



ECONOMIC CONTRIBUTIONS

OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

SUMMER 2024

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The restaurant and foodservice industry has a significant impact on the U.S. economy, stimulating growth nationally and providing sizable contributions to output and employment. It's important to document these impacts, with data on the economic contributions of the sector highlighted at the national, state, metropolitan statistical area and Congressional district levels. Such information can be a powerful tool when advocating for the restaurant and foodservice industry, as well as in describing its overall size and scope. This data will be updated regularly moving forward.

The Association's research is considered the authoritative source for restaurant industry economic impact, and the data provided in these reports add to the considerable knowledge of its overall contributions. It's hoped this knowledge can be useful to a wide variety of constituents, including restaurant operators, policymakers, and the media.

Visit Restaurant.org/Research each month for the most updated industry trends and analysis.

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ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



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INTRODUCTION

The restaurant and foodservice industry is a vital component of the U.S. economy. One in every 10 Americans work in the sector, making it the second-largest private employer. More importantly, restaurants provide opportunities for professional growth, with 8 in 10 owners starting in entry-level positions early in their careers, and they continue to be the place that people go to celebrate life's important key events and hang out with friends and family. Indeed, 9 in 10 consumers say they enjoy going to restaurants, noting that it's where they experience foods and beverages they haven't tried before.

Beyond those facts, the purpose of this analysis is to derive the total economic contributions of the industry, with data for the entire United States as well as for each state, metropolitan statistical area (MSA) and congressional district. There are also breakouts for fullservice restaurants, limited-service restaurants, and other food and beverage businesses. These impacts go well beyond the direct contributions of restaurants themselves, as the sector produces large spillover effects on the economy, ranging from national impacts to economic benefits in individual communities. In economics, this is known as the multiplier effect.

Eating and drinking places will directly contribute \$1.4T in output (or sales) to the U.S. economy in 2024 dollars, based on estimates of publicly available 2022 data. That's roughly equivalent to 5% of nominal GDP. In addition, in 2022, the industry reported it had 14.2M employees and \$472.4B in total labor income. That included all sources of income—wages, salaries, and proprietors' income—as well as benefits.

These contributions will spur additional spending in the U.S. economy, including from employees, suppliers, and others in the surrounding area. Adding in these additional impacts, the industry will make a total contribution of \$3.5T in output to the U.S. economy in 2024, or 12.3% of nominal GDP, with 22.9M employees and \$1.1T in total labor income.

The industry's eating and drinking places in the United States will pay \$216.7B in taxes to all levels of government. Including additional spillover impacts, that figure will rise to \$490.4B in total taxes being attributable to the sector.



ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



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Modeling economic contributions

This study uses the IMPLAN economic input-output mode, which is the most widely used, privately developed model for such analysis. Economic input-output models provide estimates of direct, indirect, and induced effects stimulated by spending in a specified geography. In this study, that includes national, state, metropolitan statistical area (MSA), and congressional district estimates.

Direct effects represent those economic impacts from spending by restaurants and foodservice businesses, including on wages and salaries, equipment, operational costs (including food and cooking items) and other goods and services.

Indirect effects represent the supply-chain impacts resulting from direct expenditures. Restaurant and foodservice companies have a wide variety of vendors servicing them, and this analysis captures the impacts of spending by those suppliers, including the incomes from workers and the purchases necessary to run their operations. These activities generate additional output and employment beyond the direct spending of restaurants and foodservice businesses themselves.

Induced effects refer to the household spending impacts resulting from the labor income of restaurants and foodservice companies and their suppliers. Employees use their take-home pay to purchase a variety of goods and services, ranging from groceries to health care to real estate to recreational activities. Those activities also generate additional output and employment beyond the direct spending of restaurants and foodservice businesses themselves.

The total economic contribution of the sector would add together the direct, indirect, and induced impacts from spending among restaurants and foodservice establishments. The IMPLAN model provides estimates of the impacts of restaurants and foodservice spending on total output, labor income, and jobs. The multiplier could be derived by calculating the total economic impacts divided by the direct impacts.

It's important to note that the total economic contribution tends to be larger with increased geographic size. This is simply because more of the indirect and induced activity takes place within that region, whether it be a state, MSA, or congressional district.

ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



UNITED STATES

UNITED STATES

The industry’s eating and drinking places are expected to directly contribute **\$1.37T in output** to the U.S. economy in 2024 dollars, based on IMPLAN estimates of 2022 data. That is roughly equivalent to 5% of nominal GDP. In addition, the industry had **14,168,238 employees** and **\$472.40B in total labor income** in 2022. This includes all sources of income—wages, salaries, and proprietors’ income—as well as benefits.

These contributions spur additional spending in the U.S. economy, including from employees, suppliers, and others in the surrounding area. Adding in indirect and induced impacts, eating and drinking places are expected to make a total contribution of **\$3.53T** in output to the U.S. economy in 2024, or 12.3% of nominal GDP, with **22,889,928 employees** and **\$1.13T in total labor income** in 2022.

In the United States, the industry will directly pay **\$216.67B in taxes** to all levels of government, including \$56.28B in state taxes and \$114.48B in federal taxes. With additional induced and indirect effects included, the sector will contribute **\$490.41B in taxes**, with \$120.04B in state taxes and \$279.68B in federal taxes.

