

Service Annual Survey (SAS)

Tracking America's Service Sector for the Past Six Years

Media Webinar

February 2, 2012

Webinar access information

Toll free number: 800-988-9461

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Today's Speakers

Host

Neil Tillman

Chief, Media Relations Branch
Public Information Office

Presenters

Mark Wallace

Chief, Service Sector Statistics Division

Ronald Farrar

Chief, Health Care and Consumer Services
Branch

Service Sector Statistics Division

Electronic Press Kit

- Today's presentation
- News release
- Links to the statistics
- Links to the Quarterly Services Survey

Overview

- What is the Service Annual Survey?
- What estimates are being released today?
- What patterns do we see in industry estimates from the service sector between 2005 and 2010?

Service Annual Survey

- Sample of 70,000 companies
- Collected and published annually since 1982
- Data items collected
 - Revenue
 - Expenses
 - E-commerce revenue
 - Detailed Revenue and Expense items
- Estimates typically released 13 months after the end of the reference year

Industries Covered by the SAS

NAICS Sectors: (Covers roughly 55% of US GDP)

- 22, Utilities
- 48/49, Transportation and Warehousing (part)
- 51, Information
- 52, Finance & Insurance
- 53, Real Estate & Rental & Leasing (part)
- 54, Professional, Scientific, and Technical Services
- 56, Administrative & Support and Waste Management & Remediation Services
- 61, Educational Services (part)
- 62, Health Care and Social Assistance
- 71, Arts, Entertainment, and Recreation
- 81, Other Services (except Public Administration)

SAS Sectors: Trends in 2010

NAICS Sector	Description	2010 Revenue	2009 Revenue	Difference	Year to Year Change
22	Utilities	\$502	\$478	\$24	5.0%
48/49*	Transportation and Warehousing	\$640	\$595	\$45	7.6%
51	Information	\$1,110	\$1,075	\$35	3.3%
52	Finance and Insurance	\$3,345	\$3,373	-\$27	-0.8%
53*	Real Estate and Rental and Leasing	\$356	\$350	\$6	1.8%
54	Professional, Scientific, and Technical Services	\$1,305	\$1,258	\$47	3.7%
56	Administrative and Support and Waste Management and Remediation Services	\$636	\$596	\$41	6.8%
61*	Educational Services	\$49	\$45	\$4	9.6%
62	Health Care and Social Assistance	\$1,917	\$1,843	\$75	4.0%
71	Arts, Entertainment, and Recreation	\$192	\$188	\$4	2.0%
81	Other Services (except Public Administration)	\$384	\$364	\$20	5.6%

* Partial Sector (not all industries covered in survey)

