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## ADVANCE MONTHLY SALES FOR RETAIL AND FOOD SERVICES November 2008

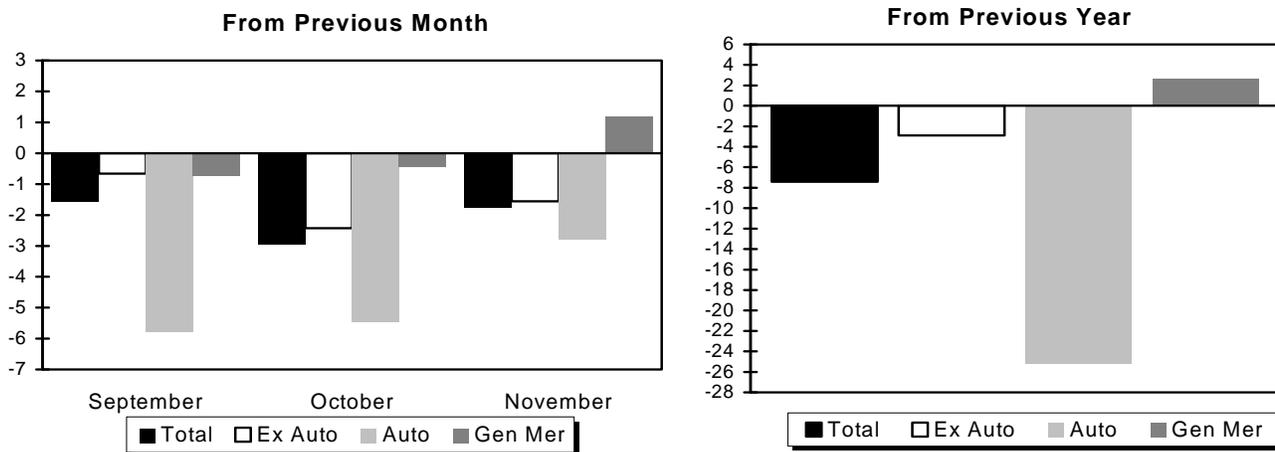
The U.S. Census Bureau announced today that advance estimates of U.S. retail and food services sales for November, adjusted for seasonal variation and holiday and trading-day differences, but not for price changes, were \$355.7 billion, a decrease of 1.8 percent ( $\pm 0.5\%$ ) from the previous month and 7.4 percent ( $\pm 0.7\%$ ) below November 2007. Total sales for the September through November 2008 period were down 4.5 percent ( $\pm 0.5\%$ ) from the same period a year ago. The September to October 2008 percent change was revised from  $-2.8$  percent ( $\pm 0.5\%$ ) to  $-2.9$  percent ( $\pm 0.2\%$ ).

Retail trade sales were down 2.0 percent ( $\pm 0.5\%$ ) from October 2008 and were 8.5 percent ( $\pm 0.7\%$ ) below last year. Motor vehicle and parts dealers sales were down 25.2 percent ( $\pm 2.3\%$ ) from November 2007 and gasoline stations sales were down 22.0 percent ( $\pm 1.7\%$ ) from last year.

*The advance estimates are based on a subsample of the Census Bureau's full retail and food services sample. A stratified random sampling method is used to select approximately 5,000 retail and food services firms whose sales are then weighted and benchmarked to represent the complete universe of over three million retail and food services firms. Responding firms account for approximately 65% of the MARTS dollar volume estimate. For an explanation of the measures of sampling variability included in this report, please see the Reliability of Estimates section on the last page of this publication.*

### Percent Change in Retail and Food Services Sales

(Estimates adjusted for seasonal variation and holiday and trading-day differences, but not for price changes)



The Advance Monthly Sales for Retail and Food Services for December is scheduled to be released January 14, 2009 at 8:30 a.m. EST.

For information, visit the Census Bureau's Web site at <http://www.census.gov/retail>. This report is also available the day of issue through the Department of Commerce's STAT-USA (202-482-1986).

\* The 90 percent confidence interval includes zero. The Census Bureau does not have sufficient statistical evidence to conclude that the actual change is different than zero.

# Table 1. Estimated Monthly Sales for Retail and Food Services, by Kind of Business

(Total sales estimates are shown in millions of dollars and are based on data from the Advance Monthly Retail Trade Survey, Monthly Retail Trade Survey, and administrative records.)

