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**PRODUCTIVITY AND COSTS BY INDUSTRY: WHOLESALE TRADE,
 RETAIL TRADE, AND FOOD SERVICES AND DRINKING PLACES INDUSTRIES – 2017**

Labor productivity rose 2.7 percent in wholesale trade and 2.8 percent in retail trade, and declined by 2.2 percent in food services and drinking places in 2017, 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 food services and drinking places and fell in wholesale trade and retail trade.

For wholesale trade in 2017, productivity, output, and hours worked all increased at a faster rate than in 2016. In retail trade, the growth in output continued to outpace the growth in hours worked in 2017 but led to a smaller productivity increase than in 2016. Productivity in food services and drinking places declined in 2017 due to hours worked increasing at a faster rate than output. In 2016, productivity increased in this industry group as a result of output growing at a faster rate than hours worked.

Chart 1. Productivity change in the largest (by employment) 4-digit wholesale trade, retail trade, and food services and drinking places industries, 2017

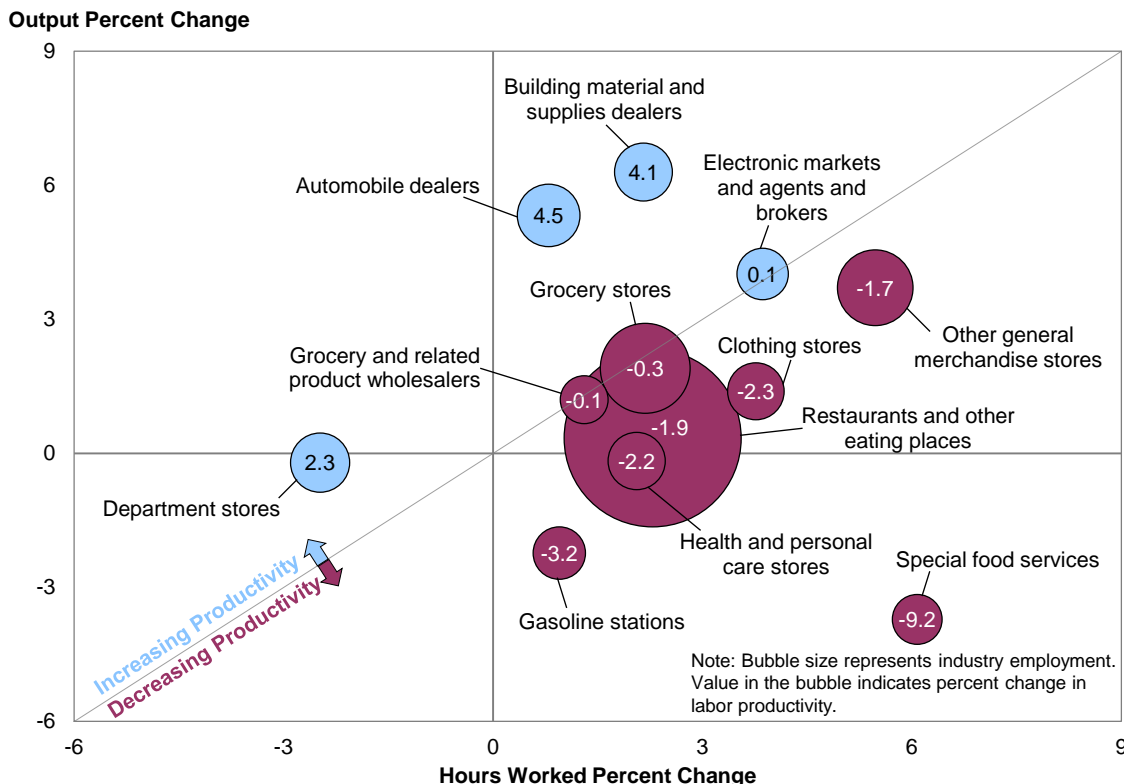


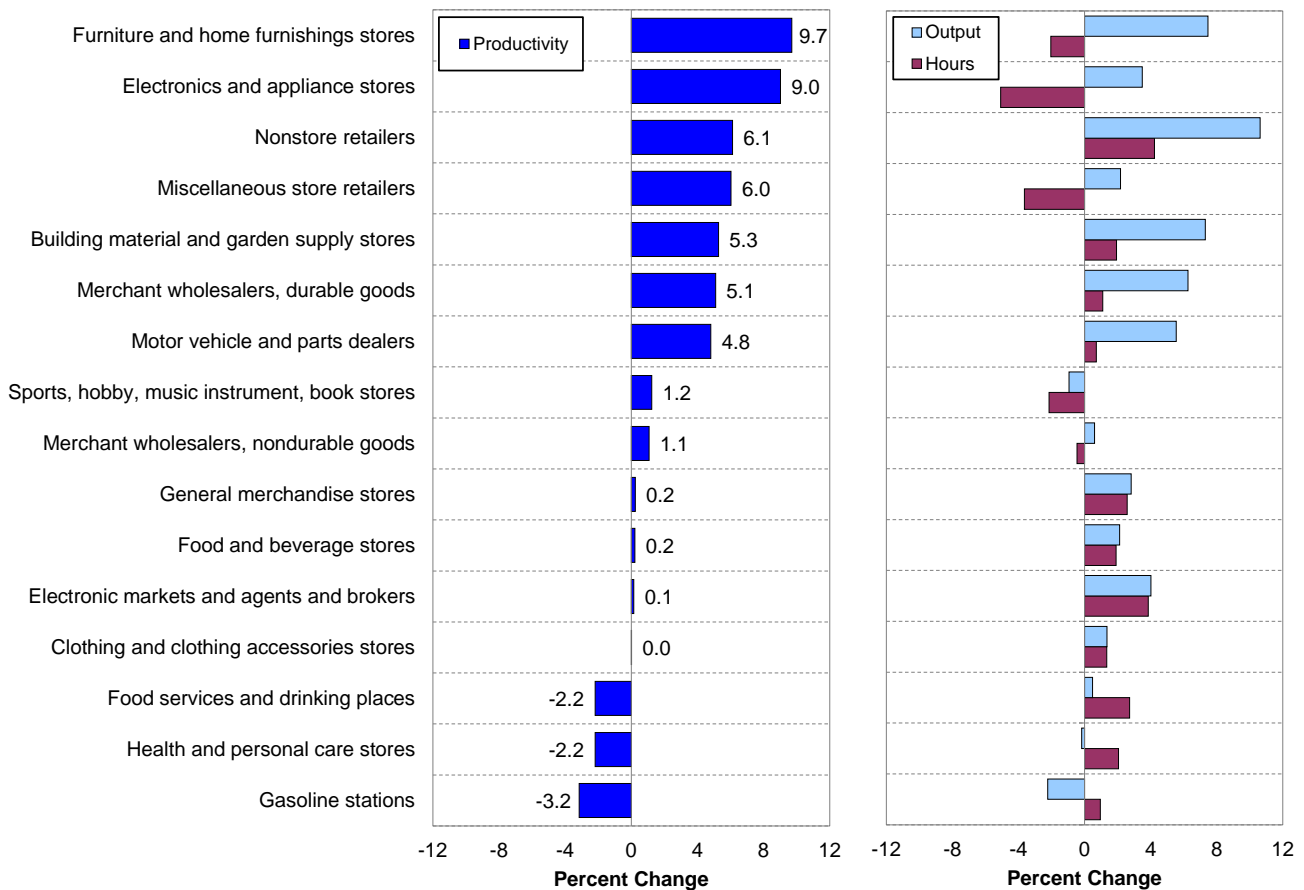
Chart 1 shows the changes in output and hours worked for industries with the largest employment. Industries above the diagonal line experienced growth in productivity. Among these industries, three reported growth in both output and hours worked. Department stores showed declines in both output and hours worked. Productivity growth was greatest in automobile dealers, where output growth surpassed 5 percent for the eighth consecutive year.

