

Personal Services

[128-200] Sector: Services

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Time Series

Year 1:	Jan 2006
Year 2:	Jan 2007
Year 3:	Jan 2008

Current Industry Population Analyzed			
as of:	1/06	1/07	1/08
Firms:	557,948	595,495	682,747
Establishments:	588,870	626,178	712,812
Small Businesses:	541,160	582,105	670,130
Startups:	30,338	27,362	23,355
Branches:	30,922	30,683	30,065

The **Current Industry Population** table displays the number of firms in the industry for five groups:

Establishments: Firms plus Branch operations.

Firms: Independent companies.

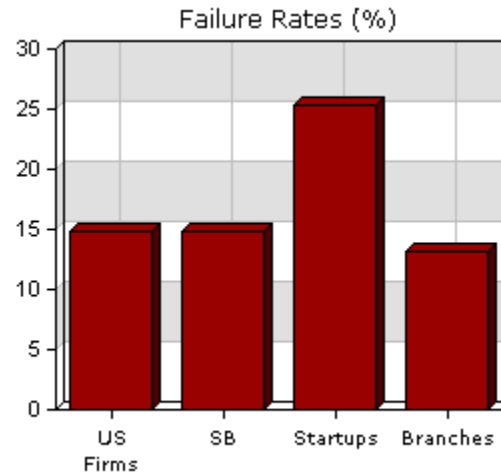
Small Businesses: In order to focus the analysis on the small businesses of greatest interest to our users, the analysis defines small businesses as single site firms with fewer than 25 employees. All small businesses are also "firms".

Startups: In order to reduce distortion and focus the analysis on the startup population of greatest interest to our users, the startup sales and employment analysis limits the definition of startups to single site firms with fewer than 50 employees, with less than \$10m annual sales and reporting one year or less of operation. All Startups are also "firms"; The overwhelming majority are also "small businesses".

Branches: Subsidiary facilities of firms; non-headquarters operations.

The **Time Series:** The report analyzes trends in three running years, each for the twelve months (real time) ending [Jan-06], [Jan-07] and [Jan-08]. Content is adjusted to account for time lags in raw data. We adjust the time series to compensate; the dates shown generally reflect the actual time series shown in the Time Series table. In some tables "Yr3" denotes the "snapshot" at the end of the time series. "Yr1" is the snapshot at the start of the time series.

Failure Rates			
	1/06 Firms	1/08 Survivors	Failure Rates
Firms:	557,948	475,319	14.81%
Establishments:	588,870	502,689	14.63%
Small Business:	541,160	460,895	14.83%
Startups:	30,338	22,639	25.38%
Branches:	30,922	26,867	13.11%



Failure Rates: Failure rates track the actual experience of business establishments, firms, small businesses, startups and branches doing business at the start of the time series, and still in operation today. "Survivors" are business operations within a given category which have maintained operations for at least three years. Throughout the report, Survivor measures isolate and report on these ongoing firms. As a result, these Survivor benchmarks display experience-rated measures, rather than snapshots of the industry at a particular point in time.

Firms which have experienced a transfer in ownership but continue as independent firms are considered "survivors". Firms which relocate but maintain independent operations are considered survivors if they do not move out of the jurisdiction being analyzed. Firms which are purchased or merge and become subsidiary locations, or whose location is terminated, are grouped with the "failures". Any business entity which does not evidence ongoing operations (for example, by registering with government agencies or credit reporting services) is considered to have ceased viable operations and is classified with the "failures".

The Failure rate analysis is developed for discrete business segments by segregating the original pool of tracked firms by industry classification, location, and population segment (all firms, small businesses, startups etc.) That beginning universe is segregated and tracked to develop the failure rate for that group.

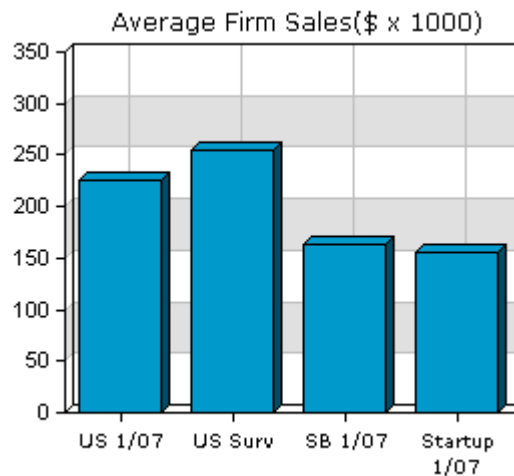
As a result, failure rates occasionally reflect performance above 100% or below 0% due to business migration among industries (changes in primary business line) or (in the case of location-specific failure rates) due to business relocations during the analysis period.