All figures are in millions of dollars

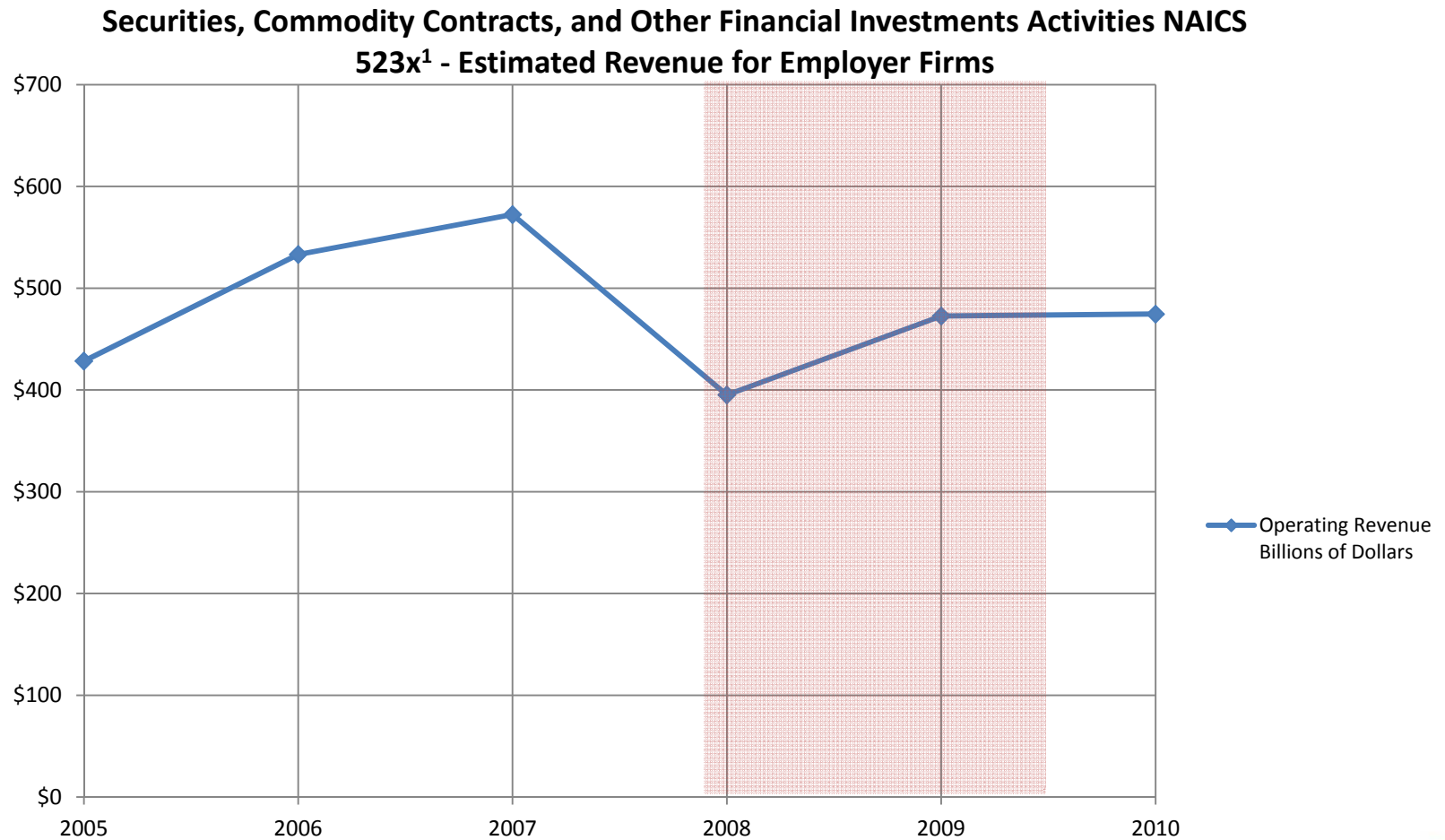
Products Being Released Today

- Industry estimates from the SAS
 - Separate Excel files for each NAICS Sector
 - Revenue for Companies with employees
 - Estimates spanning the years 2005 to 2010

How did service industries perform from 2005 to 2010?

- The period of recession defined by the National Bureau of Economic Research (NBER) <http://www.nber.org> began in December 2007 and ended in June 2009
- NBER defines a recession as two consecutive quarters of negative GDP growth
- What patterns of growth or decline did selected service industries show before, during, and after this period?

Finance Numbers Reveal the Recession



1. NAICS 523x includes NAICS 5231, 52392, and 52393

Finance Numbers Reveal the Recession

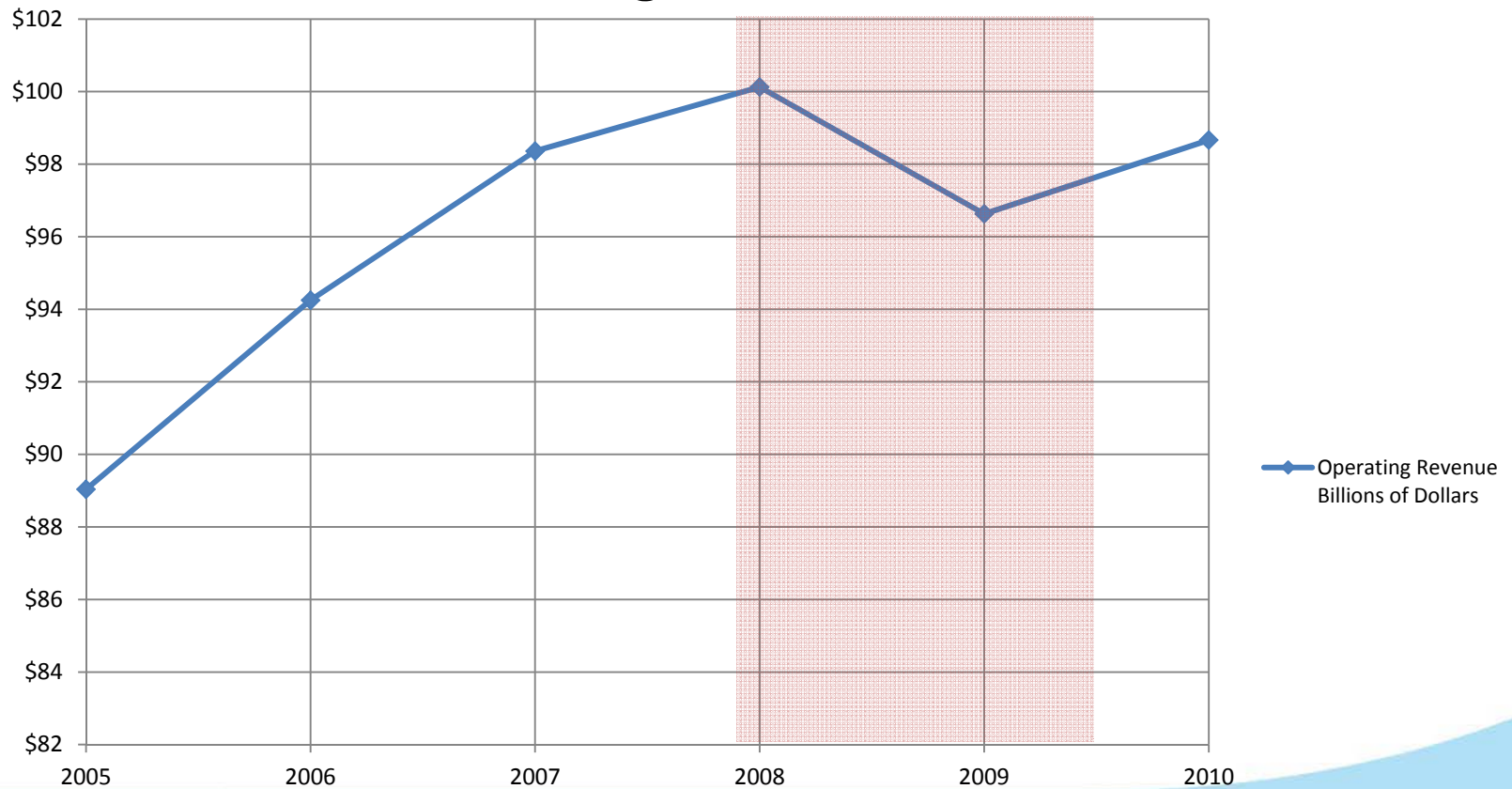
- All industry data will be presented on a line chart, connecting the six annual estimates
- The area shaded in red on each chart defines the period of the recession
- The lines connecting the annual estimates may conceal quarterly fluctuations
- For more information on quarterly fluctuations, look for data from the Quarterly Services Survey (QSS)