NAICS <sup>1</sup> code	Kind of Business	Not Adjusted							Adjusted <sup>2</sup>				
		11 Month Total		2008			2007		2008			2007	
		2008	% Chg. 2007	Nov. <sup>3</sup> (a)	Oct. (p)	Sep. (r)	Nov.	Oct.	Nov. <sup>3</sup> (a)	Oct. (p)	Sep. (r)	Nov. (r)	Oct. (r)
	<b>Retail &amp; food services,</b>												
	<b>total</b> .....	4,085,664	0.8	346,890	357,983	357,661	381,344	372,495	355,655	362,035	373,033	384,099	379,623
	Total (excl. motor vehicle & parts) ...	3,333,302	4.1	298,010	300,962	295,200	313,157	297,128	297,420	302,142	309,682	306,255	300,364
	Retail .....	3,665,069	0.4	310,340	319,183	320,124	345,596	335,100	317,141	323,581	334,415	346,627	342,153
	<b>GAFO<sup>4</sup></b> .....	(*)	(*)	(*)	91,318	87,343	108,704	92,525	(*)	95,679	96,729	98,569	97,853
441	<b>Motor vehicle &amp; parts dealers</b> .....	752,362	-11.4	48,880	57,021	62,461	68,187	75,367	58,235	59,893	63,351	77,844	79,259
4411, 4412	Auto & other motor veh. dealers .	680,776	-12.6	42,704	50,120	55,940	61,957	68,513	51,637	53,376	56,850	71,461	72,731
44111	New car dealers .....	(*)	(*)	(*)	39,360	44,391	50,912	55,842	(NA)	(NA)	(NA)	(NA)	(NA)
4413	Auto parts, acc. & tire stores.....	(*)	(*)	(*)	6,901	6,521	6,230	6,854	(NA)	(NA)	(NA)	(NA)	(NA)
442	<b>Furniture &amp; home furn. stores</b> .....	99,500	-7.4	9,293	8,685	8,619	10,737	9,787	8,734	8,720	8,804	9,797	9,866
4421	Furniture stores .....	(*)	(*)	(*)	4,511	4,605	5,416	5,082	(NA)	(NA)	(NA)	(NA)	(NA)
4422	Home furnishings stores .....	(*)	(*)	(*)	4,174	4,014	5,321	4,705	(NA)	(NA)	(NA)	(NA)	(NA)
443	<b>Electronics &amp; appliance stores</b> .....	96,968	0.9	10,496	7,959	8,188	11,095	8,377	9,232	8,979	9,164	9,683	9,425
44311, 13	Appl., T.V. & camera.....	(*)	(*)	(*)	6,267	6,573	8,993	6,643	(*)	7,146	7,385	7,820	7,540
44312	Computer & software stores.....	(*)	(*)	(*)	1,692	1,615	2,102	1,734	(*)	1,833	1,779	1,863	1,885
444	<b>Building material &amp; garden eq. &amp; supplies dealers</b> .....	304,206	-3.0	24,500	27,954	27,087	27,226	28,862	26,587	26,905	27,168	28,083	27,581
4441	Building mat. & sup. dealers .....	(*)	(*)	(*)	24,095	23,622	23,764	25,586	(*)	22,603	22,890	24,299	23,912
445	<b>Food &amp; beverage stores</b> .....	537,033	5.7	49,597	49,542	47,803	48,040	46,742	49,706	49,534	49,662	47,847	47,525
4451	Grocery stores .....	481,912	5.8	44,085	44,262	42,824	42,859	41,844	44,307	44,218	44,377	42,816	42,481
4453	Beer, wine & liquor stores .....	(*)	(*)	(*)	3,591	3,379	3,450	3,228	(*)	3,613	3,579	3,327	3,321
446	<b>Health &amp; personal care stores</b> .....	223,652	3.7	20,062	20,811	19,986	19,610	20,131	20,942	20,728	20,711	19,909	20,031
44611	Pharmacies & drug stores .....	(*)	(*)	(*)	17,416	16,613	16,296	16,862	(*)	17,142	17,162	16,578	16,646
447	<b>Gasoline stations</b> .....	465,694	14.5	29,943	39,193	43,714	39,111	38,757	32,653	38,274	43,934	41,875	38,072
448	<b>Clothing &amp; clothing accessories stores</b> .....	192,696	-0.4	19,341	17,205	16,215	20,888	17,913	18,021	17,876	18,241	19,123	18,886
44811	Men's clothing stores .....	(*)	(*)	(*)	804	770	969	867	(*)	(S)	(S)	(S)	(S)
44812	Women's clothing stores .....	(*)	(*)	(*)	3,094	3,072	3,665	3,344	(*)	3,113	3,247	3,432	3,405
44814	Family clothing stores .....	(*)	(*)	(*)	6,764	6,191	8,385	6,955	(NA)	(NA)	(NA)	(NA)	(NA)
4482	Shoe stores .....	(*)	(*)	(*)	2,045	1,934	2,242	2,058	(*)	2,144	2,171	2,256	2,187
451	<b>Sporting goods, hobby, book &amp; music stores</b> .....	76,346	1.5	7,622	6,263	6,768	7,961	6,518	7,350	7,150	7,325	7,419	7,432
452	<b>General merchandise stores</b> .....	526,043	4.2	54,848	47,672	44,161	54,156	46,110	50,128	49,548	49,764	48,862	48,504
4521	Department stores (ex. L.D.).....	173,103	-3.9	19,672	15,535	14,017	20,965	16,400	16,572	16,234	16,423	17,373	17,413
4521	Department stores (incl. L.D.) <sup>5</sup> .....	(*)	(*)	(*)	15,971	14,407	21,538	16,848	(*)	(NA)	(NA)	(NA)	(NA)
4529	Other general merch. stores.....	(*)	(*)	(*)	32,137	30,144	33,191	29,710	(*)	33,314	33,341	31,489	31,091
45291	Warehouse clubs & supercenters.....	(*)	(*)	(*)	28,458	26,792	29,092	26,134	(*)	29,613	29,604	27,813	27,423
45299	All oth. gen. merch. stores.....	(*)	(*)	(*)	3,679	3,352	4,099	3,576	(*)	3,701	3,737	3,676	3,668
453	<b>Miscellaneous store retailers</b> .....	107,899	0.7	9,680	10,251	9,831	9,989	10,129	9,973	10,049	9,928	9,885	9,964
454	<b>Nonstore retailers</b> .....	282,670	4.4	26,078	26,627	25,291	28,596	26,407	25,580	25,925	26,363	26,300	25,608
4541	Elect. shopping & m/o houses ....	(*)	(*)	(*)	18,444	17,744	19,898	18,400	(*)	17,977	18,125	18,122	17,847
722	<b>Food services &amp; drinking places</b> ...	420,595	4.2	36,550	38,800	37,537	35,748	37,395	38,514	38,454	38,618	37,472	37,470

