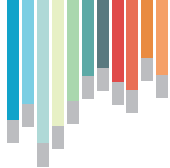




RETAIL INSIGHT

Spotlight on Retail Employees



ABOUT THIS REPORT

When many Americans think about retail jobs, they naturally imagine what they see in stores: sales associates, cashiers, and the occasional manager. But retail is more than that. From software developers to accountants to animal trainers, retail offers challenging, rewarding careers beyond what customers see when they go shopping.

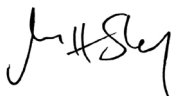
The retail industry supports 1 in 4 American jobs — from half of all working teenagers, to many of Fortune Magazine’s “Most Powerful Women,” and millions of people in between. Our industry is as dynamic and diverse as the people who work in it, and it’s always changing.

The NRF Foundation and KPMG are excited to release this report on retail employment, offering quick facts from various government resources, media, and retail industry reports, highlighting the vibrant workers and careers in our industry.

This important story needs to be told, and we are excited to play a part in telling it.



Mark Larson
Partner
Global Head
of Retail
KPMG



Matthew Shay
President
& CEO
National Retail
Federation



AN INDUSTRY FOR OPPORTUNITY

Many people assume that working in retail means standing behind a cash register, on a sales floor, or in a stock room. While store employees do make up a large percentage of the retail employment population, and have very important roles, **this is only one piece of the larger puzzle.**

**44% of retail employees do
NOT work in a sales position**



RETAIL HAS...

25,200

**Accountants
& Auditors**

21,120

**Computer Programmers
& Software Developers**

27,770

**Merchandise Displayers
& Window Trimmers**

3,850

**Architects
& Engineers**

26,500

Hairstylists & Cosmetologists

2,710

Animal Trainers

51,450

**Protective
Service Workers**

90,760

**Artists &
Designers**

70,780

Bakers



THE INDUSTRY FOR SMALL BUSINESS

Retail employees aren't all working for the "big box" retailers. In fact, more than a quarter are working in a company with fewer than 100 employees.





The infographic features a light blue cloud at the top. Two lines descend from the cloud to point to statistics. The first line points to '77%' and the second line points to '95%'. Below these statistics are stylized illustrations of retail buildings. On the left, a red building with a striped awning has a person pushing a stroller in front of it. In the center, there are two smaller red buildings with striped awnings, each displaying three blue shopping bags with dollar signs. To the right of these are several taller buildings in orange and green. At the bottom right, a red bus is shown with several passengers inside.

77%

of retail companies
have fewer than 10
employees

95%

of retail companies
have just 1 location

Source: 2007 U.S. Economic Census, among those in operation for an entire year.
Retail industry does not include restaurants and drinking places.



DIVERSITY IN OPPORTUNITY

From Amazon.com to Whole Foods, and from Nordstrom to the pet store down the street, the variety of businesses within the retail industry provides opportunities for Americans to work in any area they're passionate about as a consumer.

After restaurants, the grocery retail sector employs the largest share of retail employees.

But smaller sectors, like electronics and sporting goods stores, also employ significant portions of the industry's employees.

Employment at web-based retail companies has increased the most, with 145% growth over the last 10 years.

NUMBER OF EMPLOYEES BY SECTOR

**Restaurants
& Eating Places**

9,029,700

Grocery Stores

2,500,100

**Department
Stores**

1,501,000

**Clothing &
Accessories Stores**

1,407,900

**Building
Material & Garden
Supply Stores**

1,169,900

**Health &
Personal
Care Stores**

1,002,700

**Electronics
& Appliance
Stores**

511,600

**Auto Parts,
Accessories &
Tire Stores**

510,600

**Furniture
& Home
Furnishings
Stores**

441,700

**Sporting
Goods**
256,300

**Office Supplies,
Stationery,
& Gift Stores**

305,200

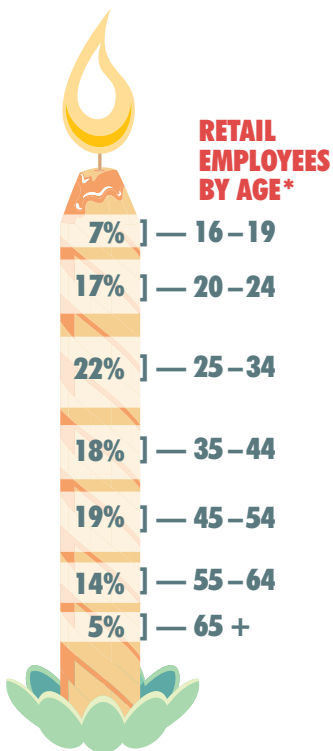
**Nonstore
Retailers**

443,400

Source: U.S. Bureau of Labor Statistics, 2012. All sectors not listed.