Finance Numbers Reveal the Recession

- The trend of growth and decline in sub-sector 523x roughly matches the period defined as the recession
 - Growth from 2005 to 2007
 - Revenue peaks in 2007
 - Significant drop between 2007 and 2008
 - Upswing again between 2008 and 2009
- In 2010, estimates returned to levels above 2005 but still below the peak level of 2007

Amusement, Gambling and Recreation

Amusement, Gambling and Recreation NAICS 713

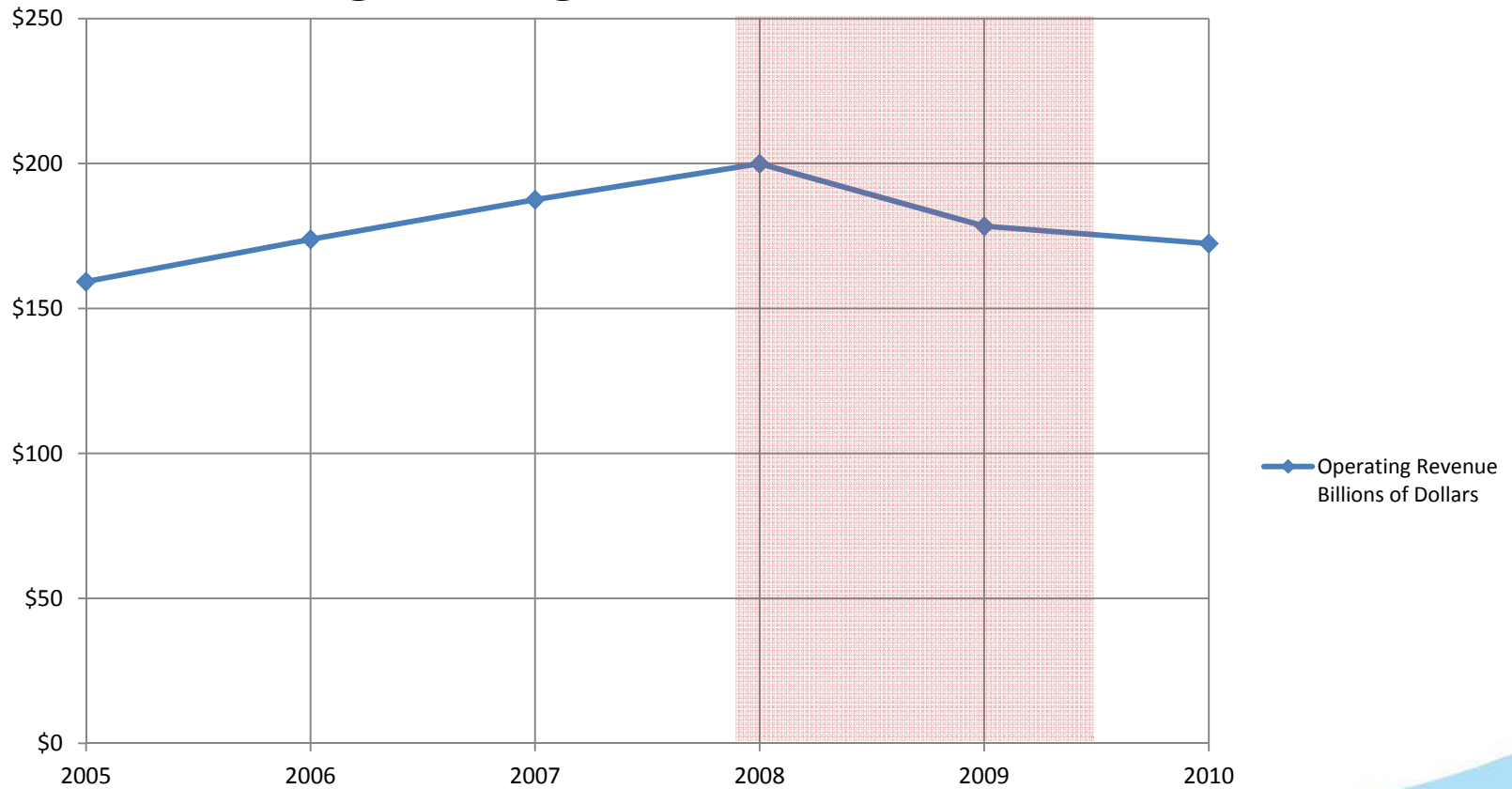


Amusement, Gambling and Recreation

- The pattern is similar to that of finance
 - Growth
 - Decline
 - Upturn
- The pattern is different from that of finance
 - The decline comes a year later (08-09)
 - 2010 revenue is at approximately the same level as 2007