(\*) Advance estimates are not available for this kind of business.

(NA) Not available. (S) Suppressed. (a) Advance estimate. (p) Preliminary estimate. (r) Revised estimate.

(1) For a full description of the NAICS codes used in this table, see <http://www.census.gov/epcd/www/naics.html>

(2) Estimates are concurrently adjusted for seasonal variation and for holiday and trading day differences, but not for price changes. Concurrent seasonal adjustment uses all available unadjusted estimates as input to the X-12 ARIMA program. The factors derived from the program are used in calculating all seasonally adjusted estimates shown in this table. Year-to-date seasonally adjusted sales estimates are not tabulated. Adjustment factors and explanatory material can be found on the Internet at <http://www.census.gov/mrts/www/mrts.html>

(3) Advance estimates are based on early reports obtained from a small sample of firms selected from the larger Monthly Retail Trade Survey (MRTS) sample. All other estimates are from the MRTS sample

(4) GAFO represents firms which specialize in department store types of merchandise and is comprised of furniture & home furnishings (442), electronics & appliances (443), clothing & accessories (448), sporting goods, hobby, book, and music (451), general merchandise (452), office supply, stationery, and gift stores (4532).

(5) Estimates include data for leased departments operated within department stores. Data for this line are not included in broader kind-of-business totals.

Note: Table 3 provides estimated measures of sampling variability. Additional information on confidentiality protection, sampling error, nonsampling error, sample design, and definitions may be found at <http://www.census.gov/mrts/www/mrts.html>

**Table 2. Estimated Change in Monthly Sales for Retail and Food Services, by Kind of Business**

(Estimates are shown as percents and are based on data from the Advance Monthly Retail Trade Survey, Monthly Retail Trade Survey, and administrative records.)