Industry Market Volume, Average Sales and Sales Class Trends

Annual Market Volume (\$)	
as of	
1/06:	135,969,736,293
1/07:	140,080,799,378
1/08:	154,050,328,606

Industry Market Volume: Reported Annual Market Volume includes industry sales figures from multi-site firms classified in the selected industry, generally including branch revenues. The Market Volume figures include sales of US firms and US-reporting subsidiaries of firms headquartered outside the US. The volume figures are for the industry (firms identifying this as their primary classification) not the product or service. As an example, a report for retail furniture stores analyzes sales of stores whose predominant revenue stream is furniture sales; That data would not include furniture sold at a general department store, for example. Consequently, more detailed industry segments may under-report volume due to the choice of companies to identify a higher level "parent classification as their primary line of business.

Average Annual Sales			
as of	Firms	Small Business	Startups
1/06 Avg Sales:	243,696	164,923	155,650
1/07 Avg Sales:	235,234	164,733	156,056
1/08 Avg Sales:	225,633	162,722	155,772
Change:	-7.4%	-1.3%	0.1%
Survivor Avg Sales:	254,314	167,538	159,352
Change:	4.4%	1.6%	2.4%



Average Annual Sales: The Average Annual Sales table displays "snapshot" average dollar sales for industry firms, small businesses and startups in each of the three years in the time series. The **Change** rows express the growth or decline of these snapshots in percentage terms. Sales will often fluctuate most radically in the startup category (both snapshot and survivor), in part because startup operations are less numerous and differ dramatically in size, growth and, in many cases, failure.

The **Survivor Avg. Sales** data row tracks the same set of firms in each category from the beginning of the time series through the end. In this case, only those firms which maintained operations through the three years are analyzed as Survivors; New entries and those which ceased operations in the interim are not included. These Survivor sales reflect an experience-rated analysis which can be used to help inform future projections.

While there is significant overlap of firms in each category between years, results can be affected by business failures, mergers and the migration of companies between the three categories. Migration between business classifications has a much lesser impact in most cases.

Company Sales Class Trends								
as of	1/06 firms	1/07 firms	1/08 firms	1/08 Surv firms	1/06 %	1/07 %	1/08 %	1/08 Surv %
\$1-\$500k	541,753	582,274	670,109	463,873	97.10%	97.78%	98.15%	97.60%
\$500k-999k	7,484	7,823	7,854	7,113	1.34%	1.31%	1.15%	1.50%
\$1m-\$2.49m	3,149	3,209	3,177	2,908	0.56%	0.54%	0.47%	0.61%
\$2.5m-\$4.99m	728	750	725	662	0.13%	0.13%	0.11%	0.14%
\$5m-\$9.99m	332	349	345	319	0.06%	0.06%	0.05%	0.07%
\$10m-\$24.99m	174	190	182	171	0.03%	0.03%	0.03%	0.04%
\$25m-\$49.99m	51	60	58	56	0.01%	0.01%	0.01%	0.01%
\$50m-\$99.99m	27	23	22	20	0.00%	0.00%	0.00%	0.00%
\$100m-\$249.99m	25	27	26	25	0.00%	0.00%	0.00%	0.01%
\$250m - \$499.99m	9	8	8	8	0.00%	0.00%	0.00%	0.00%
\$500m - \$999.99m	8	10	11	11	0.00%	0.00%	0.00%	0.00%
>\$1b	7	6	6	6	0.00%	0.00%	0.00%	0.00%
unknown	4,201	766	224	147	0.75%	0.13%	0.03%	0.03%
Total	557,948	595,495	682,747	475,319	100%	100%	100%	100%

Company Sales Class Trends: This large table classifies the number of industry firms which fall into each of thirteen sales classes. Data is displayed as the number of firms in each of the three years of the time series. The fourth column displays the distribution of Survivor firms (only those tracked from Yr1 and still in operation) through the same sales classes.