Industries below the diagonal line exhibited declining productivity. Hours worked increased in all eight of these industries while output declined or grew at a slower rate. This includes the largest industry, restaurants and other eating places, which has experienced growth in both output and hours worked for 7 consecutive years. In all but 2 of these years, the growth in hours worked exceeded the growth in output leading to productivity declines.

Labor Productivity Rose in Majority of Industries in 2017

Productivity increased in 12 of the 16 3-digit NAICS industries studied in 2017. Seven industries had productivity gains of at least 4.0 percent, including nonstore retailers which also had the largest increase in output (10.6 percent). Among the three industries with productivity declines, gasoline stations experienced the largest drop (-3.2 percent). (See chart 2).

Chart 2. Productivity change in 3-digit wholesale trade, retail trade, and food services and drinking places industries, 2017



Productivity increased in 32 of the 49 4-digit NAICS industries studied in 2017. Output grew in 34 industries while hours worked grew in 31 industries. (See table 1).

In **wholesale trade**, productivity rose 2.7 percent as output grew 3.7 percent and hours worked increased 0.9 percent.

- Productivity grew 5.1 percent in durable goods wholesalers and 1.1 percent in nondurable goods wholesalers.
- Productivity increased in 13 of the 19 4-digit wholesale trade industries while output rose in 15 industries and hours worked grew in 13.
- Productivity increased most rapidly in motor vehicles and parts due to rapid growth in output and a slight increase in hours worked.

In **retail trade**, productivity increased by 2.8 percent, driven by growth in both output (3.9 percent) and hours worked (1.0 percent).

- Productivity increased in 18 of the 27 4-digit retail trade industries while output grew in 17 industries and hours worked rose in 15.
- The largest productivity increases occurred in other motor vehicle dealers and in home furnishings stores as output rose and hours worked declined in both industries.
- Other motor vehicle dealers experienced the largest growth in output (17.2 percent) resulting in a 17.3 percent increase in productivity.

In **food services and drinking places**, productivity declined by 2.2 percent as growth in hours worked (2.7 percent) outpaced growth in output (0.5 percent).