NAICS code	Kind of Business	Percent Change <sup>1</sup>					
		Nov. 2008 Advance from --		Oct. 2008 Preliminary from --		Sep. 2008 through Nov. 2008 from --	
		Oct. 2008 (p)	Nov. 2007 (r)	Sep. 2008 (r)	Oct. 2007 (r)	Jun. 2008 through Aug. 2008	Sep. 2007 through Nov. 2007
	<b>Retail &amp; food services, total .....</b>	-1.8	-7.4	-2.9	-4.6	-4.7	-4.5
	Total (excl. motor vehicle & parts) ...	-1.6	-2.9	-2.4	0.6	-3.5	0.4
	Retail .....	-2.0	-8.5	-3.2	-5.4	-5.2	-5.3
441	<b>Motor vehicle &amp; parts dealers .....</b>	-2.8	-25.2	-5.5	-24.4	-10.5	-23.1
4411, 4412	Auto & other motor veh. dealers ..	-3.3	-27.7	-6.1	-26.6	-11.7	-25.4
442	<b>Furniture &amp; home furn. stores .....</b>	0.2	-10.9	-1.0	-11.6	-4.7	-11.1
443	<b>Electronics &amp; appliance stores .....</b>	2.8	-4.7	-2.0	-4.7	-3.2	-3.7
444	<b>Building material &amp; garden eq. &amp; supplies dealers.....</b>	-1.2	-5.3	-1.0	-2.5	-3.0	-3.5
445	<b>Food &amp; beverage stores.....</b>	0.3	3.9	-0.3	4.2	0.1	4.5
4451	Grocery stores .....	0.2	3.5	-0.4	4.1	-0.1	4.3
446	<b>Health &amp; personal care stores .....</b>	1.0	5.2	0.1	3.5	1.0	4.0
447	<b>Gasoline stations .....</b>	-14.7	-22.0	-12.9	0.5	-14.7	-2.1
448	<b>Clothing &amp; clothing accessories stores .....</b>	0.8	-5.8	-2.0	-5.3	-5.4	-5.0
451	<b>Sporting goods, hobby, book &amp; music stores.....</b>	2.8	-0.9	-2.4	-3.8	-3.2	-2.0
452	<b>General merchandise stores.....</b>	1.2	2.6	-0.4	2.2	-1.1	2.6
4521	Department stores (ex. L.D.).....	2.1	-4.6	-1.2	-6.8	-3.1	-5.7
453	<b>Miscellaneous store retailers .....</b>	-0.8	0.9	1.2	0.9	-1.3	-0.2
454	<b>Nonstore retailers .....</b>	-1.3	-2.7	-1.7	1.2	-3.8	0.6
722	<b>Food services &amp; drinking places ....</b>	0.2	2.8	-0.4	2.6	0.1	3.0

(p) Preliminary estimates (r) Revised estimates

(1) Estimates shown in this table are derived from adjusted estimates provided in Table 1 of this report.

Note: Table 3 provides estimated measures of sampling variability. Additional information on confidentiality protection, sampling error, nonsampling error, sample design, and definitions may be found at <http://www.census.gov/mrts/www/mrts.html>.

Source: U.S. Census Bureau

### Survey Description

The U.S. Census Bureau conducts the Advance Monthly Retail Trade and Food Services Survey (MARTS) to provide an early estimate of monthly sales by kind of business for retail and food service firms located in the United States. Each month, questionnaires are mailed to a probability sample of approximately 5,000 employer firms selected from the larger Monthly Retail Trade Survey (MRTS). Firms responding to MARTS account for approximately 65% of the total national sales estimate. Advance sales estimates are computed using a link relative estimator. The change in sales from the previous month is estimated using only units that have reported data for both the current and

previous month. There is no imputation or adjustment for nonrespondents in MARTS. The total sales estimate is derived by multiplying this ratio by the preliminary sales estimate for the previous month (derived from the larger MRTS sample). Detailed industry estimates are summed to derive total estimates at broad industry levels. The monthly estimates are adjusted using annual survey estimates and for seasonal variation and holiday and trading-day differences. Additional information on MARTS and MRTS can be found on the Census Bureau website at: <http://www.census.gov/mrts/www/mrts.html>.

Official Business

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## Reliability of Estimates

Because the estimates presented in this report are based on a sample survey, they contain sampling error and nonsampling error.

Sampling error is the difference between the estimate and the result that would be obtained from a complete enumeration of the sampling frame conducted under the same survey conditions. This error occurs because only a subset of the entire sampling frame is measured in a sample survey. Standard errors and coefficients of variation (CV), as given in Table 3 of this report, are estimated measures of sampling variation.