U.S. – ECONOMIC CONTRIBUTIONS

BY TYPE OF FOODSERVICES AND DRINKING PLACES, 2024

	OUTPUT		EMPLOYMENT		LABOR INCOME		TAXES	
FULL-SERVICE RESTAURANTS	Direct	\$545.12B	Direct	5.65M	Direct	\$198.78B	Direct	\$86.92B
	Total	\$1.45T	Total	9.40M	Total	\$468.70B	Total	\$198.54B
LIMITED-SERVICE RESTAURANTS	Direct	\$568.27B	Direct	5.56M	Direct	\$160.79B	Direct	\$84.43B
	Total	\$1.60T	Total	9.76M	Total	\$458.92B	Total	\$208.48B
ALL OTHER FOOD AND DRINKING PLACES	Direct	\$254.86B	Direct	2.96M	Direct	\$112.83B	Direct	\$45.32B
	Total	\$657.29B	Total	4.76M	Total	\$244.00B	Total	\$97.56B

Source: National Restaurant Association calculations using 2022 IMPLAN data

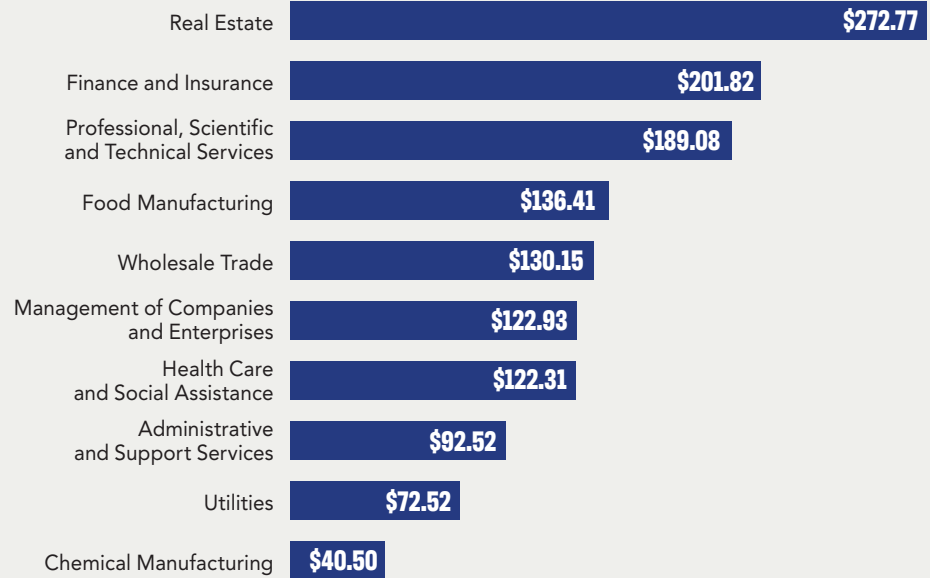
ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



UNITED STATES

U.S. LARGEST INDIRECT AND INDUCED OUTPUT IMPACTS

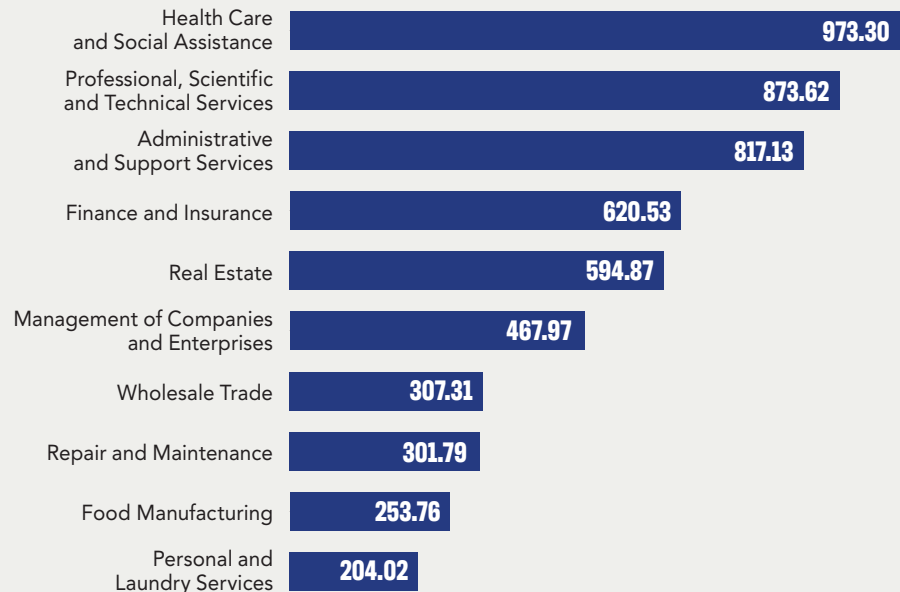
FROM EATING AND DRINKING PLACES, 2024 (IN BILLIONS OF DOLLARS)



Source: National Restaurant Association calculations using 2022 IMPLAN data

U.S. LARGEST INDIRECT AND INDUCED EMPLOYMENT IMPACTS

FROM EATING AND DRINKING PLACES, 2024 (IN THOUSANDS OF WORKERS)



Source: National Restaurant Association calculations using 2022 IMPLAN data

ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

CALIFORNIA

Eating and drinking places are expected to directly contribute **\$181.04B** in output to the California economy in 2024, with **1,730,324 employees** and **\$67.26B in total labor income**. This includes all sources of income—wages, salaries, and proprietors’ income—as well as benefits.