Each of the final four columns corresponds to the first four by year, and displays the distribution as a percentage of all firms for that year and, in the case of Yr3 Survivors, among all Survivor firms. Firms which do not report sales are noted in the unknown row, while the final row sums the total number of firms in the industry in each of the years and for the survivor category.

The analysis in the **Company Sales Class Trends** table is deepened by reading it in conjunction with the **Market Share by Sales Class** and **Average Annual Company Sales by Class** tables on the following page.

Market Share by Sales Class (\$ million)								
as of	1/06	1/07	1/08	1/08 Survivors	1/06 %	1/07 %	1/08 %	1/08 Survivors %
\$1-\$500k	85,792.2	92,010.2	105,137.3	73,847.7	63.10%	65.68%	68.25%	61.09%
\$500k-999k	5,058.0	5,285.1	5,317.6	4,803.7	3.72%	3.77%	3.45%	3.97%
\$1m-\$2.49m	4,622.9	4,719.8	4,684.0	4,279.4	3.40%	3.37%	3.04%	3.54%
\$2.5m-\$4.99m	2,435.0	2,530.3	2,462.2	2,251.1	1.79%	1.81%	1.60%	1.86%
\$5m-\$9.99m	2,226.3	2,323.1	2,290.1	2,118.0	1.64%	1.66%	1.49%	1.75%
\$10m-\$24.99m	2,493.1	2,759.0	2,586.3	2,436.6	1.83%	1.97%	1.68%	2.02%
\$25m-\$49.99m	1,768.2	1,967.2	1,915.5	1,851.8	1.30%	1.40%	1.24%	1.53%
\$50m-\$99.99m	1,962.3	1,625.8	1,609.5	1,442.0	1.44%	1.16%	1.04%	1.19%
\$100m-\$249.99m	3,997.5	4,304.0	3,900.4	3,716.3	2.94%	3.07%	2.53%	3.07%
\$250m - \$499.99m	3,339.6	2,618.9	2,704.1	2,704.4	2.46%	1.87%	1.76%	2.24%
\$500m - \$999.99m	5,219.0	6,315.2	7,415.3	7,415.4	3.84%	4.51%	4.81%	6.13%
>\$1b	16,039.8	13,444.0	13,978.7	13,978.3	11.80%	9.60%	9.07%	11.56%
unknown	1,015.8	178.2	49.3	35.3	0.74%	0.12%	0.04%	0.04%
Total	135,969.7	140,080.8	154,050.3	120,880.0	100%	100%	100%	100%

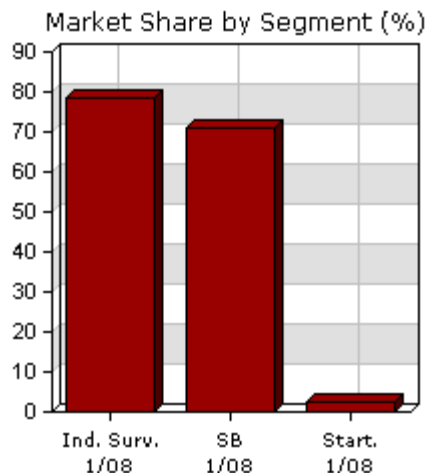
Negative numbers may be displayed due to rounding.

Market Share by Sales Class: This table displays the total reported dollar sales volume (market share) captured by firms in each of 13 sales categories in each of the three years of the time series, plus a fourth column showing Survivor sales (explained on the previous page). The percentage of total sales is displayed in the four corresponding columns on the right. Projected sales for non-reporting firms are displayed in the "unknown" cells.

Average Annual Company Sales by Class				
as of	1/06	1/07	1/08	1/08 Survivors
\$1-\$500k	158,360	158,019	156,896	159,198
\$500k-999k	9,863	675,585	677,056	675,341
\$1m-\$2.49m	1,468,053	1,470,801	1,474,347	1,471,596
\$2.5m-\$4.99m	3,344,780	3,373,733	3,396,138	3,400,453
\$5m-\$9.99m	6,705,723	6,656,447	6,637,971	6,639,498
\$10m-\$24.99m	14,328,161	14,521,053	4,037	14,249,123
\$25m-\$49.99m	1,079,629	909,262	966,745	33,067,857
\$50m-\$99.99m	72,677,778	70,686,957	73,159,091	72,100,000
\$100m-\$249.99m	159,900,000	159,407,407	150,015,385	148,652,000
\$250m - \$499.99m	371,066,667	327,362,500	338,012,500	338,050,000
\$500m - \$999.99m	652,375,000	631,520,000	674,118,182	674,127,273
>\$1b	2,291,400,000	2,240,666,667	2,329,783,333	2,329,716,667
unknown	241,800	232,637	220,089	240,136