The margin of sampling error, as used on page 1, gives a range about the estimate which is a 90 percent confidence interval. If, for example, the percent change estimate is +1.2 percent and its estimated standard error is 0.9 percent, then the margin of sampling error is  $\pm 1.65 \times 0.9$  percent or  $\pm 1.5$  percent, and the 90 percent confidence interval is -0.3 percent to +2.7 percent. If the interval contains 0, then one does not have sufficient evidence to conclude at the 90 percent

confidence level that the change is different from zero and therefore the change is not statistically significant. Estimated changes shown in the text are statistically significant unless otherwise noted. For a monthly total, the median estimated coefficient of variation is given. The resulting confidence interval is the estimated value  $\pm 1.65 \times CV \times$  (the estimated monthly total). The Census Bureau recommends that individuals using estimates in this report incorporate this information into their analyses, as sampling error could affect the conclusions drawn from the estimates.

Nonsampling error encompasses all other factors that contribute to the total error of a sample survey estimate. This type of error can occur because of nonresponse, insufficient coverage of the universe of retail businesses, mistakes in the recording and coding of data, and other errors of collection, response, coverage, or processing. Although nonsampling error is not measured directly, the Census Bureau employs quality control procedures throughout the process to minimize this type of error.

**Table 3. Estimated Measures of Sampling Variability and Revision to Advance Estimates**

(Estimates are shown as percents and are based on data from the Advance Monthly Retail Trade Survey and Monthly Retail Trade Survey)

NAICS Code	Kind of Business	Median CV <sup>(1)</sup> for Current Mo. (%)	Median standard error <sup>(1)</sup> for Percent change			Revision for month-to-month change <sup>(2)</sup>	
			Previous Mo. to Current Mo.	Previous Qtr. to Current Qtr.	Current Mo. to same Mo. Last Yr.	Average revision	Median absolute revision
	<b>Retail &amp; food services,</b>						
	total .....	0.6	0.3	0.2	0.4	0.0	0.2
	Total (excl. motor vehicle & parts) ..	0.6	0.2	0.2	0.3	0.1	0.1
	<b>Retail .....</b>	0.7	0.3	0.2	0.4	0.0	0.2
441	<b>Motor vehicle &amp; parts dealers .....</b>	2.0	1.3	0.6	1.4	-0.3	0.7
4411, 4412	Auto & other motor veh. dealers .	2.1	1.4	0.7	1.5	-0.3	0.7
442	<b>Furniture &amp; home furn. stores.....</b>	2.6	1.5	0.8	2.1	-0.4	0.8
443	<b>Electronics &amp; appliance stores .....</b>	1.5	0.7	0.5	1.2	0.0	0.7
444	<b>Building material &amp; garden eq. &amp;... supplies dealers.....</b>	2.4	1.3	0.8	1.6	0.3	0.4
445	<b>Food &amp; beverage stores.....</b>	0.8	0.3	0.2	0.5	0.0	0.3
4451	Grocery stores .....	0.9	0.3	0.2	0.6	0.0	0.2
446	<b>Health &amp; personal care stores .....</b>	1.6	0.4	0.4	1.1	-0.1	0.1
447	<b>Gasoline stations .....</b>	2.0	0.5	0.4	1.0	0.2	0.6
448	<b>Clothing &amp; clothing accessories stores .....</b>	2.0	0.7	0.6	1.0	-0.2	0.8
451	<b>Sporting goods, hobby, book &amp; music stores.....</b>	2.3	1.5	1.1	1.6	-0.1	0.5
452	<b>General merchandise stores.....</b>	0.2	0.0	0.1	0.1	0.0	0.1
4521	Department stores (ex. L.D.).....	0.0	0.0	0.0	0.0	-0.1	0.2
453	<b>Miscellaneous store retailers .....</b>	3.8	2.8	1.5	3.3	0.1	0.6
454	<b>Nonstore retailers .....</b>	1.6	0.9	0.7	1.3	0.1	0.5
722	<b>Food services &amp; drinking places ..</b>	1.9	0.8	0.7	1.3	0.2	0.4

- (1) Estimated measures of sampling variability are based on estimates not adjusted for seasonal variation or holiday or trading-day differences. Medians are based on estimates for the most recent 12 months.
- (2) These columns provide measures of the difference between the advance-to-preliminary and preliminary-to-final estimates of month-to-month change for the same pair of months as measured by the Advance sample and MRTS sample. The average and median revisions are based on estimates for the most recent 12 months.

Note: Additional information on confidentiality protection, sampling error, nonsampling error, sample design, and definitions may be found at <http://www.census.gov/mrts/www/mrts.html>