These contributions spur additional spending in the U.S. economy, including from employees, suppliers, and others in the surrounding area. Adding in indirect and induced impacts, the industry will contribute a total of **\$349.94B** in output to the California economy, with **2,399,418 employees** and **\$125.03B in total labor income**.

Eating and drinking places in California will directly pay **\$33.00B in taxes** to all levels of government, including \$1.37B in county taxes, \$9.56B in state taxes and \$16.53B in federal taxes. With additional induced and indirect effects included, the sector will contribute **\$59.35B in taxes**, with \$2.20B in county taxes, \$17.11B in state taxes and \$31.12B in federal taxes.

CALIFORNIA – ECONOMIC CONTRIBUTIONS

BY TYPE OF EATING AND DRINKING PLACES, 2024

	OUTPUT		EMPLOYMENT		LABOR INCOME		TAXES	
FULL SERVICE RESTAURANTS	Direct	\$70.44B	Direct	663,948	Direct	\$27.19B	Direct	\$13.12B
	Total	\$137.18B	Total	941,718	Total	\$49.70B	Total	\$23.25B
LIMITED-SERVICE RESTAURANTS	Direct	\$75.77B	Direct	681,777	Direct	\$23.65B	Direct	\$13.23B
	Total	\$154.54B	Total	1,000,523	Total	\$49.41B	Total	\$24.87B
ALL OTHER EATING AND DRINKING PLACES	Direct	\$34.83B	Direct	384,599	Direct	\$16.43B	Direct	\$6.66B
	Total	\$68.59B	Total	535,469	Total	\$28.69B	Total	\$11.97B

Source: National Restaurant Association calculations using 2022 IMPLAN data

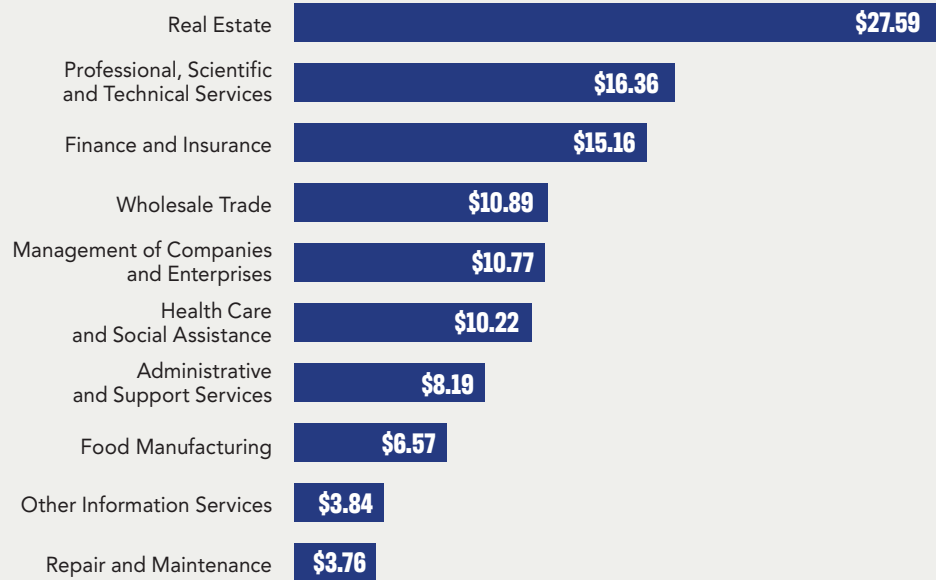
ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

CALIFORNIA LARGEST INDIRECT AND INDUCED OUTPUT IMPACTS

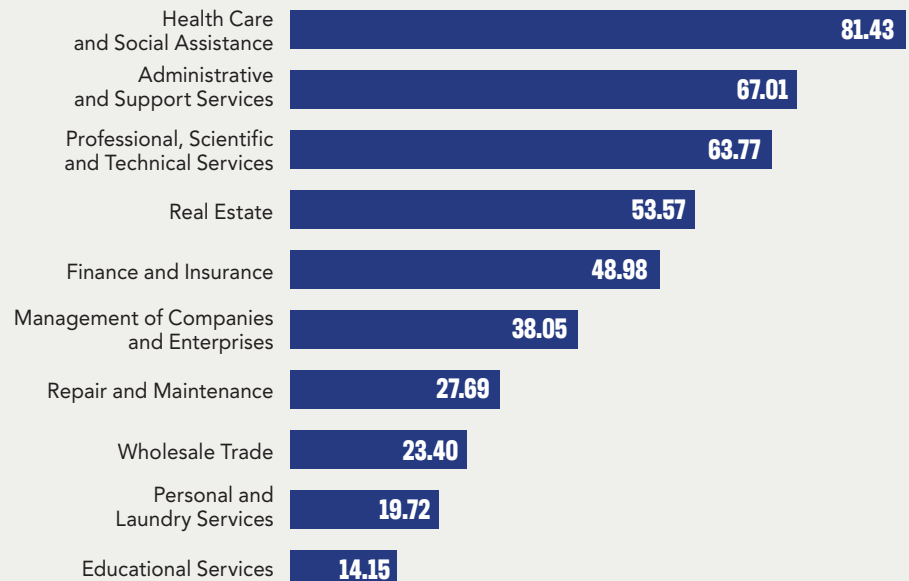
FROM EATING AND DRINKING PLACES, 2024 (IN BILLIONS OF DOLLARS)