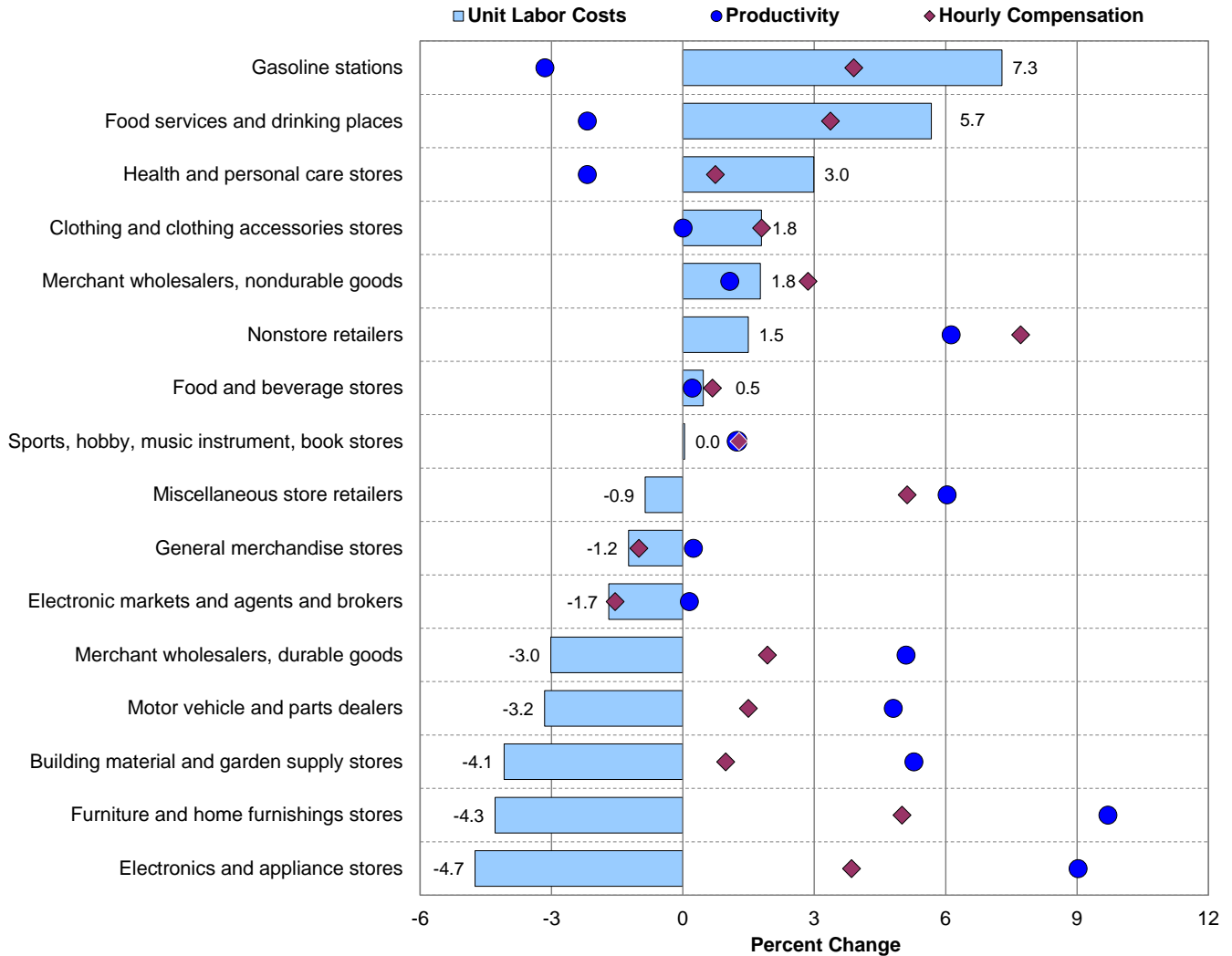
- Drinking places (alcoholic beverages) was the only industry out of the three to experience productivity growth (6.5 percent).
- All three 4-digit industries had increases in hours worked while special food services was the only industry to have a decline in output.

Unit Labor Costs Decline in About Half of the Industries in 2017

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

- Unit labor costs fell in 8 out of 16 3-digit industries in 2017. All unit labor cost declines occurred in industries where productivity rose. (See chart 3).
- Unit labor costs declined in 8 of 19 wholesale trade and 14 of 27 retail trade 4-digit industries. Two of the food services and drinking places industries experienced an increase in unit labor costs.
- Hourly compensation, defined as labor compensation per hour worked, rose in 42 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, 2017



Long-term Productivity Slowdown Reflected in All Three Industry Groups

From 1987 to 2017, **labor productivity** increased at an average annual rate of 2.8 percent in wholesale trade, 2.9 percent in retail trade, and 0.4 percent in food services and drinking places.

