Staying positive: Funding will slow, but steady demand will enable growth

IBISWorld Industry Report 62419
Family Counseling & Crisis Intervention Services in the US

December 2012

Caitlin Moldvay
About this Industry

**Industry Definition**
This industry includes establishments which provide nonresidential individual and family social assistance services. This includes counseling and support groups for alcoholism and drug addiction, abuse, marriage and parenting, crisis centers and family welfare services. This industry does not include social assistance services specifically for children, the elderly, or individuals with disabilities.

**Main Activities**
The primary activities of this industry are:
- Alcoholism self-help and counseling services
- Drug addiction self-help organizations
- Family welfare and social service agencies
- Hotline centers
- Marriage counseling services
- Parenting support services
- Private parole and probation offices
- Suicide crisis centers
- Support group services

The major products and services in this industry are:
- Assistance services for immigrants and refugees
- Counseling and developmental services
- Crisis intervention services
- Rehabilitative services
- Self-help group services
- Shelter and food services

**Similar Industries**

62133 Psychologists, Social Workers & Marriage Counselors in the US
This industry provides clinical psychological and psychiatric social counseling services

62411 Adoption & Child Welfare Services in the US
This industry comprises units mainly engaged in child and youth services.

62412 Elderly & Disabled Services in the US
This industry comprises establishments mainly engaged in providing non-residential services for the elderly and people with disabilities.

62441 Day Care in the US
This industry comprises establishments mainly engaged in providing child day care services.
About this Industry

Additional Resources

For additional information on this industry

www.cdc.gov
Centers for Disease Control and Prevention

www.samhsa.gov
Substance Abuse and Mental Health Services Administration

www.bls.gov
US Bureau of Labor Statistics

IBISWorld writes over 700 US industry reports, which are updated up to four times a year. To see all reports, go to www.ibisworld.com
Industry at a Glance
Family Counseling & Crisis Intervention Services in 2012

Key Statistics
Snapshot

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<thead>
<tr>
<th>Revenue</th>
<th>Annual Growth 07-12</th>
<th>Annual Growth 12-17</th>
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<tbody>
<tr>
<td>$32.7bn</td>
<td>2.0%</td>
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Profit

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<td>$915.4m</td>
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Wages

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<td>$12.6bn</td>
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Businesses

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Market Share
There are no Major Players in this industry

Revenue vs. employment growth

Poverty rate

Products and services segmentation (2012)

<table>
<thead>
<tr>
<th>Revenue vs. employment growth</th>
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<tbody>
<tr>
<td>% change</td>
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<th>Poverty rate</th>
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<td>%</td>
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<td>Year</td>
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<th>Key External Drivers</th>
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<td>Poverty rate</td>
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<tr>
<td>Crime rate</td>
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<tr>
<td>Federal funding for social services</td>
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<td>National unemployment rate</td>
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<td>Per capita disposable income</td>
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<th>Products and services</th>
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<tr>
<td>4.5% Self-help group services</td>
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<tr>
<td>3.8% Rehabilitative services</td>
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<tr>
<td>3.1% Assistance services for immigrants and refugees</td>
</tr>
<tr>
<td>11.1% Crisis intervention services</td>
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<tr>
<td>17% Shelter and food services</td>
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<tr>
<td>60.5% Counseling and developmental services</td>
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Industry Structure

Life Cycle Stage: Mature
Revenue Volatility: Low
Capital Intensity: Low
Industry Assistance: High
Concentration Level: Low
Regulation Level: Heavy
Technology Change: Low
Barriers to Entry: Low
Industry Globalization: Low
Competition Level: Low

For additional statistics and time series see the appendix on page 31.
Industry Performance

Executive Summary

The Family Counseling and Crisis Intervention Services industry provides a range of social services, including counseling for alcoholism and drug addiction, rehabilitation services, shelter and food services, marriage and parenting counseling, crisis centers and self-help organizations. Because demand for these services is countercyclical, the industry recorded strong gains during the recession. In particular, demand for food and shelter services provided by the industry grew strongly during the period as the poverty rate soared from 13.0% in 2007 to a high of 15.3% in 2010, according to the latest data from the US Census Bureau. Furthermore, illicit drug use has become more prevalent over the past five years, increasing demand for alcoholism and drug addiction counseling, as well as substance-abuse support groups. During this period, the industry’s revenue has grown at an average annual rate of 2.0% to an estimated $32.7 billion, including projected growth of 0.6% in 2012. In response to heightened demand for industry services, government funding for industry social programs rose over the five-year period. For instance, the Temporary Assistance for Needy Families program received a $5.0 billion increase in emergency funding due to heightened nationwide poverty. Industry organizations receive funding for social programs from government grants, local businesses and individual donations, as well as operating fees, which are generally charged on a sliding fee scale. For-profit organizations in the industry recorded average profit margins of 2.8% in 2012, a slight decrease from 3.2% in 2007 due to lower per capita disposable income, which reduced the amount that individuals were able to pay for services. Over the next five years to 2017, revenue growth is expected to slow to an average annual rate of 1.5%, reaching an estimated $35.3 billion. Revenue growth will slow as government cutbacks on social programs take effect. For example, federal funding for substance abuse prevention and treatment is expected to receive a 5.3% budget cut during 2013. As the economy slowly recovers from the recession, the decline in the poverty rate will lessen demand for need-based programs.

Key External Drivers

Poverty rate
The demand for industry services is highly correlated with changes in the poverty rate. There are currently an estimated 46.2 million people living in poverty in the United States. Individuals living under the poverty rate are eligible for basic assistance services provided by industry operators, such as food and shelter, as well as job assistance counseling and development programs. Consequently, when the number of people living under the poverty line increases, the demand for industry services generally rises. This driver is expected to decrease during 2013.

Crime rate
Given that the industry provides crisis intervention services, such as telephone hotlines and in-person counselor sessions with individuals who have been abused, a rise in the crime rate increases demand for these services. Although the crime rate typically rises during recessionary periods, the most recent recession marked a turnaround from this trend, with the crime rate actually falling.
Industry Performance

Key External Drivers continued

steadily. This driver is expected to decrease during 2013.

Federal funding for social services
Government grants are a key source of funding for social assistance programs provided by the industry. Government funding for industry programs increased during the recession, due to rising unemployment and the escalating poverty rate which increased demand for industry services. However, due to heightened deficit concerns, government funding is expected to contract, which will adversely affect industry revenue. This driver is expected to decrease during 2013, which is a potential threat to the industry.