DEMOGRAPHICS OF RETAIL EMPLOYEES



For many Americans, retail was where they received their first paycheck. *The retail industry employs a quarter of the country's working teenagers — and more than half when including restaurants.*

Retail is also a place for older Americans. *For working Americans aged 65 and older, the retail industry is among the top employers.**

Opportunities in the industry aren't limited to those starting their careers and those winding down their working years. The retail industry offers careers at any and all levels of educational degree and training.

A third of retail employees over the age of 24 have a college degree — and 1 in 7 of these employees have advanced degrees.**

33%

College Graduates

58%

High School Graduates



*Source: U.S. Bureau of Labor Statistics, 2012. Retail industry does not include restaurants and drinking places. Percentages do not sum to 100 due to rounding.

**Master's, professional, or doctorate. Source: U.S. Bureau of Labor Statistics, 2012. Represents ages 25 and older. Retail industry does not include restaurants and drinking places.



WOMEN IN RETAIL

To many people, retail may just seem like a starting point for their working life, but the Forbes Power Women list, which ranks the world's 100 most powerful women, demonstrates that a career in our industry can lead to some of the most powerful positions in the world. Among the politicians, humanitarians and media moguls highlighted, six of the world's most powerful women come right from within our industry.

The retail industry continues to be a career destination for women; in fact, more than half of retail employees are women.

RETAILERS ON THE 2012 LIST OF MOST POWERFUL WOMEN



Sheri McCoy
CEO
Avon



Angela Ahrendts
CEO
Burberry



Rosalind Brewer
President & CEO
Sam's Club



Carol Meyrowitz
CEO
TJX Co.



Jan Fields
President
McDonald's USA



Mindy Grossman
CEO
HSN



COAST-TO-COAST CAREER OPPORTUNITIES

The retail industry employs millions of American workers, and is the nation's largest industry sector employer. Since January 2009, the retail and restaurant industries have added more than 800,000 employees across the country.*

The jobs and careers in the retail industry are not limited to a specific region of the country, or even one type of town — if there are people, there is retail, and if there is retail, there are jobs. Even some of the cities and metro areas hardest hit by the recession have seen significant job recovery from the retail industry. From the first quarter of 2009 to the first quarter of 2012, Riverside, California has gained more than 27,000 retail employees; Youngstown, Ohio has added more than 2,500 retail employees; and the New Orleans area has added more than 2,000 employees to their retail sector.**

NUMBER OF RETAIL EMPLOYEES IN TOP US METRO AREAS



Los Angeles, CA
569,570

San Francisco, CA
182,740

San Diego, CA
137,190

San Jose, CA
79,115



Dallas & Fort Worth, TX
322,134

Houston, TX
297,859

San Antonio, TX
91,470

Austin, TX
80,171

El Paso, TX
42,774



Boston, MA
246,659



Oklahoma City, OK
60,540



Denver, CO
130,626



Nashville, TN
86,694

Memphis, TN
54,850



Charlotte, NC
82,951



Milwaukee, WI
82,817



Las Vegas, NV
98,725



Jacksonville, FL
73,166

*Source: U.S. Bureau of Labor Statistics, January 2009 to January 2013. Retail industry includes restaurants and drinking places.

**Source for metro areas: U.S. Quarterly Workforce Indicators. Retail industry does not include restaurants and drinking places.



FULL-TIME & PART-TIME RETAIL EMPLOYMENT

The majority of retail employees — about 70% — are full-time, and most part-time employees (68%) choose to work less than a full-time schedule.

Part-time retail opportunities give people an option to have a second job, to balance raising a family, or to make extra money during the holidays.

Part-time jobs in the retail industry also provide the scheduling flexibility students need, and offer a starting-block for those pursuing a career in the industry. It's not surprising that nearly half of part-time retail employees are under the age of 25.

20% of part-time retail employees are 55 or older. Part-time employment is an opportunity for older workers looking to make some extra money before retirement, or while already retired from a career in another field.



BENEFITS IN RETAIL

In retail, it takes more than awesome products and great brand names to make profits — it takes great people. According to the 2012 NRF and Mercer Retail Compensation & Benefits Study, retail companies have been focused on developing talent and career advancement opportunities. Here are three of the top training trends in retail:

- Offering technology training programs for employees
- Building opportunities to grow within their organization
- Innovating careers in retail such as international assignments, internships, and job rotations

62% of retail companies offer health care benefits to their employees, which is more than the construction industry (52%) and the leisure and hospitality industry (34%), and on par with other industries, like education and healthcare (69%).*

BEST COMPANIES TO WORK FOR

The 2013 Fortune Magazine annual list of the best companies to work for includes 14 retailers, showcasing their commitment to both the community and their employees. Here is how they ranked:

5



16

The Container Store®

17



31



37



50

MEN'S WEARHOUSE®

66



71



74



77

Publix.

78



88



94



97

AÉROPOSTALE

* Source: U.S. Bureau of Labor Statistics National Compensation Survey 2012.
Retail industry does not include restaurants and drinking places.

