



2601 Market Street
services@bizminer.com

Camp Hill, PA 17011
www.bizminer.com

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Industry Cluster Pack

release date: December 2007



[129-999] Services, misc. Services

46 industry segments analyzed in this report: [see list on the next page](#)

Table of Contents:

- Section 1:** Contents-Time Series-Introduction
- Section 2:** Industry segments analyzed (segment names and # of firms)
- Section 3:** Industry population analysis (establishments-firms-small business)
- Section 4:** Business failure rates (establishment-company-small business)
- Section 5:** Sales volumes (3 yrs.: industry-small business)
- Section 6:** Average industry firm sales (3 yrs. and survivors)
- Section 7:** Average small business sales (3 yrs. and survivors)
- Section 8:** Sales per employee (3 yrs.)
- Section 9:** Startup activity rates, new branch activity rates
- Section 10:** Sales concentration quotients (3 yrs.)
- Section 11:** About the metrics and data

Time Series:

This Industry Cluster Report displays effectively timely analysis of industry trends and averages:

- General Time Series: [Jan 05 to Jan 07]
- Industry Population Analysis: as of [Jan 07]
- Business Failure Rates: [Jan 05-Jan 07]
- Sales Volume and Averages: 12 months ending [Jan 05-Jan-06-Jan07]
- Sales per Employee: [Jan 05-Jan-06-Jan07]
- Startup and New Branch Activity Rates: [Jan 06-Jan-07]
- Sales Concentration Quotients: [Jan 05-Jan-06-Jan07]

Average sales data also include [Jan 05 to Jan 07] experience-rated sales of firms which were already in operation as of Jan 05 and maintained operation through the end of the time series [Jan 07]. The data tables term these "Survivor" firms. A more detailed explanation of the methodology for the survivor firm and other longitudinal measures can be found in the About the Data section at the end of the Cluster Pack report.

As is the case for most industry databases, sales data is based on the primary line of business as identified by firms in the databases. All sales are attributed to a company's primary line of business and aggregated into the primary industry analysis. Data for business segments (including numbers of firms) will often not "roll up" to the totals displayed for the parent industry cluster. This is because many firms (particularly those with diversified revenue streams) identify a primary line of business only at the broader parent industry level, not at the more specific detailed level. While this tendency normally has minimum impact on trends and averages, it can lead to undercounting firm population and sales volume totals for some industry segments. Mergers, business failures and changes in primary industry classification can also have a significant impact on year-to-year sales data.

Segments analyzed in this report:

- [129-999] Services, misc. (109,493 firms)
 - [129-999.01] Artists and artists' studios (13,994 firms)
 - [129-999.0101] Artist (8,737 firms)
 - [129-999.0102] Artist's studio (2,544 firms)
 - [129-999.0103] Sculptor's studio (1,110 firms)
 - [129-999.0104] Calligrapher (352 firms)
 - [129-999.02] Art related services (2,666 firms)
 - [129-999.0201] Art restoration (635 firms)
 - [129-999.0202] Greeting card painting by hand (71 firms)
 - [129-999.0203] Stained glass art (599 firms)
 - [129-999.03] Commercial and literary writings (6,266 firms)
 - [129-999.0301] Advertising copy writing (285 firms)
 - [129-999.0302] Author (1,291 firms)
 - [129-999.0303] Ghost writing (46 firms)
 - [129-999.0304] Newspaper column writing (195 firms)
 - [129-999.0305] Writing for publication (2,141 firms)
 - [129-999.0306] Technical writing (1,052 firms)
 - [129-999.04] Song writings (1,277 firms)
 - [129-999.0401] Music arranging and composing (1,058 firms)
 - [129-999.05] Weather related services (419 firms)
 - [129-999.0502] Weather forecasting (211 firms)
 - [129-999.0503] Weather modification (11 firms)
 - [129-999.06] Lecturing services (1,007 firms)
 - [129-999.0601] Christian Science lecturers (33 firms)
 - [129-999.07] Earth science services (5,459 firms)
 - [129-999.0701] Geological consultant (1,328 firms)
 - [129-999.0702] Geophysical consultant (280 firms)
 - [129-999.0703] Natural resource preservation service (1,004 firms)
 - [129-999.08] Communication services (2,758 firms)
 - [129-999.0801] Radio and television announcing (154 firms)
 - [129-999.0802] Radio commentator (86 firms)
 - [129-999.09] Scientific consulting (4,614 firms)
 - [129-999.0901] Chemical consultant (634 firms)
 - [129-999.0902] Entomological consultant (32 firms)
 - [129-999.0903] Nuclear consultant (156 firms)
 - [129-999.0904] Physics consultant (166 firms)
 - [129-999.1] Personal services (4,414 firms)
 - [129-999.1001] Home planning (251 firms)
 - [129-999.1002] Information bureau (765 firms)
 - [129-999.1003] Psychological consultant (869 firms)
 - [129-999.99] Services, misc., misc. (2,856 firms)
 - [129-999.9901] Actuarial consultant (522 firms)
 - [129-999.9902] Editorial service (964 firms)
 - [129-999.9903] Inventor (640 firms)
 - [129-999.9904] Search and rescue service (452 firms)
 - [129-999.9905] Technical manual preparation (278 firms)