Source: National Restaurant Association calculations using 2022 IMPLAN data

CALIFORNIA LARGEST INDIRECT AND INDUCED EMPLOYMENT IMPACTS

FROM EATING AND DRINKING PLACES, 2024 (IN THOUSANDS OF WORKERS)



Source: National Restaurant Association calculations using 2022 IMPLAN data

ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

CALIFORNIA CONGRESSIONAL DISTRICTS

ECONOMIC CONTRIBUTIONS FROM EATING AND DRINKING PLACES, 2024

CONGRESSIONAL DISTRICT	OUTPUT		EMPLOYMENT		LABOR INCOME		TAXES	
CA-01	Direct	\$2.35B	Direct	24,779	Direct	\$782.75M	Direct	\$412.16M
	Total	\$3.36B	Total	29,804	Total	\$1.08B	Total	\$579.59M
CA-02	Direct	\$3.32B	Direct	31,055	Direct	\$1.30B	Direct	\$559.37M
	Total	\$4.45B	Total	36,039	Total	\$1.73B	Total	\$730.60M
CA-03	Direct	\$3.62B	Direct	36,578	Direct	\$1.27B	Direct	\$583.06M
	Total	\$4.68B	Total	41,497	Total	\$1.61B	Total	\$736.64M
CA-04	Direct	\$3.82B	Direct	35,955	Direct	\$1.46B	Direct	\$616.72M
	Total	\$4.70B	Total	39,825	Total	\$1.74B	Total	\$743.81M
CA-05	Direct	\$3.77B	Direct	38,559	Direct	\$1.28B	Direct	\$600.22M
	Total	\$4.41B	Total	41,637	Total	\$1.48B	Total	\$692.46M
CA-06	Direct	\$2.55B	Direct	25,701	Direct	\$863.64M	Direct	\$367.94M
	Total	\$2.95B	Total	27,515	Total	\$1.00B	Total	\$421.68M
CA-07	Direct	\$3.07B	Direct	31,181	Direct	\$1.06B	Direct	\$446.74M
	Total	\$3.50B	Total	32,986	Total	\$1.20B	Total	\$507.35M
CA-08	Direct	\$2.09B	Direct	20,316	Direct	\$730.69M	Direct	\$306.52M
	Total	\$2.34B	Total	21,251	Total	\$801.61M	Total	\$345.27M
CA-09	Direct	\$2.33B	Direct	23,732	Direct	\$777.11M	Direct	\$389.31M
	Total	\$2.96B	Total	26,708	Total	\$964.00M	Total	\$496.41M
CA-10	Direct	\$3.21B	Direct	31,167	Direct	\$1.18B	Direct	\$510.93M
	Total	\$3.97B	Total	34,201	Total	\$1.48B	Total	\$626.29M
CA-11	Direct	\$7.76B	Direct	61,865	Direct	\$3.72B	Direct	\$1.15B
	Total	\$10.94B	Total	70,454	Total	\$5.09B	Total	\$1.52B
CA-12	Direct	\$3.27B	Direct	30,592	Direct	\$1.91B	Direct	\$476.94M
	Total	\$3.77B	Total	32,432	Total	\$2.23B	Total	\$539.96M
CA-13	Direct	\$1.92B	Direct	19,516	Direct	\$621.24M	Direct	\$292.51M
	Total	\$2.24B	Total	20,869	Total	\$708.96M	Total	\$338.09M
CA-14	Direct	\$2.52B	Direct	23,185	Direct	\$971.40M	Direct	\$364.75M
	Total	\$2.84B	Total	24,360	Total	\$1.09B	Total	\$405.87M
CA-15	Direct	\$3.52B	Direct	30,928	Direct	\$1.49B	Direct	\$498.30M
	Total	\$4.27B	Total	33,101	Total	\$1.80B	Total	\$592.57M
CA-16	Direct	\$4.71B	Direct	42,101	Direct	\$1.93B	Direct	\$656.09M
	Total	\$5.12B	Total	43,323	Total	\$2.10B	Total	\$708.61M
CA-17	Direct	\$4.06B	Direct	36,809	Direct	\$1.67B	Direct	\$513.19M
	Total	\$4.56B	Total	38,147	Total	\$1.89B	Total	\$567.02M
CA-18	Direct	\$2.90B	Direct	26,558	Direct	\$1.13B	Direct	\$425.92M
	Total	\$3.10B	Total	27,181	Total	\$1.19B	Total	\$454.67M

ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

CALIFORNIA CONGRESSIONAL DISTRICTS

ECONOMIC CONTRIBUTIONS FROM EATING AND DRINKING PLACES, 2024

CONGRESSIONAL DISTRICT	OUTPUT		EMPLOYMENT		LABOR INCOME		TAXES	
CA-19	Direct	\$3.85B	Direct	36,515	Direct	\$1.48B	Direct	\$615.43M
	Total	\$4.44B	Total	38,897	Total	\$1.70B	Total	\$705.58M
CA-20	Direct	\$3.38B	Direct	34,576	Direct	\$1.11B	Direct	\$521.78M
	Total	\$3.81B	Total	36,488	Total	\$1.24B	Total	\$585.02M
CA-21	Direct	\$1.78B	Direct	18,401	Direct	\$583.65M	Direct	\$263.00M
	Total	\$1.99B	Total	19,363	Total	\$643.24M	Total	\$291.31M
CA-22	Direct	\$1.71B	Direct	17,413	Direct	\$546.17M	Direct	\$250.91M
	Total	\$1.91B	Total	18,245	Total	\$603.60M	Total	\$279.50M
CA-23	Direct	\$2.51B	Direct	25,068	Direct	\$825.20M	Direct	\$351.74M
	Total	\$2.64B	Total	25,616	Total	\$856.92M	Total	\$370.10M
CA-24	Direct	\$3.92B	Direct	38,641	Direct	\$1.40B	Direct	\$657.72M
	Total	\$5.63B	Total	46,508	Total	\$2.01B	Total	\$911.35M
CA-25	Direct	\$2.02B	Direct	20,115	Direct	\$683.05M	Direct	\$305.61M
	Total	\$2.20B	Total	20,928	Total	\$728.46M	Total	\$330.60M
CA-26	Direct	\$3.56B	Direct	34,997	Direct	\$1.24B	Direct	\$591.52M
	Total	\$4.77B	Total	40,391	Total	\$1.68B	Total	\$775.12M
CA-27	Direct	\$2.52B	Direct	23,281	Direct	\$926.62M	Direct	\$351.86M
	Total	\$2.55B	Total	23,394	Total	\$935.21M	Total	\$355.90M
CA-28	Direct	\$4.85B	Direct	45,875	Direct	\$1.80B	Direct	\$681.02M
	Total	\$4.96B	Total	46,314	Total	\$1.84B	Total	\$694.49M
CA-29	Direct	\$2.04B	Direct	18,861	Direct	\$745.61M	Direct	\$276.60M
	Total	\$2.07B	Total	18,972	Total	\$754.77M	Total	\$280.35M
CA-30	Direct	\$6.07B	Direct	57,658	Direct	\$2.37B	Direct	\$811.21M
	Total	\$6.30B	Total	58,511	Total	\$2.45B	Total	\$834.93M
CA-31	Direct	\$2.69B	Direct	24,871	Direct	\$995.29M	Direct	\$371.53M
	Total	\$2.73B	Total	25,036	Total	\$1.01B	Total	\$377.22M
CA-32	Direct	\$5.77B	Direct	54,070	Direct	\$2.20B	Direct	\$822.69M
	Total	\$5.96B	Total	54,843	Total	\$2.26B	Total	\$844.45M
CA-33	Direct	\$1.95B	Direct	19,384	Direct	\$631.42M	Direct	\$273.46M
	Total	\$2.06B	Total	19,859	Total	\$660.11M	Total	\$286.95M
CA-34	Direct	\$3.47B	Direct	33,248	Direct	\$1.37B	Direct	\$471.48M
	Total	\$3.57B	Total	33,644	Total	\$1.40B	Total	\$482.60M
CA-35	Direct	\$2.79B	Direct	27,821	Direct	\$953.01M	Direct	\$395.67M
	Total	\$2.98B	Total	28,704	Total	\$1.01B	Total	\$419.51M
CA-36	Direct	\$5.65B	Direct	53,482	Direct	\$2.20B	Direct	\$753.17M
	Total	\$5.92B	Total	54,496	Total	\$2.30B	Total	\$778.65M

ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

CALIFORNIA CONGRESSIONAL DISTRICTS

ECONOMIC CONTRIBUTIONS FROM EATING AND DRINKING PLACES, 2024

CONGRESSIONAL DISTRICT	OUTPUT		EMPLOYMENT		LABOR INCOME		TAXES	
	Direct	Total	Direct	Total	Direct	Total	Direct	Total
CA-37	\$3.69B	\$3.80B	35,102	35,513	\$1.43B	\$1.47B	\$489.07M	\$500.45M
CA-38	\$3.12B	\$3.17B	28,958	29,180	\$1.15B	\$1.17B	\$429.61M	\$437.10M
CA-39	\$2.11B	\$2.26B	20,873	21,621	\$706.45M	\$749.76M	\$297.87M	\$315.85M
CA-40	\$4.12B	\$4.40B	39,797	40,947	\$1.45B	\$1.55B	\$580.28M	\$615.44M
CA-41	\$4.22B	\$4.68B	41,756	44,120	\$1.44B	\$1.56B	\$645.61M	\$706.03M
CA-42	\$4.15B	\$4.24B	38,744	39,089	\$1.55B	\$1.58B	\$565.96M	\$578.74M
CA-43	\$2.86B	\$2.92B	26,734	26,942	\$1.06B	\$1.08B	\$384.27M	\$391.45M
CA-44	\$2.56B	\$2.61B	23,755	23,924	\$938.21M	\$951.93M	\$339.58M	\$346.12M
CA-45	\$4.87B	\$5.15B	46,659	47,753	\$1.75B	\$1.85B	\$685.35M	\$721.63M
CA-46	\$3.55B	\$3.78B	34,409	35,342	\$1.28B	\$1.36B	\$496.67M	\$527.28M
CA-47	\$5.59B	\$6.39B	54,487	57,683	\$2.04B	\$2.34B	\$810.17M	\$906.29M
CA-48	\$2.58B	\$2.65B	25,039	25,344	\$897.74M	\$917.03M	\$356.13M	\$366.02M
CA-49	\$4.00B	\$4.15B	38,690	39,285	\$1.43B	\$1.48B	\$548.89M	\$567.61M
CA-50	\$5.40B	\$6.06B	53,026	55,769	\$2.00B	\$2.24B	\$786.85M	\$864.60M
CA-51	\$4.13B	\$4.59B	40,265	42,148	\$1.50B	\$1.67B	\$580.08M	\$634.46M
CA-52	\$2.79B	\$2.89B	27,174	27,570	\$1.01B	\$1.04B	\$386.49M	\$400.55M