National unemployment rate
Another key measure of industry demand is the unemployment rate. When the unemployment rate rises, individuals are left with less disposable income, and a greater number of individuals fall below the poverty line. Rising unemployment has resulted in greater demand for counseling services provided by the industry given the emotional distress of unemployment. Moreover, the industry also provides vocational rehabilitation services. The demand for these services has increased strongly given rising competition for employment. This driver is expected to decrease during 2013.

Per capita disposable income
Social assistance programs are generally provided to individuals on a sliding fee-based scale based on the individuals' ability to pay. During the recession, decreased disposable income resulted in fewer individuals being able to afford the full price of industry services, a factor which adversely affected profit margins. With a slow improvement in economic conditions, however, this trend has begun to reverse. This driver is expected to increase during 2013, which is a potential opportunity for the industry.
Industry Performance

Current Performance

Over the five years to 2012, revenue for the Family Counseling and Crisis Intervention Services industry is expected to rise at an average annual rate of 2.0% to an estimated $32.7 billion in 2012, including projected revenue growth of 0.6% during 2012. Demand for family counseling and crisis intervention has increased over the five-year period, as recessionary conditions prompted greater demand for counseling services, particularly vocation-related counseling. Moreover, increasing usage of illicit drugs has resulted in greater demand for rehabilitative services for individuals suffering from substance abuse. Furthermore, with heightened unemployment leading to a notable climb in the poverty rate, the demand for shelter and food services provided by the industry has grown.

The Family Counseling and Crisis Intervention Services industry provides a range of different state and community-based services. This includes counseling for alcoholism and drug addictions, rehabilitation services for ex-offenders, shelter and food services, hotline centers, marriage counseling services, parenting support services, rape and suicide crisis centers, self-help organizations, support group services, travelers’ aid centers and job training programs. Typically, these organizations receive the majority of their funding through government grants and private donations. In addition, industry operators generally charge for services on a sliding scale according to an individual’s income level. The majority of industry players operate as nonprofit organizations and, thus, are not subject to income taxes. According to the latest information from the US Census Bureau, 73.3% of industry operators are nonprofit establishments.

Countercyclical demand

The Family Counseling and Crisis Intervention Services industry is countercyclical, meaning demand for the industry’s services generally grows when the economy is in a recession. During 2008 and 2009, industry revenue rose 1.2% and 3.1%, respectively, according to the latest information provided by the US Census Bureau. As the US economy moved into the worst recession since the Great Depression, unemployment spiked, reaching a height of 10.1% in January 2010. The poverty rate climbed from 13.0% in 2007 to a high of 15.3% in 2010 (or 46.2 million people), according to the latest data from the US Census Bureau. Consequently, the demand for shelter and food services provided by local and state organizations rose over the five-year period. Thus, industry establishments like soup kitchens, food hamper services, snowsuit programs and food banks were among the most popular industry services over the past five years. These establishments distribute donated food, clothing and household goods to disadvantaged individuals and families.

Over the past five years, the number of organizations operating in the industry increased at an average annual rate of...
Industry Performance

Countercyclical demand continued

3.3% to an estimated 94,001 in 2012. New operators were drawn in by the heightened demand during the recession. Still, the majority of family counseling and crisis intervention services in the United States continue to operate as nonprofit organizations. Although these institutions may generate a profit, this money must be put back into the organization. In contrast to nonprofits, for-profit organizations do not have the same access to federal funding, foundation grants or tax-exempt donations. According to the latest data available from the US Census (2007), about 26.7% of industry operators were for-profit institutions. For-profit organizations in the industry typically generate profit margins of 2.8%, compared to 3.2% in 2007. Profit margins have been adversely affected by decreased disposable income, which reduced the amount that individuals were able to pay for services. Because of the industry’s sliding fee-based services, heightened unemployment meant fewer individuals were able to pay the full price for industry services.

Growing numbers of unemployed and homeless contributed to a spike in demand for services

More drugs but less crime

Also contributing to the increase in demand, illicit drug use has become more common over the past five years. According to the 2011 National Survey on Drug Use and Health, sponsored by the Substance Abuse and Mental Health Services Administration, an estimated 22.5 million Americans aged 12 or older use illicit drugs, representing 8.7% of the population; in 2007, 8.0% of the population, or 19.9 million Americans, used illicit drugs. Increased drug use has resulted in greater demand for substance abuse counseling and rehabilitative services provided by the industry. An estimated 2.3 million individuals received treatment for substance abuse in 2011, according to the latest available data.

Despite an increase in drug use, crime has declined overall during the five-year period, according to 2011 UCR Crime Statistics, which are published by the Disaster Center. Although many people believe crime rates trend in line with recessionary conditions, crime actually sustained the downward trajectory it has been on since the early 1990s during this past recession. In particular, violent crimes declined at an average annual rate of 3.9% between 2007 and 2011, and overall crime levels decreased at an average of 2.3% per year over the same period. Therefore, industry services provide support to abused victims or provide counseling for of ex-offenders has declined over the period.

Funding boost

One of the primary federal agencies that distributes funds for the industry is the Department of Health and Human Services. For example, the Temporary Assistance for Needy Families (TANF) program that provides funding to states for low-income Americans is overseen by this department. Currently, 2012 spending on TANF is estimated at $17.9 billion, which includes $612.0 million allocated under the TANF Contingency Fund for states to draw upon during
Funding boost continued

poor economic conditions. The TANF program provides states with grants to spend on basic assistance, such as cash benefits, work activities and food. TANF funds are also used by states for marriage counseling and career advancement activities, which are covered by this industry.

The Substance Abuse Prevention and Treatment Block Grant program is the cornerstone of government funding for substance abuse programs administered by states. One of the primary agencies that provides rehabilitation and counseling is the Substance Abuse and Mental Health Services Administration. Funding for the agency rose from $3.1 billion in 2007 to $3.3 billion in 2012. The government also provides funding for the Suicide Prevention Resource Center, the Center for Mental Health Services and the Office on Violence Against Women.

Industry Outlook

During the five years to 2017, industry revenue is expected to rise at an average annual rate of 1.5% to an estimated $35.3 billion. Given that the industry provides social services, a significant share of revenue is sourced through government grants. Consequently, projected government spending cutbacks will slow revenue growth over the period. As a result of this trend, industry revenue is expected to contract by 0.9% in 2013.

