

2A

Statistical Annex on the U.S. Retail Sector and Its Workforce

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Chapter 2 of *Where Bad Jobs Are Better* summarizes the characteristics of the U.S. retail workforce and retail jobs, as a whole and for our focus subsectors (groceries, consumer electronics, and general merchandise as an approximation of big box stores). To streamline the chapter, most tables and figures were omitted, and instead the narrative simply summarized the main patterns. This Statistical Annex makes the omitted numbers available for readers who are interested in the details. We group the statistics in three sections: General Retail Trends, Demographic Profile of the U.S. Retail Workforce, and Retail Job Quality Statistics. This Annex is designed to be read in conjunction with Chapter 2, so there is little commentary here, except in the case of a few indicators that were omitted entirely from the chapter.

GENERAL RETAIL TRENDS

Before considering jobs and workers in U.S. stores, a look at sales, business concentration, and productivity can give a sense of how the retail sector has evolved, and how its subsectors differ. Between 1997 and 2012, grocery stores, consumer electronics and general merchandise all experienced growth in sales. However, grocery stores sales grew much more slowly than the retail industry as a whole (12 percent and 20 percent, respectively). General merchandise has surged at 36 percent with warehouse stores and superstores in particular achieving a staggering 247 percent growth in sales (offset by losses in other general merchandise sectors, such as traditional department stores). The consumer electronics sector's sales lagged far behind at 5 percent growth over the period—an 11 percent loss from 2007 sales. Despite the recession in the intervening years, total retail sales inched up a bit over 1 percent over 2007-12, and warehouses and superstores grew their sales a healthy 17 percent).¹

Table 2A.1: Sales and employment concentrations for top 4 firms by sub-sector; 1997-2007

Sub-sector	% Sales 1997	% Sales 2007	% Employment 1997	% Employment 2007
Grocery	19.9	30.7	17.1	26.4
Supermarkets	20.8	32.0	18.1	27.6
Electronics and Appliances	37.4	46.3	31.8	38.1
General Merchandise	55.9	73.2	55.9	64.9
Warehouses and Superstores	89.6	93.9	86.8	94.0

Note: 2007 data are the most recent available for sales and employment concentration.

Source: U.S. Census Bureau, Economic Census, 1997 (U.S. Census Bureau 2001), Table 7 and 2007 Industry Series Reports, Table EC0744SSSZ2

(http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ECN_2007_US_44SSSZ2&prodType=table, accessed July 2015).

Table 2A.1 shows sales and employment for the top four firms in each sub-sector. The highest levels of concentration are found in general merchandise, where warehouses and super-centers contribute significantly to those concentrations. Grocery and electronics have high sales and employment concentrations too, although not as high. Over the period, these four firm concentration ratios for sales and employment indicate growing concentration in all sectors.

Labor productivity in retail has outstripped overall productivity growth, but this pace is driven by subsectors other than groceries (the largest subsector, but relatively stagnant in terms of productivity).

Table 2A.2: Labor productivity growth in retail and sub-sectors, 1987-2013

Industry	Average annual productivity growth, 1987-97 %	Average annual productivity growth, 1997-2007 %	Average annual productivity growth, 2007-2013 %
All retail	2.4	3.6	1.8
Food and beverage	-1.0	2.0	0.4
General merchandise	3.1	4.3	1.5
Electronics and appliances	10.1	15.3	9.6
Electronics and appliances, net	-2.9	2.4	2.6
All nonfarm business	1.6	2.8	1.6

Source: U.S. Bureau of Labor Statistics, Productivity and Costs, <http://stats.bls.gov/lpc/home.htm#> data (accessed August 2015), with added calculations by authors

Note: Net productivity growth adjusts the gross productivity growth by netting out average annual productivity growth in the Computer and Electronic Product Manufacturing sector (BLS productivity figures do not take account of productivity changes in inputs.) The gross productivity figures overstate the growth rate, whereas the net figures almost surely understate it.