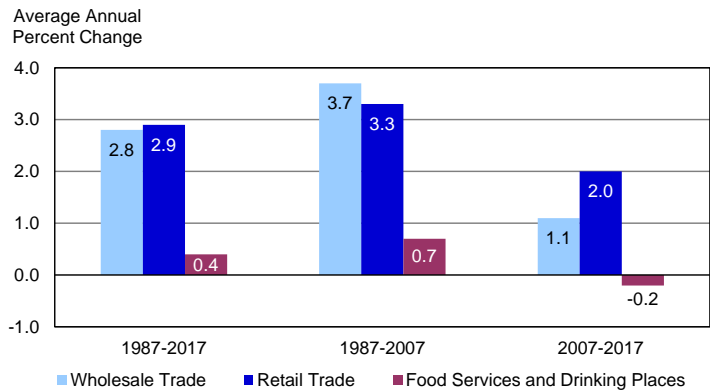
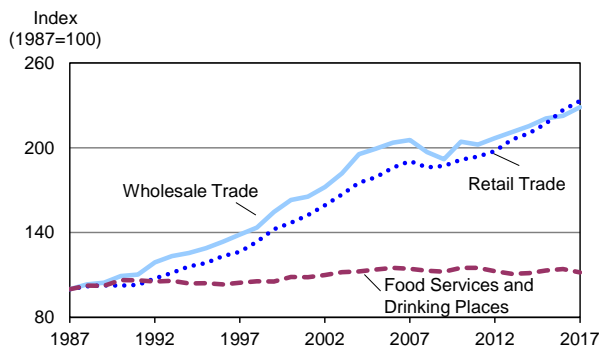
- Among the 4-digit industries, productivity rose in all but two industries from 1987 to 2017. Median productivity among these industries grew at an average annual rate of 1.8 percent.
- Of the 47 4-digit industries with increasing productivity growth, 43 experienced rising output while 23 had an increase in hours worked.
- All three industry groups experienced a slowdown in productivity growth from 2007 to 2017. (See chart 4). Productivity increased in 45 out of 49 4-digit industries from 1987 to 2007 compared to 33 industries from 2007 to 2017.

From 1987 to 2017, **unit labor costs** increased at an average annual rate of 3.2 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.

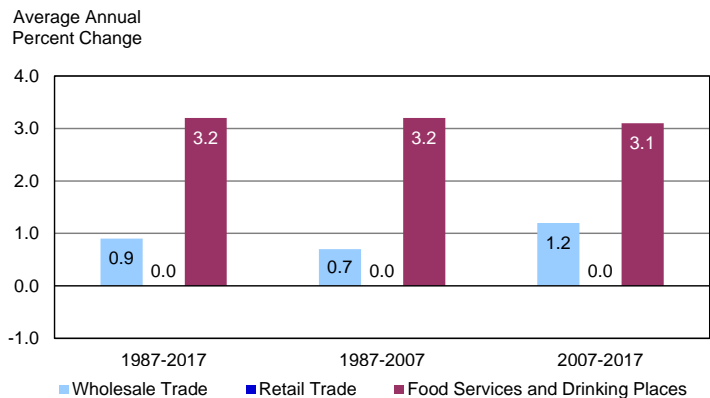
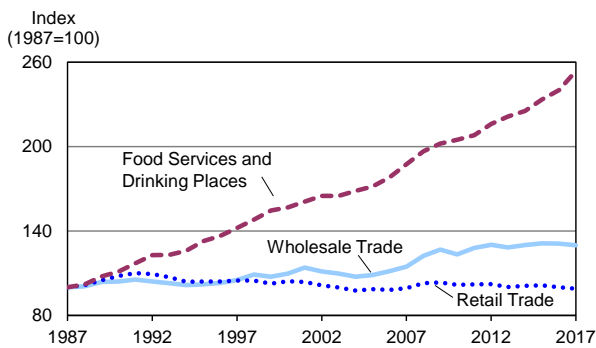
- Among the 4-digit industries, unit labor costs fell in 14 out of 49 industries from 1987 to 2017. Unit labor costs declined in 2 out of 19 wholesale trade and in 12 out of 27 retail trade industries and increased in all food services and drinking places industries.
- From 2007 to 2017, unit labor costs declined in 15 out of 49 industries. All industries with declines in unit labor costs experienced increases in productivity.
- During the 1987 to 2007 and 2007 to 2017 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 2017), Annual Wholesale Trade Report (March 2018), Monthly Wholesale Trade Survey (May 2018), Annual Retail Trade Survey (March 2018), Annual Revision of the Monthly Retail and Food Services: Sales and Inventories (May 2018), and Nonemployer Statistics (June 2018). Data have been benchmarked to the final results of the 2012 Economic Census. Accordingly, the labor productivity and output series for all industries have been revised for 2016 and earlier years. Additionally, the unit labor cost measures incorporate preliminary data from the BLS Quarterly Census of Employment and Wages (June 2018).