Industry population analysis

Industry	1/07					Percentage			
	Estabs	Firms	SB	Branches	Startups	Firms	SB	Branches	Startups
129-999	110,606	109,493	108,350	1,113	9,249	99.00%	98.00%	1.00%	8.40%
129-999.01	14,101	13,994	13,931	107	426	99.20%	98.80%	0.80%	3.00%
129-999.0101									
129-999.0102									
129-999.0103									
129-999.0104									
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129-999.1003									
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129-999.9904									
129-999.9905									

**44 more cluster segments
analyzed with the same
metrics
(listed on P2 of this sample)**

Business failure rates

Industry	Estabs			Firms			Small Business		
	1/05	1/07 Surv	Failure Rate	1/05	1/07 Surv	Failure Rate	1/05	1/07 Surv	Failure Rate
129-999	109,823	64,224	41.50%	108,775	63,403	41.70%	107,903	62,672	41.90%
129-999.01	15,314	11,609	24.20%	15,228	11,556	24.10%	15,169	11,490	24.30%
129-999.0101									
129-999.0102									
129-999.0103									
129-999.0104									
129-999.02									
129-999.0201									
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129-999.0801									
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129-999.1003									
129-999.99									
129-999.9901									
129-999.9902									
129-999.9903									
129-999.9904									
129-999.9905									

**44 more cluster segments
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Annual Sales volumes

Industry	Industry			Small Business			% 07 Total
	1/05	1/06	1/07	1/05	1/06	1/07	
129-999	22,183,104,573	19,059,125,633	21,569,572,816	19,825,040,557	16,850,172,972	18,845,335,769	87.40%
129-999.01	2,474,512,490	2,264,072,427	2,339,519,851	2,410,422,617	2,193,886,182	2,290,389,934	97.90%
129-999.0101							
129-999.0102							
129-999.0103							
129-999.0104							
129-999.02							
129-999.0201							
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129-999.1002							
129-999.1003							
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129-999.9901							
129-999.9902							
129-999.9903							
129-999.9904							
129-999.9905							

**44 more cluster segments
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Average industry firm sales

Industry	Average			Surv 1/07	Change 1/05-1/07	
	1/05	1/06	1/07		Avg	Surv
129-999	203,936	196,023	196,995	206,058	-3.40%	1.00%
129-999.01	162,498	164,540	167,180	168,217	2.90%	3.50%
129-999.0101						
129-999.0102						
129-999.0103						
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129-999.9905						

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Average small business sales