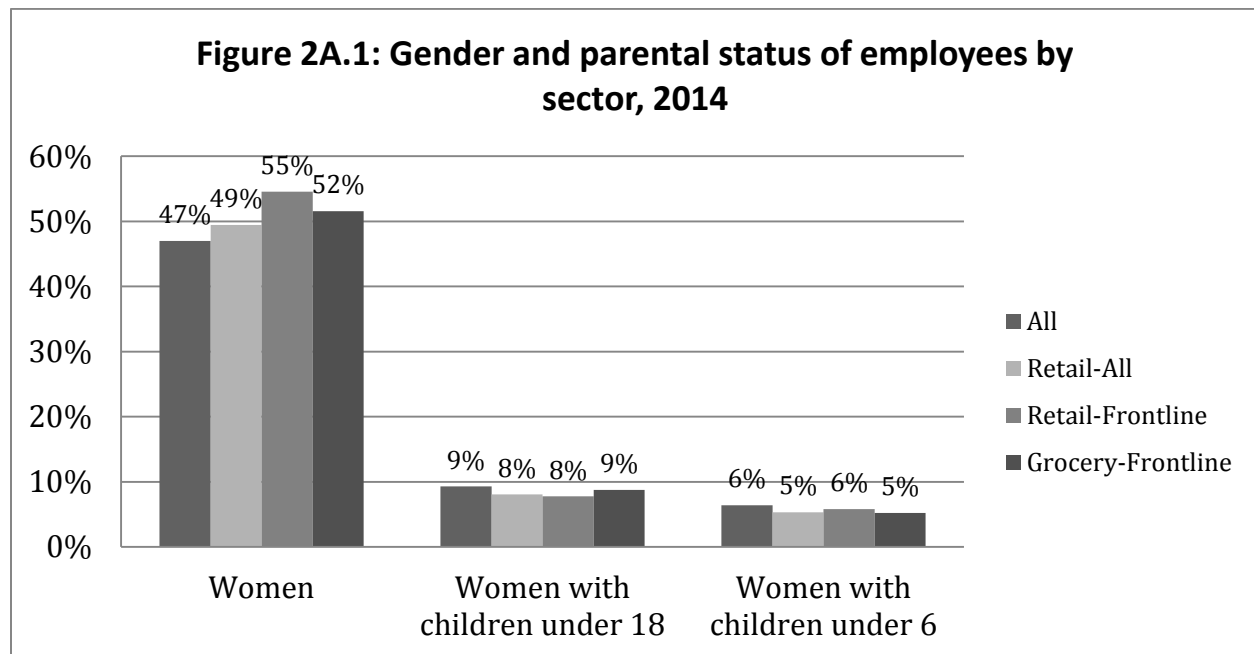
DEMOGRAPHIC PROFILE OF THE U.S. RETAIL WORKFORCE

We now turn to workforce statistics. All but one (Table 2A.4) of the remaining tables and figures in this Annex are based on our analysis of June 2014 Current Population Survey data. As Table 2A.3 shows, the sizes are adequate for statistical analysis for most of the samples, but the sample of consumer electronics frontline workers is very small—too small to view the results with any confidence, and we have omitted them from the tables and figures that rely on this sample.