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- Additional industries and sectors
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- Additional years and long-term data

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Questions?

Additional information can be obtained by calling the BLS productivity program at (202) 691-5606 or by sending an email to productivity@bls.gov. Information in this release will be made available to sensory impaired individuals upon request. Voice phone: (202) 691-5200; Federal Relay Service: (800) 877-8339.

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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	2017 Employment (thousands)	Percent change, 2016-2017				
			Labor productivity	Unit labor costs	Output	Hours worked	Labor compensation
Wholesale Trade							
Wholesale trade.....	42	6,039.5	2.7	-0.9	3.7	0.9	2.7
Merchant wholesalers, durable goods.....	423	3,034.4	5.1	-3.0	6.3	1.1	3.1
Motor vehicles and parts.....	4231	347.3	7.9	-4.8	8.9	0.9	3.7
Furniture and furnishings.....	4232	111.7	-0.9	2.4	-1.1	-0.2	1.2
Lumber and construction supplies.....	4233	233.0	0.2	4.6	4.8	4.6	9.6
Commercial equipment.....	4234	630.4	5.4	-2.5	5.1	-0.3	2.5
Metals and minerals.....	4235	125.4	4.8	-1.9	4.3	-0.5	2.3
Appliances and electric goods.....	4236	336.1	5.5	-4.9	7.6	2.1	2.4
Hardware and plumbing.....	4237	257.2	-2.2	5.8	1.1	3.3	6.9
Machinery and supplies.....	4238	672.0	5.7	-4.3	6.3	0.6	1.7
Miscellaneous durable goods.....	4239	321.3	4.3	-3.6	5.5	1.1	1.7
Merchant wholesalers, nondurable goods.....	424	2,103.9	1.1	1.8	0.6	-0.5	2.4
Paper and paper products.....	4241	121.2	-4.1	1.9	-1.8	2.5	0.1
Druggists' goods.....	4242	203.1	2.0	0.6	0.5	-1.4	1.1
Apparel and piece goods.....	4243	153.7	-2.1	6.9	-5.3	-3.3	1.2
Grocery and related products.....	4244	784.0	-0.1	2.4	1.2	1.3	3.7
Farm product raw materials.....	4245	74.5	-1.9	5.8	-0.5	1.4	5.3
Chemicals.....	4246	132.2	1.4	2.5	2.1	0.7	4.6
Petroleum.....	4247	98.2	1.0	3.3	1.5	0.5	4.9
Alcoholic beverages.....	4248	199.8	0.9	0.1	1.7	0.8	1.9
Miscellaneous nondurable goods.....	4249	337.2	6.4	-0.7	0.6	-5.5	-0.1
Electronic markets and agents and brokers.....	425	901.2	0.1	-1.7	4.0	3.9	2.3
Electronic markets and agents and brokers.....	4251	901.2	0.1	-1.7	4.0	3.9	2.3
Retail Trade							
Retail trade.....	44-45	16,702.7	2.8	-0.9	3.9	1.0	3.0
Motor vehicle and parts dealers.....	441	2,066.3	4.8	-3.2	5.6	0.7	2.2
Automobile dealers.....	4411	1,330.1	4.5	-3.5	5.3	0.8	1.7
Other motor vehicle dealers.....	4412	161.6	17.3	-10.4	17.2	-0.1	5.0
Auto parts, accessories, and tire stores.....	4413	574.6	-1.6	4.2	-0.9	0.7	3.3
Furniture and home furnishings stores.....	442	515.0	9.7	-4.3	7.5	-2.0	2.9
Furniture stores.....	4421	237.4	5.0	-2.4	4.1	-0.9	1.6
Home furnishings stores.....	4422	277.6	15.1	-6.4	11.4	-3.2	4.3
Electronics and appliance stores.....	443	520.3	9.0	-4.7	3.5	-5.1	-1.4
Electronics and appliance stores.....	4431	520.3	9.0	-4.7	3.5	-5.1	-1.4
Building material and garden supply stores.....	444	1,317.7	5.3	-4.1	7.3	1.9	2.9
Building material and supplies dealers.....	4441	1,145.7	4.1	-3.4	6.3	2.2	2.7
Lawn and garden equipment and supplies stores.....	4442	172.0	13.6	-8.2	14.2	0.6	4.8
Food and beverage stores.....	445	3,185.0	0.2	0.5	2.1	1.9	2.6
Grocery stores.....	4451	2,762.4	-0.3	1.2	1.9	2.2	3.1
Specialty food stores.....	4452	248.8	5.6	-7.8	7.2	1.4	-1.2
Beer, wine and liquor stores.....	4453	173.8	4.4	-2.7	2.7	-1.7	-0.1
Health and personal care stores.....	446	1,115.6	-2.2	3.0	-0.2	2.1	2.8
Health and personal care stores.....	4461	1,115.6	-2.2	3.0	-0.2	2.1	2.8
Gasoline stations.....	447	940.0	-3.2	7.3	-2.2	1.0	4.9
Gasoline stations.....	4471	940.0	-3.2	7.3	-2.2	1.0	4.9
Clothing and clothing accessories stores.....	448	1,482.7	0.0	1.8	1.4	1.3	3.2
Clothing stores.....	4481	1,097.2	-2.3	2.9	1.4	3.8	4.3
Shoe stores.....	4482	217.3	8.5	0.4	-1.0	-8.7	-0.5
Jewelry, luggage, and leather goods stores.....	4483	168.2	1.4	-1.8	3.6	2.2	1.8
Sports, hobby, music instruments, book stores.....	451	664.3	1.2	0.0	-0.9	-2.2	-0.9
Sporting goods and musical instrument stores.....	4511	573.5	1.9	-0.1	-0.6	-2.5	-0.7
Book stores and news dealers.....	4512	90.8	-3.1	0.6	-2.8	0.3	-2.2