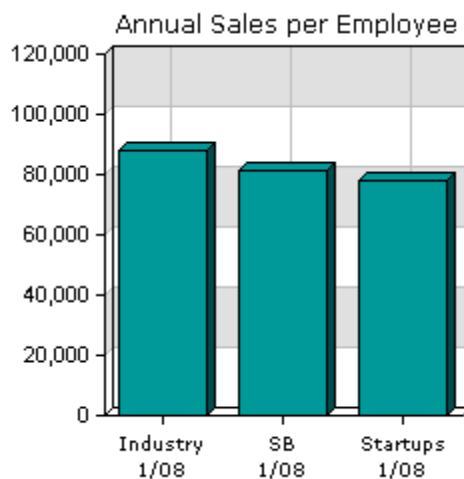
Average Annual Company Sales by Class: This table displays the average firm sales within each industry sales class, indicating a benchmark within that peer group. The average sales figure is derived by dividing the total market share within each sales class by the number of firms in the class. Reported sales are utilized, capturing revenue from all headquarters and branch operations of multi-site firms.

Market Share by Segment (% total industry sales)			
as of	Firms	Small Business	Startups
1/06:	100.00%	65.64%	3.47%
1/07:	100.00%	68.45%	3.05%
1/08:	100.00%	70.79%	2.36%
Survivor:	78.47%	50.12%	2.34%



Market Share by Segment: The share of total industry market volume captured by each category of firms is displayed as a percentage for each year of the time series. Naturally, the (all) **Firms** category captures 100% of the snapshot sales in each year. To the right, the **Small Business** and **Startup** shares of total market volume is displayed. For each category, a separate calculation has been performed to report the share of market volume held by “**Survivors**” in each category. Note that Survivor small businesses may not fall within the small business definition by the end of the time series shown here; and that startup survivors have by definition superseded the startup parameter of “one year or less of operation” by the end of the time series.

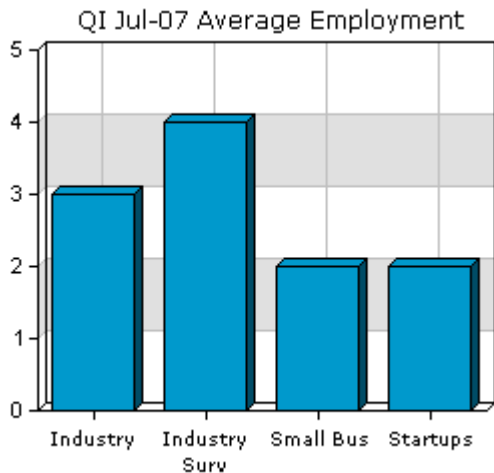
Annual Sales per Employee			
as of	Industry	Small Business	Startups
1/06 SPE:	92,758	54,974	77,825
1/07 SPE:	90,419	45,909	78,028
1/08 SPE:	88,002	81,361	77,886
Survivor SPE:	71,936	55,846	79,676



Sales per Employee: A common indicator of productivity, Sales per Employee data is presented for the **Industry** (all firms), and the **Small Business** and **Startup** sectors within it. Sales per employee measures are displayed for each of the three years in the time series, as well as for **Survivor** firms in each industry category. As is the case for average sales calculations, sales per employee will often fluctuate most radically in the startup category (both snapshot and survivor), in part because startup operations are relatively few in number and differ dramatically in size, growth and failure rates.

Facility Employment Class											
as of	1 emp	2-4 emps	5-9 emps	10-24 emps	25-49 emps	50-99 emps	100-249 emps	250-499 emps	500-999 emps	>1,000 emps	unknown
1/06	243,613	240,982	59,688	26,864	4,499	1,366	658	105	31	14	11,050
1/07	269,360	254,019	61,016	27,507	4,626	1,405	690	97	33	15	7,410
1/08	319,696	291,710	60,907	26,932	4,537	1,406	652	100	30	13	6,829
1/08 Surv	190,691	219,376	55,816	24,982	4,196	1,270	607	607	95	11	5,616
Percentage breakdown											
1/06	41.37%	40.92%	10.14%	4.56%	0.76%	0.23%	0.11%	0.02%	0.01%	0.00%	1.88%
1/07	43.02%	40.57%	9.74%	4.39%	0.74%	0.22%	0.11%	0.02%	0.01%	0.00%	1.18%
1/08	44.85%	40.92%	8.54%	3.78%	0.64%	0.20%	0.09%	0.01%	0.00%	0.00%	0.96%
1/08 Surv	37.93%	43.64%	11.10%	4.97%	0.83%	0.25%	0.12%	0.02%	0.01%	0.00%	1.12%