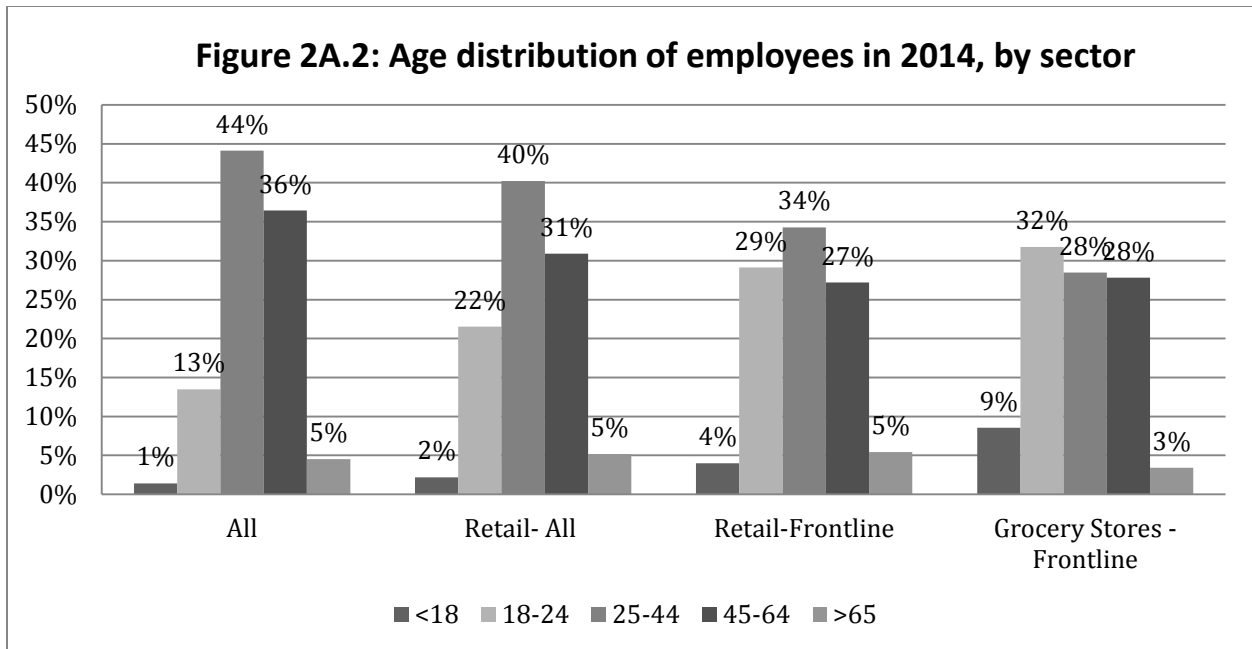
Figures 2A.1-5 present a quick demographic profile of the overall retail workforce with particular attention to frontline workers and grocery employees (and omitting consumer electronics workers due to sample size constraints). The figures display retail workers' gender and parental status, age, race and ethnicity, migration status, and education.

Table 2A.3: Sample sizes of sector samples in June 2014 Current Population Survey

	All	Retail-All	Retail-Frontline	Electronics-Frontline	Grocery Stores - Frontline
Sample size	139,415	7,684	3,733	17	744



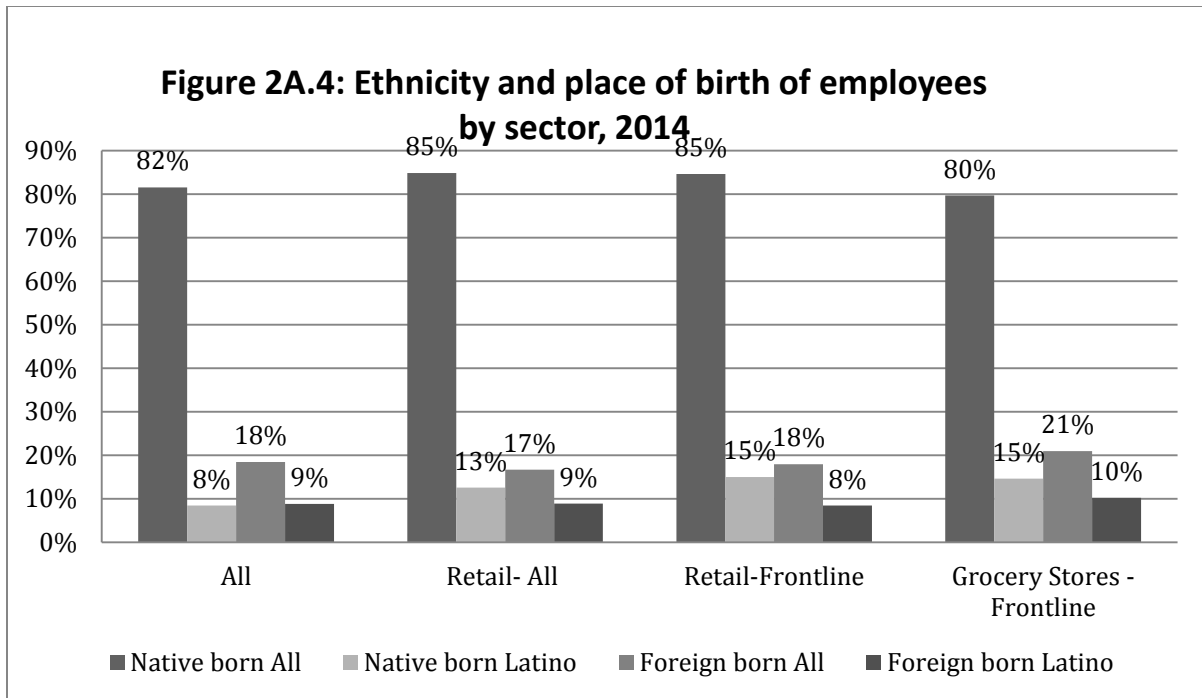
Source: Authors' calculations from June 2014 Current Population Survey. Universe is all privately employed wage and salary workers. Frontline jobs include cashiers, clerks, and baggers. Electronics retail omitted because of small sample size.