Source: National Restaurant Association calculations using 2022 IMPLAN data

ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

CALIFORNIA METROPOLITAN STATISTICAL AREAS

ECONOMIC CONTRIBUTIONS FROM EATING AND DRINKING PLACES, 2024

MSAs	OUTPUT		EMPLOYMENT		LABOR INCOME		TAXES	
BAKERSFIELD-DELANO	Direct	\$2.89B	Direct	29,130	Direct	\$942.23M	Direct	\$510.56M
	Total	\$4.15B	Total	35,280	Total	\$1.34B	Total	\$735.12M
CHICO	Direct	\$820.31M	Direct	8,837	Direct	\$276.36M	Direct	\$142.74M
	Total	\$1.21B	Total	10,768	Total	\$394.35M	Total	\$205.40M
EL CENTRO	Direct	\$466.65M	Direct	4,737	Direct	\$152.61M	Direct	\$86.12M
	Total	\$624.03M	Total	5,510	Total	\$192.18M	Total	\$113.42M
FRESNO	Direct	\$3.83B	Direct	39,292	Direct	\$1.26B	Direct	\$684.84M
	Total	\$5.90B	Total	49,514	Total	\$1.90B	Total	\$1.03B
HANFORD-CORCORAN	Direct	\$415.12M	Direct	4,378	Direct	\$127.61M	Direct	\$66.45M
	Total	\$525.63M	Total	4,862	Total	\$154.54M	Total	\$81.86M
LOS ANGELES-LONG BEACH-ANAHEIM	Direct	\$68.12B	Direct	644,194	Direct	\$25.51B	Direct	\$12.36B
	Total	\$126.86B	Total	892,107	Total	\$45.68B	Total	\$21.48B
MERCED	Direct	\$719.11M	Direct	7,391	Direct	\$228.61M	Direct	\$124.09M
	Total	\$987.66M	Total	8,773	Total	\$305.82M	Total	\$167.41M
MODESTO	Direct	\$2.12B	Direct	21,550	Direct	\$727.59M	Direct	\$367.93M
	Total	\$3.02B	Total	26,025	Total	\$1.02B	Total	\$521.72M
NAPA	Direct	\$1.06B	Direct	8,983	Direct	\$460.28B	Direct	\$190.80M
	Total	\$1.43B	Total	10,803	Total	\$585.96B	Total	\$249.78M
OXNARD-THOUSAND OAKS-VENTURA	Direct	\$3.52B	Direct	34,941	Direct	\$1.21B	Direct	\$622.22M
	Total	\$5.59B	Total	44,641	Total	\$1.96B	Total	\$958.72M
REDDING	Direct	\$620.77M	Direct	6,545	Direct	\$204.59M	Direct	\$109.46M
	Total	\$943.68M	Total	8,172	Total	\$300.31M	Total	\$165.67M
RIVERSIDE-SAN BERNADINO-ONTARIO	Direct	\$17.00B	Direct	169,284	Direct	\$5.70B	Direct	\$3.01B
	Total	\$24.77B	Total	210,620	Total	\$7.98B	Total	\$4.22B
SACRAMENTO-ROSEVILLE-FOLSOM	Direct	\$9.80B	Direct	98,704	Direct	\$3.40B	Direct	\$1.72B
	Total	\$16.52B	Total	129,725	Total	\$5.67B	Total	\$2.80B
SALINAS	Direct	\$1.92B	Direct	18,201	Direct	\$735.96M	Direct	\$348.97M
	Total	\$2.79B	Total	22,396	Total	\$1.03B	Total	\$497.99M