About 17.0% of revenue is directed toward shelter and food services for disadvantaged children, youth or adults. Over the next five years, the poverty rate is projected to decline, which will lessen demand for shelter and food services provided by the industry. According to IBISWorld estimates the poverty rate is currently at 14.2%. By 2017, however, the rate is expected to decline to 13.4%, which is only slightly higher than prerecession levels. The poverty rate typically moves in tandem with the unemployment rate, which is expected to come down significantly over the period. Consequently, with an improving economy and more jobs available, the poverty rate will gradually contract, leaving fewer individuals in need of shelter and food services.

Over the next five years, industry operators will continue to invest in programs that aid individuals suffering from substance abuse. An estimated 20.6 million Americans suffer from substance dependence or abuse, according to 2011 information from SAMHSA, a trend that has become more pervasive over the past decade. According to information from the Bureau of Labor Statistics, employment for mental health and substance abuse social workers is projected to increase 31.0% from 2010 to 2020, which represents faster-than-average employment growth.

Government cutbacks

In 2013, government funding for the Substance Abuse and Mental Health Services Administration (SAMHSA) agency is expected to decrease. The agency oversees programs for rehabilitation and counseling for individuals suffering from substance abuse. According to the proposed
Industry Performance

Government cutbacks continued

budget, SAMHSA’s funding will be reduced 5.8% during 2013, negatively impacting revenue for the industry. Furthermore, a large reduction in funding for the Community Services Block Grant is also expected. During 2013, funding will be cut by nearly 50.0% to $350.0 million. This grant is directed toward industry community programs for impoverished individuals, including employment, housing, emergency services and health in particular.

Over the next five years, the number of industry organizations is projected to increase at an average annual rate of 3.2% to an estimated 109,908 organizations by 2017. Although government funding is expected to decline over the period, improving economic conditions will yield greater per capita disposable income growth, which will favorably affect profit margins. Because many social service organizations charge on a sliding-fee scale, improved per capita disposable income will enable a greater number of individuals to pay the full rate for industry services. Over the next five years, the average profit margins of for-profit organizations are projected to increase from a current 2.8% to 3.3% by 2017.

Growth will slow as the government increases its focus on reducing the budget deficit
Industry Performance

Industry value added is experiencing moderate growth, in line with the rest of the economy.

There is a high degree of public acceptance.

There has been stable growth in the number of industry operators.

Life Cycle Stage

- **Maturity**: Company consolidation; level of economic importance stable.
- **Quality Growth**: High growth in economic importance; weaker companies close down; developed technology and markets.
- **Quantity Growth**: Many new companies; minor growth in economic importance; substantial technology change.
- **Decline**: Shrinking economic importance.

Key Features of a Mature Industry
- Revenue grows at same pace as economy.
- Company numbers stabilize; M&A stage.
- Established technology & processes.
- Total market acceptance of product & brand.
- Rationalization of low margin products & brands.

Psychologists, Social Workers & Marriage Counselors

Family Counseling & Crisis Intervention Services

Adoption & Child Welfare Services

Generic Pharmaceutical Manufacturing

Elderly & Disabled Services

Brand Name Pharmaceutical Manufacturing
Industry Performance

Industry Life Cycle

This industry is Mature

The Family Counseling and Crisis Intervention Services industry is in the mature stage of its industry life cycle. Industry value added (IVA), which measures the industry’s contribution to the overall economy, is forecast to rise at an average annual rate of 2.5% over the 10 years to 2017. By comparison, GDP is projected to grow on average 1.8% per year over the same ten-year period. Therefore, the industry is maintaining its share of the overall economy, which is a key indicator of the industry’s mature life cycle stage.

The industry provides a range of state and community-based social services. These include counseling for alcoholism and drug addictions, hotline centers for rape, suicide and abuse, marriage counseling services, parenting support services, rehabilitation services, shelter and food services, self-help organizations and support group services. Funding for these social programs are provided through a range of government grants, private contributions and individual fees. These programs are likely to remain staple government and private sponsored programs, given their high degree of social acceptance.

Another indicator of the industry’s mature life cycle stage is the slow growth in the number of industry operators. Over the ten years to 2017, the number of industry organizations is expected to increase at an average annual rate of 3.2% to an estimated 109,908 organizations. Given heightened need for social services during the recession and slow recovery period, particularly those aimed at poverty-stricken individuals, there has been stable growth for organizations that provide counseling and aid to individuals.
Family Counseling & Crisis Intervention Services in the US

December 2012

13

Products & Markets

Supply Chain

产品的与市场

Supply Chain

KEY BUYING INDUSTRIES

92 Public Administration in the US
Governments promote and fund family counseling and crisis intervention services.

9901 Consumers in the US
Consumers are the primary recipients of this industry’s services.

KEY SELLING INDUSTRIES

32541a Brand Name Pharmaceutical Manufacturing in the US
This industry provides prescription and over-the-counter products that are used for treatment.

32541b Generic Pharmaceutical Manufacturing in the US
This industry provides prescription and over-the-counter products that are used for treatment.

62111a Primary Care Doctors in the US
This industry provides the services of a physician for rehabilitative treatment for individuals.

62111b Specialist Doctors in the US
This industry provides the services of specialist doctors for rehabilitative treatment for individuals.

Products & Services

产品与服务

Counseling and developmental services

Counseling and developmental programs are the primary services offered by this industry. In 2012, revenue from counseling and developmental services amounted to 60.5% of revenue. This includes programs which promote emotional and life skills development of children, youth and families. Counseling services can also include counseling for marriage, parenting, non-medical advice on contraception as well as providing counseling for victims of violence. This industry does not include psychologists and psychiatrists, these practitioners are included in the Psychologists, Social Workers and Marriage Counselors industry (IBISWorld report 62133). Rather, this industry primarily includes government-supported agencies and charitable organizations which deliver counseling advice to disadvantaged children, youth and...
Family Counseling & Crisis Intervention Services in the US December 2012

Products & Markets

**Products & Services continued**

adults. The majority of funds are provided through the Department of Health and Human Services.

**Shelter and food services**
An estimated 17.0% of revenue is directed towards shelter and food services. This includes providing temporary shelter for children, youth and families. These shelters include meals, shower facilities and access to a sleeping area. There are a variety of different types of shelters in operation including youth shelters, shelters for families with sick children, shelters for victims of domestic violence and abuse and general-use shelters for the homeless. There are also programs which distribute food, clothing and donated household goods to the disadvantaged population. These include soup kitchens, food hamper services, snowsuit programs, and food banks.