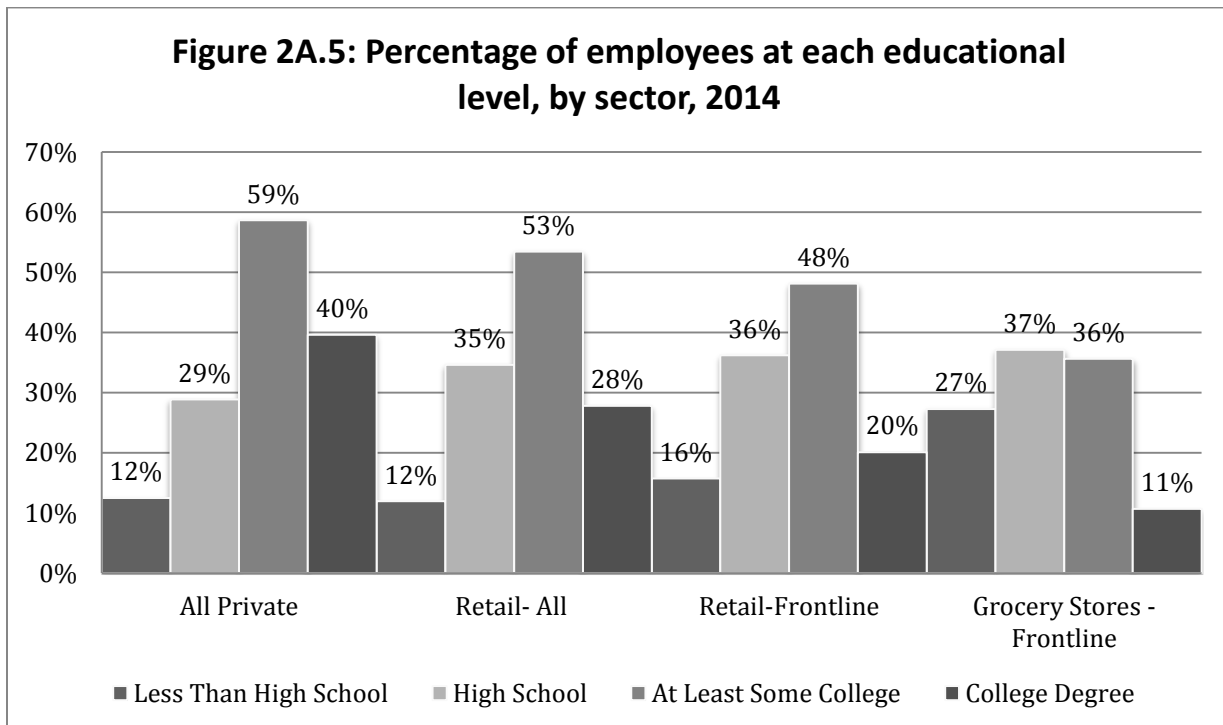
Source: See Figure 2A.1.



Source: See Figure 2A.1. Black-white combination and a number of other smaller racial categories are omitted.



Source: See Figure 2A.1.



Source: See Figure 2A.1

RETAIL JOB QUALITY STATISTICS

As we explain in Chapter 2, hourly earnings and part-time hours are particularly important indicators of job quality. Here we highlight some detailed numbers regarding each, then close by assessing the scale of unions' institutional impact on retail jobs.

Wage levels are such a central and widely used index of job quality that we present most of the relevant wage information in Chapter 2 itself. Table 2A.4, the exception, contrasts two approximations of the "big box" category, "Discount department stores" and "Warehouse clubs and superstores" with their non-discount general merchandise counterparts. Not surprisingly, the big box groupings pay lower wages than non-discounters.