ECONOMIC CONTRIBUTIONS OF THE RESTAURANT & FOODSERVICE INDUSTRY



CALIFORNIA

CALIFORNIA METROPOLITAN STATISTICAL AREAS

ECONOMIC CONTRIBUTIONS FROM EATING AND DRINKING PLACES, 2024

MSAs	OUTPUT		EMPLOYMENT		LABOR INCOME		TAXES	
SAN DIEGO-CHULA VISTA- CARLSBAD	Direct	\$16.88B	Direct	164,539	Direct	\$6.14B	Direct	\$3.02B
	Total	\$28.59B	Total	217,011	Total	\$10.10B	Total	\$4.85B
SAN FRANCISCO-OAKLAND-FREMONT	Direct	\$24.72B	Direct	218,178	Direct	\$10.44B	Direct	\$4.31B
	Total	\$40.77B	Total	270,587	Total	\$16.77B	Total	\$6.77B
SAN JOSE-SUNNYVALE-SANTA CLARA	Direct	\$10.18B	Direct	91,621	Direct	\$4.15B	Direct	\$1.64B
	Total	\$14.66B	Total	105,661	Total	\$5.99B	Total	\$2.30B
SAN LUIS OBISPO-PASO ROBLES	Direct	\$1.57B	Direct	15,817	Direct	\$557.18M	Direct	\$276.63M
	Total	\$2.30B	Total	19,590	Total	\$770.58M	Total	\$395.34M
SANTA CRUZ-WATSONVILLE	Direct	\$1.32B	Direct	12,730	Direct	\$501.96M	Direct	\$235.75M
	Total	\$1.99B	Total	15,750	Total	\$742.23M	Total	\$346.30M
SANTA MARIA-SANTA BARBARA	Direct	\$2.39B	Direct	23,302	Direct	\$864.73M	Direct	\$414.31M
	Total	\$3.87B	Total	29,951	Total	\$1.41B	Total	\$635.81M
SANTA ROSA-PETALUMA	Direct	\$2.14B	Direct	20,812	Direct	\$798.00M	Direct	\$384.21M
	Total	\$3.36B	Total	26,430	Total	\$1.22B	Total	\$574.71M
STOCKTON-LODI	Direct	\$2.42B	Direct	24,710	Direct	\$801.93M	Direct	\$426.54M
	Total	\$3.38B	Total	29,441	Total	\$1.09B	Total	\$597.87M
VALLEJO	Direct	\$1.54B	Direct	15,343	Direct	\$521.60M	Direct	\$260.23M
	Total	\$2.00B	Total	17,566	Total	\$651.57M	Total	\$333.85M
VISALIA	Direct	\$1.39B	Direct	14,425	Direct	\$439.01M	Direct	\$246.64M
	Total	\$1.91B	Total	17,058	Total	\$583.44M	Total	\$333.85M
YUBA CITY	Direct	\$500.98M	Direct	5,172	Direct	\$162.51M	Direct	\$85.20M
	Total	\$693.09M	Total	6,114	Total	\$218.52M	Total	\$114.21M

Source: National Restaurant Association calculations using 2022 IMPLAN data



For more information: Restaurant.org | CalRest.org



SAMPLING OF **INDUSTRY DEFINITIONS**

This section outlines official definitions for the North American Industry Classification System (NAICS). For the complete list and more information, [click here](#).

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Administrative and Support

Services (NAICS 561): Industries in the Administrative and Support Services subsector group establishments are engaged in activities that support the day-to-day operations of other organizations. The processes employed in this sector (e.g., general management, personnel administration, clerical activities, cleaning activities) are often integral parts of the activities of establishments found in all sectors of the economy. The establishments classified in this subsector have specialization in one or more of these activities and can, therefore, provide services to clients in a variety of industries and, in some cases, to households. The individual industries of this subsector are defined based on the particular process they're engaged in and the particular services they provide.

Chemical Manufacturing

(NAICS 325): The Chemical Manufacturing subsector is based on the transformation of organic and inorganic raw materials by a chemical process and the formulation of products. This subsector distinguishes the production of basic chemicals that comprise the first industry group from the production of intermediate and end products produced by further processing of basic chemicals that make up the remaining industry groups.

Construction (NAICS 23): The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites

also are included in this sector. Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).

Educational Services (NAICS 61):

The Educational Services sector comprises establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated. They may also offer food and/or accommodation services to their students.

Educational services are usually delivered by teachers or instructors that explain, tell, demonstrate, supervise, and direct learning. Instruction is imparted in diverse settings, such as educational institutions, the workplace, or the home, and through diverse means, such as correspondence, television, the Internet, or other electronic and distance-learning methods. The training provided by these establishments may include the use of simulators and simulation methods. It can be adapted to the particular needs of the students. For example, sign language can replace verbal language for teaching

students with hearing impairments. All industries in the sector share this commonality of process, namely, labor inputs of instructors with the requisite subject matter expertise, and teaching ability.

Finance and Insurance (NAICS 52):

The Finance and Insurance sector comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions.

Food and Beverage Stores

(NAICS 445): Industries in the Food and Beverage Stores subsector usually retail food and beverages merchandise from fixed point-of-sale locations. Establishments in this subsector have special equipment (e.g., freezers, refrigerated display cases, refrigerators) for displaying food and beverage goods. They have staff trained in the processing of food products to guarantee the proper storage and sanitary conditions required by regulatory authority.

Food Manufacturing (NAICS 311):

Industries in the Food Manufacturing subsector transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products. The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included.



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General Merchandise Stores (NAICS 452): Industries in the General Merchandise Stores subsector retail new general merchandise from fixed point-of-sale locations. Establishments in this subsector are unique in that they have the equipment and staff capable of retailing a large variety of goods from a single location. This includes a variety of display equipment and staff trained to provide information on many lines of products.

Health Care and Social Assistance (NAICS 62): The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. The services provided by establishments in this sector are delivered by trained professionals. All industries in the sector share this commonality of process, namely, labor inputs of health practitioners or social workers with the requisite expertise. Many of the industries in this sector are defined based on the educational degree held by the practitioners included in the industry.

Management of Companies and Enterprises (NAICS 55): The Management of Companies and Enterprises sector comprises (1) establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise

and that normally undertake the strategic or organizational planning and decision-making role of the company or enterprise. Establishments that administer, oversee, and manage may hold the securities of the company or enterprise. Establishments in this sector perform essential activities that are often undertaken in-house by establishments in many sectors of the economy. By consolidating the performance of these activities of the enterprise at one establishment, economies of scale are achieved.

Non-store Retailers (NAICS 454): Industries in the Non-store Retailers subsector retail merchandise using methods, such as the broadcasting of infomercials, the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, and selling from portable stalls and distribution through vending machines. Establishments in this subsector include mail-order houses, vending machine operators, home delivery sales, door-to-door sales, party plan sales, electronic shopping, and sales through portable stalls (e.g., street vendors, except food). Establishments engaged in the direct sale (i.e., non-store) of products, such as home heating oil dealers and newspaper delivery service providers, are included in this subsector.