**Crisis intervention services**
Crisis intervention services account for about 11.1% of revenue. This segment includes telephone hotlines with counselors who provide information, advice and referrals to callers to enable them to obtain assistance. Crisis intervention services typically include advice and information for individuals with HIV/AIDS or with issues related to substance abuse, pregnancy, parenting, health matters, contraception and sexually transmitted diseases. Furthermore, telephone hotlines are available for individuals who are contemplating suicide or who have been raped. In addition to providing information and advice, agencies also provide protective services following investigation for children and adults who have been abused, neglected or exploited and are unable to take steps to correct their situation.

**Self-help group services**
Self-help group services account for an estimated 4.5% of revenue. These programs provide individuals with access to a gathering of children, youth or families with a common problem or concern in order to offer advice, emotional support, guidance feedback for one another. Typically, these programs are available for the disabled, recovering alcoholics and other addictions, drug abusers, victims of abuse or crime.

**Rehabilitative services**
Rehabilitative services accounts for about 3.8% of industry revenue. These rehabilitative services also include outpatient programs for individuals with prior substance abuse. Specific services may include detoxification and substance abuse counseling, treatments and therapies. The segment also includes programs that provide vocational rehabilitation, basic job training, job counseling and other related services to assist individuals in securing permanent jobs. It also includes programs that provide vocational rehabilitation and other services to assist disabled individuals to secure permanent jobs. This may include programs for basic job training workshops designed specifically for disabled individuals.

**Assistance services for immigrants and refugees**
Assistance services for immigrants and refugees amounts to 3.1% of industry revenue. These programs provide immigrants and refugees with information, referrals, job search support, help with credential recognition and advocacy services. This segment, however, does not include providing language training.
Demand Determinants

Demand for the Family Counseling and Crisis Intervention Services industry has countercyclical tendencies, as the need for shelter, food, and counseling services, typically increases during poor economic conditions. The demand for family counseling and crisis intervention services is primarily influenced by the level of economic growth, the unemployment rate, the poverty rate, public policy, the marriage rate, incidents of violence and abuse, and severity of natural disasters.

Economic growth
The demand for industry services is influenced by the level of economic growth. In times of strong economic growth, the demand for food assistance, shelter and government-funded development programs typically declines. Strong economic growth generally leads to employment opportunities, job security and wage growth. This means that individuals are more likely to be self-sufficient and not dependent on government-sponsored services. The reverse is true during recessionary periods.

Unemployment
The demand for industry services is highly correlated with changes in the unemployment rate. A decrease in household disposable income, caused by job losses, is a major factor leading to increased demand for food services, job rehabilitative programs and shelters.

Poverty rate
The demand for industry services is highly correlated with changes in the poverty rate. The poverty rate typically moves closely with the unemployment rate. In 2007, strong economic growth resulted in the poverty rate dropping 0.3 percentage points to 13.0%, the first drop since 2000. However, the massive job losses brought on by the 2008 global financial crisis quickly reversed that trend. Over the next two years, the poverty rate jumped 1.3 percentage points, averaging 14.3% over 2009. As unemployment remained high in 2010, the poverty rate climbed further, averaging 14.6% for the year. Currently, an estimated 14.2% of Americans live below the poverty line in 2012.

Government
About half of the industry’s revenue is either generated by or donated to rehabilitation centers and programs, and as such, industry revenue is affected not only by the prominence of substance abuse among the community at large, but by federal and state government responses to the problem. After many years of adopting a ‘zero tolerance’ approach to drug addiction, public opinion is gradually shifting towards greater treatment-based solutions for drug users, suggesting an increase in funding for establishments in that industry segment.

The demand for family services is also affected by changes in public policy. Welfare reform in 1996 attempted to move welfare recipients into work and increased self-sufficiency by limiting the period of government welfare assistance and tightening welfare eligibility criteria. Any change in focus from federal and state governments towards greater government contributions to welfare would inevitably result in an increase in revenue growth.

Services provided by the industry include family social and welfare services, marriage counseling, mediation services, parenting support services and referral services for personal and social problems. Demand for marriage counseling is partly linked to the marriage rate in the United States. The marriage rate has fallen slowly and steadily since the mid-1980s as unmarried cohabitation has risen. Furthermore, during recessionary periods, the marriage rate typically declines due to economic uncertainty and
Individuals under the age of twenty are the smallest market for the industry. Overall, people in this age bracket account for 4.9% of the industry’s revenue. The Family Counseling and Crisis Intervention Services industry does not include organizations that specifically target adolescents, which is part of the reason that individuals under the age of 20 make up a small percentage of the industry’s revenue. People in this age bracket utilize counselor services, crisis intervention services, self-help groups and rehabilitative services. Individuals under the age of 20 are especially at risk for suicide. According to the National Institute of Mental Health, among adolescents between the ages of 15 and 19, 6.9 per 100,000 died by suicide. Risk factors among youth include depression, alcohol or other drug-use disorder, abuse or disruptive behavior. Furthermore, individuals in this age bracket are likely to use counseling services for unplanned pregnancies. Women in this age bracket account for 23% of unplanned pregnancies.

The majority of people who use family counseling and crisis intervention services are between the ages of 20 and 54 years.
The Family Counseling and Crisis Intervention Services industry consists of government-funded initiatives and local-based solutions for individuals. This industry does not export or import any goods or services.
Business Locations 2012

Additional States (as marked on map)

1 VT 0.5
2 NH 0.5
3 MA 2.4
4 RI 0.3
5 CT 1.4
6 NJ 2.3
7 DE 0.4
8 MD 1.7
9 DC 0.7

Establishments (%)
- Less than 3%
- 3% to less than 10%
- 10% to less than 20%
- 20% or more

SOURCE: WWW.IBISWORLD.COM
Products & Markets

Business Locations

The distribution of family counseling and crisis intervention service establishments trends closely with the distribution of the US population. Furthermore, disbursement is also based on states’ respective poverty and crime rates. The majority of industry establishments are concentrated in the Southeast, the Mid-Atlantic, the West and the Great Lakes regions of the United States. Data sourced from the US Census Bureau’s County Business Patterns shows that these four regions account for 70.8% of industry establishments.