Engineering Services

Engineering Services NAICS 54133

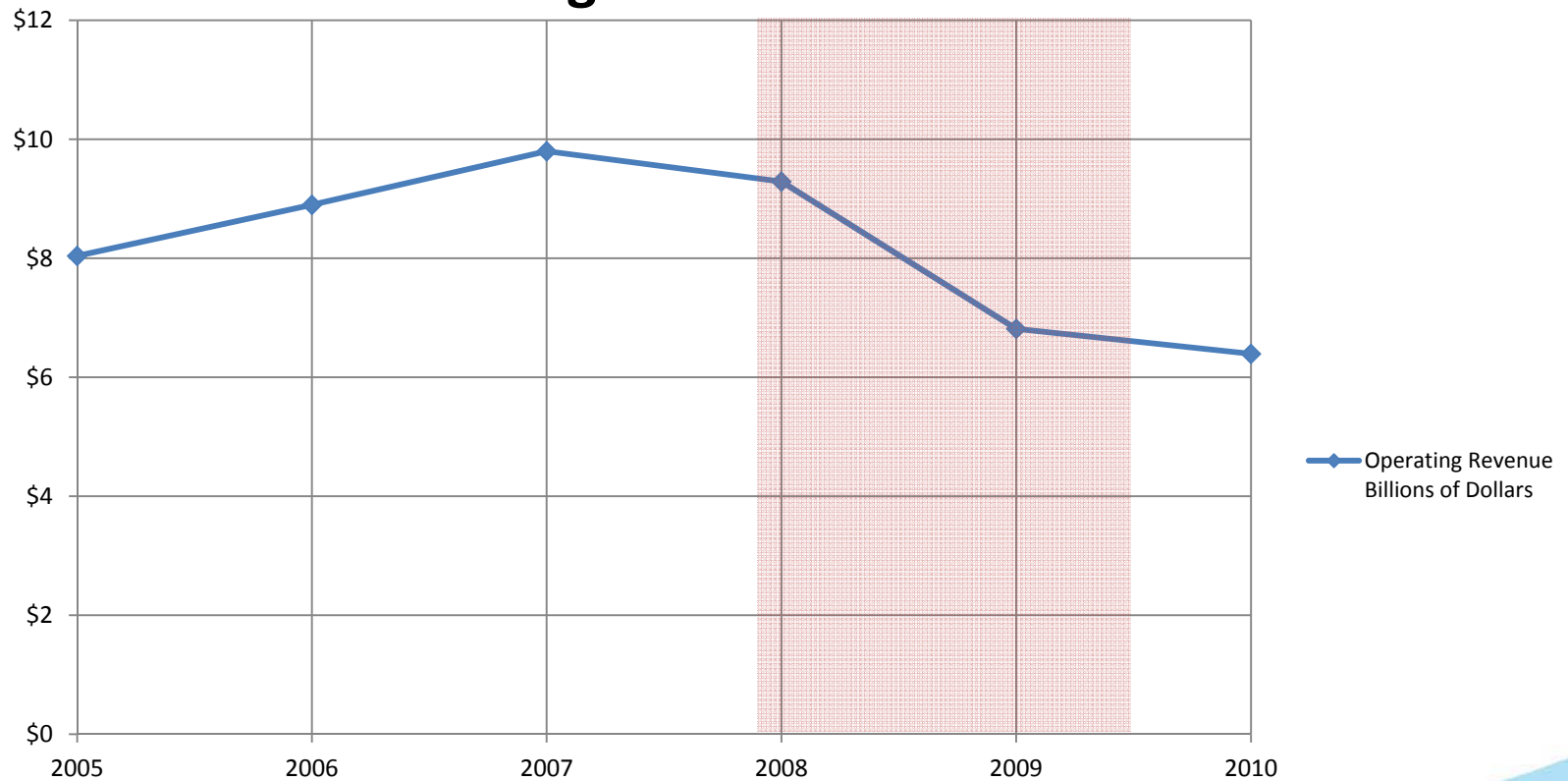


Engineering Services

- Growth from 2005 to 2008
- We see a drop between 2008 and 2009, rather than between 2007 and 2008, as seen in Finance