Other Information Services (NAICS 519): Industries in the Other Information Services subsector group include establishments supplying information, storing and providing access to information, searching and retrieving information, operating websites that use search engines to allow for searching information on the Internet, or publishing and/or broadcasting content exclusively on the Internet. The main components of the subsector are news syndicates, libraries, archives, exclusive Internet publishing and/or broadcasting, and Web Search Portals.

Performing Arts, Spectator Sports, and Related Industries (NAICS 711): Industries in the Performing Arts, Spectator Sports, and Related Industries subsector group are establishments that produce or organize and promote live presentations involving performances of actors and actresses, singers, dancers, musical groups and artists, athletes, and other entertainers, including independent (i.e., freelance) entertainers and the establishments that manage their careers. The classification recognizes four basic processes: (1) producing (i.e., presenting) events; (2) organizing, managing, and/or promoting events; (3) managing and representing entertainers; and (4) providing the artistic, creative, and technical skills necessary to the production of these live events. Also, this subsector contains four industries for performing arts companies. Each is defined based on the particular skills of the entertainers involved in the presentations.

Personal and Laundry Services (NAICS 812): Industries in the Personal and Laundry Services subsector group include establishments that provide personal and laundry services to individuals, households, and businesses. Services performed include personal care services; death care services; laundry and drycleaning services; and a wide range of other personal services, such as pet care (except veterinary) services, photofinishing services, temporary parking services, and dating services.

Professional, Scientific, and Technical Services (NAICS 54): The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and,



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in some cases, to households. This includes the following subsectors:

- Legal Services (NAICS 5411)
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services (NAICS 5412)
- Architectural, Engineering, and Related Services (NAICS 5413)
- Specialized Design Services (NAICS 5414)
- Computer Systems Design and Related Services (NAICS 5415)
- Management, Scientific, and Technical Consulting Services (NAICS 5416)
- Scientific Research and Development Services (NAICS 5417)
- Advertising and Related Services (NAICS 5418)
- Other Professional, Scientific, and Technical Services (5419)

Real Estate (NAICS 531):

Industries in the Real Estate subsector group are establishments primarily engaged in renting or leasing real estate to others; managing real estate for others; selling, buying, or renting real estate for others; and providing other real estate related services, such as appraisal services. This subsector includes equity Real Estate Investment Trusts (REITs) primarily engaged in leasing buildings, dwellings, or other real-estate property to others.

Religious, Grantmaking, Civic, Professional, and Similar Organizations (NAICS 813):

Industries in the Religious, Grantmaking, Civic, Professional, and Similar Organizations subsector group include establishments that organize and promote religious activities, support various causes through grantmaking, advocate various social and political causes, and promote and defend the interests of their members.

Repair and Maintenance (NAICS 811):

Industries in the Repair and Maintenance subsector restore machinery, equipment, and other products to working order. These establishments also typically provide general or routine maintenance (i.e., servicing) on

such products to ensure they work efficiently and prevent breakdown and unnecessary repairs.

Telecommunications (NAICS 517):

Industries in the Telecommunications subsector group include establishments that provide telecommunications and services related to that activity (e.g., telephony, including Voice over Internet Protocol (VoIP); cable and satellite television distribution services; Internet access; telecommunications reselling services). The Telecommunications subsector is primarily engaged in operating and/or providing access to facilities for the transmission of voice, data, text, sound, and video. Transmission facilities may be based on a single technology or a combination of technologies.

Utilities (NAICS 22):

The Utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility. Electric power includes generation, transmission and distribution. Natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage-treatment facilities.

Warehousing and Storage (NAICS 493):

Industries in the Warehousing and Storage subsector are primarily engaged in operating warehousing and storage facilities for general merchandise, refrigerated goods, and other warehouse products. These establishments provide facilities to store goods. They do not sell the goods they handle. These establishments take responsibility for storing the goods and keeping them secure. They may also provide a range of services, often referred to as logistics services, related to the distribution of goods. Logistics services can include labeling,

breaking bulk, inventory control and management, light assembly, order entry and fulfillment, packaging, pick and pack, price marking and ticketing, and transportation arrangement. However, establishments in this industry group always provide warehousing or storage services in addition to any logistic services. Furthermore, the warehousing or storage of goods must be more than incidental to the performance of services, such as price marking.

Wholesale Trade (NAICS 42):

The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing. The wholesaling process is an intermediate step in the distribution of merchandise. Wholesalers are organized to sell or arrange the purchase or sale of (a) goods for resale (i.e., goods sold to other wholesalers or retailers), (b) capital or durable non-consumer goods, and (c) raw and intermediate materials and supplies used in production.

Wholesalers sell merchandise to other businesses and normally operate from a warehouse or office. Those warehouses and offices are characterized by having little or no display of merchandise. In addition, neither the design nor the location of the premises is intended to solicit walk-in traffic. Wholesalers do not normally use advertising directed toward the public. Generally, customers are initially reached via telephone, in-person marketing, or by specialized advertising that might include Internet and other electronic means. Follow-up orders are either vendor-initiated or client-initiated based on previous sales, and typically exhibit strong ties between sellers and buyers. In fact, transactions are often conducted between wholesalers and clients that have long-standing business relationships.