Industry	Average			Surv 1/07	Change 1/05-1/07	
	1/05	1/06	1/07		Avg	Surv
129-999	183,730	177,696	173,927	186,892	-5.30%	1.70%
129-999.01	158,906	160,388	164,414	165,528	3.50%	4.20%
129-999.0101						
129-999.0102						
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129-999.9905						

**44 more cluster segments
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Sales per employee

Industry	Industry			Small Business		
	1/05	1/06	1/07	1/05	1/06	1/07
129-999	125,756	121,731	122,255	91,865	88,848	75,464
129-999.01	211,304	106,504	107,766	158,906	160,388	79,719
129-999.0101						
129-999.0102						
129-999.0103						
129-999.0104						
129-999.02						
129-999.0201						
129-999.0202						
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129-999.9904						
129-999.9905						

**44 more cluster segments
analyzed with the same
metrics
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Startup activity rates, new branch activity rates

Industry	Startups	Rate	New Branches	Rate
129-999	15,256	28.36%	93	0.08%
129-999.01	729	7.17%	8	0.06%
129-999.0101				
129-999.0102				
129-999.0103				
129-999.0104				
129-999.02				
129-999.0201				
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129-999.9904				
129-999.9905				

**44 more cluster segments
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metrics
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sample)**

Sales concentrations

Industry	% of total parent industry			% of total economy		
	1/05	1/06	1/07	1/05	1/06	1/07
129-999	100.00%	100.00%	100.00%	0.0578%	0.0462%	0.0473%
129-999.01	11.15%	11.88%	10.85%	0.0059%	0.0051%	0.0048%
129-999.0101						
129-999.0102						
129-999.0103						
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**44 more cluster segments
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metrics
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Section 11: About the metrics and data

Industry population and concentrations

The report begins with a look at the business population. The total business establishment population is broken down into identified numbers of firms, branches, small businesses and startups. Each segment is measured as a percentage of the total establishments in that segment.

BizMiner defines a small business as a single site firm which employs fewer than 25 people. This definition is applied across all industries in our Profiles, including the Cluster Pack series. Our definition targets comparables for most real-life small businesses.

In addition to measures for small businesses, the Cluster Pack identifies startup firms in each industry segment. BizMiner defines startups as single site firms with one year or less of operation, less than \$10m annual sales and fewer than 50 employees. More than 97% of all startups fit into our small business definition as well.

Establishment, firm and branch failure rates

How do the chances of maintaining operations vary from segment to segment within in a given industry? The Cluster Pack examines failure rates of all establishments in each area, then breaks out firms (headquarters and single site operations) and small business failure rates. Note: establishments = firms (companies) + branches in any industry or area.

To develop failure rates, BizMiner takes a "snapshot" of all establishments, firms and branches which were in operation in the first analysis year of the report. We then trace these individual facilities through the final analysis year of the time series, and compare the number which are still active to the original total. The percentage which ceased operation in the interim make up the failure rates displayed for each segment.

Failure Rates occasionally reflect performance above 100% or below 0% due to classification migration among industries (changes in primary business line) during the analysis period. A filtered sub-group of industry firms may be tracked to mitigate this concern.

When reviewing failure rates, it is important to note that low failure rates can be a sign of stability, but also of a sluggish economy with limited new vitality. Conversely, high failure rates indicate higher risk, but may also suggest high levels of new competition which may result from higher opportunity levels.

Total sales volume (industry-wide and small business)

The Cluster Pack develops total reported sales volume numbers for each segment. Reported sales assign all corporate revenue to headquarters operations -- which is how companies report it, as is the case for most industry databases. All sales are attributed to a company's primary line of business and aggregated into the primary industry analysis. Data for business segments (including numbers of firms) will often not "roll up" to the totals displayed for the parent industry cluster. This is because many firms (particularly those with diversified revenue streams) identify a primary line of business only at the broader parent industry level, not at the more specific detailed level. While this tendency normally has minimum impact on trends and averages, it can lead to undercounting firm population and sales volume totals for some industry segments. Mergers, business failures and changes in primary industry classification can also have a significant impact on year-to-year sales data.