Southeast

The Southeast region accounts for the greatest share of industry establishments. In 2012, 22.9% of industry establishments were located in the Southeast region. Within the region, Florida has the highest number of family counseling and crisis intervention service locations, accounting for 4.8% of the total. The primary reason for the region’s dominant share of industry establishments is that it houses 25.4% of the nation’s population. Furthermore, states within the Southeast have some of the highest poverty and unemployment rates in the nation. According to data from the US Census Bureau, Mississippi, Louisiana, Alabama, West Virginia, South Carolina, Georgia, Tennessee, North Carolina and Florida all have poverty rate exceeding the nation’s average of 15.3%. In particular, Mississippi has the highest poverty rate in the nation at 22.4%, according to the latest 2010 information from the US Census Bureau.

Mid-Atlantic

The Mid-Atlantic has 16.8% of the family counseling and crisis intervention service establishments which is in line with the region’s 15.6% of the population. In particular, New York has a high share of establishments with 6.0% of the nation’s total; the state has 6.3% of the population. Furthermore, the District of Columbia has one of the highest poverty rates in the nation at 18.8%. The District of Columbia also has the highest crime rate in the nation which may necessitate the need for crisis intervention services.

West

The West has 16.3% of the nation’s family counseling and crisis intervention service locations. California accounts for the highest share of establishments at 10.8%; the state’s poverty rate is 15.8%, which is slightly above the nation’s average. Given that the West is highly populated with 17.0% of the nation’s population, there is a high demand for industry services. Furthermore, Nevada has the second-highest crime rate per person in the country. In addition, Nevada and California have the first and second-highest unemployment rates in the country. Consequently, there is high demand for career-related counseling and job rehabilitation services. Consequently, there is a greater demand for counseling and crisis services in the state.
Great Lakes
The Great Lakes is another primary location for industry establishments. In 2012, the region held 14.8% of total family counseling and crisis intervention service locations and 15.0% of the nation’s population. Illinois has the highest share of establishments in the region with 4.2% of the nation’s total; this is in line with the state’s share of the population.

Regions that tend to have a higher concentration of establishments tend to be those that contain major population centers (e.g. New York and Los Angeles), which tend to exhibit higher concentrations of low-income families. The concentration in major cities allows service providers to exploit economies of scale to serve more individuals.
Competitive Landscape

Market Share Concentration

The Family Counseling and Crisis Intervention Services industry has a low level of market share concentration. Although the majority of funding is provided through federal government departments, the actual provision of services is undertaken by a large number of small organizations at the local level. Consequently, there are no organizations with significant market share. The vast majority of industry operators are non-profit organizations. Typically, establishments in the industry have an average of 4 employees. According to the latest information provided by the Statistics of US Businesses, 53.9% of employer companies have fewer than 5 employees.

Key Success Factors

IBISWorld identifies 250 Key Success Factors for a business. The most important for this industry are:

- Ability to control size and growth of internal bureaucracy
- Access to secure revenue
- Ability to alter goods and services produced in favor of market conditions
- Ability to provide goods/services in diverse locations

Cost Structure Benchmarks

The majority of organizations in the Family Counseling and Crisis Intervention Services industry are nonprofit organizations. According to the latest information from the US Census Bureau, 73.3% of industry providers are nonprofit organizations. Although these institutions can generate profit, the money must be reused by the organization. For-profit organizations in the industry typically generate profit margins of 2.8% compared with average profit margins of 3.2% in 2007. Profit margins have been adversely affected by decreased disposable income, which reduced the amount that individuals were able to pay for services. Given that many services are offered on a sliding fee basis that is dependent on income levels, with heightened unemployment, fewer individuals were able to pay the full price for industry services. Industry organizations receive a large degree of their funding through federal government grants, which are then distributed to states for disbursement to local organizations. The Department of Health and Human Services provides the majority of federal
funding for organizations. The rest of industry funding is provided through private contributions.

**Labor and capital**

Wages are the single largest expense for organizations given that the industry is primarily a service-related industry. In 2012, wages accounted for 38.6% of revenue for organizations. This is a slight increase from 2007, when labor expenses accounted for 38.2% of revenue. Although there was a small decrease in industry employment during 2007, for the most part, with increasing demand for government-funded family counseling and crisis intervention services during the recession, industry employment has trended upwards over the five-year period. The industry employs a wide variety of individuals including social workers, counselors and therapists. Social workers provide information, advice and intervention services for a wide variety of issues. This includes parenting advice and support for families as well as support for individuals and families coping with illness or disease as well as substance abuse problems. The industry also employs counselors that specialize in education, vocations, rehabilitation, mental health, physical health, substance abuse, behavioral disorders, marriage and family therapists.

Depreciation expenses are relatively low, estimated at 1.8% in 2012. Industry operators must invest in computer systems, medical equipment and office equipment. Depreciation expenses have remained relatively constant over the five-year period.

**Purchases**

Purchases account for an estimated 21.0% of revenue for industry operators.
Competitive Landscape

Cost Structure
Benchmarks continued

Typical purchases include food, clothing, medical supplies and basic household goods. About 17.0% of industry revenue is directed towards providing temporary shelter and food services to disadvantaged individuals and these organizations commonly distribute clothing, food and basic necessities for individuals. Organizations that are aimed at aiding individuals with substance abuse problems will have to purchase medical suppliers for their facilities. In addition, industry organizations purchase office equipment, educational booklets and materials for distribution to individuals.

Other expenses
Other smaller expenses include rent, utilities, administrative expenses, research costs, advertising campaigns, among others.

Basis of Competition

Level & Trend
Competition in this industry is Low and the trend is Steady

The Family Counseling and Crisis Intervention Services industry has a low level of competition. The majority of services provided by this industry are funded by the US Department of Health and Human Services (HHS) which oversees the Temporary Assistance for Needy Families (TANF) program. Funding is then channeled through state government agencies that decide how to best allocate those funds. In recent years, increased funding has been allocated towards the Department of Defense and the Department of Homeland Security to boost national security. However, this trend has begun to reverse itself, with the recession and heightened unemployment prompting increased government spending on social services for families. Budget allocation is derived through necessity, priority and political processes. At a local level, service providers such as government and local community agencies compete with each other for their share of the HHS funding budget.

Community services provided by the industry are funded by federal and state governments and private contributions. These social service programs are operated by state, country or city governments along with public or private agencies. These programs compete with other programs that are publicly-funded such as education, healthcare, pensions and transportation.