Table 2A.4: Average hourly earnings as a percentage of the retail-wide average for non-discount and discount retail sub-sectors, 1990 and 2004

<i>Retail sub-sector</i>	<i>Average hourly earnings as % of retail-wide average</i>	
	<i>1990</i>	<i>2004</i>
Non-discount department stores	102.9%	99.7%
Discount department stores	82.0%	82.2%
Warehouse clubs and superstores	83.7%	82.3%

Source: U.S. Bureau of Labor Statistics, Current Employment Statistics, <http://stats.bls.gov/ces/home.htm#data> (accessed December 2005; this level of industrial detail is no longer available online)

Turning to part-time employment, Figure 2A.6 tracks the percentage of the workforce in different retail subsectors that conforms to our working definition of part-time work (usually working fewer than 32 hours per week). Table 2A.5 drills down on where part-time employment is particularly concentrated, broken down by the demographic categories we applied to retail employment in general.

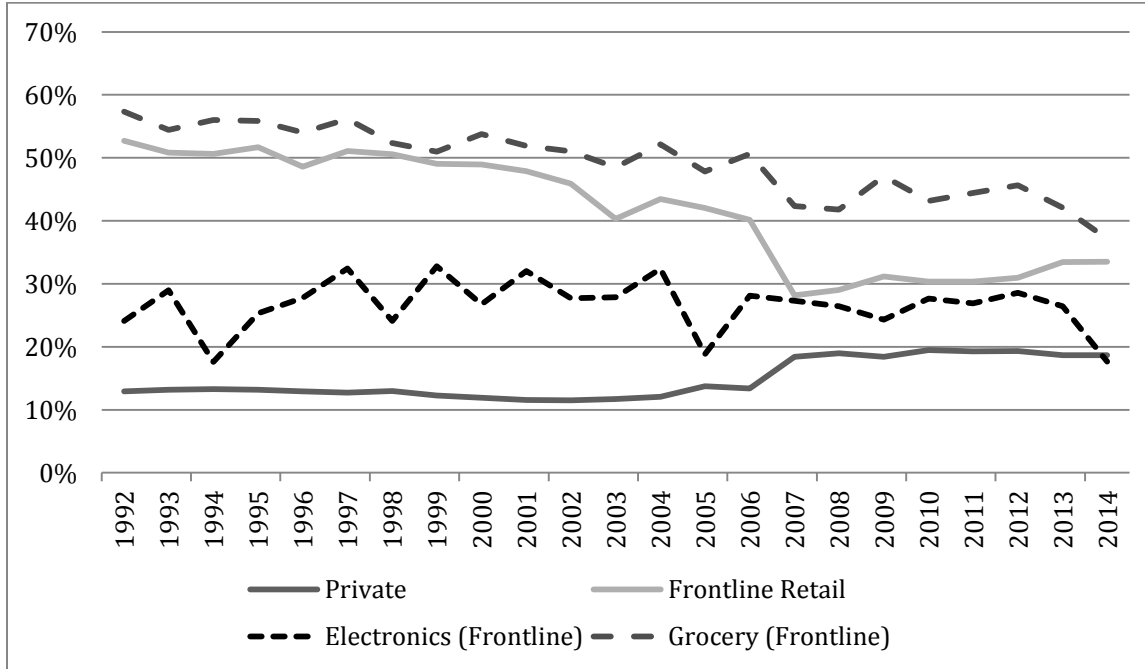
Table 2A.5: Percent of various demographic groups who work part-time, by sector, 2014

Category	Total	Retail - All	Retail - Frontline	Grocery - Frontline
Total	11.9%	27.9%	39.1%	50.3%
Less than high school	11.5%	43.6%	53.0%	66.0%
High school or more	12.0%	26.7%	37.1%	37.1%
Men	8.6%	20.7%	33.5%	49.1%
Women	14.9%	36.8%	43.6%	51.3%
Women without children	14.3%	37.6%	45.0%	53.6%
Women with children under 18	18.0%	31.5%	36.5%	35.8%
Women with children under 6	18.1%	35.2%	37.7%	44.4%
White	12.3%	28.3%	40.7%	54.3%
Black	10.6%	29.6%	36.5%	47.7%
Latino	12.3%	28.6%	38.8%	40.2%
Native	11.8%	28.4%	35.6%	52.9%
Foreign-born	11.0%	24.0%	39.6%	36.5%

Source: See Figure 2A.1.