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

Industry	2012 NAICS code	2017 Employment (thousands)	Percent change, 2016-2017				
			Labor productivity	Unit labor costs	Output	Hours worked	Labor compensation
General merchandise stores.....	452	3,149.1	0.2	-1.2	2.8	2.6	1.5
Department stores.....	4521	1,194.8	2.3	-5.5	-0.2	-2.5	-5.7
Other general merchandise stores.....	4529	1,954.3	-1.7	2.0	3.7	5.5	5.8
Miscellaneous store retailers.....	453	976.4	6.0	-0.9	2.2	-3.6	1.3
Florists.....	4531	75.6	7.7	2.2	4.2	-3.3	6.5
Office supplies, stationery and gift stores.....	4532	274.6	4.9	3.9	-4.8	-9.2	-1.1
Used merchandise stores.....	4533	226.7	12.8	-7.9	12.1	-0.7	3.2
Other miscellaneous store retailers.....	4539	399.5	4.4	-1.2	2.5	-1.8	1.3
Nonstore retailers.....	454	770.3	6.1	1.5	10.6	4.2	12.3
Electronic shopping and mail-order houses.....	4541	468.7	7.1	3.3	12.5	5.1	16.2
Vending machine operators.....	4542	46.6	-12.4	15.1	-0.9	13.2	14.0
Direct selling establishments.....	4543	255.0	-2.8	3.4	-2.0	0.8	1.3
Food Services and Drinking Places							
Food services and drinking places.....	722	11,961.0	-2.2	5.7	0.5	2.7	6.2
Special food services.....	7223	844.4	-9.2	12.6	-3.7	6.1	8.4
Drinking places, alcoholic beverages.....	7224	408.0	6.5	-6.7	14.0	7.0	6.4
Restaurants and other eating places.....	7225	10,708.6	-1.9	5.6	0.3	2.3	5.9