There is also segment of the industry provided by private corporations that do not receive government grants or funding, or if they do, it is not enough for the firm to be considered as government funded, as often this funding comes in the form of tax concessions. About 73.3% of firms in the industry are currently exempt from taxation. The bulk of these are nonprofit firms, which are less inclined to compete for market share, and generally, private firms compete against one another for business, rather than with the lower-cost, publicly funded, tax-exempt organizations.

Barriers to Entry

Level & Trend
Barriers to Entry in this industry are Low and Steady

Specific local and regional programs need to be tailored to meet the relevant needs of the individuals and families in that region. For example, some states have larger numbers of immigrants and refugees and will need to have programs targeted for this population. Some states have a larger agricultural and rural population and will need programs targeted for these groups.

In 2001, the Bush Administration announced the Faith-Based and Community Initiative to remove unnecessary barriers that may prevent...
these organizations from receiving federal funding, in order to improve the funding opportunities for faith based and community organizations. The high involvement of religious organizations, or groups associated with specific religions, particularly in the various counseling segments (i.e. pregnancy counseling, sexual assault help lines) have even lower barriers to entry than other industry entrants.

There are no major players within this industry, which suggests no current players have managed to monopolize any specific market segment, product or service, or geographic region. The absence of large competitors in an industry reduces barriers for new entrants, as competition for funding is not against an entrenched and reputable organization with a history of gaining funding.

The primary factor keeping barriers to industry entry low is the availability of tax concessions and rebates for nonprofit organizations. If a new industry entrant can prove the new institution is nonprofit, tax exemptions are provided. Currently 73.3% of industry establishments operate without having to pay taxes.

Government grants can be provided for the establishment of new industry entities. However, the new player must provide either a service that is currently not being offered, or provide an existing service in a geographic area that lacks such services, and it must be deemed by the proper oversight organization that the service is required in that region. Access to these grants can be a significant barrier.

Increasingly, the federal government uses block grants to the states for specific programs in order to give them more discretion in allocating resources to local and community organizations in particular regions for maximum efficiency.
The Family Counseling and Crisis Intervention Services industry is composed of a wide variety of social assistance programs. The majority of funding for the industry comes from Department of Health and Human Services (HHS). The HHS department is the primary agency at the federal level responsible for funding health-related services for individuals and families. The HHS may issue block grants to states for specific programs, which means that the states have discretion over which programs, including faith-based and community organizations, need funding. Some programs and services are also funded by private enterprise and nongovernment agencies.

The industry can be broken into three primary segments: rehabilitation services, social services and crisis services. The major government agencies involved in the service provision of each segment are examined below.

**Rehabilitation services**
The Substance Abuse and Mental Health Services Administration (SAMHSA) is a branch of the US Department of Health and Human Services. The SAMHSA agency uses grants to improve the quality and availability of prevention, treatment and rehabilitative services to individuals suffering from substance abuse and mental illnesses. The agency also conducts substantial data collection to expand research into substance abuse and mental illness.

SAMHSA provides funding to states through the Substance Abuse Prevention and Treatment Block Grant Program (SABG) and the Mental Health Block Grant (MHBG). The SABG is the cornerstone of funding for substance abuse programs administered by states. The grant enables states to provide substance abuse treatment and prevention services. In 2012, the budget for the SABG was $1.4 billion, which is a slight decrease compared with 2007. After rising steadily from 2007 to 2010, funding for the SABG has faced cutbacks over the past two years.

**Social services for individuals and families**
Social services for individuals and families include general family welfare services, marriage counseling, parenting support services and various social service centers. The majority of funding and programs within this segment is derived from the Office of Family Assistance (OFA), which is part of the HHS. The OFA agency administers and oversees the Temporary Assistance for Needy Families (TANF) program, which provides grants and funding to states so that they can implement programs that provide assistance to needy families and promote job readiness. States spend TANF funds for basic assistance such as cash benefits, work activities, child care, transportation and emergency assistance. Primarily, the core function of the TANF program is to find work for people that are on welfare. In addition to federal funding, states are also required to spend a set minimum to help eligible families find work.

The American Recovery and Reinvestment Act of 2009 created a new TANF emergency fund to provide up to $5.0 billion to help states during 2009 and 2010 so they could have increased funding for basic assistance for needy families. In 2012, spending on TANF is estimated at $17.9 billion, which is a slight increase from 2007, when federal appropriations totaled $17.1 billion.

**Crisis services**
Crisis services include programs and initiatives that provide information, advice and intervention services for individuals. These primarily include rape and suicide crisis centers. However,
there are also a variety of programs that provide advice and information for individuals with HIV/AIDS or with issues related to substance abuse, pregnancy, parenting, health matters, contraception and sexually transmitted diseases. Programs that aim to educate and minimize suicide, particularly youth suicide, are funded by the SAMHSA, which is a part of the HHS. One major agency is the Suicide Prevention Resource Center (SPRC), which aims to provide prevention support and education on suicide. The SPRC collaborates with ten other organizations that include the American Association of Suicidology (AAS), National Alliance for the Mentally Ill (NAMI) and the Suicide Prevention Action Network (SPAM).

SAMHSA and its Center for Mental Health Services (CMHS) also receive federal appropriations to manage two significant youth suicide prevention programs. The Garrett Lee Smith State/Tribal Youth Suicide Prevention and Early Intervention Grant Program supports 42 states and 18 tribal organizations in developing and implementing youth suicide prevention and early intervention strategies. The Garrett Lee Smith Campus Suicide Prevention program also provides funding to institutions of higher education to prevent suicide and suicide attempts. The Garrett Lee Smith Youth Suicide Prevention program was allocated $10.0 million in 2012.