Interior Design Services

Interior Design Services NAICS 54141

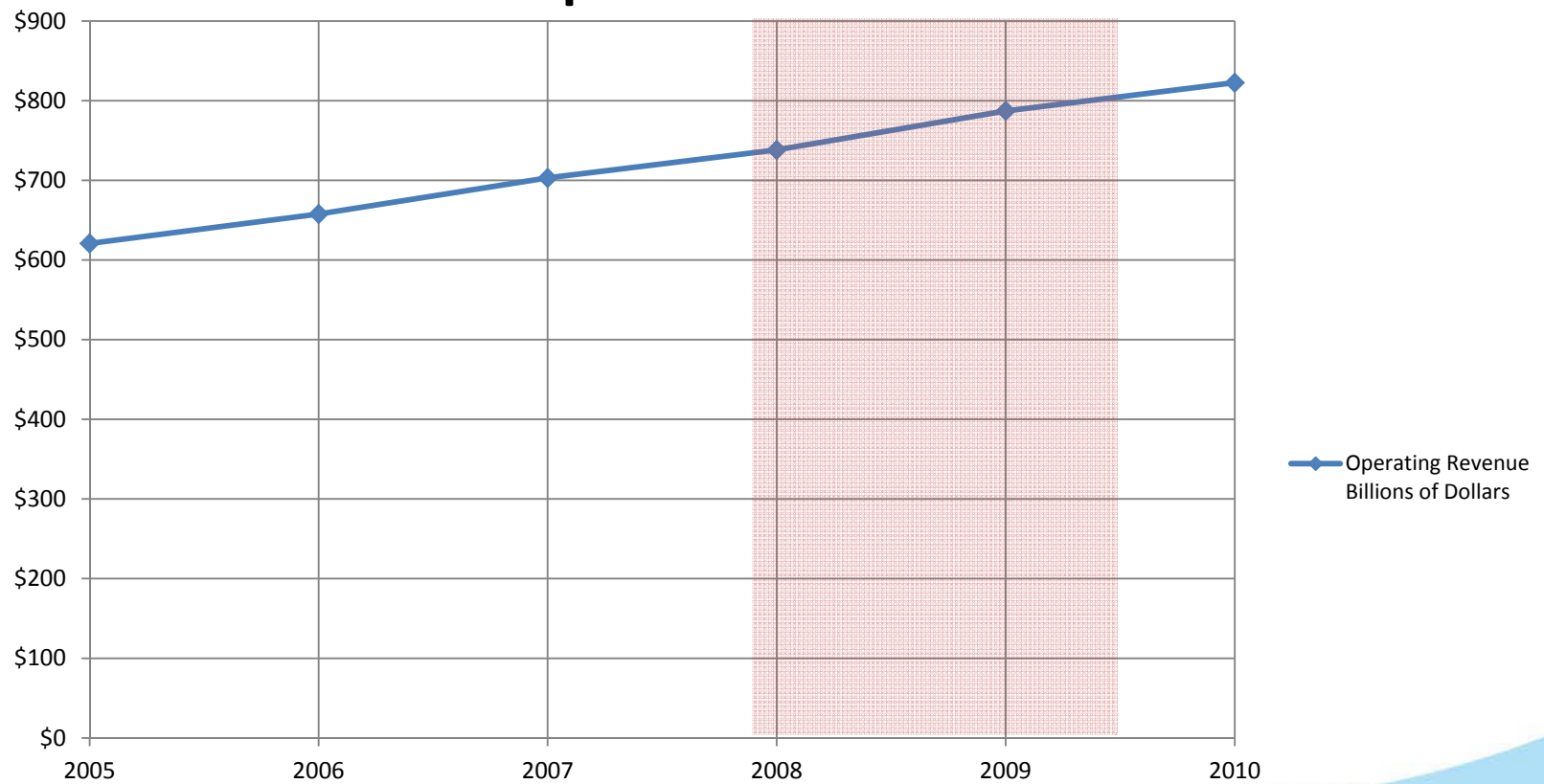


Interior Design Services

- Growth from 2005 to 2007
- Downturn between 2007 and 2009, though not as sharp as Finance
- Continued decline between 2009 and 2010, but at a slower rate

Hospitals

Hospitals NAICS 622

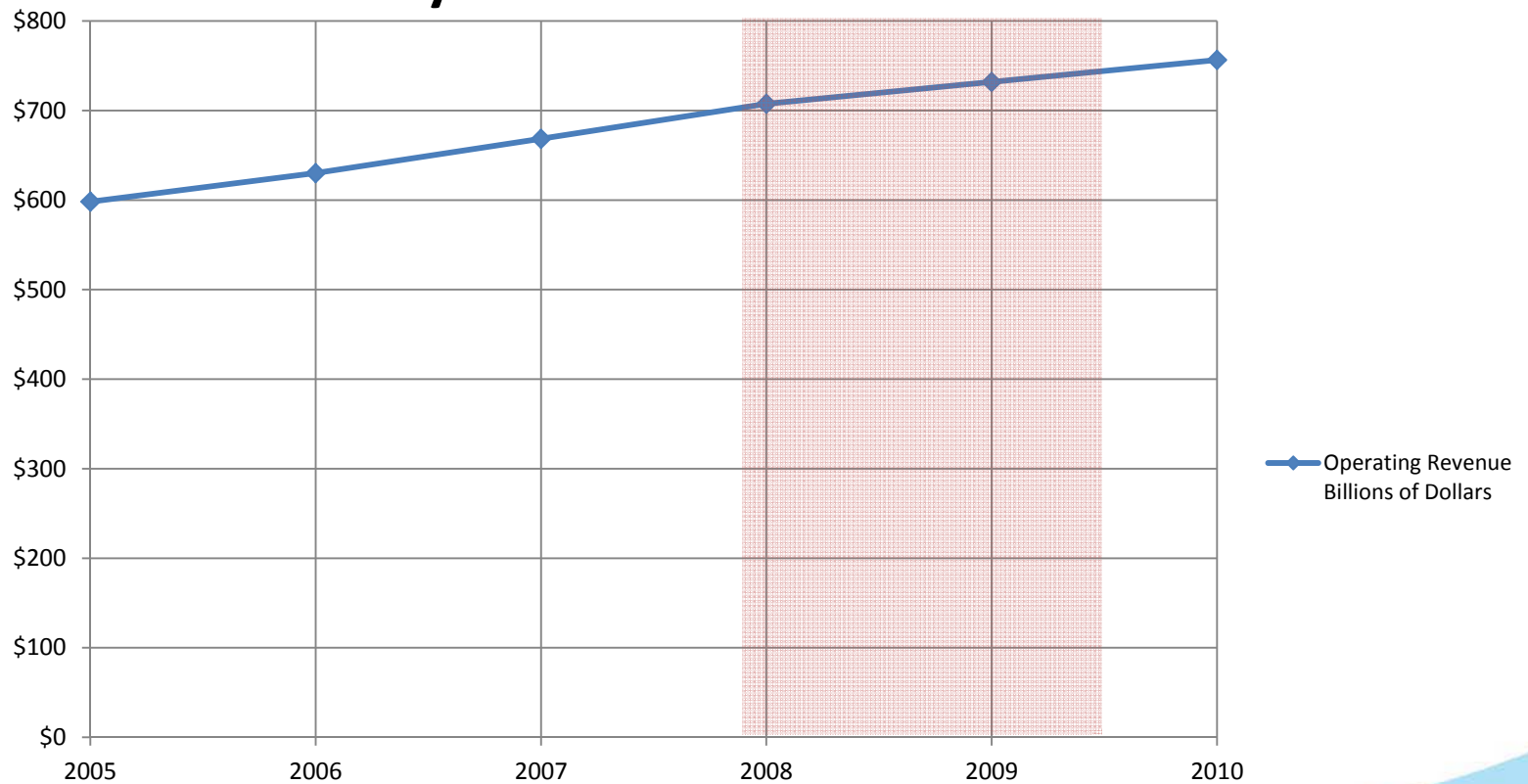


Hospitals

- Continuous growth throughout the entire period of the sample
- Growth pattern appears to be largely unaffected by the period of recession