Facility Employment Class: Using the same general format as the previous Sales Class Trends table, the Facility Employment Class analysis displays the distribution of industry establishments (not just firms, and including branches) among ten employment size categories. An eleventh column on the right reports the number of industry establishments which do not identify employment data. In the second set of rows in the table, the row labels are repeated and table cells display the percentage of establishments in each year – and for Survivors – which are distributed among the same employment categories. This analysis method makes it possible to observe significant shifts in employment, toward larger or smaller operations – in a more granular way than average employment data alone (below) can indicate. In this regard, survivor percentage changes between employment categories may be especially noteworthy.



Average Employment Trends				
	1/06 Empls.	1/07 Empls.	1/08 Empls.	1/08 Survivors
Industry:	3	3	3	4
Small Business:	3	2	2	3
Startups:	2	2	2	2
Branches:	11	11	11	11

Average Employment Trends: Presented as a more traditional method of measuring industry employment trends, this table displays average establishment employment in the Industry (by establishment, not firms), as well as for **Small Business**, **Startup** and **Branch** categories. Survivor average employment in each category offers a window on employment projections over similar time series. Total reported employment can be ascertained by multiplying average employment data by the number of total establishments taken from the Industry Population table on P1.

Vitality Trends

Entrepreneurial Activity (Jan-07 to Jan-08)	
US All-Industry Startup Rate:	10.17%
Segment Startup Rate:	10.71%
Segment Startup Index:	1.05

Entrepreneurial Activity: The **Segment Startup Rate** measures the percentage of all industry firms which indicated one year or less of operation during the one-year period reflected by the Time Series table and which maintained operation through the end of the time series. These startup firms are compared to the number of firms in the industry for which ages can be identified to create the Segment Startup Rate. This is then compared to the **US All-Industry Startup Rate**, the national startup percentage for all industries combined. The **Segment Startup Index** benchmarks the industry rate against national all-industry startup patterns, expressed as a two-digit decimal where the US all-industry rate equals 1.00; An Index of 1.10 indicates an industry rate 10% above the economy-wide average. Independent, newly initiated franchise operations are included in these calculations as startup operations.

New Branch Development (Jan-06 to Jan-08)	
US All-Industry New Branch Rate:	0.77%
Segment New Branch Rate:	0.22%
Segment New Branch Index:	0.29

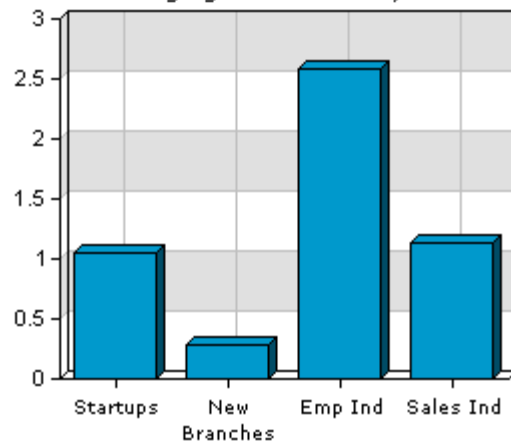
New Branch Development: The **Segment New Branch Rate** measures the number of new branches developed in the final year of the time series and which maintained operation through the end of the time series. These are compared to the total number of industry establishments to develop the Segment New Branch Rate. The **US Segment New Branch Rate** performs the comparable calculation at the national level for comparison purposes. Like the Startup Activity Rate, New Branch Rates are an indicator of new growth and sector vitality. The **Segment New Branch Index** benchmarks the industry rate against national all-industry new branch development patterns, expressed as a two-digit decimal where the US all-industry rate equals 1.00; An Index of 1.10 indicates an industry rate 10% above the economy-wide average.