Federal funding is primarily appropriated through the Department of Justice, which allocates funds through the Office on Violence Against Women (OVW). Funds are then allocated to community and state-based programs through grants. These funds primarily assist in establishing rape crisis centers and hotlines for victims of rape and sexual assault. The OVW created the Sexual Assault Services Program in 2005, which provides federal funding for direct intervention and assistance for victims of sexual assault. It operates crisis centers as well as 24-hour sexual assault hotlines. The program began to receive funding in 2009 and was allocated $23.0 million in 2012, an increase from $9.4 million in 2009.
Operating Conditions

Capital Intensity | Technology & Systems | Revenue Volatility
Regulation & Policy | Industry Assistance

**Capital Intensity**

*Level*
The level of capital intensity is **Low**

The Family Counseling and Crisis Intervention Services industry has a low level of capital intensity. In 2012, for every $1.00 spent on wages, industry operators spent an average of $0.046 in capital investment. This represents a slight decline compared to 2007 when industry operators invested $0.05 in capital for every $1.00 spent on wages. The industry is primarily a service-related industry which necessitates a high degree of personal interaction between employees and individuals. Typically, industry organizations employ social workers, counselors and therapists. Social workers typically provide information and advice on marriage, parenting as well as support for individuals or families coping with illness, disease, or substance abuse problems. Organizations also employ counselors specializing in education,

**Tools of the Trade: Growth Strategies for Success**

**New Age Economy**

*Recreation, Personal Services, Health and Education.* Firms benefit from personal wealth so stable macroeconomic conditions are imperative. Brand awareness and niche labor skills are key to product differentiation.

**Investment Economy**

*Information, Communications, Mining, Finance and Real Estate.* To increase revenue firms need superior debt management, a stable macroeconomic environment and a sound investment plan.

**Capital Intensive**

*Agriculture and Manufacturing.* Traded goods can be produced using cheap labor abroad. To expand firms must merge or acquire others to exploit economies of scale, or specialize in niche, high-value products.

**Labor Intensive**

*Psychologists, Social Workers & Marriage Counselors.*

**Family Counseling & Crisis Intervention Services**

**Wholesale and Retail.* Reliant on labor rather than capital to sell goods. Functions cannot be outsourced therefore firms must use new technology or improve staff training to increase revenue growth.

**Change in Share of the Economy**

SOURCE: WWW.IBISWORLD.COM
Operating Conditions

Capital Intensity continued

vocational training, rehabilitation, mental health, physical health, substance abuse and behavioral disorders. Capital expenditure is mainly directed towards spending on computers, information systems and databases. Most establishments lease their premises rather than owning them, which further limits depreciation costs for offices.

Technology & Systems

The majority of technological change in this industry revolves on improving the communication between different agencies and improving systems of data collection and analysis. Technological change also stems from ongoing research by the National Institutes of Health (NIH) and other research bodies in terms of improved scientific understanding and new program initiatives.

The Temporary Assistance for Needy Families (TANF) program was established in 1996 and part of the welfare reform included improved data collection methods in order to continually monitor and evaluate both individual cases and state welfare caseloads.

The Violence Against Women Electronic Network (VAWnet) helps practitioners share data and lessons learned about VAW prevention and intervention efforts. The network improves communication among state domestic violence and sexual assault coalitions and allied organizations. VAWnet features a database to promote state to state electronic networking and a library of resources about violence against women.

The National Institutes of Health (NIH) are a collection of federally funded research centers that engage in leading edge scientific research into different health related issues. In addition, there are a myriad of university research departments and private research agencies which provide new information on the economic and social aspects of health policy and provide recommendations on new program initiatives. Also, use of internet technology to improve access to counseling services and awareness of the resources available has increased markedly over the current period. The majority of service providers are increasingly relying on these communication techniques to increase the reach of their message.
Operating Conditions

Revenue Volatility

The Family Counseling and Crisis Intervention Services industry has a low degree of revenue volatility. Between 2007 and 2012, year-on-year revenue changes averaged 1.7%. The level of volatility for this industry depends largely on federal and state government funding priorities. Government funding is made up of pre-appropriated grants for long-term projects and discretionary grants for short-term initiatives. Changes in government policy and government budget priorities will increase industry volatility. Industry volatility is minimized by the wide scope of operations covered under this particular industry heading.

Regulation & Policy

The Family Counseling and Crisis Intervention Services industry is highly regulated by a range of federal and state legislations. The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 provided an overhaul in welfare implementation. For example, the Act established the Temporary Assistance for Needy Families (TANF) program and mandated citizens to work after being on welfare for two years with few exceptions. The Act also cuts assistance to families that have been receiving assistance for five cumulative years. The TANF program replaced the Aid to Families with Dependent Children program and the Job Opportunities and Basic Skills Training program of 1988. TANF provides grants and funding to states so that they can implement programs that provide assistance to needy families, promote job readiness as well as a number of services that promote work and marriage.

The Migrant Health Act is another pertinent industry-related regulation. The act provides grants to community nonprofit organizations for a broad range of medical and support services to migrant and seasonal farm workers and their families. The industry is also governed by the Trafficking Victims Protection Act which was developed in 2000 and designates the US Department of Health and Human Services as the agency responsible for helping victims of human trafficking become eligible to receive benefits and services. The Violence Against Women Act of 1994 aims to reduce the violence against women by regulating safe streets for women, safe homes for women and equal...
Operating Conditions

Regulation & Policy continued

justice for women in the courts. Recently, the Office on Violence Against Women created the Sexual Assault Services Program in 2005, which provides federal funding for direct intervention and assistance for victims of sexual assault. It operates crisis centers as well as 24-hour sexual assault hotlines. The program began to receive funding in 2009.

Industry Assistance

This industry receives a high level of assistance. Increasingly, the federal government uses block grants that are given to states for specific programs in order to give them more discretion in allocating resources to local and community organizations. This aids in maximizing grant efficiency and effectiveness. The remaining industry revenue comes from state and local governments as well as public, private and community-based local organizations.

Several of the most prominent federal grants include the Substance Abuse Prevention and Treatment Block Grant Program, which provides funding for substance abuse programs administered by states. In 2012, the proposed budget for the grant was $1.448 billion. In addition, funding for social services that provide assistance to needy families, promote job readiness and marriage are distributed through the Temporary Assistance for Needy Families (TANF) program. TANF had a 2012 budget of $17.86 billion. Funding for suicide crisis services is primarily distributed through the Garrett Lee Smith State/Tribal Youth Suicide Prevention and Early Intervention Grant Program, which was allocated $10 million. Federal funding is also allocated through the Department of Justice, which allocates funds to the Office on Violence Against Women; the organization received $397.5 million in 2012. The program operates crisis centers as well as 24-hour sexual assault hotlines.
## Key Statistics

### Industry Data

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue ($m)</th>
<th>Industry Value Added ($m)</th>
<th>Establishments</th>
<th>Enterprises</th>
<th>Employment</th>
<th>Exports</th>
<th>Imports</th>
<th>Wages ($m)</th>
<th>Domestic Demand</th>
<th>Poverty Rate (%)</th>
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### Annual Change