Disaggregating part-time workers by whether they are working more or fewer hours reveals still more differences. Tables 2A.6-7 show the share of the part-time retail workforce working more or fewer than 16 hours weekly, by subsector, gender, and frontline job category.

Figure 2A.6: Percentage of the workforce usually working less than 32 hours a week, 1992-2014



Source: Authors' analysis of CPS data, various years

Table 2A.6: Length of part-time hours by gender and sub-sector for 2014

Sector/Gender	% Working less than 16 hours per week	% Working 16 to 31 hours per week	% Working Part-Time (less than 32 hours)
All Private	4.3%	15.0%	19.3%
Men	2.8%	9.6%	12.4%
Women	5.9%	19.7%	25.6%
All Retail	6.4%	22.3%	28.7%
Men	4.5%	16.3%	20.7%
Women	8.4%	28.4%	36.8%
All Grocery	7.8%	29.4%	37.2%
Men	8.2%	25.0%	33.1%
Women	7.4%	33.9%	41.3%

Source: See Figure 2A.1

Table 2A.7: Length of part-time hours by job type and sub-sector for 2014

Sector/Job Type	% Working less than 16 hours per week	% Working 16 to 31 hours per week	% Working Part-Time (less than 32 hours)
All Electronics	2.9%	8.6%	11.5%
All Grocery	7.8%	29.4%	37.2%
Cashier	10.5%	46.9%	57.5%
Stock clerks and order fillers	10.3%	31.4%	41.7%
All General Merchandise	6.0%	28.8%	34.9%
Cashier	8.7%	46.1%	54.8%
Sales	5.8%	37.1%	42.9%
Stock clerks and order fillers	6.2%	31.1%	37.3%

Note: Electronics occupational categories are omitted, along with the Grocery sales category, because sample sizes range from 1 to 11.

Source: See Figure 2A.1.

Table 2A.8: Union wage premium and union density for grocery workers by region and for larger states, in descending order by premium, 2013-14

Region or state	Union wage premium	Union density
<i>Regions</i>		
Midwest	23.4%*	5.3%
Mid Atlantic	12.2%*	9.3%
South	1.3%*	1.9%
New England	1.0%*	4.8%
Mountain West	0.9%	3.9%
Pacific	0.6%	10.6%
<i>States</i>		
California	9.0%*	10.9%
New York	7.0%*	9.2%
Illinois	2.8%*	6.8%

Note: Raw hourly wage premium without any added controls. Only includes states with samples large enough to estimate reliably.

*Difference in union and non-union wages significant at the 5% level.

Source: Authors' analysis of Current Population Survey Outgoing Rotation Group data, July 2013-June 2014.

Finally, Table 2A.8 offers a window on unions' reach and impact on retail. The table shows the union density (percentage of retail workers who are union members) and the union wage premium (the raw percentage difference in hourly wage between union members

and non-members in the sector). Table 2A.9 supplements these data by showing the sample sizes on which the union statistics are based. The latter table demonstrates that the sample sizes are adequate to distinguish union densities and wage premia for a number of more populous regions and even states.

Table 2A.9: State and regional sample sizes for previous table

Region or state	Union	Non Union
<i>Regions</i>		
Midwest	923	17175
Mid Atlantic	953	9326
South	372	18936
New England	452	9014
Mountain West	370	9289
Pacific	1200	10648
<i>States</i>		
California	636	5225
New York	267	2641
Illinois	161	2210

References

U.S. Census Bureau. 2001. Economic Census 1997, Retail Trade Subject Series: Summary, EC97R44S-SM. Washington, DC: US GPO.

Notes

¹ U.S. Census Bureau, <https://www.census.gov/data/tables/2012/econ/census/retail-trade.html>, data from 2012 Economic Census, Tables EC0744A1 and EC124A1, and U.S. Census Bureau 2001, adjusted for inflation by authors with data from US Bureau of Labor Statistics Consumer price Index series, <https://www.bls.gov/cpi/>