Ambulatory Health Care

Ambulatory Health Care Services NAICS 621

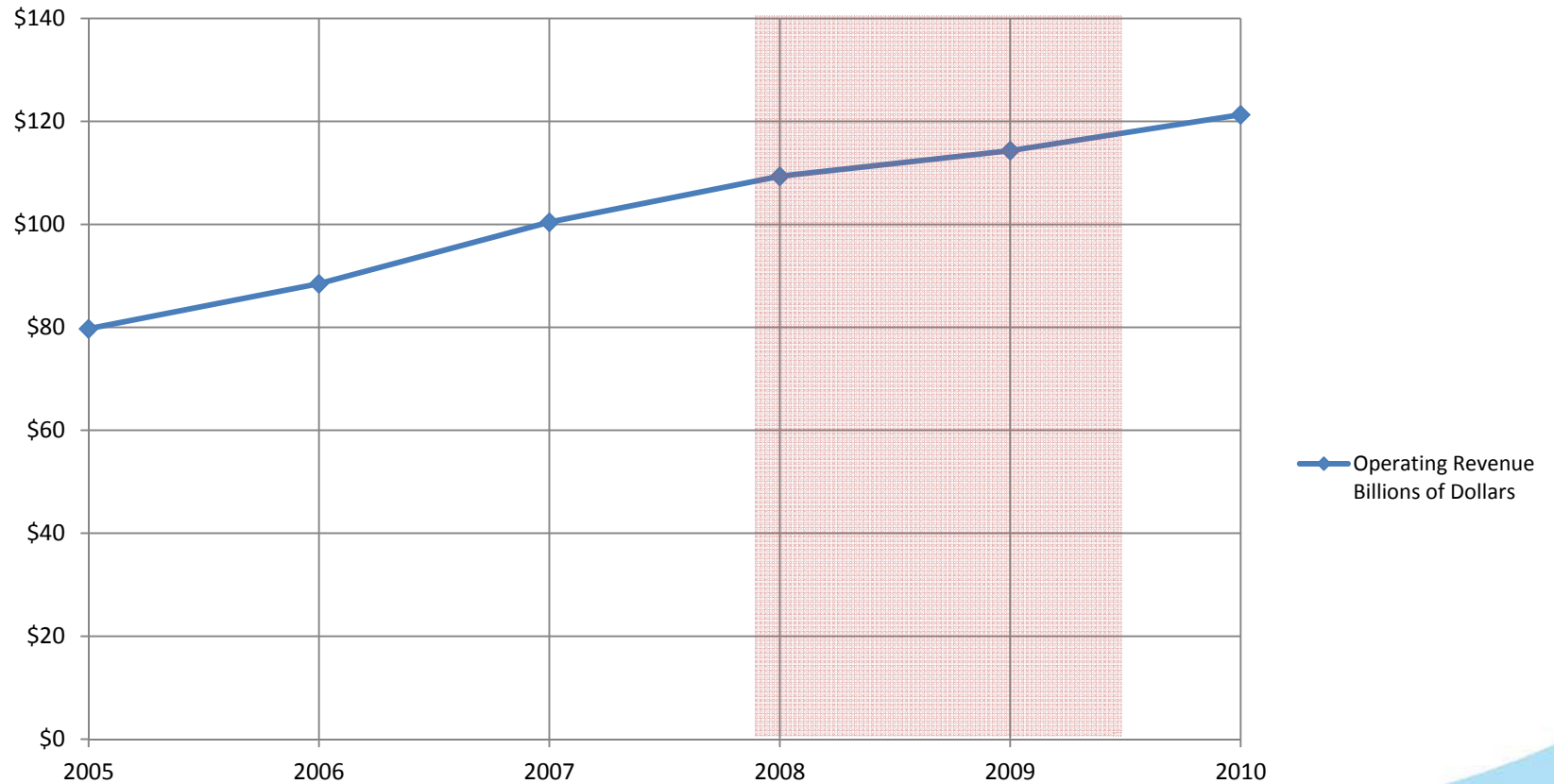


Ambulatory Health Care

- Pattern very similar to that of hospitals
- Continuous growth throughout the entire period of the sample
- Growth pattern appears to be largely unaffected by the period of recession