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<th>Year</th>
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<th>Industry Value Added (%)</th>
<th>Establishments (%)</th>
<th>Enterprises (%)</th>
<th>Employment (%)</th>
<th>Exports (%)</th>
<th>Imports (%)</th>
<th>Wages (%)</th>
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### Key Ratios

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<td>N/A</td>
<td>N/A</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Revenue per Employee ($/000)</td>
<td>60.95</td>
<td>62.37</td>
<td>59.32</td>
<td>60.11</td>
<td>63.94</td>
<td>64.59</td>
<td>65.06</td>
<td>63.96</td>
<td>63.27</td>
<td>61.75</td>
<td>25/33</td>
<td>25/33</td>
</tr>
<tr>
<td>Wages/Revenue (%)</td>
<td>40.51</td>
<td>39.39</td>
<td>40.75</td>
<td>40.19</td>
<td>38.20</td>
<td>38.09</td>
<td>38.35</td>
<td>38.58</td>
<td>38.32</td>
<td>38.51</td>
<td>19/33</td>
<td>19/33</td>
</tr>
<tr>
<td>Employees per Est. (%)</td>
<td>5.65</td>
<td>5.36</td>
<td>5.35</td>
<td>5.28</td>
<td>5.26</td>
<td>5.25</td>
<td>5.16</td>
<td>5.09</td>
<td>5.14</td>
<td>5.22</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Average Wage ($)</td>
<td>24,694.19</td>
<td>24,569.32</td>
<td>24,170.01</td>
<td>24,157.41</td>
<td>24,426.07</td>
<td>24,602.33</td>
<td>24,968.26</td>
<td>24,674.77</td>
<td>24,266.28</td>
<td>23,779.35</td>
<td>14/33</td>
<td>14/33</td>
</tr>
<tr>
<td>Share of the Economy (%)</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
<td>0.10</td>
</tr>
</tbody>
</table>

Figures are inflation-adjusted 2012 dollars. Rank refers to 2012 data.

SOURCE: WWW.IBISWORLD.COM
Jargon & Glossary

Industry Jargon

DEPARTMENT OF HEALTH AND HUMAN SERVICES
Primary agency responsible for federal funding for health-related individual and family services.

SLIDING-FEE SCALE
A formula for determining the amount owed based on a person’s income level.

IBISWorld Glossary

BARRIERS TO ENTRY
Barriers to entry can be High, Medium or Low. High means new companies struggle to enter an industry, while Low means it is easy for a firm to enter an industry.

CAPITAL/LABOR INTENSITY
An indicator of how much capital is used in production as opposed to labor. Level is stated as High, Medium or Low. High is a ratio of less than $3 of wage costs for every $1 of depreciation; Medium is $3 – $8 of wage costs to $1 of depreciation; Low is greater than $8 of wage costs for every $1 of depreciation.

CONSTANT PRICES
The dollar figures in the Key Statistics table, including forecasts, are adjusted for inflation using 2012 as the base year. This removes the impact of changes in the purchasing power of the dollar, leaving only the ‘real’ growth or decline in industry metrics. The inflation adjustments in IBISWorld’s reports are made using the US Bureau of Economic Analysis’ implicit GDP price deflator.

DOMESTIC DEMAND
The use of goods and services within the US; the sum of imports and domestic production minus exports.

EARNINGS BEFORE INTEREST AND TAX (EBIT)
IBISWorld uses EBIT as an indicator of a company’s profitability. It is calculated as revenue minus expenses, excluding tax and interest.

EMPLOYMENT
The number of working proprietors, partners, permanent, part-time, temporary and casual employees, and managerial and executive employees.

ENTERPRISE
A division that is separately managed and keeps management accounts. The most relevant measure of the number of firms in an industry.

ESTABLISHMENT
The smallest type of accounting unit within an Enterprise; usually consists of one or more locations in a state or territory of the country in which it operates.

EXPORTS
The total sales and transfers of goods produced by an industry that are exported.

IMPORTS
The value of goods and services imported with the amount payable to non-residents.

INDUSTRY CONCENTRATION
IBISWorld bases concentration on the top four firms. Concentration is identified as High, Medium or Low. High means the top four players account for over 70% of revenue; Medium is 40–70% of revenue; Low is less than 40%.

INDUSTRY REVENUE
The total sales revenue of the industry, including sales (exclusive of excise and sales tax) of goods and services; plus transfers to other firms of the same business; plus subsidies on production; plus all other operating income from outside the firm (such as commission income, repair and service income, and rent, leasing and hiring income); plus capital work done by rental or lease. Receipts from interest royalties, dividends and the sale of fixed tangible assets are excluded.

INDUSTRY VALUE ADDED
The market value of goods and services produced by an industry minus the cost of goods and services used in the production process, which leaves the gross product of the industry (also called its Value Added).

INTERNATIONAL TRADE
The level is determined by:
- Exports/Revenue: Low is 0–5%; Medium is 5–20%; High is over 20%.
- Imports/Domestic Demand: Low is 0–5%; Medium is 5–35%; and High is over 35%.

LIFE CYCLE
All industries go through periods of Growth, Maturity and Decline. An average life cycle lasts 70 years. Maturity is the longest stage at 40 years with Growth and Decline at 15 years each.

NON-EMPLOYING ESTABLISHMENT
Businesses with no paid employment and payroll are known as non-employing establishments. These are mostly set-up by self employed individuals.

VOLATILITY
The level of volatility is determined by the percentage change in revenue over the past five years. Volatility levels: Very High is greater than ±20%; High Volatility is between ±10% and ±20%; Moderate Volatility is between ±3% and ±10%; and Low Volatility is less than ±3%.

WAGES
The gross total wages and salaries of all employees of the establishment.
At IBISWorld we know that industry intelligence is more than assembling facts
It is combining data with analysis to answer the questions that successful businesses ask

Identify high growth, emerging & shrinking markets
Arm yourself with the latest industry intelligence
Assess competitive threats from existing & new entrants
Benchmark your performance against the competition
Make speedy market-ready, profit-maximizing decisions

Who is IBISWorld?
We are strategists, analysts, researchers, and marketers. We provide answers to information-hungry, time-poor businesses. Our goal is to provide real world answers that matter to your business in our 700 US industry reports. When tough strategic, budget, sales and marketing decisions need to be made, our suite of Industry and Risk intelligence products give you deeply-researched answers quickly.

IBISWorld Membership
IBISWorld offers tailored membership packages to meet your needs.

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