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

Industry	2012 NAICS code	2017 Employment (thousands)	Average annual percent change, 1987-2017				
			Labor productivity	Unit labor costs	Output	Hours worked	Labor compensation
Wholesale Trade							
Wholesale trade.....	42	6,039.5	2.8	0.9	3.2	0.4	4.1
Merchant wholesalers, durable goods.....	423	3,034.4	4.4	-0.6	4.6	0.1	3.9
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Furniture and furnishings.....	4232	111.7	1.8	2.4	1.6	-0.2	4.0
Lumber and construction supplies.....	4233	233.0	1.1	1.5	1.7	0.6	3.3
Commercial equipment.....	4234	630.4	11.7	-6.8	11.8	0.1	4.2
Metals and minerals.....	4235	125.4	-0.4	3.6	-0.2	0.1	3.4
Appliances and electric goods.....	4236	336.1	7.6	-3.0	7.2	-0.4	4.1
Hardware and plumbing.....	4237	257.2	1.6	1.9	2.3	0.7	4.3
Machinery and supplies.....	4238	672.0	1.8	2.1	1.7	0.0	3.8
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Merchant wholesalers, nondurable goods.....	424	2,103.9	1.2	2.7	1.4	0.2	4.1
Paper and paper products.....	4241	121.2	1.0	2.2	0.4	-0.7	2.6
Druggists' goods.....	4242	203.1	2.6	3.7	3.7	1.1	7.5
Apparel and piece goods.....	4243	153.7	1.9	1.6	1.5	-0.4	3.1
Grocery and related products.....	4244	784.0	1.0	2.4	1.7	0.7	4.2
Farm product raw materials.....	4245	74.5	1.4	3.9	-0.3	-1.7	3.5
Chemicals.....	4246	132.2	0.3	3.4	0.6	0.3	4.0
Petroleum.....	4247	98.2	2.5	1.9	1.1	-1.4	3.1
Alcoholic beverages.....	4248	199.8	0.2	2.9	2.0	1.8	5.0
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Jewelry, luggage, and leather goods stores.....	4483	168.2	3.3	-0.1	2.6	-0.7	2.5
Sports, hobby, music instruments, book stores.....	451	664.3	3.4	-0.8	3.9	0.5	3.1
Sporting goods and musical instrument stores.....	4511	573.5	4.0	-1.3	4.7	0.7	3.4
Book stores and news dealers.....	4512	90.8	1.2	1.0	0.4	-0.8	1.4

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

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Miscellaneous store retailers.....	453	976.4	3.3	-0.9	3.1	-0.2	2.2
Florists.....	4531	75.6	3.1	0.0	0.1	-2.9	0.1
Office supplies, stationery and gift stores.....	4532	274.6	5.4	-2.2	3.6	-1.7	1.4
Used merchandise stores.....	4533	226.7	4.8	-2.4	6.3	1.4	3.8
Other miscellaneous store retailers.....	4539	399.5	1.1	0.4	2.4	1.3	2.8
Nonstore retailers.....	454	770.3	7.9	-3.7	8.9	0.9	4.8
Electronic shopping and mail-order houses.....	4541	468.7	9.7	-4.7	14.1	4.0	8.7
Vending machine operators.....	4542	46.6	0.2	3.1	-2.1	-2.3	0.9
Direct selling establishments.....	4543	255.0	2.0	0.6	0.8	-1.2	1.4
Food Services and Drinking Places							
Food services and drinking places.....	722	11,961.0	0.4	3.2	2.1	1.7	5.3
Special food services.....	7223	844.4	1.0	1.8	2.2	1.2	4.0
Drinking places, alcoholic beverages.....	7224	408.0	-0.2	3.0	0.0	0.2	3.0
Restaurants and other eating places.....	7225	10,708.6	0.4	3.3	2.2	1.9	5.7