461	1,114.2	2.4	-0.7	2.2	-0.2	1.5
Gasoline stations.....	447	941.8	-1.6	4.0	0.5	2.1	4.5
Gasoline stations.....	4471	941.8	-1.6	4.0	0.5	2.1	4.5
Clothing and clothing accessories stores.....	448	1,475.8	4.3	-3.2	5.6	1.2	2.2
Clothing stores.....	4481	1,095.4	4.2	-2.6	5.0	0.7	2.2
Shoe stores.....	4482	207.4	0.9	-3.4	4.6	3.7	1.1
Jewelry, luggage, and leather goods stores.....	4483	173.0	9.1	-6.5	9.8	0.7	2.7
Sports, hobby, music instruments, book stores.....	451	632.9	4.1	3.2	-3.2	-7.0	-0.2
Sporting goods and musical instrument stores.....	4511	547.2	1.8	3.4	-2.9	-4.6	0.4
Book stores and news dealers.....	4512	85.7	23.0	1.9	-5.4	-23.1	-3.6

Table 1. Recent labor productivity, unit labor costs, and related data — Continued

Industry	2012 NAICS code	2018 Employment (thousands)	Percent change, 2017-2018				
			Labor productivity	Unit labor costs	Output	Hours worked	Labor compensation
General merchandise stores.....	452	3,114.4	2.2	-0.3	3.0	0.9	2.8
Department stores.....	4521	1,163.9	0.7	0.2	-0.1	-0.8	0.1
Other general merchandise stores.....	4529	1,950.5	2.1	0.3	3.9	1.8	4.2
Miscellaneous store retailers.....	453	987.8	3.1	1.5	3.5	0.4	5.1
Florists.....	4531	77.4	15.5	-7.8	4.9	-9.2	-3.3
Office supplies, stationery and gift stores.....	4532	261.7	9.0	-9.0	5.9	-2.8	-3.6
Used merchandise stores.....	4533	222.8	8.3	3.6	0.0	-7.7	3.6
Other miscellaneous store retailers.....	4539	425.9	-4.8	8.5	3.3	8.4	12.1
Nonstore retailers.....	454	799.0	11.5	1.1	9.8	-1.5	11.0
Electronic shopping and mail-order houses.....	4541	495.6	11.0	3.4	10.6	-0.4	14.3
Vending machine operators.....	4542	47.1	10.3	1.3	6.1	-3.8	7.5
Direct selling establishments.....	4543	256.3	7.7	-3.0	4.3	-3.2	1.2
Food Services and Drinking Places							
Food services and drinking places.....	722	12,163.4	1.6	2.0	3.6	2.0	5.7
Special food services.....	7223	864.2	0.7	-0.5	5.6	4.8	5.1
Drinking places, alcoholic beverages.....	7224	407.3	-0.7	2.2	2.5	3.2	4.8
Restaurants and other eating places.....	7225	10,891.9	1.7	2.2	3.5	1.7	5.8

Table 2. Long run labor productivity, unit labor costs, and related data

Industry	2012 NAICS code	2018 Employment (thousands)	Average annual percent change, 1987-2018				
			Labor productivity	Unit labor costs	Output	Hours worked	Labor compensation
Wholesale Trade							
Wholesale trade.....	42	5,977.1	2.7	0.9	3.1	0.3	4.0
Merchant wholesalers, durable goods.....	423	3,214.8	4.3	-0.4	4.5	0.2	4.0
Motor vehicles and parts.....	4231	352.5	3.4	0.3	3.2	-0.2	3.6
Furniture and furnishings.....	4232	119.7	1.6	2.2	1.7	0.1	3.9
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Metals and minerals.....	4235	137.1	-0.4	3.8	0.0	0.3	3.8
Appliances and electric goods.....	4236	359.5	7.4	-2.9	7.2	-0.2	4.1
Hardware and plumbing.....	4237	280.8	1.5	2.0	2.4	0.9	4.5
Machinery and supplies.....	4238	704.0	1.9	1.9	2.0	0.1	4.0
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Merchant wholesalers, nondurable goods.....	424	2,206.4	1.0	2.8	1.3	0.2	4.1
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Grocery and related products.....	4244	811.9	0.9	2.4	1.6	0.7	4.1
Farm product raw materials.....	4245	72.4	1.3	3.9	-0.5	-1.8	3.4
Chemicals.....	4246	150.8	0.2	3.3	0.7	0.6	4.1
Petroleum.....	4247	103.9	2.2	2.4	0.9	-1.3	3.3
Alcoholic beverages.....	4248	201.3	0.3	2.8	2.1	1.8	4.9
Miscellaneous nondurable goods.....	4249	341.7	0.0	3.3	-0.4	-0.4	2.9
Electronic markets and agents and brokers.....	425	555.9	1.6	0.6	3.3	1.7	3.9
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Grocery stores.....	4451	2,724.4	0.6	2.3	0.6	0.1	3.0
Specialty food stores.....	4452	262.7	0.1	2.0	-0.3	-0.4	1.7
Beer, wine and liquor stores.....	4453	179.3	2.2	0.6	1.5	-0.6	2.2
Health and personal care stores.....	446	1,114.2	1.6	1.6	2.7	1.1	4.3
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Sporting goods and musical instrument stores.....	4511	547.2	4.0	-1.1	4.5	0.5	3.4
Book stores and news dealers.....	4512	85.7	1.9	1.0	0.3	-1.6	1.3

Table 2. Long run labor productivity, unit labor costs, and related data — Continued

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Department stores.....	4521	1,163.9	0.6	0.9	0.5	-0.1	1.4
Other general merchandise stores.....	4529	1,950.5	4.9	-1.8	7.4	2.3	5.5
Miscellaneous store retailers.....	453	987.8	3.3	-0.8	3.1	-0.2	2.3
Florists.....	4531	77.4	3.3	-0.1	0.1	-3.1	0.0
Office supplies, stationery and gift stores.....	4532	261.7	5.6	-2.5	3.8	-1.7	1.2
Used merchandise stores.....	4533	222.8	4.7	-2.0	5.9	1.1	3.8
Other miscellaneous store retailers.....	4539	425.9	0.9	0.6	2.4	1.5	3.1
Nonstore retailers.....	454	799.0	8.1	-3.6	8.9	0.7	5.0
Electronic shopping and mail-order houses.....	4541	495.6	9.9	-4.6	14.1	3.8	8.8
Vending machine operators.....	4542	47.1	0.5	3.0	-1.9	-2.4	1.0
Direct selling establishments.....	4543	256.3	2.4	0.3	1.0	-1.3	1.4
Food Services and Drinking Places							
Food services and drinking places.....	722	12,163.4	0.5	3.0	2.3	1.8	5.3
Special food services.....	7223	864.2	1.2	1.4	2.6	1.4	4.1
Drinking places, alcoholic beverages.....	7224	407.3	-0.3	3.1	0.0	0.3	3.0
Restaurants and other eating places.....	7225	10,891.9	0.5	3.2	2.4	1.9	5.6