Average annual sales (industry-wide and small business)

The Cluster Pack surveys annual sales for three years in every segment. The Average Sales tables indicate which industry segments create the highest average sales, while the three-year trend shows where sales growth patterns are most promising.

One of the BizMiner metrics presented in the Cluster Pack is the Survivor data shown in the average sales table. This measure begins with the snapshot of Year 1 firms, traces those Year 1 firms and measures sales of only those which still active in Year 3 (survivors), presenting an experience-rated sales perspective, a useful basis for three-year projections. (The Year 3 Average Sales data shows another snapshot which includes these survivors, but also other firms which have started up, entered the databases or in-migrated during the three-year analysis period.)

As is the case for the market volume data presented in the Cluster Pack, all sales are attributed to a company's primary line of business and aggregated into the primary industry analysis. Mergers, business failures and changes in primary industry classification can have a significant impact on year-to-year sales data.

Sales Per Employee (industry-wide and small business)

Sales per employee measures for each industry segment within the cluster are derived from reported sales and employment data. Sales per employee data is often used to indicate relative value-added and efficiency within and among industry segments. The sales per employee metric is detailed for three years for both average industry firms and small businesses within each segment.

Startup and new branch activity rates

The Cluster Pack displays data for two key business vitality measures: the startup activity rate (entrepreneurial activity), and new branch development rates.

Entrepreneurial activity is often an indicator of high opportunity levels and a positive environment for specific industry segments. The startup activity rate is developed by identifying successful (surviving) startups during the most recent year of the analysis period, comparing them to the number of all firms in an industry for which an age can be identified. The resulting percentage is the startup activity rate.

New branch activity helps clarify where existing business identifies fertile expansion opportunities. A year's worth of new branches are calculated as a percent of all industry establishments in each segment to produce the new branch development rate.

Sales concentration quotients

The sales concentration quotients display reported sales within each segment as a percentage of a) sales totals within the parent industry and b) segment sales as a per cent of all reported US sales in the databases. Data is presented for three years to facilitate a trend analysis of increasing or decreasing relative importance of each segment within the parent cluster and the economy overall.

Abbreviations	estabs = establishments	surv = survivor firms (definition above)
	sb = small business firms	HG = high growth (details: P8)
	avg = average	

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 update. Census and other government data are used incidentally to inform and test projections for non-reporting firms.

At the same time, private sector firms are not legally required to supply information to private reporting services. As a result, 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 Profiles 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. Survival and sales analysis of franchisees and independent business operations are based on information supplied largely by business owners and representatives to private reporting services. Inaccurate information supplied by franchisees or other business owners or representatives may affect the analysis. Survival rates assume that the discontinuance of a facility's presence among the credit reporting databases reflects the discontinuance of operations of that facility. Neither the Brandow Company nor its resellers has undertaken independent primary research to confirm the accuracy of the data utilized in the Profile analyses. Neither the Brandow Company nor its resellers are responsible for conclusions drawn or decisions made based upon this data or analysis. In no event will the Brandow Company or its resellers be liable for any damages, direct, indirect,

incidental or consequential resulting from the use of the information contained in BizMiner reports.

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.

Intra-Industry Segment Definitions:

In some cases, our definitions for industry segments differ between the Financial Analysis/Cash Flow series on the one hand and the Marketing Research/State Market Index series on the other. Definitions are provided below. Any differences between series reflect our effort to capture total primary industry market information in the marketing research metrics while analyzing precise benchmarking peer groups for our financial analysis measures.

Firms and Establishments: Firms are companies. Branches are subsidiary facilities of firms. Firms plus branches equals the number of establishments in an industry or area.

Industry and Industry Sales Class: Industry Financial Analysis reports display industry sales and sales class averages from corporations in the industry. Sales Class trends and Market Share Statistics tables in the Marketing Research series report sales from all industry firms. Marketing research industry averages also include data applied from all corporate and non-corporate firms in our databases.