Sales Growth Index (Jan-06 to Jan-08)	
Segment Sales Growth Rate:	13.30%
Segment Sales Growth Index:	1.14

Employment Growth Index (Jan-06 to Jan-08)	
Segment Employment Growth Rate:	7.11%
Segment Employment Growth Index:	2.59

Sales Growth Index and Employment Growth Index: The Sales Growth Index compares the change in total sales over the time series displayed in the report. The industry specific growth rate is displayed, followed by a two-decimal index benchmarking the industry against economy-wide growth percentages. The US Index equals 1.00 in all cases, so an Index of 1.10 indicates an industry growth rate 10% above the economy-wide average. Similarly, the **Employment Growth Index** compares the change in total employment over the time series reflected by the report. Again, the industry specific growth rate is displayed, followed by a two-decimal index benchmarking the industry against economy-wide growth percentages.

US Industry = 1.00 in all market vitality index ratings
Emerging Market Vitality Index



Industry Concentrations (% of total area)			
	1/06	1/07	1/08
Establishments	4.6979%	4.6687%	4.7003%
Employment	0.5290%	1.5617%	1.6391%
Reported Sales	0.3518%	0.3240%	0.4403%

Industry Concentrations: The **Establishment Concentration** compares the number of operating establishments in this industry to those in the national economy overall for each of three years. The **Employment Concentration** is comparably analyzed, displaying reported employment in the industry to the economy. The **Reported Sales Concentration** shows the industry percentage of total economy-wide sales. (Reported Sales data attributes all company sales to the location of headquarters operations.) In each case, the three year trend indicates the increasing or decreasing importance of the industry for the economic metric under review.

Consolidation Trends	
Industry Branch Concentration 1/06:	5.25%
Industry Branch Concentration 1/07:	4.90%
Industry Branch Concentration 1/08:	4.22%
All US Branch Concentration 1/06:	11.43%
All US Branch Concentration 1/07:	11.03%
All US Branch Concentration 1/08:	9.74%

Consolidation Trends: The Consolidation Trends table displays three years of national all industry-specific data reflecting the percentage of branch operations to all establishments (**Industry Branch Concentration**), and compares that to three years of economy-wide data reflecting national all-industry branch operation percentages (**All US Branch Concentration**). Taken together, the two measures indicate increasing or decreasing trends toward industry consolidation, either as a stand-alone metric or benchmarked against economy-wide patterns.

About the Data

Raw data analyzed for BizMiner reports is sourced from an array of the nation's private business databases, reporting agencies and government statistical sources, including the IRS. None of these raw data sources creates the final measures reflected in BizMiner industry profiles. In total, BizMiner accesses over half a billion sourced data points from eighteen million business operations for each of its twice-annual updates. Census and other government data are used incidentally to inform and test projections for non-reporting firms.

At the same time, some firms are missed and specific information on others is lacking from the database. However, the overall current coverage of the databases approaches 12 million business operations annually. While 100% firm coverage is desirable for analysis purposes, the greatest value of the content rests in discerning patterns of activity, which are reflected in the large samples used to develop our reports. As is the case with any databases this large, some errors are inevitable. No representation is made as to the accuracy of the databases utilized or the results of subsequent analyses.

Sales volume figures are for firms identifying this as their primary classification. For example, a report for retail furniture stores analyzes sales of stores whose predominant revenue stream is furniture sales; that data would not include furniture sold at a general department store. Firms in more detailed industry segments may opt to identify a higher level parent classification as their primary line of business, effectively reducing sales applied to the detailed segment.

It is sometimes difficult to ascertain precise sales data for the smallest firms in the databases. When precise numbers are not available, reports that offer a sales range may be utilized. When there is a very small number of firms in a category (most often startups, which are by nature often micro-firms) the sales is recorded at 150,000 (reflecting a 100,000-175,000 range).

Survival and sales analysis of independent business operations are based on information supplied largely by business owners and representatives to private reporting services. Inaccurate information supplied by business owners or representatives may affect the analysis. Survival rates assume that the discontinuation of a facility's presence among credit reporting databases utilized reflects the discontinuation of operations of that facility. Where insufficient data is available to create specific line items in specific industry reports, projections developed through proprietary algorithms, including projections from broader industry data, may be utilized.

The Time Series: Our Profiles are adjusted to account for time lags in raw data. We adjust the time series to compensate, and the dates shown in the reports generally reflect the actual time series shown in each Profile.

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