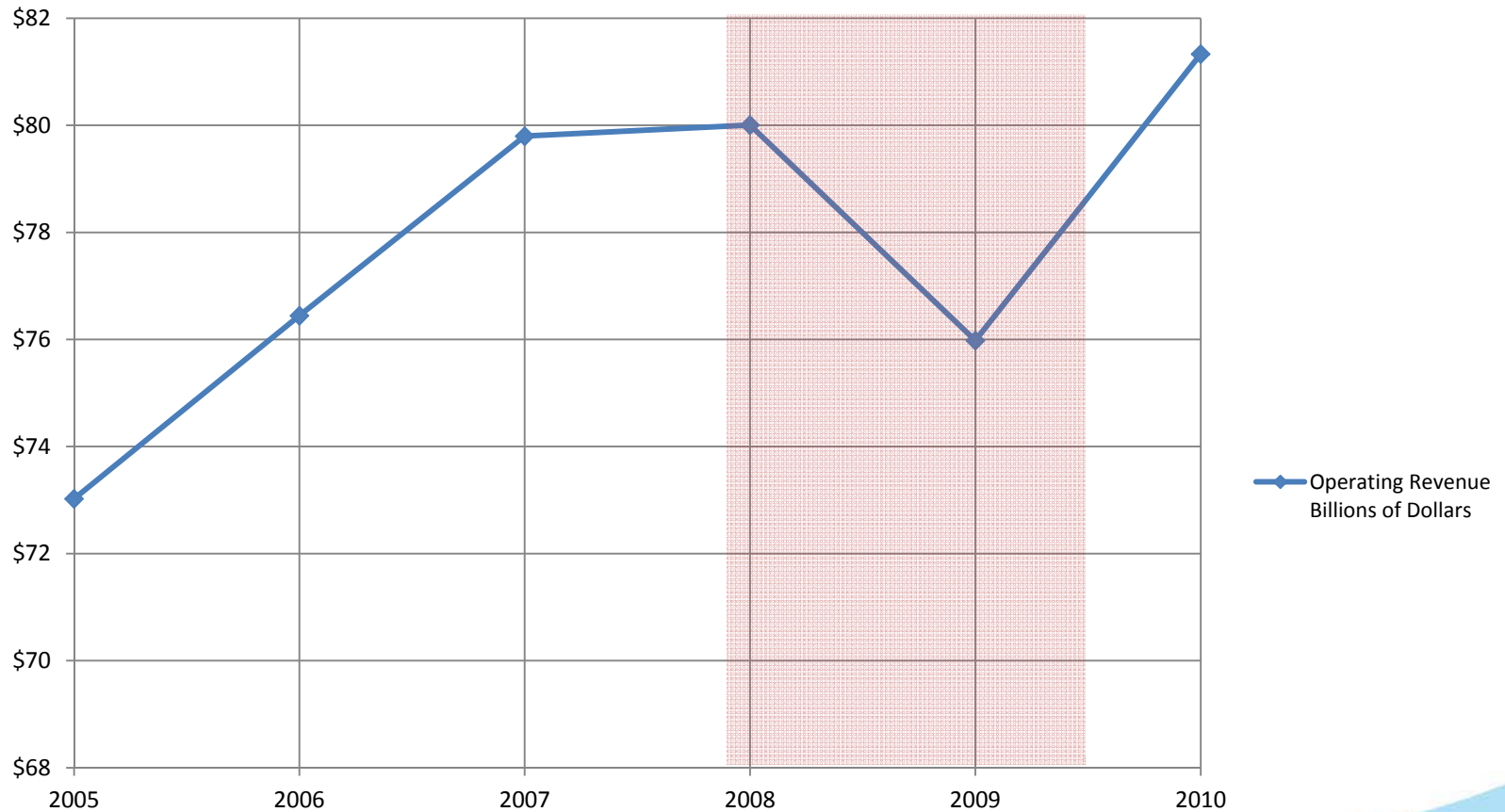
Cable and Other Program Distribution

Cable and Other Program Distribution NAICS 5175



Motion Picture and Video Industries

Motion Picture and Video Industries NAICS 5121

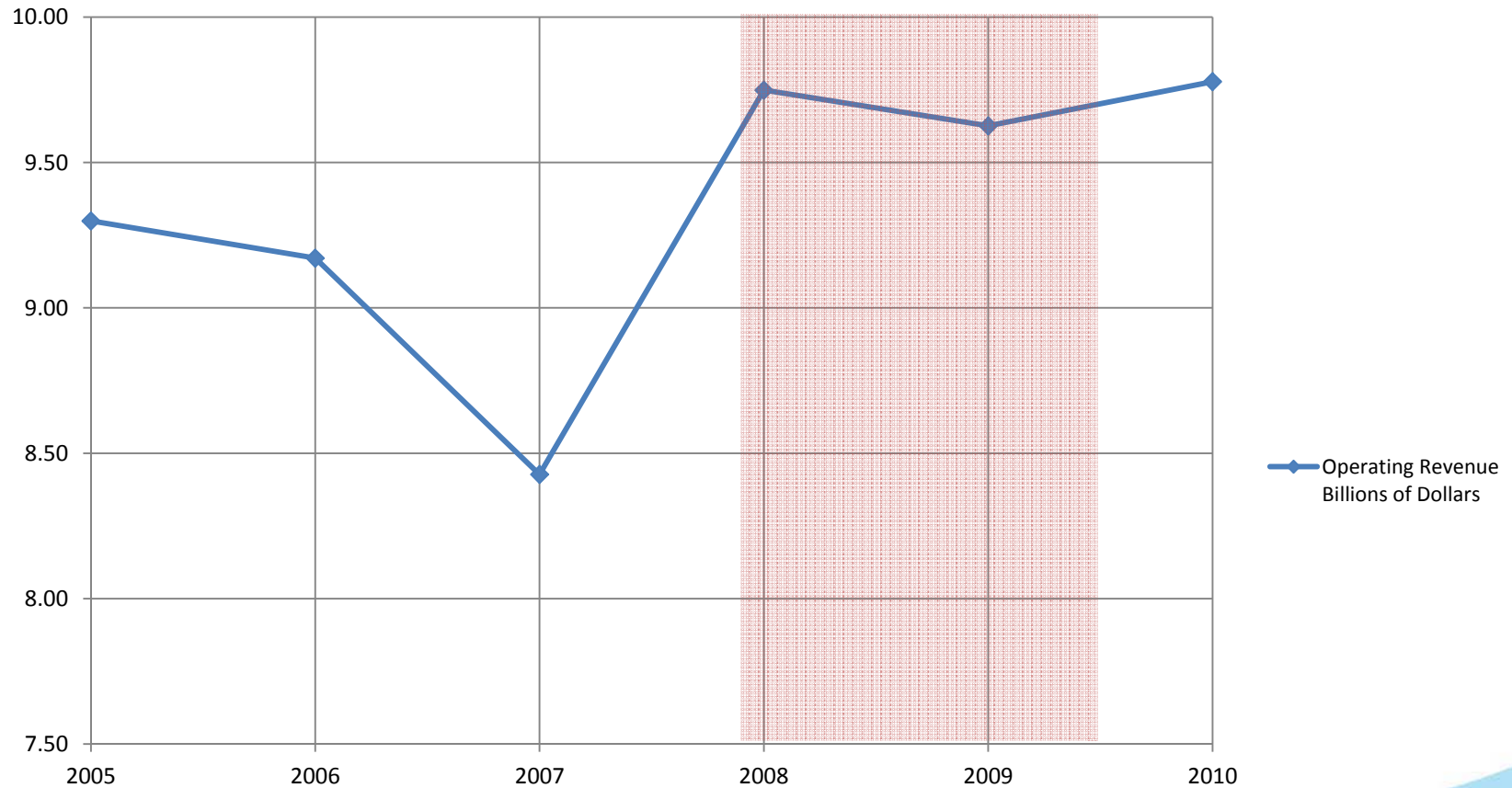


Cable Distribution and Motion Pictures

- Cable and Other Program Distribution (NAICS 5175) continues much the same trend throughout the period of recession
- Motion Picture and Video Industries (NAICS 5121) shows a pattern different from that of Cable Distribution
 - Growth from 2005 to 2007
 - Relatively flat trend from 2007 to 2008
 - Decline from 2008 to 2009
 - Sharp growth from 2009 to 2010

Emergency and Other Relief Services

Emergency and Other Relief Services NAICS 624230



Emergency and Other Relief Services

- Trends quite different from any other industry shown
 - Decline from 2005 to 2007
 - Significant growth from 2007 to 2008
 - Maintains 2008 level thereafter
- Emergency and Other Relief Services affected more by natural disasters than what is going on in the economy
 - 2005: Hurricane Katrina
 - 2008: The busiest Atlantic hurricane season on record

Where to find the Estimates

- Estimates from the Service Annual Survey (SAS) and its counterpart, the Quarterly Services Survey (QSS) may be found at:
- <http://www.census.gov/services>

Where to find the Estimates

The screenshot shows the 'Annual & Quarterly Services' page. The main content area includes:

- The **1st Quarter 2012** report will be released on June 7, 2012 at 10:00 a.m.
- The **2nd Quarter 2012** report will be released on September 6, 2012 at 10:00 a.m.
- The **3rd Quarter 2012** report will be released on December 6, 2012 at 10:00 a.m.

Quarterly Services Press Release: 3rd Quarter 2011

Seasonal Adjustment Factors	Excel [4,767KB]	PDF [129KB]
Full Quarterly Services Report: 3rd Quarter 2011	Excel [32KB]	Excel [523KB]

Annual Benchmark Report for Services through 2010:

4th Quarter 2003 - 4th Quarter 2010 (Adjusted):	Excel [78KB]
4th Quarter 2003 - 4th Quarter 2010 (Not Adjusted):	Excel [830KB]

Benchmark Text [PDF](#) [40KB]
Appendix: [PDF](#) [41KB]

- [Individual Tables for 3rd Quarter 2011](#) (indicated by a red arrow)
- [Search Database](#)
- [Reliability of Estimates](#)
- [Seasonal Adjustment FAQs](#)

Latest Annual Services Report

The **2010 Annual Services** report was released on February 2, 2012 at 3:00p.m.

Service Sectors	2010
22 Utilities	2010
48/49 Transportation & Warehousing	2010
51 Information Sector Services	2010
52 Finance and Insurance	2010
53 Rental and Leasing Services	2010
54 Professional, Scientific, and Technical Services	2010
56 Administrative & Support, and Waste Management & Remediation Services	2010
61 Educational Services	2010
62 Health Care and Social Assistance	2010
71 Arts, Entertainment, and Recreation Services	2010
81 Other Services	2010

- [Archived Data - Historical Years 2009 and Earlier](#)
- [Reliability of Estimates](#)
- [Benchmarking to the 2007 Economic Census](#)

Contact Us

Contact the Quarterly Services staff:

- Email us!
- Call us: (301) 763-2960

Contact the Annual Services staff:

- Email us!
- Call us: (301) 763-2826

Recap

- The Service Annual Survey produces annual estimates of revenue and other items within the service sector
- Products being released today include 2010 industry estimates for eleven sectors
- Estimates from the Service Annual Survey shows how various sectors performed over the past six years.

Questions?

Upcoming Releases From the U.S. Census Bureau

- Quarterly Services Survey: 2011 4th Quarter (March 8 at 10 a.m.)
- 2010 Census Summary File 2 – Ongoing release of state files (Dec. 2011– April 2012)
- Educational Attainment: 2011 (Feb. 23)
- Foreign-Born Population: 2010 (March)

For Further Information

Media

Public Information Office

301-763-3030

General Public

Customer Services Center

1-800-923-8282 or

(301) 763-INFO (4636)