Small Business: The Small Business data in the Financial Analysis series applies averages of single-site small business (S) corporations, which by definition have <35 employees. The small business definition used in our Marketing Research and State Market Index series includes only single-site firms with <25 employees.

Startup: The Marketing Research and State Market Index series apply parameters to define startups as single-site firms reporting one year or less of operation, and which report less than \$10m sales and fewer than 50 employees. (The overwhelming majority are much smaller.) The Startup version of our Cash Flow series applies the same age and size parameters, but includes only non-corporate startups, in order to focus on startup benchmarks of greatest interest to our customers. Actual average sales are identified at a broad level for each startup industry during the selection process.

Sole Proprietor: For the Sole Proprietor version of our Cash Flow series, we apply data from single-site sole proprietorships with <\$750m sales and <1,000 employees. (The overwhelming majority are much smaller.) Actual average sales are identified at a broad level for each sole proprietorship industry during the selection process.

Failure Rates: The failure rate tracks the actual experience of firms and branches doing business at the start of the time series (Yr1), and still in operation today. "Survivor" firms are establishments in a given category which have maintained operations for at least three years. Survivor measures benchmark these successful firms, rather than more common "average" or "typical" firm measures. Failure Rates occasionally reflect performance above 100% or below 0% due to business migration among industries (changes in primary business line) during the analysis period.

Industry Market Volume: Reported Industry Volume (US and Local) includes sales figures from multi-site firms located in the industry, generally including branch revenues. Also includes sales of US firms and US-reporting subsidiaries of firms headquartered outside the US. Locally Generated Market Volume (state and metro reports only) projects sales volume based on the number of local industry employees and national sales per employee data developed by BizMiner

Market Share Statistics: Market Share is analyzed in two ways. The Market Share by Sales Class table displays the total reported dollar sales volume (market share) of firms in each of 13 sales categories, with the percentage of total sales displayed in the columns to the right. Projected sales for non-reporting firms are displayed in the "unknown" cells. Average sales for each category can be ascertained by dividing total sales in a given category by the number of firms in that category (from the Sales Class Trends table on P2 of the report).

Startup Activity: The Startup Activity Rate measures the percentage of all firms which indicated one year or less of operation during the period indicated in the Time Series table. These firms are compared to the number of firms in the industry for which ages can be identified. The Startup Activity Index benchmarks the result against national all-industry startup patterns.

New Branch Rate: calculates the number of recently developed branches to total industry firms.

Industry Consolidation: trend measures compare the percentage of branch facilities relative to all industry firms at two different points in time.

Indexed Emerging Market Vitality: measures compare local industry to national industry rates, where the national rate equals 1.00.

Growth Index Measures: The Sales Growth Index compares the change in total sales over the time series displayed in the report. The Employment Growth Index compares the change in total employment over the time series displayed in the report. The US Marketing Research series compares national industry growth to overall reported US growth data, aggregating all industries. State and Metro Marketing Research Profiles compare local reported sales or employment to the national industry. In addition to the displayed rate, both the Sales and Employment Index are expressed as a two-decimal comparison to the larger universe, which is always 1.00.

Operational Concentration: Compares the number of operating establishments in this industry to those in the area economy overall. When benchmarked against comparable percentages in multiple local areas or national data, used as a relative indicator of industry strength and market opportunity.

Branch Concentration: Shows the percentage of branches relative to all establishments in the industry and area you select. Used as an indicator of local industry decision making and industry consolidation trends.

Sales Concentration: Compares the reported sales of firms in this industry to those based in the area economy overall. When benchmarked against comparable percentages in multiple local areas or national data, used as a relative indicator of area industry strength. Attributes all company sales to the location of headquarters operations.

US Totals: Beginning with 1/04 data, US totals include data from Puerto Rico and the Virgin Islands.

BizMiner
2601 Market Street

Camp Hill, PA 17011

717-909-6000
fax: 717-763-1232

www.bizminer.com
services@bizminer.com

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